

The Future of Mobility, Collaboration, and Document Management

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Agenda

- ⊕ About Nemertes
- ⊕ The Latest Research
- ⊕ How Can You Succeed?
- ⊕ Success Stories
- ⊕ Key Takeaways

About Nemertes

- ⊕ US-based research and consulting firm specializing in **evaluating the business impact of emerging technologies**

Unified Communications and Collaboration

Mobile and Network Services

Big Data, Analytics, and Virtualization

Security and Compliance

Contact Center and Customer Engagement

Enterprise Trusted Advisor

ET Innovation, Transformation

Cost Models and Total Cost of Ownership

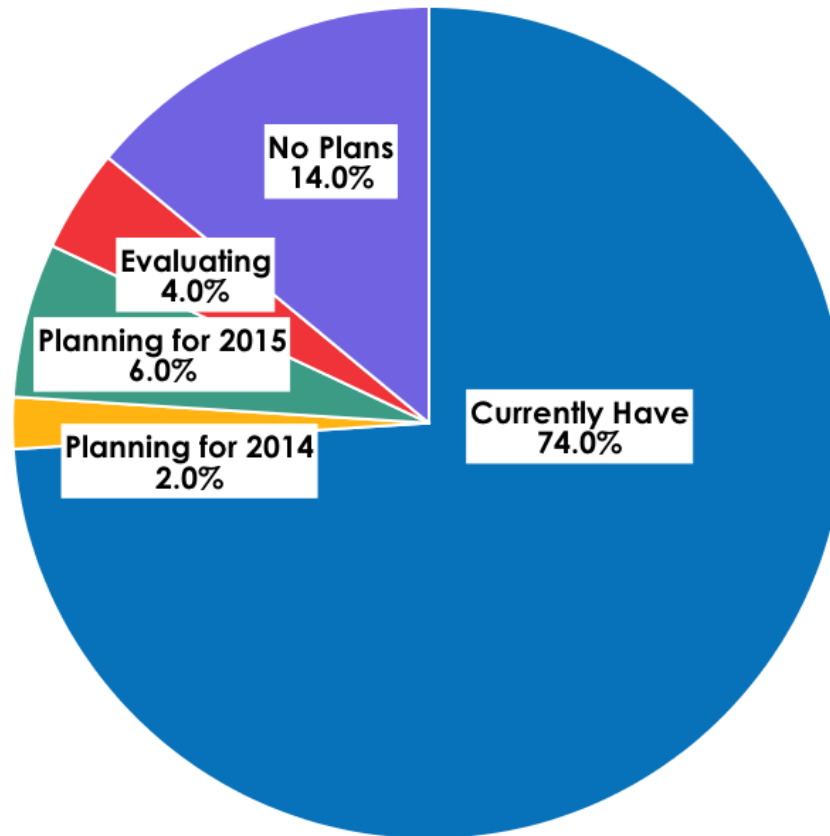
Cloud Delivery

- ⊕ The only research firm that consistently benchmarks 200+ IT organizations
- ⊕ Staffed by former IT and business practitioners with 20+ years experience
- ⊕ Organized to deliver customized research findings to clients in real-time
- ⊕ Independent and objective: We serve only our clients. No investment from, no stock in, no board positions on companies we cover
- ⊕ Founded in 2002; consistently profitable
- ⊕ Registered Women-Owned Business

The Latest Research

Most Have or Will Have Active UC Plan

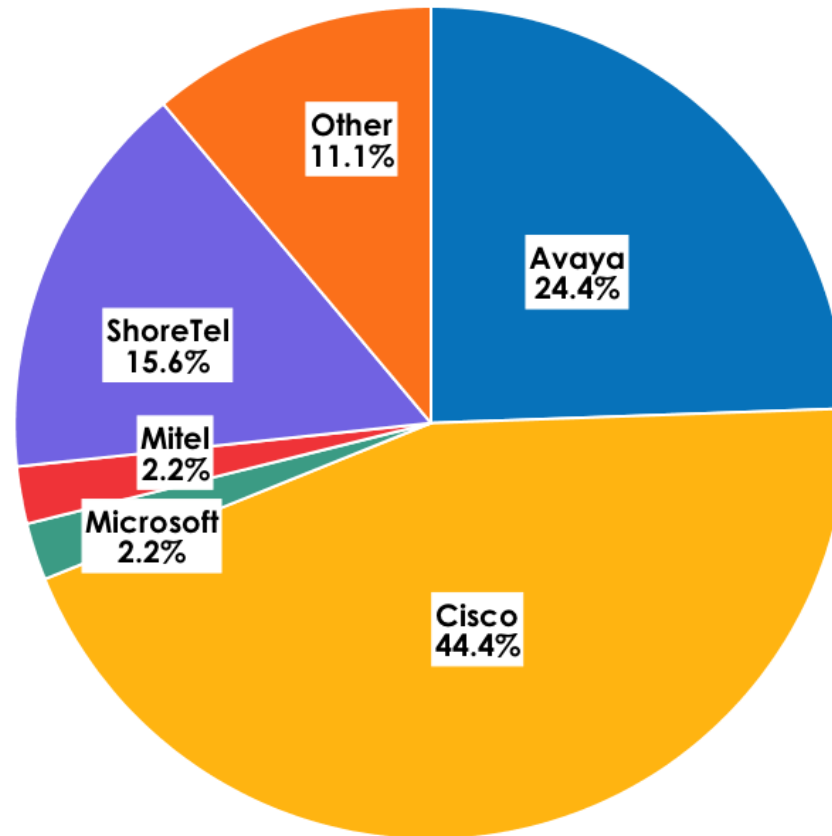
Do You Have a UC Initiative?



UC Initiative: A formal effort to integrate real-time collaboration applications or deploy a new integration platform

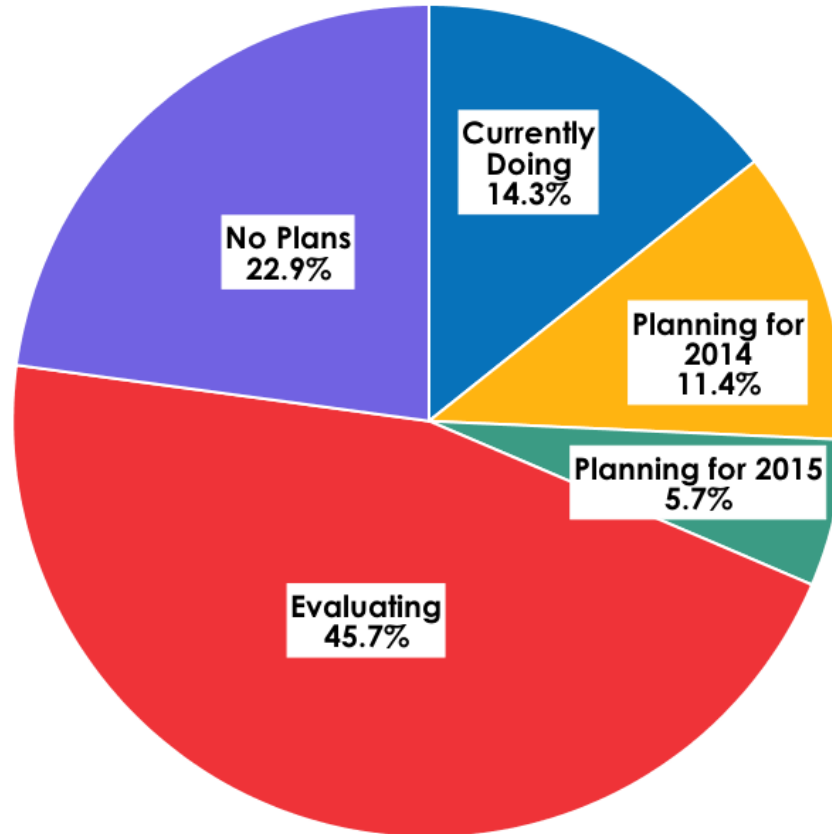
Cisco Dominant IPT Provider

Current IP Telephony Vendor



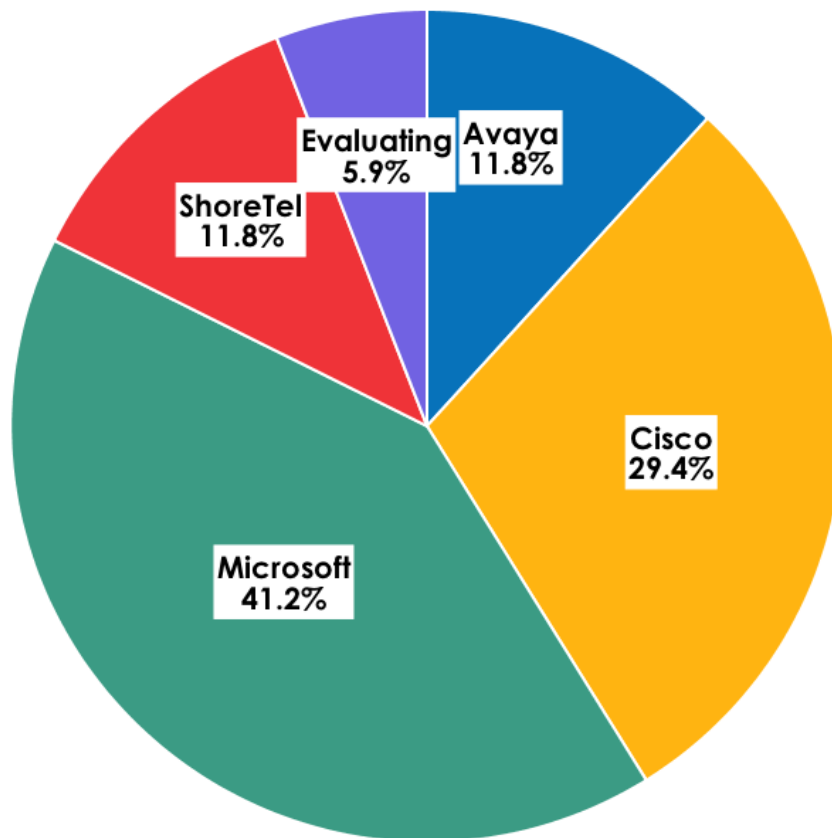
More Than One-Fourth Consolidating UC Apps

Consolidating all UC Apps to One Platform



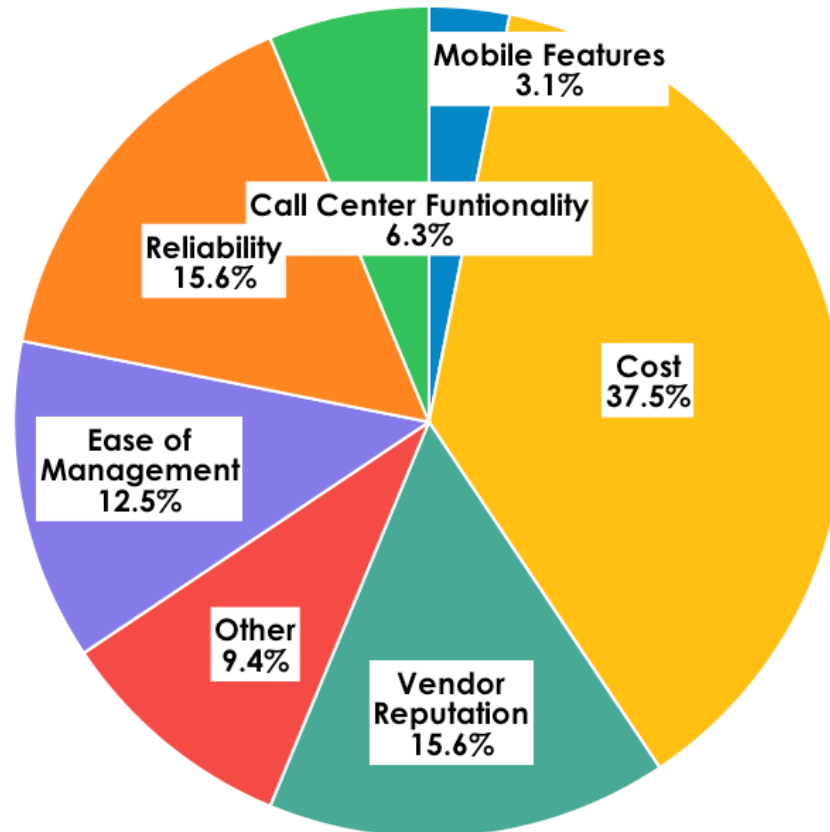
Microsoft Dominating UC Consolidation

What UC Platform Are You Consolidating On?



Cost Biggest IPT Buying Factor

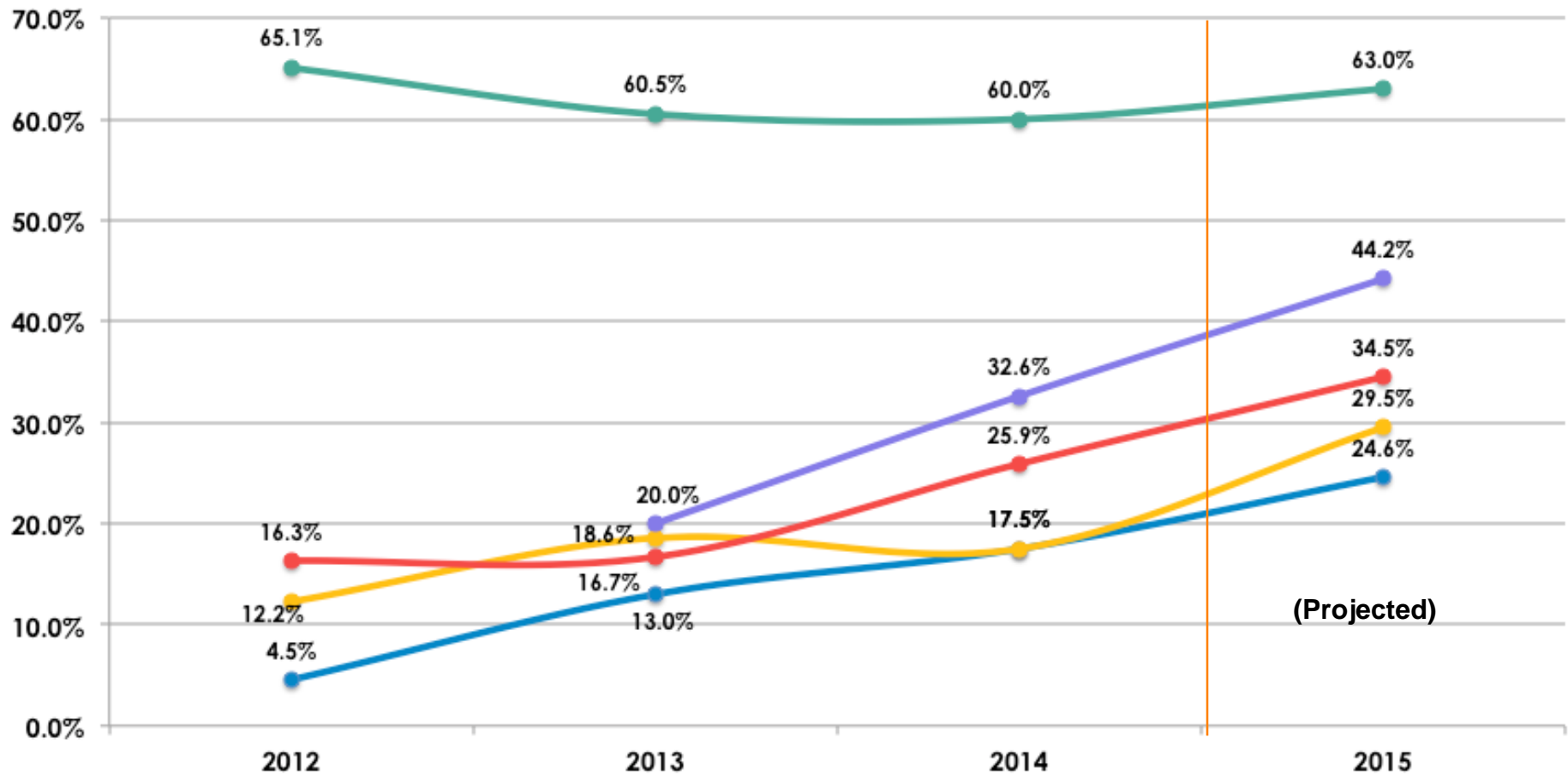
Most Important Factor in Choosing a New IPT System



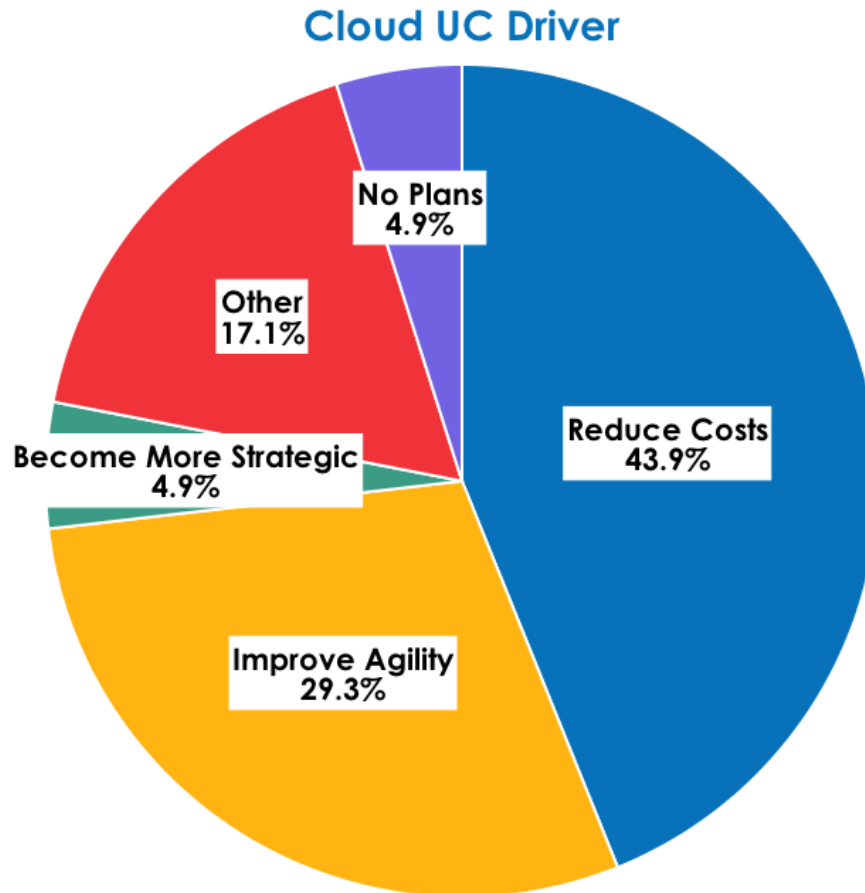
All UCaaS Apps Gaining Momentum

Cloud UC Adoption

IP Telephony Video Conferencing Web Conferencing IM Email/Calendar

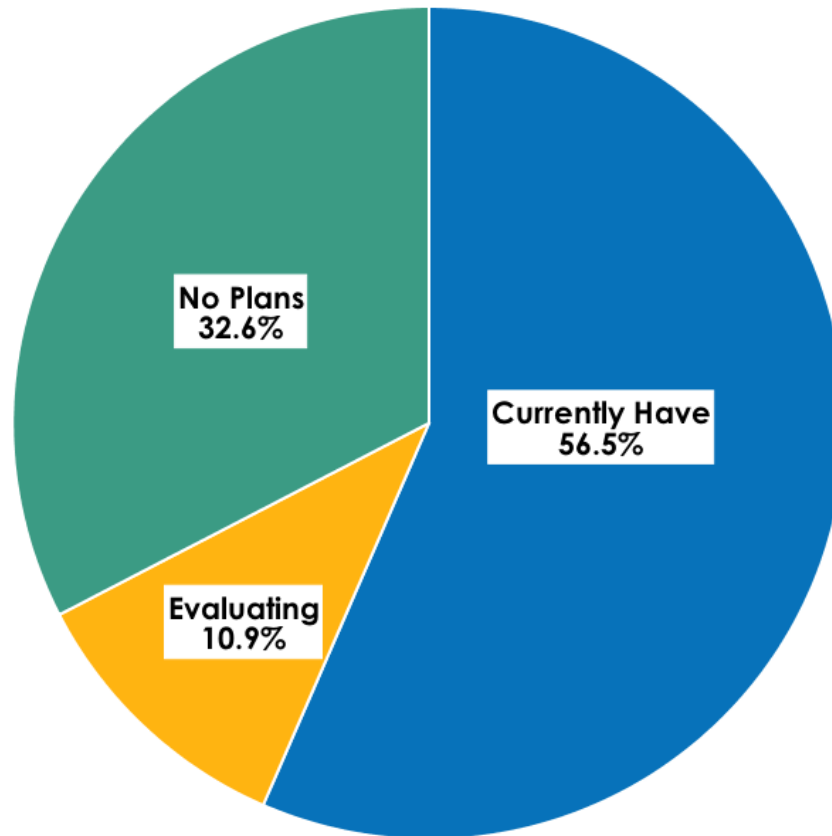


Cost Savings Primary Driver for Cloud UC



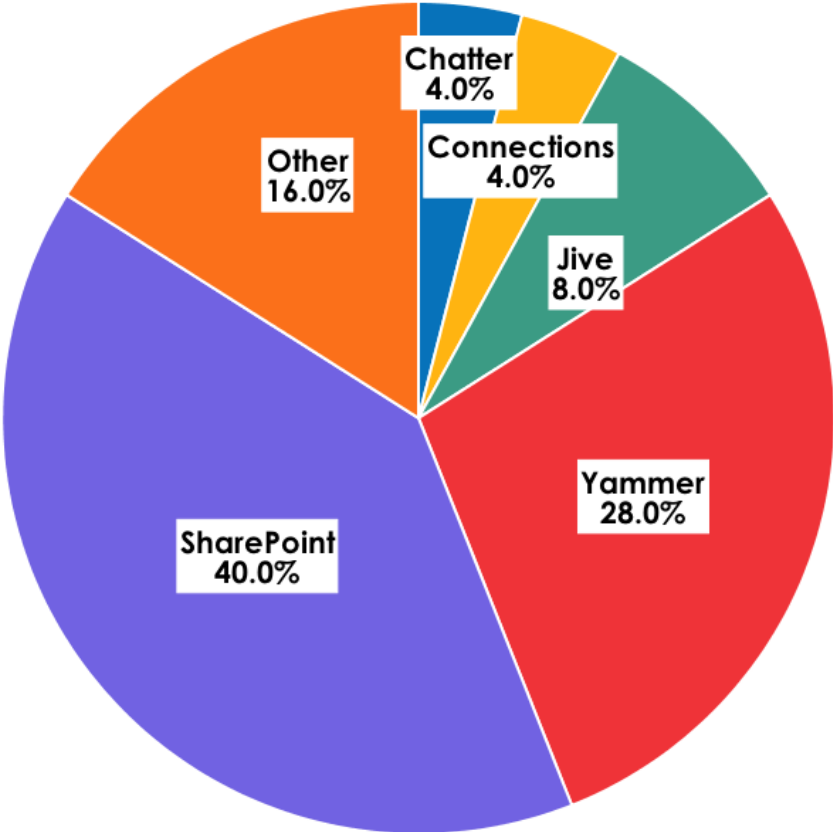
Most Have Adopted Social Software

Enterprise Social Software Adoption



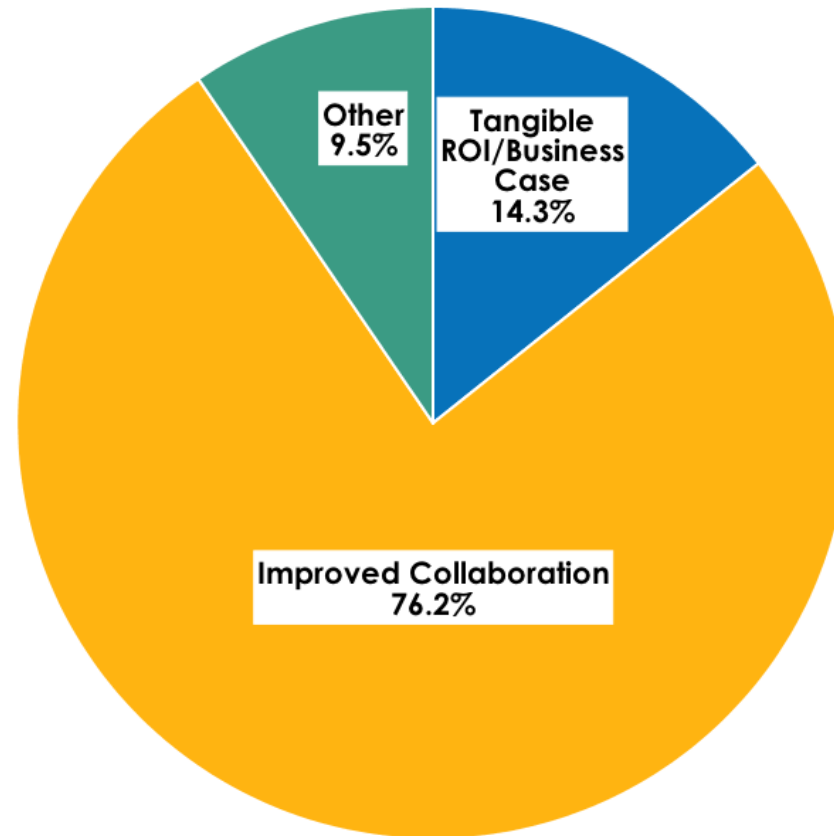
Microsoft Dominates Social Platform Market

Enterprise Social Software Platform



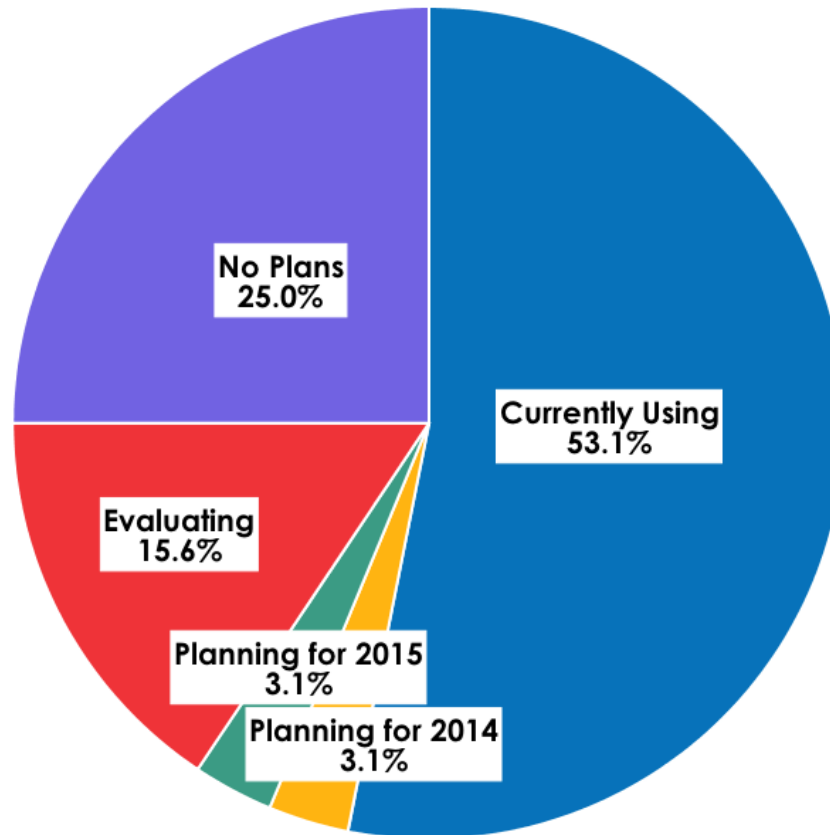
Collaboration Drives Social Adoption

Enterprise Social Software Driver



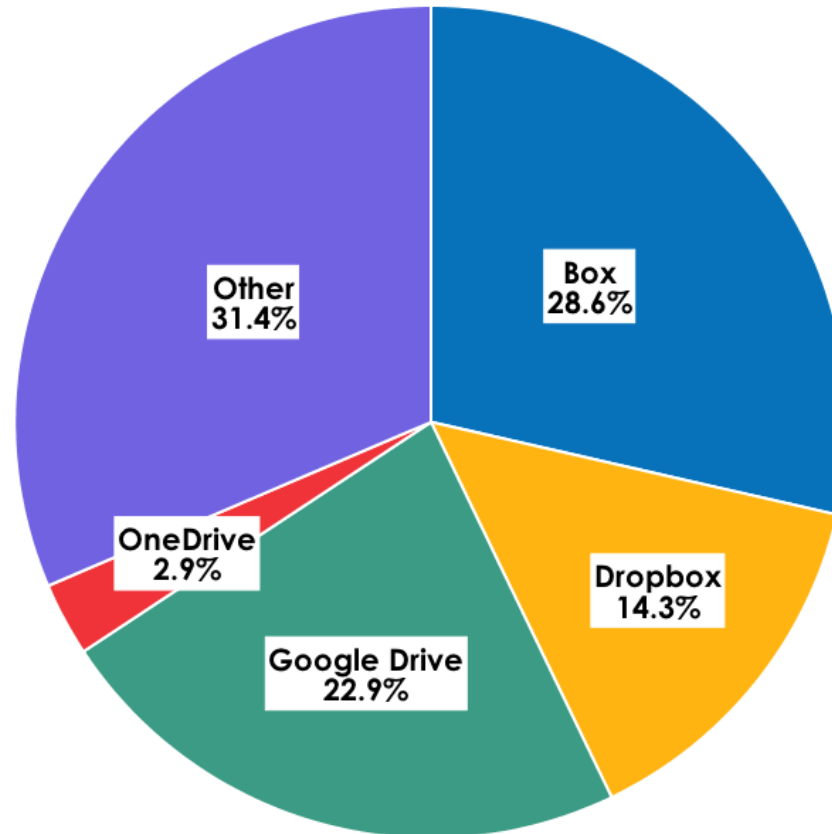
More Than Half Using Secure Document Share (SDS)

Cloud-based File Sync and Share Adoption



Box and Google Are Largest Vendors

Cloud-based File Sync and Share Vendor

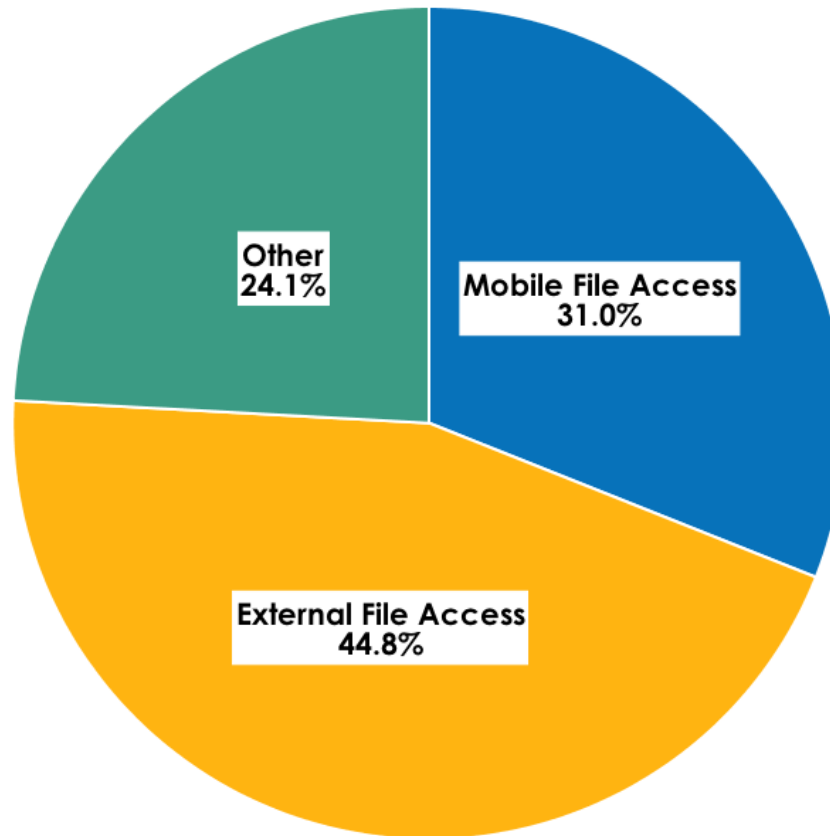


Other:

- YouSendIt
- Citrix ShareFile
- Multiple

Sharing Externally Is Biggest Driver

Cloud-based File Sync and Share Drivers



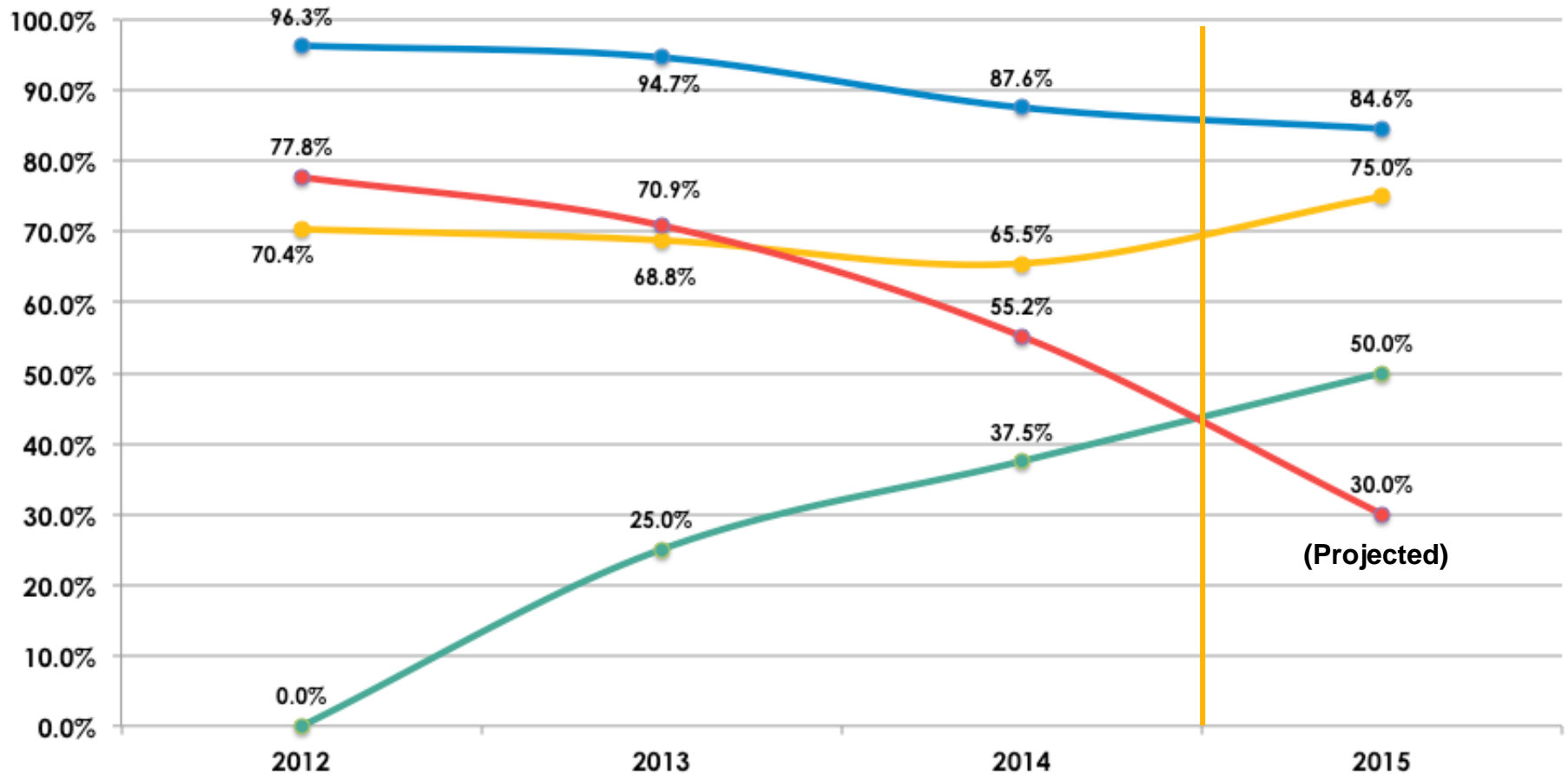
Other:

- Backup and replication
- Came as part of another purchase (Google Apps / Office 365)

Blackberry Down, Android Up, WP8 Way Up

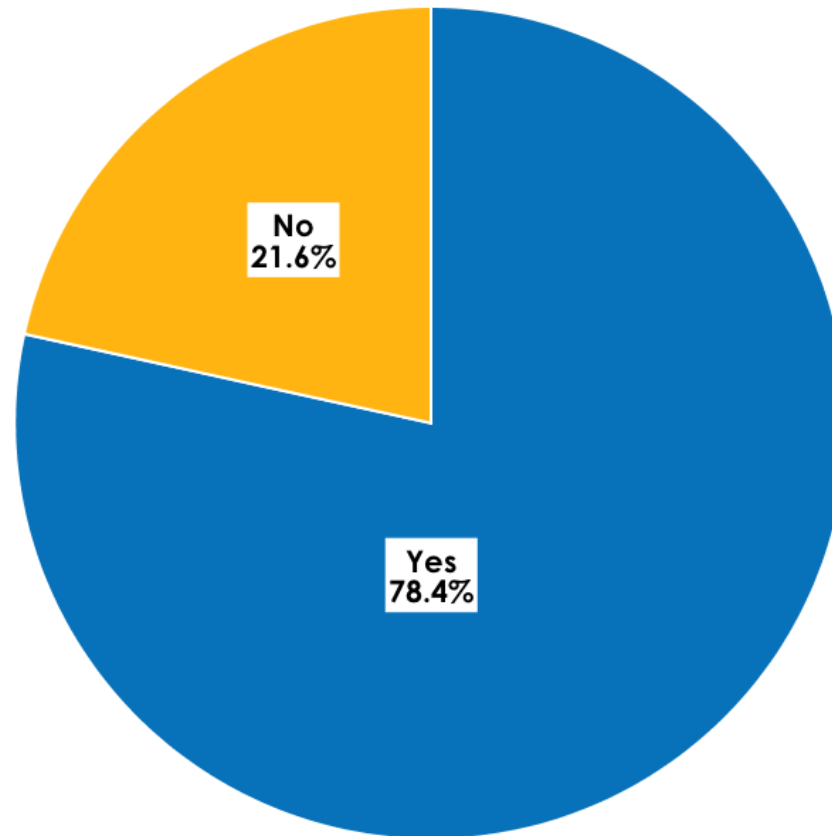
Mobile OS Adoption

— iOS — Android — Windows Phone 8 — BlackBerry



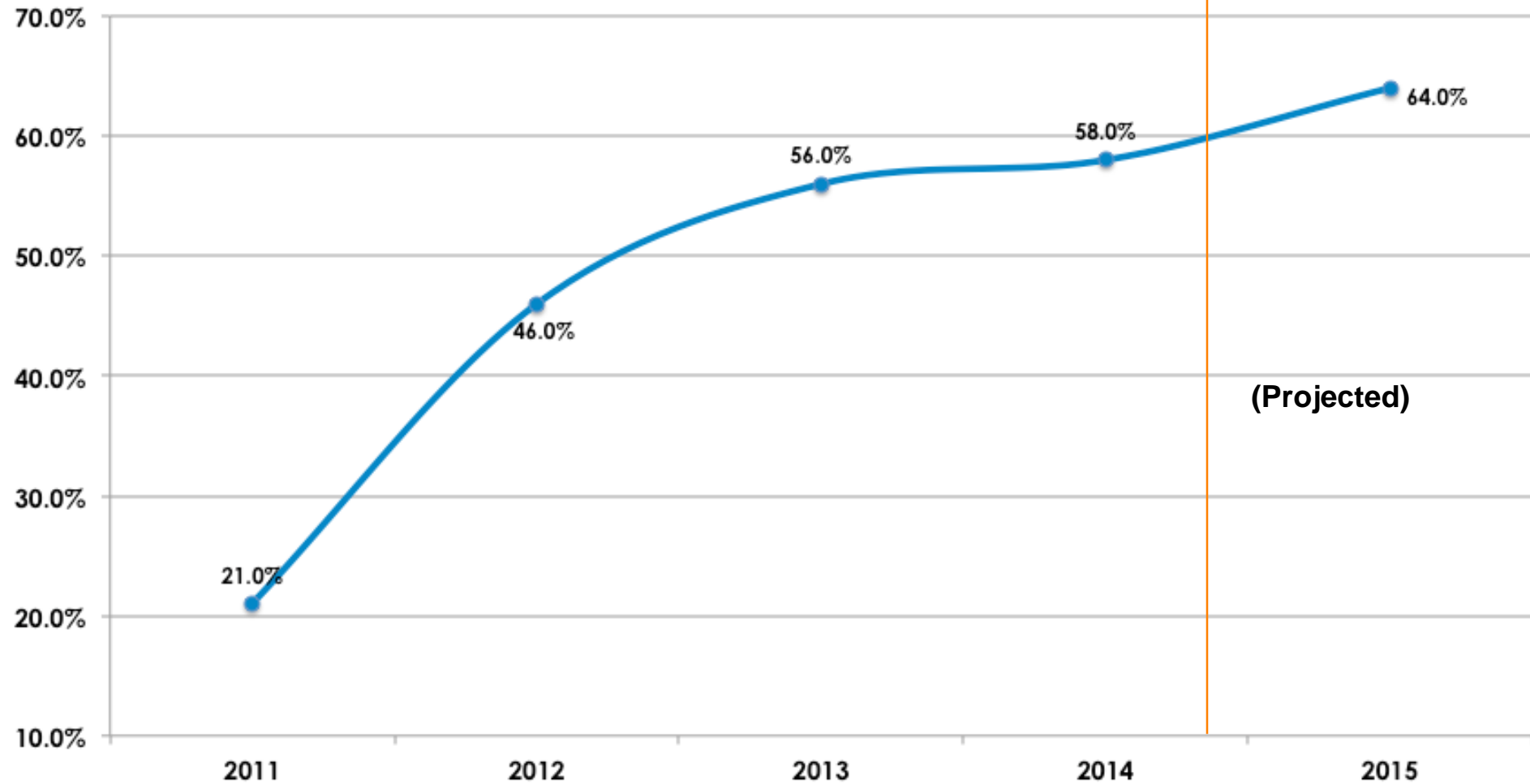
Most Companies Leverage at Least One EMM Solution

Will You Use Some Form of Mobile Management by End 2014?



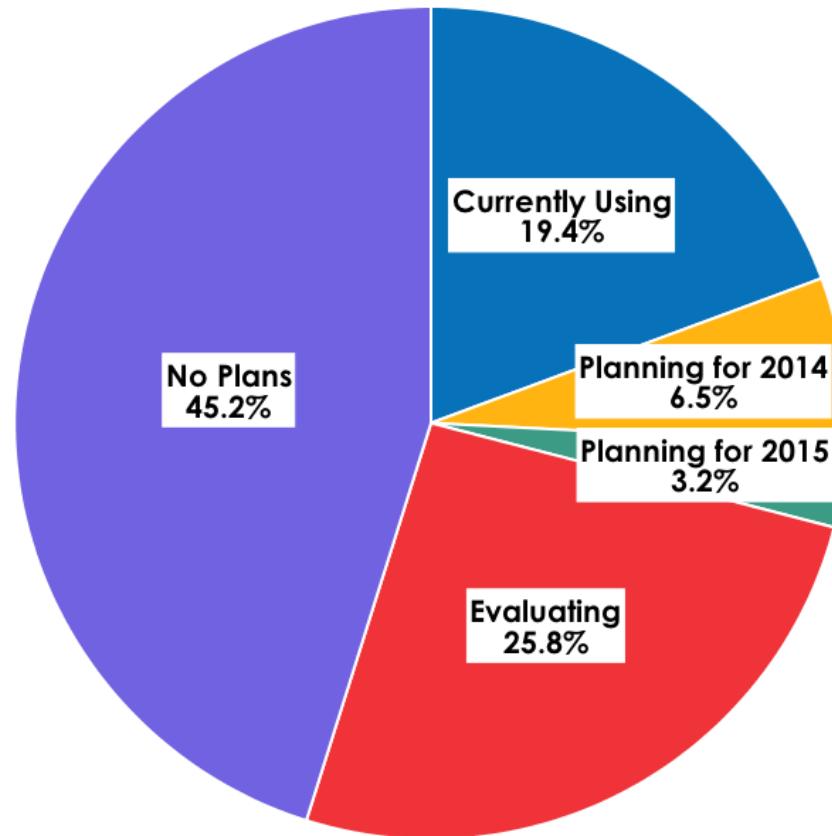
MDM Continues to Trend Upward

MDM Adoption (2011-2015)



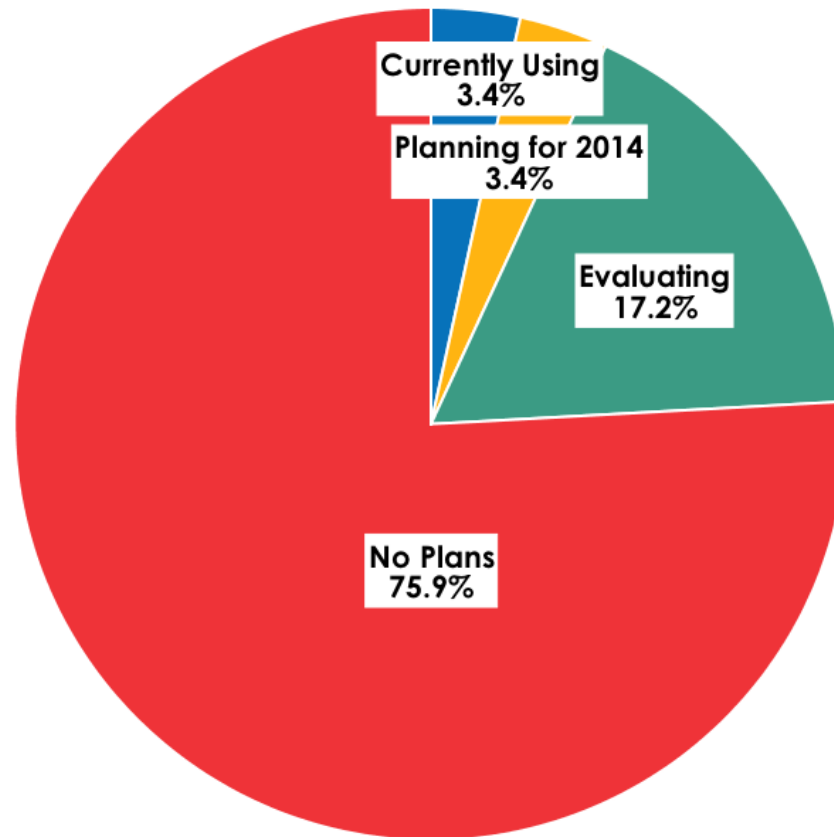
Enterprise App Stores are Garnering Attention

Mobile App Store Adoption



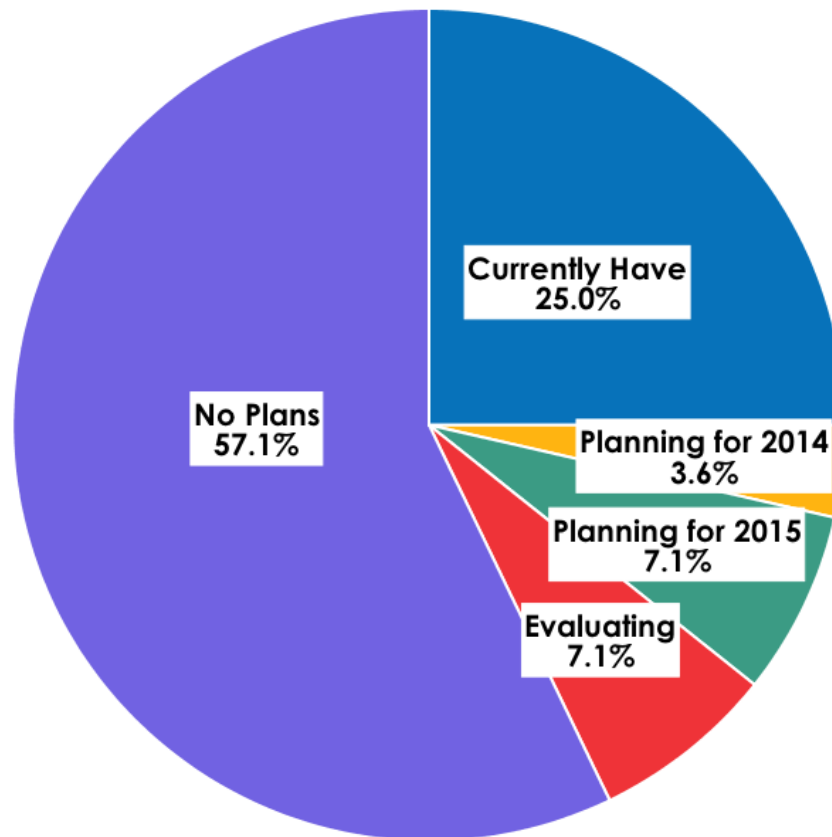
Wearables Gain Some Traction

Wearables Adoption



More Than a Third of Companies will Deploy M2M Through 2015

Machine-to-Machine Adoption



How Can You Succeed?

Reality Check

- ⊕ The more ways we have to collaborate, the more confusing things have become
 - ⊕ Most people still use e-mail first and foremost
 - ⊕ Social tools exploding, but largely in silos
 - ⊕ UC deployments prevalent, but integration remains a challenge
 - ⊕ Mobility is a key requirement
- ⊕ How do you adopt these technologies in a structured, successful way?

1.) Identify Strategic Goals

- ⊕ What are the high-level goals you want to achieve with your strategy and roadmap?
 - ⊕ Improve employee efficiency, productivity
 - ⊕ Reduce costs (travel, certain IT costs, inefficient customer service)
 - ⊕ Bolster customer service (multiple channels, proactive outreach)
 - ⊕ Consolidate vendors
 - ⊕ Increase revenue
 - ⊕ Gain competitive advantage

2.) Uncover, Define Use Cases

- ⊕ Assemble team, including representation from:
 - ⊕ Business units
 - ⊕ All areas of IT
- ⊕ Determine endpoint: What do you want to get out of the exercise?
 - ⊕ Develop questions (typically 20-40 questions)
- ⊕ Gather data
 - ⊕ Interview leaders
 - ⊕ Conduct survey of employees
- ⊕ Analyze data
- ⊕ Uncover use cases

**This whole step
takes time! Allow
4-6 weeks**

Sampling of Questions for Use Case Development

Questions/Issues to Consider	Use Case		
	1	2	3
Business Unit			
Priority level			
Describe the business process or human interaction that is not effective today What business parameters must we consider when developing the solution?			
What business units does this issue affect			
What people/roles does it affect?			
Does this use case require changes to a process or organization? Describe			
Recommendation on which collaboration technology can solve this issue			
Stakeholders/funders?			

3.) Map Use Cases to Strategic Goals

- ⊕ Only focus on the use cases that map to strategic goals!
- ⊕ Then prioritize those use cases: 1, 2, 3 priority level based on the impact quotient
- ⊕ If you have a lot of (>10) of use cases, start grouping them into “Common Themes”
 - ⊕ Remote collaboration
 - ⊕ Find the expert
 - ⊕ Document collaboration
 - ⊕ Knowledge retention
 - ⊕ Training
 - ⊕ Innovation management

4.) Map High-Level Use Cases Apps/Capabilities

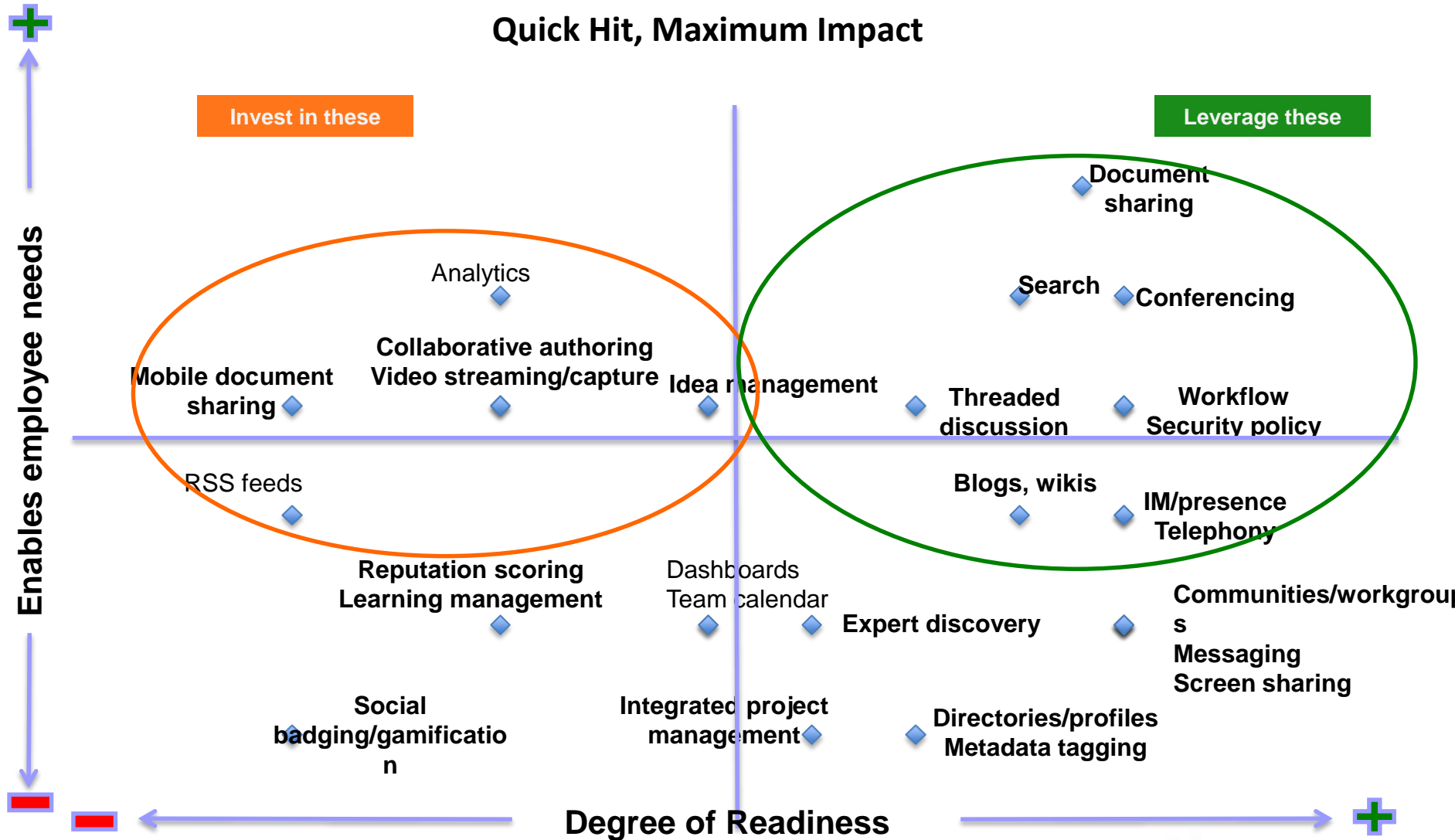
Collaboration Apps/Capabilities	Use Cases						
	Remote collaboration	Training	Business processes	Innovation management	Document collaboration	Find the Expert	Knowledge retention
Analytics	✓	✓		✓	✓	✓	
Blogs & wikis	✓	✓		✓			
Collaborative document collaboration	✓			✓	✓		✓
Communities/workgroups	✓	✓					
Conferencing (video, audio, Web)	✓	✓		✓		✓	✓
Dashboards	✓	✓					
Directories/profiles	✓	✓	✓			✓	
Document sharing	✓	✓	✓	✓	✓		✓
Expert discovery		✓				✓	
Idea management				✓			
IM/presence			✓				✓
Integrated project management	✓						
Learning management		✓		✓			
Metadata tagging	✓	✓			✓	✓	
Messaging	✓		✓				
Mobile document sharing			✓		✓		✓
Reputation scoring		✓					
RSS feeds	✓	✓	✓	✓			
Screen sharing	✓				✓		
Search	✓	✓		✓	✓	✓	
Secure access	✓		✓		✓		✓
Shared calendar	✓						
Social badging/gamification		✓				✓	
Telephony	✓		✓				✓
Threaded discussions/activity streams	✓	✓	✓	✓			
Video streaming/capture	✓	✓	✓		✓		
Workflow	✓		✓	✓	✓		

5.) Establish 'Heat Map'

Building Blocks	Degree of Readiness
Analytics/data mining	Microsoft SharePoint, Hadoop
Blogs & Wikis	T-wiki SharePoint Blogs
Collaborative authoring	Microsoft Office 2010
Communities/workgroups	Yammer, Socialcast
Conferencing (video, audio, Web)	Polycom, Cisco Webex
Dashboards	
Directories/profiles	Active Directory
Document sharing	Microsoft SharePoint Custom Solution
Expert discovery	MySite
Idea management	Intuit Brainstorm
IM/presence	Microsoft Lync
Integrated project management	
Learning management	LX
Metadata tagging	SAP Brainstorm
Messaging	Microsoft Outlook and Lync
Mobile document repository access	
RSS feeds/push notification	Microsoft Exchange, SharePoint
Screen sharing	Cisco Webex
Search	Endeca Custom Solution
Security policy (access control)	McAfee
Shared/team calendar	Microsoft Outlook
Social badging/gamification/tagging	Microsoft Sharepoint
Telephony	Microsoft Lync, Avaya Aura
Threaded discussions/activity streams	Yammer
Video streaming/capture	Polycom Skype
Workflow	

Legend	
■	Already deployed and used enterprise-wide
■	Already deployed in specific BU(s) but not enterprise-wide
■	Already deployed enterprise-wide but not used. Needs marketing
■	Available from existing supplier, but not deployed or licensed yet
■	Requires supplier or product evaluation

6.) Identify Which Use Cases Have the most Impact



7.) Pitch Top-Priority Use Cases to Stakeholders

- ⊕ You need stakeholders! In IT, and in the business units
 - ⊕ Especially true if you need funding and support to forge ahead
 - ⊕ Even if the app is in place already, you need support that both executives and grassroots employees plan to actually *use* the new apps
- ! ⊕ Gather buy-in and commitment from marketing, corporate communications
 - ⊕ Far too many apps never win a user base for this reason

8.) Finalize Decisions

- ⊕ Establish timeline (roadmap!) for when you will have the technologies available to support which use cases
 - ⊕ Consider operational, cost, IT, marketing, security, IT impacts
- ⊕ Explicitly identify the executive stakeholder
- ⊕ Plan technology deployment, rollout
- ⊕ Keep team together to work on marketing technology to employees

- ⊕ But first!!! Make sure you know how you will measure your success
 - ⊕ Identify metrics and establish baselines

Success Stories

Case Study: Transportation Company



- ⊕ **Challenge:** Ensure that drivers are taking optimal routes to deliver goods in fastest possible time
- ⊕ **Challenge to IT:** The trucks—and their cargo-- are now “part of the network” (have IP addresses, are updated in real time)
- ⊕ **IT says:** “I used to manage switches, routers, servers... now I’m managing trucks!”

Budget owner	Driver	Execution
<ul style="list-style-type: none">• CFO (initial)• IT (ongoing)	<ul style="list-style-type: none">• Route efficiency• Product life	<ul style="list-style-type: none">• IT• Customer service

Case Studies: Hotel Chain

- ⊕ Device: Tablets
- ⊕ Users: Wait staff on the beach
- ⊕ Challenge: Customers complained about delay in receiving drinks
- ⊕ Solution: Speed order-taking with tablets
- ⊕ Outcome: Measurable increase in sales; improved customer satisfaction
- ⊕ Business case: Must measure before/after with customer satisfaction! Average increase of 2.8 additional drinks per customer; \$7 per. Average 53 customers per day.
- ⊕ $(2.8*7)*53 *365 = \$379,162$ per year
- ⊕ **20 devices: \$174K per year cost**



What's the increase? How do they measure customer satisfaction?

Case Studies: Clothing Manufacturer

- ⊕ Device: Any smartphone, mobile device, laptop
- ⊕ Users: Teenage customers
- ⊕ Challenge: Increase customer loyalty; gather feedback for clothing designs
- ⊕ Solution: Write “cool” mobile avatar app for teens
- ⊕ Outcome: Customers more loyal, designers get constant feedback to keep designs more current



Key Takeaways

Key Takeaways

- ✦ Forge ahead with mobile collaboration in a structured, disciplined manner
 - ✦ Engage the business units in the development, and corporate marketing to effectively get the word out!
 - ✦ Prioritize the applications, technologies that address business use cases
- ✦ Outsource, rely on cloud providers for “keep-the-lights-on” functions so you can focus on being more strategic
- ✦ Document success



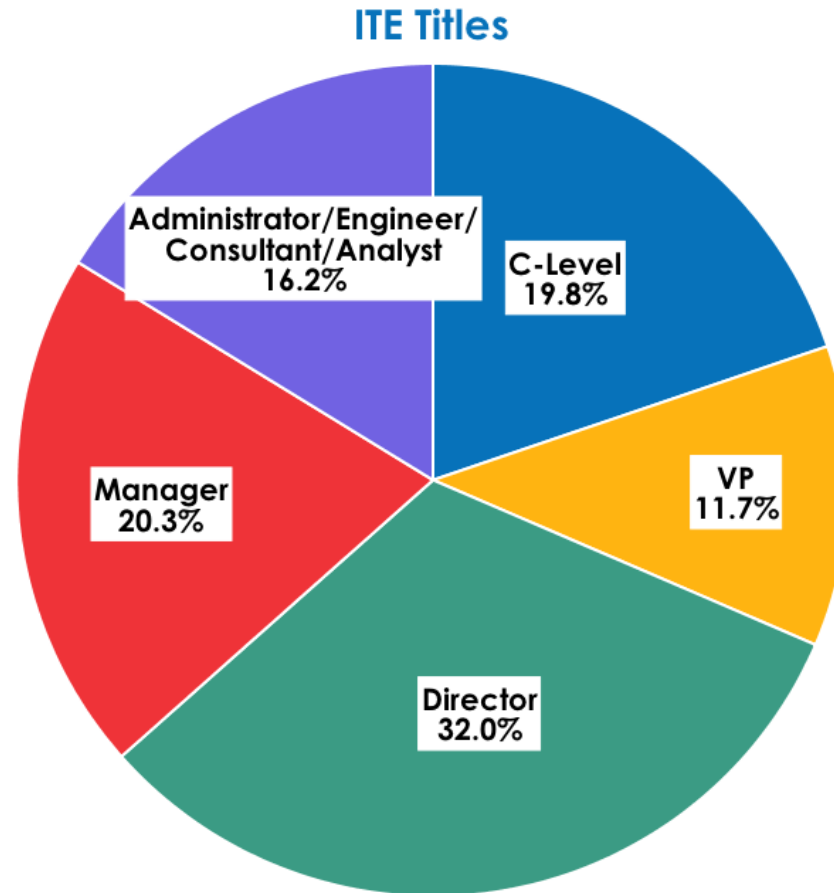
Thank you!
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Addendum

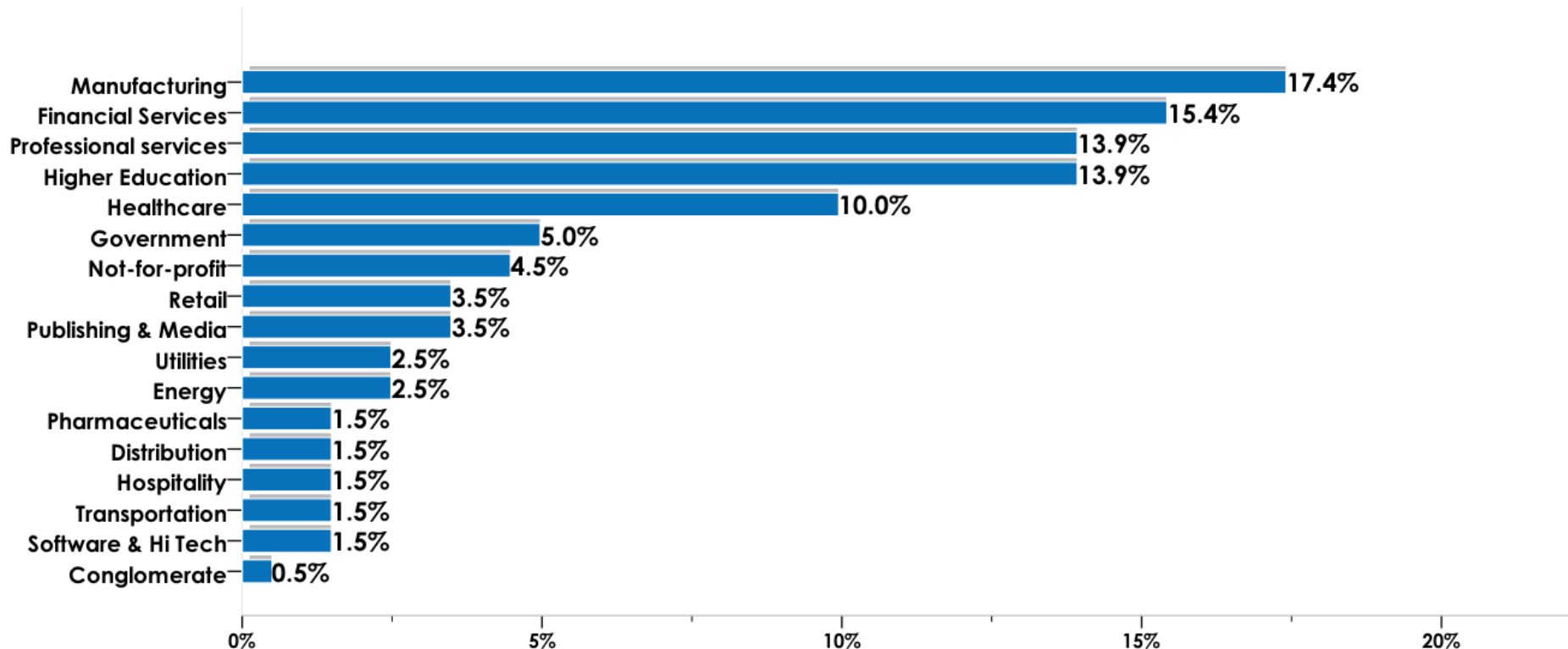
Research Methodology

Benchmark Participants: IT Titles



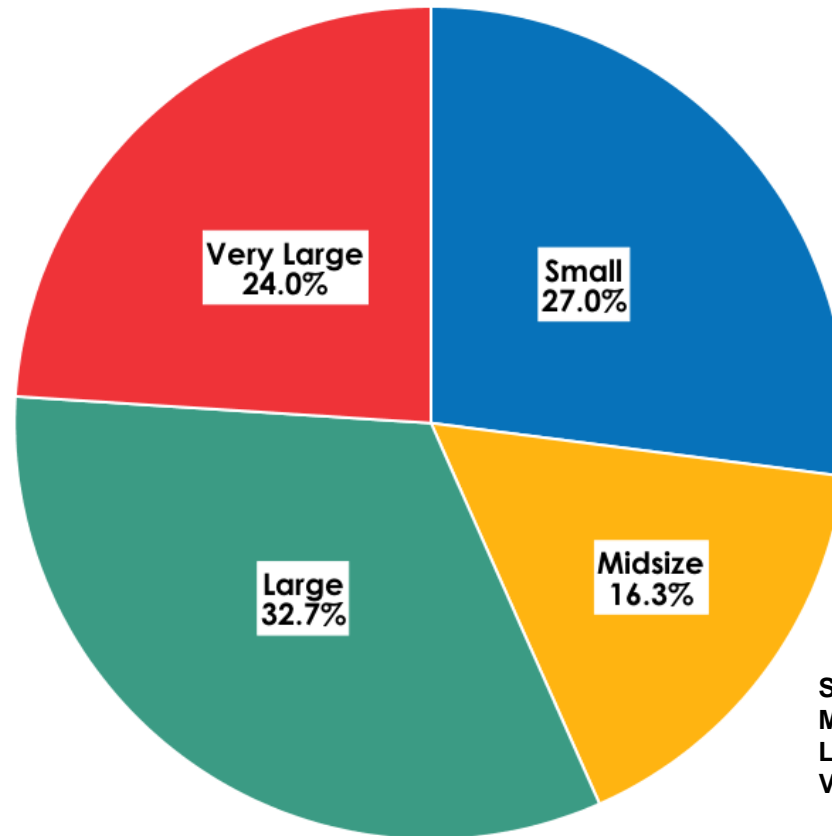
Benchmark Participants: Industries

Industry



Benchmark Participants: Size (Revenue)

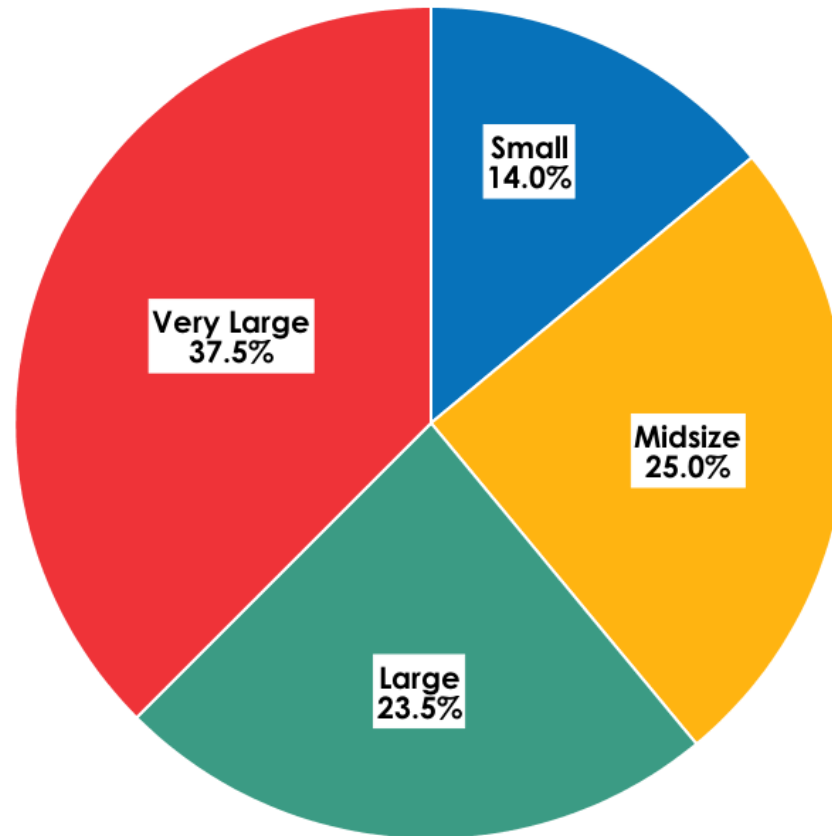
Company Size (Revenue)



Small = < \$300 million
Midsize = \$300.1 million – \$1 billion
Large = \$1 billion – \$10 billion
Very Large = > \$10 billion

Benchmark Participants: Size (Employees)

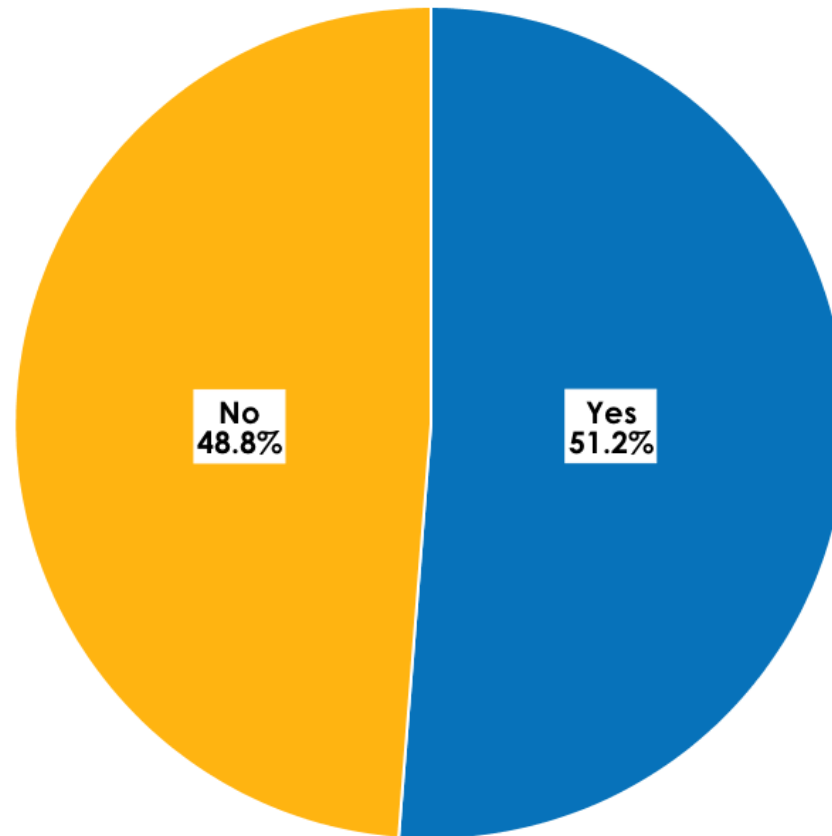
Company Size (Employees)



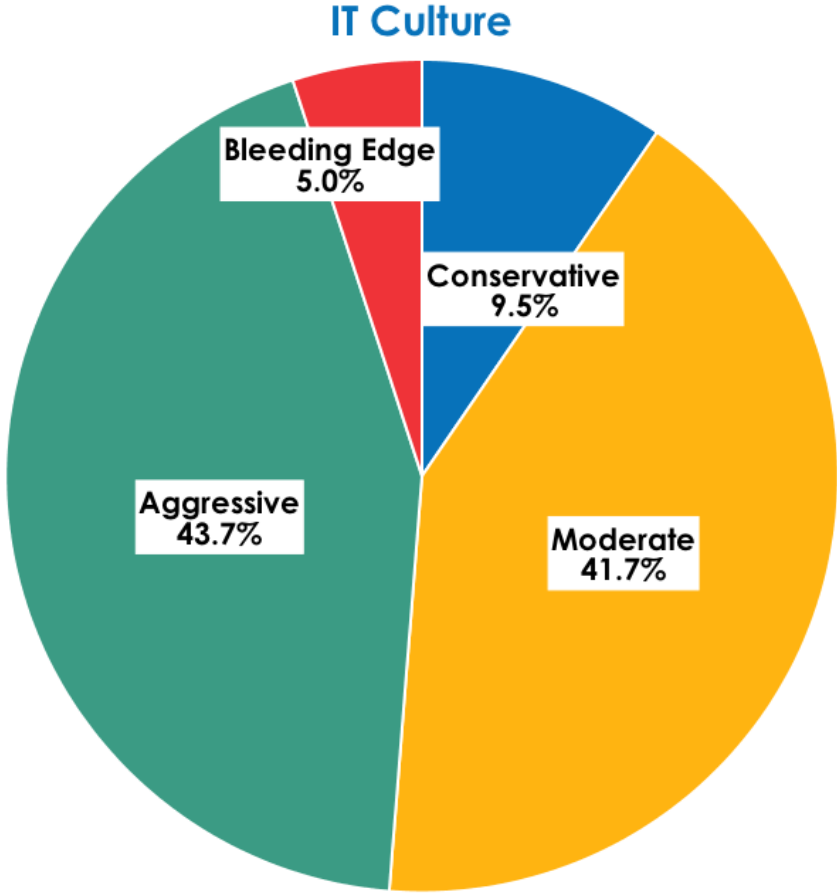
Small = < 250
Midsize = 251 – 2500
Large = 2501 – 10,000
Very Large = > 10,000

Benchmark Participants: Global Reach

Do You Have Global Operations?



Benchmark Participants: IT Culture



Additional Steps in UC Strategy

9.) Validate the Business Case (Financial)

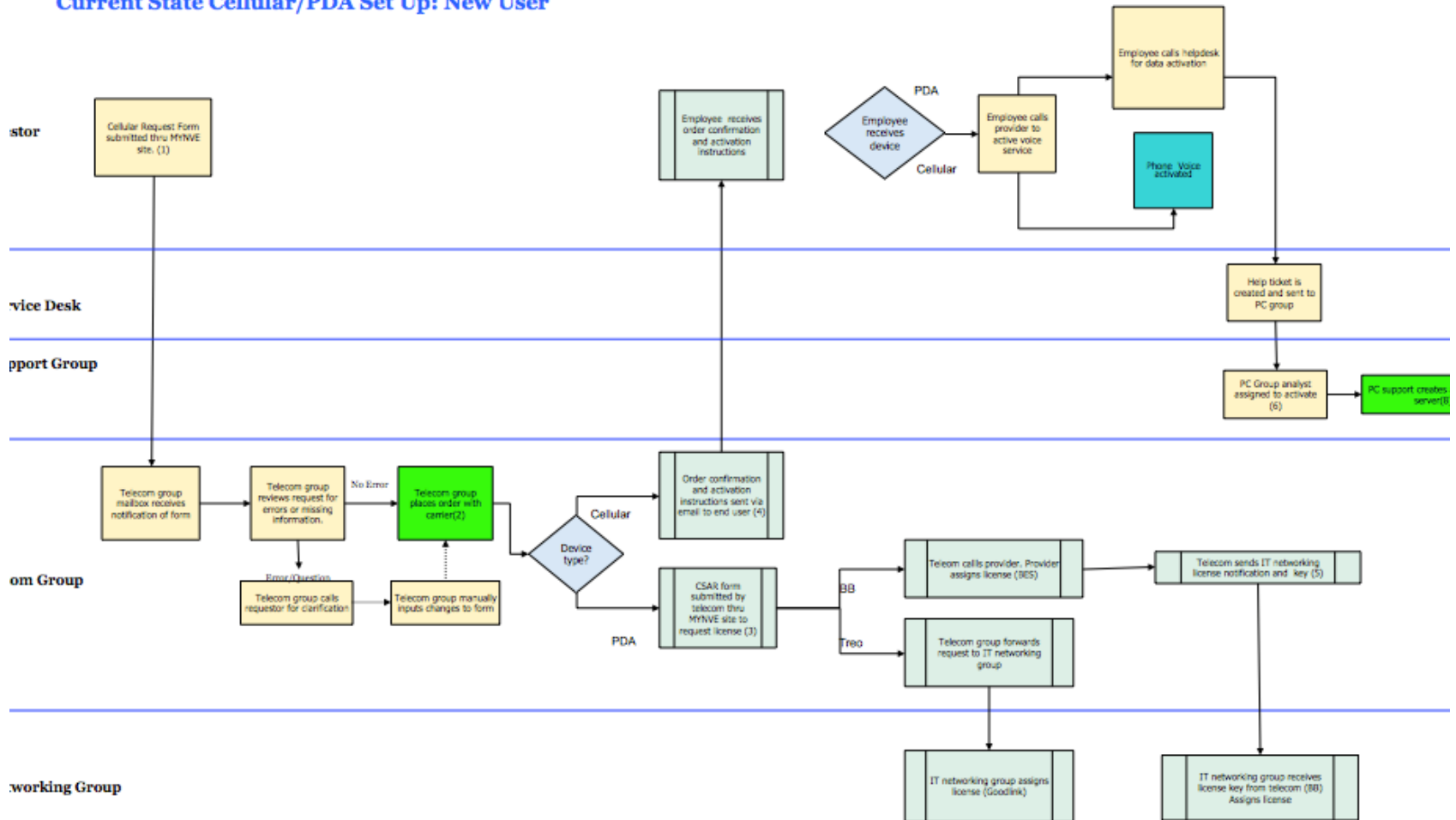
⊕ A Ten Step Program

1. Look for transactions involving human– to–human interaction
2. Conduct pilots, model before / after results
3. Look for ways to reduce operational costs (travel reductions, long distance savings, virtual worker support)
4. Consider all costs in your business case (operation, capital, licensing, training, etc.)
5. Don't rely on “soft” metrics – “Improved productivity is not tangible!”
6. Work your vendors & partners to understand specific opportunities in your vertical
7. Evaluate options to deliver new services (cloud, virtualization)
8. Evaluate customer support metrics – first call resolution, average wait times)
9. Evaluate sales metrics – increased revenues
10. Evaluate project life cycle metrics – shorter time to market



10.) Consider Operational Impact: Swimlanes

Current State Cellular/PDA Set Up: New User



11.) Establish Governance Council

- ⊕ Identify people on the council
- ⊕ Advisory only, or decision-making authority?
- ⊕ Rules of engagement, structure
 - ⊕ Meeting schedules, format
 - ⊕ Process for appeal, exceptions
- ⊕ Interaction with other governance bodies
 - ⊕ Areas of coverage
 - ⊕ Areas explicitly *not* covered
- ⊕ UC/Collaboration touches everyone, so establishing, operating governance council is *very* time-consuming, but *very* important

Additional Success Stories

Sample Initiatives Machine-to-Machine

Company	Owner	Description	Driver
Global engineering	IT, manufacturing	Factory machines (robots) talk to one another at all locations to coordinate construction of product. Communicate with supply chain to order new materials	Faster speed to market; external customer demands
Insurance	IT	Testing with 40 employees. Device plugged into car that measures results of their driving, delivers real-time	Better drivers get lower insurance rates
Logistics	Customer service	Package tracking sensors ensure trucks are at right temperature for product. Can monitor, change in real-time	Improved customer service via longer-lasting perishable products
Manufacturing	Product development	Sensor in water coolers residing in customer locations calls office to schedule filter changes	Service efficiency, customer satisfaction
University	IT, Student services, metro bus	Sensors installed in buses transmit to mobile apps real-time location of buses.	Student safety, convenience, directions