

2015

Executive Enterprise

Mobility Report



APPERIAN
MOBILE APP MANAGEMENT

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INTRODUCTION

It's a pivotal time for mobility, as industry-leading organizations move beyond the legacy mindset and prepare for a more sophisticated approach. In this era, it is all about the enterprise mobile apps. In order to roll out apps that make a difference, leading organizations are beginning to build their own apps to support key business processes, with direct input from users in an agile development process. It's also about the extended enterprise: rolling out apps to customers, contractors, and partners, and making it as easy as possible for everyone to use those apps.

In an effort to measure enterprise trends, Apperian conducted its 2015 Enterprise Mobility survey. The survey received responses from a total of 332 professionals across industries regarding the state of their enterprise mobility programs.

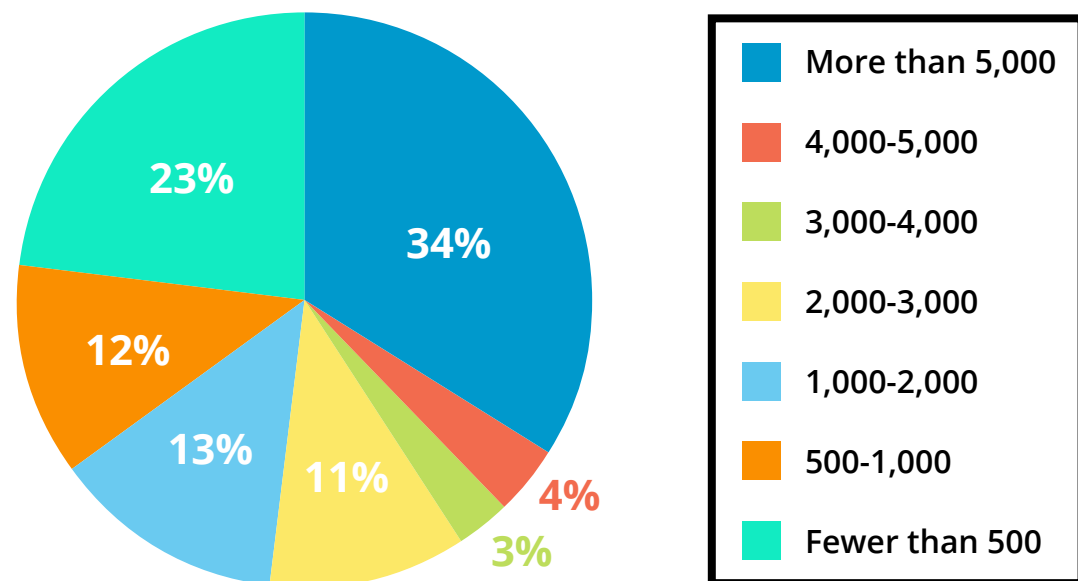
The vast majority of respondents are in management (60% IT management, 13% enterprise mobility program management, and 20% line of business management). Some 6% of respondents were mobile application developers.

In this report, CITO Research analyzes the survey results and suggests a program for taking advantage of the lessons that emerge from the data. This report examines key findings, describes drivers of success, and concludes with recommendations for enterprise mobility programs seeking a competitive advantage and new revenue streams.

KEY FINDINGS

More Users Equipped with Apps as Enterprises Roll Out Mobility Programs

Mobility programs come in all sizes. About one third (34%) of all programs are already rolling out to more than 5,000 users. About the same proportion (35%) are rolling apps out to 1,000 users or fewer.



How Many Users Do You Expect to Equip with Mobile Apps in the Next Two Years?

A hand is holding a silver stopwatch. The stopwatch has a white face with black markings and numbers. The main dial shows minutes and seconds, with a smaller sub-dial for tenths of a second. The hand is positioned on the left side of the frame, with the thumb and index finger gripping the top of the stopwatch. The background is a solid, bright orange color.

Companies want mobility to speed up business processes.

67% of respondents cite **improved business processes** as a goal for mobility

Wanted: Improved Business Processes, New Revenue Streams

Participants were asked to report the benefits they are seeking from their mobility investments. The most frequently cited benefit is improved business processes, selected by 64% of survey participants. This became a consistent theme across all of our findings.

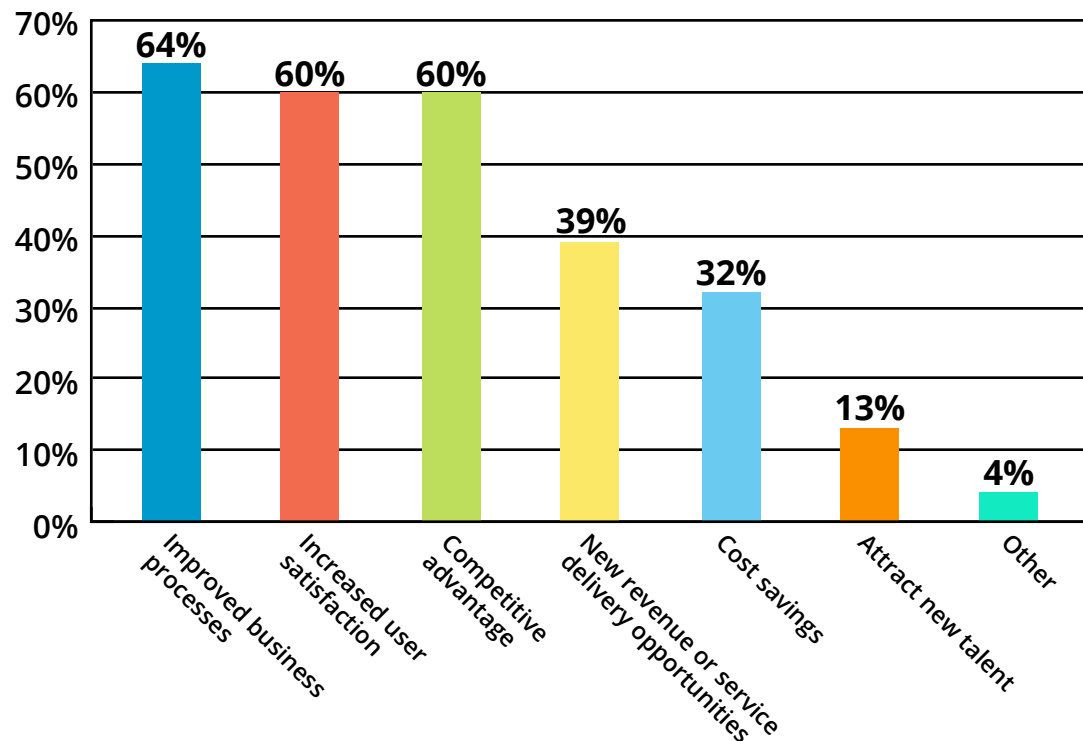
Increased user satisfaction and competitive advantage tied, selected by 60% of respondents. Users expect to be able to work on the go and execute on tasks as easily as if they were working from a PC. Enabling mobile workers is definitely a source of competitive advantage. And increasingly mobile workers mean not just employees, but the extended enterprise, encompassing contract workers, part-time employees, dealers, external partners, and others.

Businesses will increasingly expect mobility programs to bring in new revenue streams or foster new service delivery opportunities.

Not only is mobility a source of competitive advantage, but also a new source of revenue or service delivery. Some 39% are expecting to gain new revenue or service delivery opportunities from their mobility investments (up from 30% in the 2014 survey).

Some participants responded, citing benefits like “increased velocity across the business” and “ease of access to improve productivity.” Such responses illuminate specific facets of improving business processes, speeding them up and helping people become more productive by giving them easy access to the information they need to make business decisions, wherever they are.

What Benefits Are You Seeking with Your Mobility Investments?



Mobile Apps with the Greatest Impact on ROI

Participants were asked to rank types of mobile apps with the greatest impact on productivity and ROI.

Productivity apps, including note taking and access to documents, rated highest. People need access to important information on the go, including documents and spreadsheets so they can make quick decisions and eliminate delays.

The top priority for mobile is speeding up the unique business processes that represent an organization's best practices for driving revenue.

The need for productivity apps is universal, so it is not surprising that such apps rank first. After all, they are relevant no matter what industry you are in or what job you are doing. Custom-built apps are specific to a particular industry and may have a greater impact, but not all companies have such apps yet.

Field service, including maintenance and parts delivery, ranked second. Once a priority for only executives, mobile access is being extended to workforce populations that have the biggest potential for cost saving and productivity increases. Companies have seen tremendous productivity improvements by giving those in remote locations the ability to capture and access data.

Which Mobile Apps Do You Believe Will Have the Greatest Impact on Productivity and/or ROI?

	Overall Rank
Productivity apps (e.g., note taking apps and office docs)	1
Field service apps (e.g., maintenance and parts inventory)	2
Selling tools (e.g., sales collateral and ordering processing)	3
HR apps (e.g., time tracking, booking, and benefits)	4
Travel (e.g., reservations & expense reporting)	5

A woman with blonde hair is looking upwards. Above her head is a large white thought bubble with a white outline. To the right of the thought bubble is a white circle containing text. The background is a solid teal color.

**Mobile security
is top of mind.**

67% cite
security as a
challenge

Top Mobility Challenges

Participants were asked what challenges they face in achieving their mobility goals. Security topped the list, cited by 67% of respondents. All mobility programs must ensure that they deal appropriately with the security challenges they face, in keeping with the requirements of their industries. Given the importance of security and the continuous evolution of mobile security threats, we were not surprised to see security cited by most respondents.

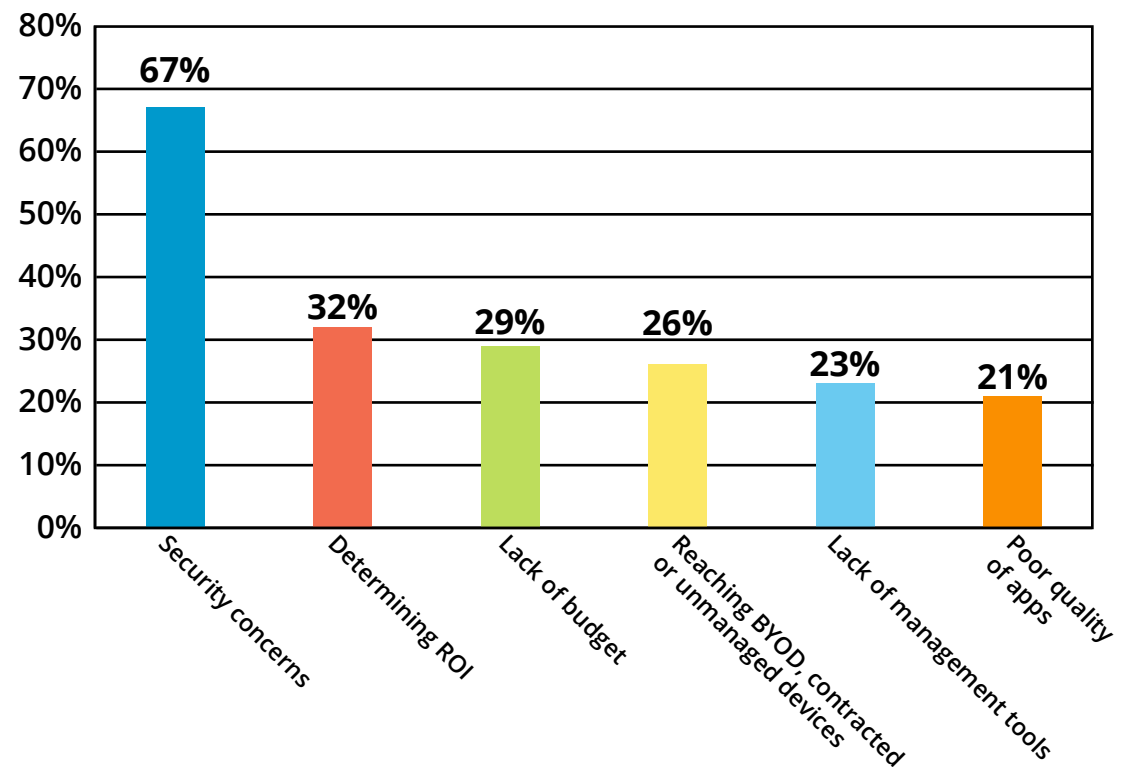
Apart from security, what other challenges are organizations facing? Some 32% are challenged by determining ROI while 29% are hindered by lack of budget. These factors are linked. If you can't determine ROI, it's harder to justify budget requests. But how do you demonstrate ROI? The best way is through app data and usage analytics. With usage analytics, you can determine the impact of your applications more precisely.

Some 26% cite difficulty in rolling out apps to all the stakeholders they want to reach. Companies are struggling to support the range of heterogeneous devices brought in by BYOD. If you then extend apps to

business partners, supplier networks, and contract workers as well as to customers, you must support a full range of devices and operating system versions. In these types of environments, securely deploying mobile applications and data is extremely difficult with legacy tools.

More than a quarter cite difficulty in reaching BYOD, contracted, and unmanaged devices, a challenge related to the extended enterprise.

What Challenges Are You Facing in Achieving Mobility Goals?



How much visibility do companies have into mobile metrics?



Not nearly enough.

More than
50% have **no idea** if their
apps are being
used

Visibility into App Usage

Analytics are a key component of any successful enterprise mobility program. How much visibility do participants have into their metrics? In short, not nearly enough.

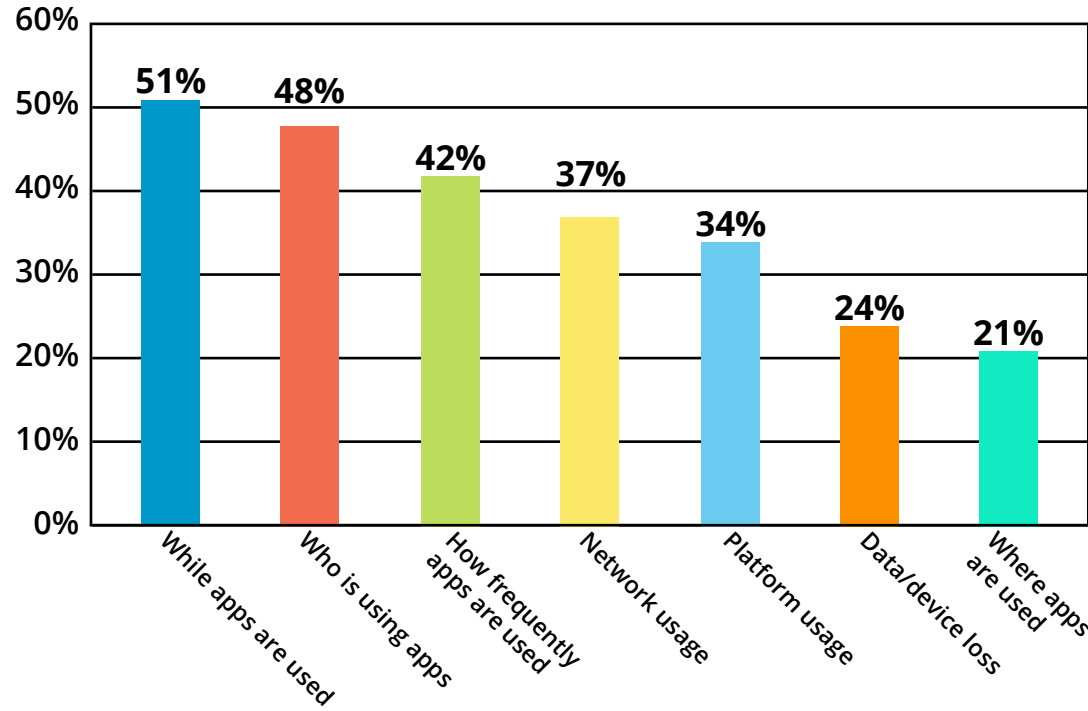
Just more than half of respondents can tell which apps are being used, while 48% can see who is using them and 42% can see how frequently apps are used. This means that the other half of the respondents do not have this visibility at all.

Given concerns around security, the most alarming finding is that less than a quarter of respondents can see when devices or data are lost. That means that three-quarters can't detect such events, which can easily lead to corporate data leaks if the right controls are not in place.

A critical concern: All organizations surveyed need greater visibility into metrics about their app usage.

Many programs are in early stages, but without visibility into platform usage, which only 34% have, it is hard to make strategic decisions about development priorities, particularly when there is competition for development resources as organizations seek to keep their apps running on the latest iOS and Android releases on multiple hardware platforms. Data around network usage is important for ensuring good response time, a baseline user expectation.

Do You Have Visibility into the Following Metrics For Your Mobility Program?



Investments to Increase Adoption

Participants were asked what investments they are making to increase adoption.

Creating apps for core business processes is the top investment, cited by 47%.

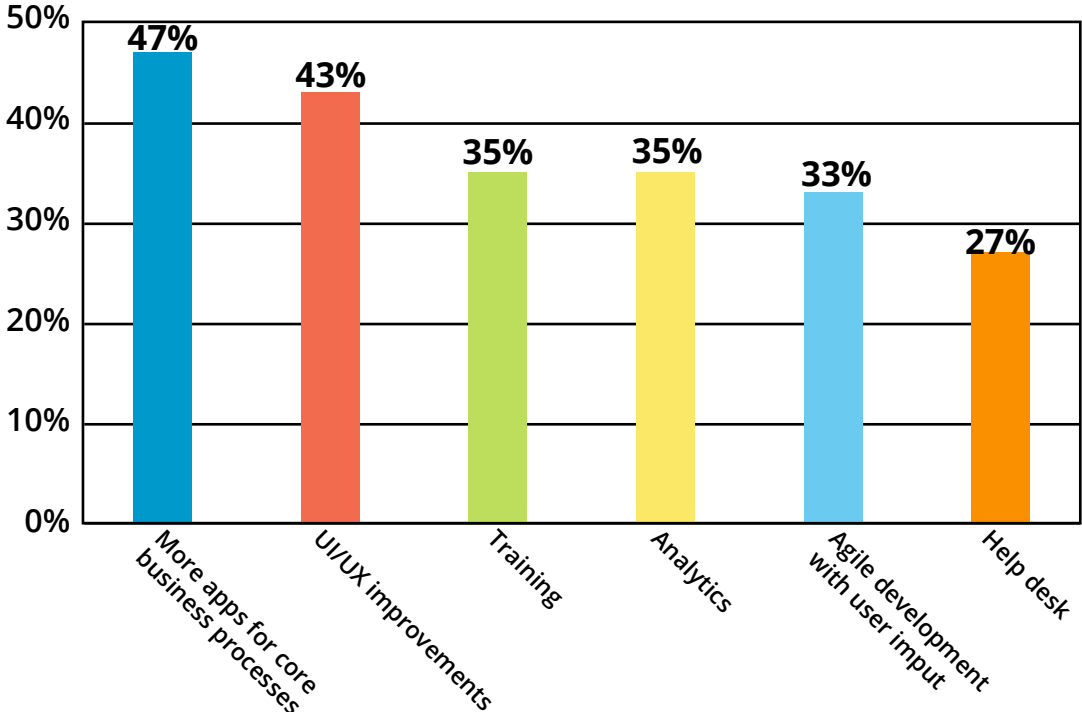
Ranked second is UI/UX at 43%. In order for apps to succeed, the user interface and user experience must be first-rate.

Nearly half of respondents (47%) are investing in apps that support core business processes.

App users expect a great experience. It doesn't matter if it's an app at work or an app they download at home. The bar has been raised by the consumerization of IT. Some 33% note that they are following an agile development process, which relies on getting early input from users to shape development and the user experience.

Supporting users by offering training (35%) and a help desk (27%) were identified as significant strategies to improve adoption. Some 35% say they are making investments in analytics for their mobility programs.

What Investments Are You Making to Increase Mobile App Adoption?



WHAT'S DRIVING SATISFACTION WITH ADOPTION?

We sought to find out what those most satisfied with their mobility programs are doing differently from others. Respondents were asked about their satisfaction with adoption because uptake of apps is a proxy for the success of their mobility

program as a whole. Some 31% of respondents are satisfied with adoption, 39% are neutral, and 27% are unsatisfied. This begs a question: what are those who are most satisfied doing differently from the others?

Developing Internal Apps

Given the interest in supporting core business processes, it made sense to examine satisfaction in terms of where apps are coming from.

Participants were asked about four kinds of apps:

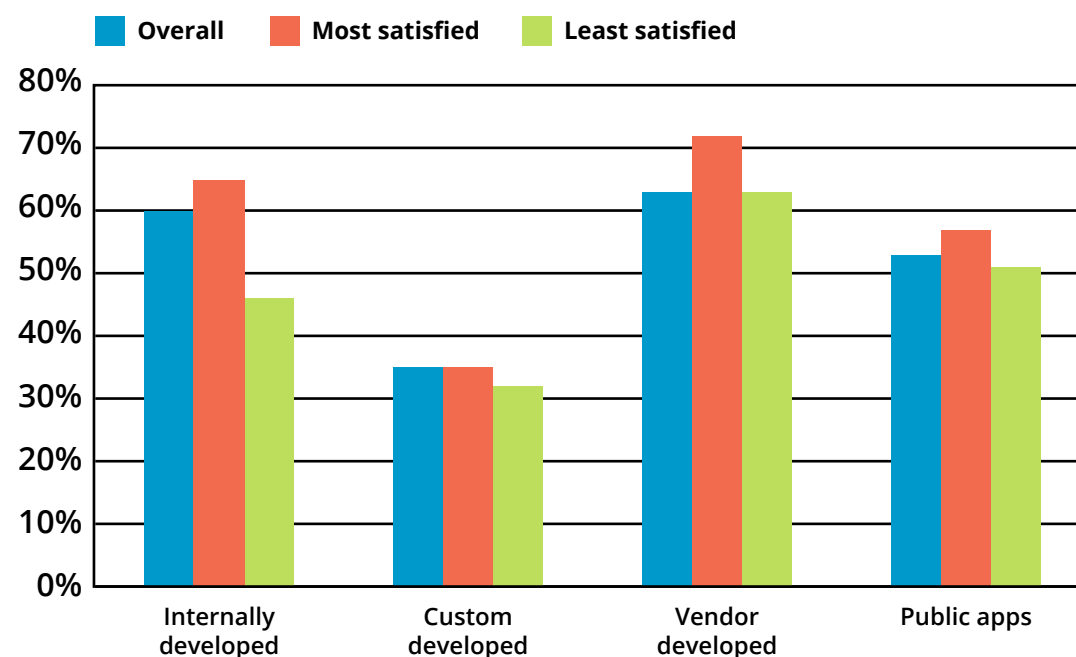
- **Internally developed apps** created in-house, by internal development staff
- **Custom developed apps** created for a company but developed by third-party firms
- **Vendor developed apps** created by an enterprise software vendor
- **Public apps** available for anyone to download and install from public app stores

Those most satisfied offer more apps of every type, but internally developed apps are most likely to impact core business processes.

All categories of apps are growing, but one category stands out: internally developed apps. Internally developed apps address core business processes, critical functions likely linked to a company's unique differentiation. These apps are growing the fastest. Overall, 60% of organizations have internally developed apps in place, compared with 42% in the 2014 survey, exhibiting double-digit growth (18%).

Who is developing the most apps internally? Some 65% of those most satisfied have such apps in place compared with 46% of the least satisfied organizations. Organizations developing apps internally also have a higher level of investment in mobility and are more mature.

What Is the Source of Mobile Apps That You Currently Offer?



To support differentiating business processes, create your own apps.

65% of those **most satisfied** with mobility **develop apps internally**



Strategies to Drive Adoption

Participants were asked about strategies being used to drive adoption. Responses included device management software (mobile device management or MDM), app management software (mobile app management or MAM), a private app store, help desk, and BYOD (bring your own device).

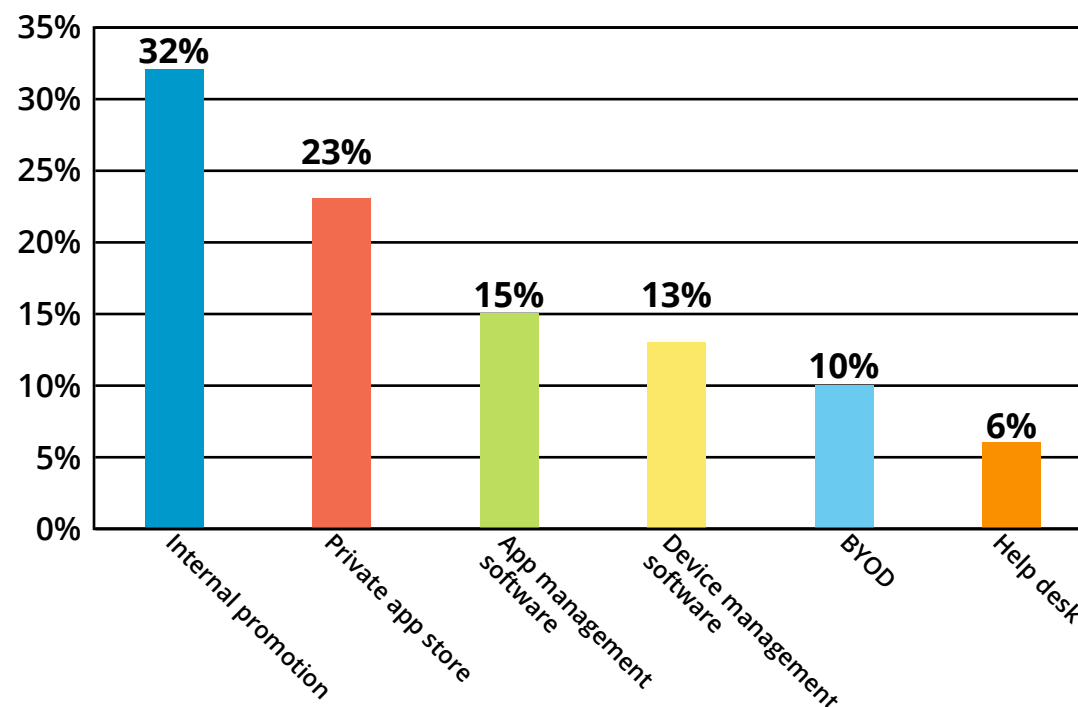
Those most satisfied promote new apps internally, selling the app to the organization and letting employees know “there’s an app for that.”

We see best practices emerging from those most satisfied with adoption:

- 1 Rather than leaving app adoption to chance, those most satisfied are far more likely to promote apps internally, selling the app to the organization and letting employees know “there’s an app for that.”

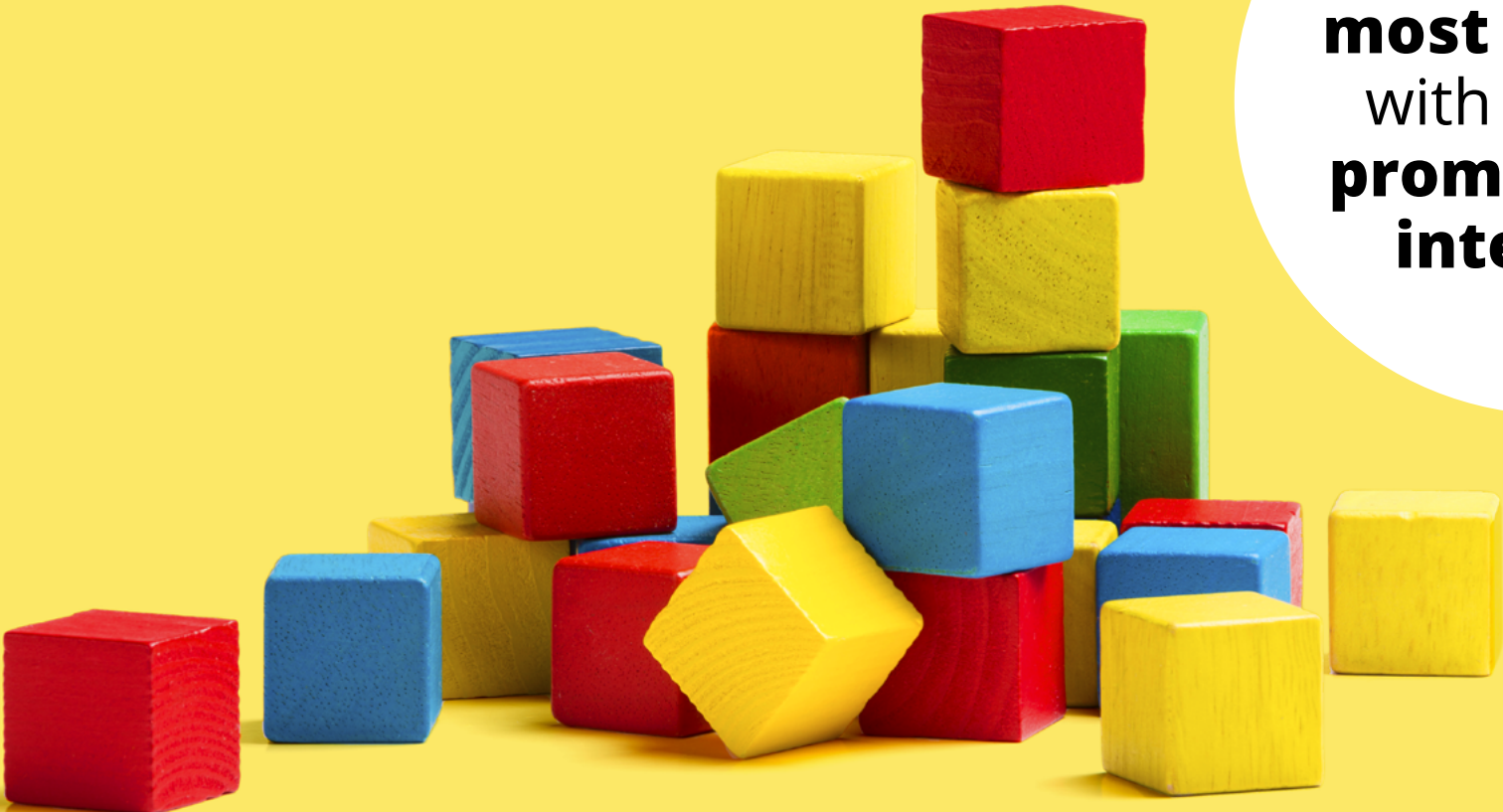
Strategies Used to Drive Adoption

(Difference between most and least satisfied)



- 2 Those most satisfied with adoption are using software to manage mobility more than those least satisfied. MAM software, which works at the app level, is used 15% more by those most satisfied; MDM software, an older type of mobility management that works at the device level, is used 13% more by those most satisfied.
- 3 Those most satisfied are also much more likely to offer corporate app stores that let users discover internally developed apps as well as third-party apps used by other workers. App stores also empower users to offer feedback through reviews and ratings.

**If you build it, will they come?
Mobility leaders don't
leave it to chance.**



57% of those
most satisfied
with mobility
promote apps
internally

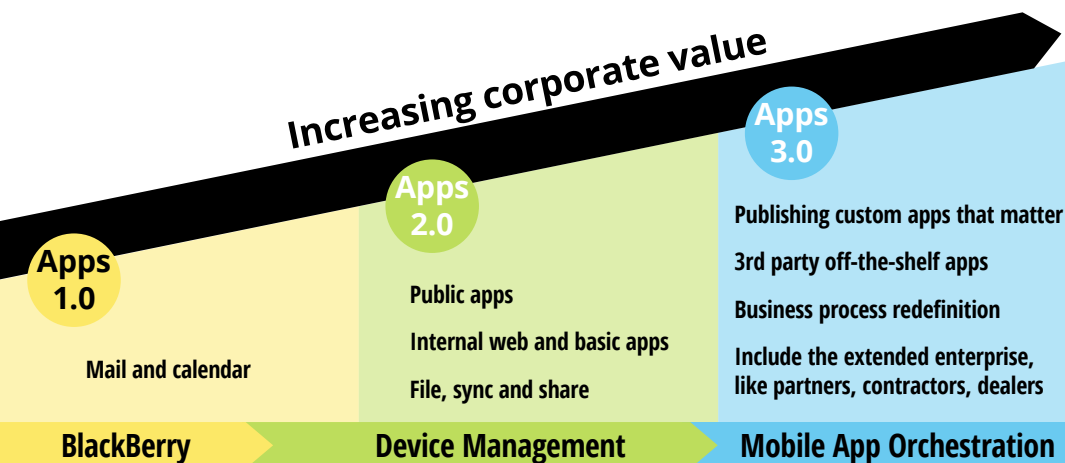
RECOMMENDATIONS FOR ENTERPRISE MOBILITY PROGRAMS

- ❶ Focus first on core business processes when developing apps
- ❷ Business processes are best supported with internally developed apps
- ❸ Invest in technology to manage the apps
- ❹ Successful app development is equal parts marketing and development
- ❺ Think of your users as customers
- ❻ Invest in analytics

Recommendations for Enterprise Mobility Programs

- **Focus first on core business processes when developing apps.** This is where organizations are seeing a large return and differentiation from their peers. Consider augmenting core apps with commonly useful apps, such as note taking or room booking apps, to help deliver utility to all workers and promote the importance of mobility.
- **Business processes are best supported with internally developed apps** that are tailored around an organization's specific needs, processes, and data.
- **Invest in technology to manage the apps**, support heterogeneous devices, and provide analytics from app usage. Analytics can help drive ROI analysis and guide development priorities.
- **Remember that successful app development is equal parts marketing and development.** You can't assume that if you build an application, users will know about it or even understand what it can do for them. Develop an internal marketing program to drive adoption of your apps.
- **Think of your users as customers.** And consider the extended enterprise, contracted workers, consultants, dealers and others supporting core business processes who can greatly benefit from mobile enablement, but who are often overlooked. Understand how their day-to-day tasks inform app requirements and employ agile development techniques.
- **Invest in analytics** that not only tells you the basics of app usage, but which also measures interactions within the application. This can help drive prioritization of development at the feature level.

More and More "Apps that Matter" Are Being Built



Finally, work on building apps that matter. The figure to the left shows the progression from apps 1.0 through apps 2.0 (where management was at the device level), to apps 3.0, where business processes are supported by custom apps. This enables you to position yourself to take full advantage of the continuing mobile revolution.



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CITO Research is a source of news, analysis, research and knowledge for CIOs, CTOs, IT and business professionals. CITO Research engages in a dialogue with its audience to capture technology trends that are harvested, analyzed and communicated in a sophisticated way to help practitioners solve difficult business problems.

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