Unlocking Asset And Device Visibility Value From MDM Solutions

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Contributing Research: Forrester's Infrastructure and Operations research group

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Executive Summary

Mobile devices, connected printers, smartphones, tablets, and other types of connected devices are transforming how companies engage with employees across many roles in the organization. Technology decision-makers must establish a comprehensive strategy to monitor, manage, and track the utilization and health of their company's business-critical devices. Having greater visibility into a firm's mobile devices and capturing predictive insight into the health of these devices can lead to better business outcomes through improved worker productivity, greater predictability and increased device uptime, leading to maximum ROI on the investment for your mobile workers.

In August 2016, Zebra commissioned Forrester Consulting to evaluate opportunities for companies to increase employee productivity, reduce inefficiency, and take proactive actions to enhance operational and asset visibility of their workers' mobile devices. Then to further explore this trend, Forrester developed a hypothesis to test the assertion that enterprises of all sizes use mobile device management (MDM) solution partners to gain end-to-end operational and asset visibility insight into employees' mobile devices in an efficient, effective, and productive manner.

In conducting in-depth surveys with decision-makers responsible for MDM or asset tracking services in North America, EMEA, and Asia Pacific, Forrester found that these companies were able to improve performance, increase productivity and enhance operational efficiency by using MDM and asset visibility solutions from third-party partners.

KEY FINDINGS

Forrester's study yielded three key findings:

› **There is widespread deployment of device management and asset tracking solutions.** Customer-obsessed companies are deploying mobile devices to enhance employee productivity, support field service operations, and improve business processes. Between 69% and 71% of companies are currently implementing or expanding deployment of mobile device management or asset tracking solutions.

› **Existing MDM investments are often underutilized.** Firms that are deploying MDM solutions have achieved many benefits, including improved performance (51%), increased productivity (49%), and improved operational efficiency (48%). However, over half (53%) of these companies are looking to better leverage their existing MDM solution functionality.

› **Firms are turning to third-party service providers and cloud-based solutions for assistance.** Nine out of 10 companies use a mobile device management solution, but the deployment models vary. More than a quarter of companies manage mobile devices in-house with an ad hoc system. Many firms are leveraging cloud-based solutions. In fact, 44% of firms use a cloud-based mobile solution managed by a third-party service provider, while 33% of firms use a cloud-based MDM solution that they manage in-house. In addition, 31% of firms use an on-premises MDM solution managed by a third-party service provider.

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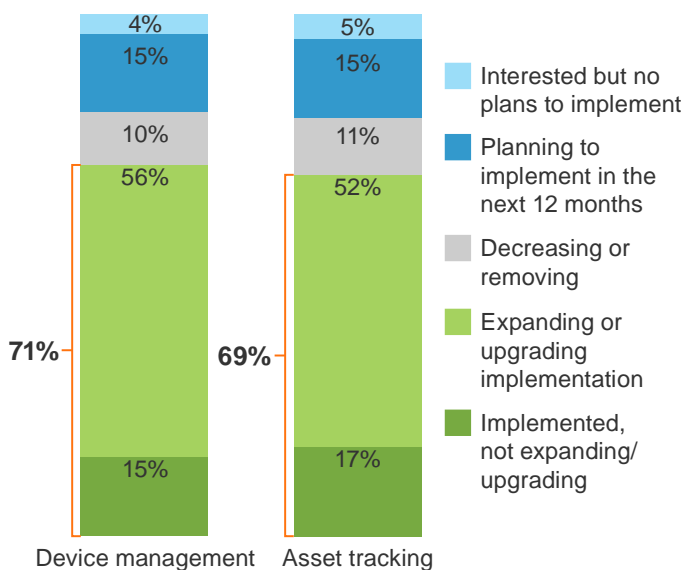# Device Management And Asset Tracking Is Important Yet Difficult

With the multitude of mobile devices in businesses today, it's no surprise that many enterprises are looking for more efficient ways to manage and track these mobile devices and assets. Our survey found:

› **There is widespread deployment of device management and asset tracking solutions.** Customer-obsessed companies are deploying mobile devices to enhance employee productivity, support field service operations, and improve business processes. Thus, companies need comprehensive strategies for deploying and managing these mobile devices. Survey results show that between 69% and 71% of companies are currently implementing or expanding deployment of mobile device management or asset tracking solutions. In addition, 15% of companies are planning to implement one or both of these solutions in the next 12 months (see Figure 1).

FIGURE 1

Widespread Deployment Of Device Management And Asset Tracking Solutions Is Seen

"What are your organization's plans when it comes to implementing the following items?"

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA

Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

FIGURE 2

A Comprehensive Strategy And Full Use Of Existing MDM Solutions Are Key

"How important are each of the following mobility and asset management capabilities to your firm's business and operational strategy?"
(Very important)

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA
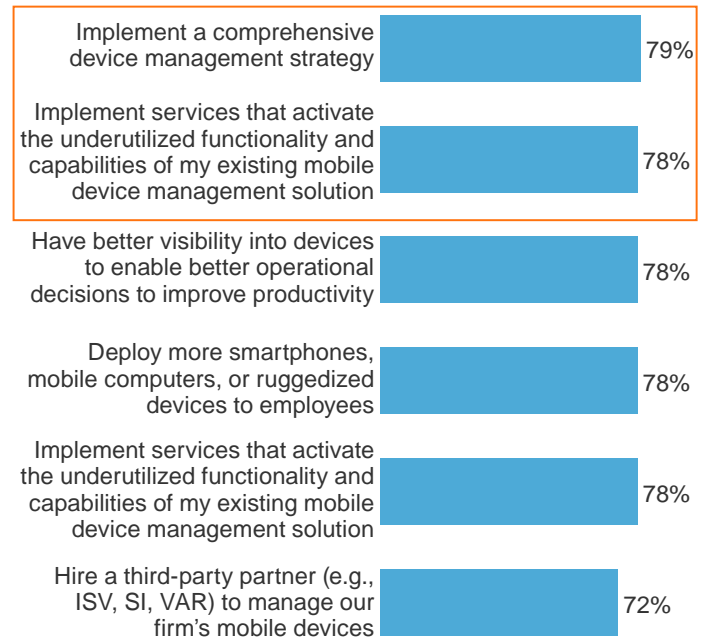
(selected variables shown)

Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

› **A comprehensive device management strategy is very important for most firms.** Implementing a comprehensive device management strategy is very important in nearly four out of five (79%) companies (see Figure 2). Having better visibility into devices to enable better operational decisions to improve productivity is very important to 78% of companies.

› **MDM solutions enable a wide range of benefits.** As companies consider adopting MDM solutions, it's essential to understand the benefits these MDM solutions can provide to firms. For those companies that have already implemented or are currently considering adoption of MDM solutions, the benefits include improved performance (51%), increased productivity (49%), and improved operational efficiency (48%) (see Figure 3).

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FIGURE 3

MDM Solutions Drive Benefits, Including Improved Performance, Productivity, And Efficiency

"What benefits are you receiving/do you anticipate from working with mobile device management (MDM) solutions?"

Improved performance	51%
Increased productivity	49%
Improved operational efficiency	48%
Improved utilization	47%
Increased availability	46%
Increased device utilization	40%
Increased device uptime	37%
Reduced support costs	33%
Increased operational transparency	33%
Improved adoption	32%
Decreased mobile device downtime	29%

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA
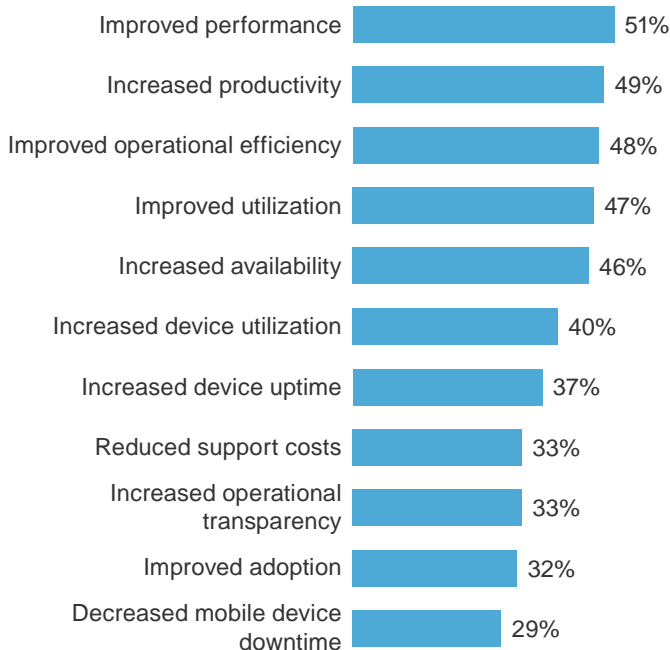
Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

› **Existing MDM investments are often underutilized.** Over 70% of surveyed companies have implemented device management solutions. However, over half (53%) of these companies are looking to better leverage their existing MDM solutions' functionality (see Figure 4).

› **Many companies turn to third-party providers to improve their MDM utilization and strategies.** Many corporate decision-makers recognize that their firm does not have the internal expertise or resources to develop an MDM strategy. Nearly half (45%) of companies are currently evaluating third-party services providers to assist with their MDM initiatives, and 46% of surveyed firms have hired a third-party partner to help implement or improve their firm's MDM strategy (see Figure 4).

Deploying And Integrating Asset Management Solutions And Functions Proves Challenging
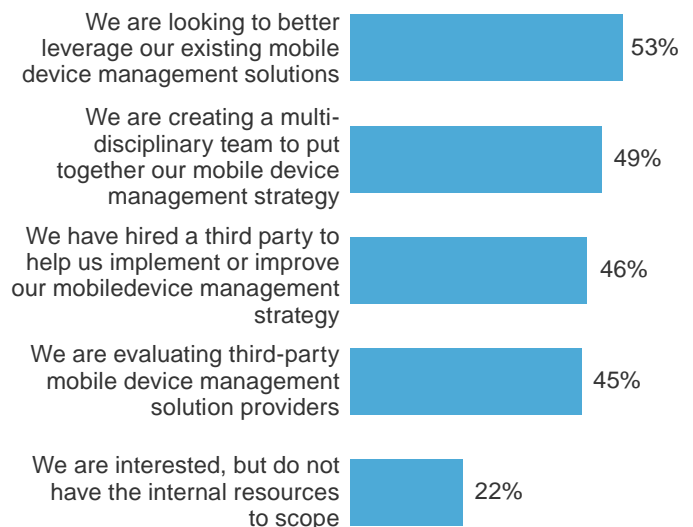
A wide variety of asset management and operational management functions are important to firms. However, many firms find it difficult to implement these functions and integrate them into their daily operations. Specifically, our study found that:

› **Identifying actionable asset and operational insight is important to many firms.** Specifically, 82% of firms stated that identifying actionable insight through reporting, analytics, and alerts is important to their firm. In addition, 79% of companies stated that it is important for their asset management solutions to give users proactive recommended actions to fix the device or address a problem before it becomes an issue (see Figure 5). However, achieving these functional capabilities is challenging for many firms.

FIGURE 4

More Than Half Of Companies Are Looking To Better Leverage Existing MDM Solutions

"You said implementing a comprehensive device management strategy was a priority. What actions, if any, is your company taking to address this priority?"

We are looking to better leverage our existing mobile device management solutions	53%
We are creating a multi-disciplinary team to put together our mobile device management strategy	49%
We have hired a third party to help us implement or improve our mobiledevice management strategy	46%
We are evaluating third-party mobile device management solution providers	45%
We are interested, but do not have the internal resources to scope	22%

Base: 244 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA

Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

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› **Integrating important asset and device management functions is challenging for most companies.** Specifically, 62% of companies stated that the ability to integrate operational management solutions into existing mobile device management solutions is challenging for their firm. This integration complexity is exacerbated by the fragmented array of asset, device, and operational solutions available from third-party vendors and service providers (see Figure 5).

› **Many firms are challenged with predicting the probability of device errors or malfunctions.** Sixty-one percent of firms stated that using predictive analytics to identify the probability that something will go wrong with the device within 30 days is challenging for their organization. In addition, 59% of firms stated that identifying actionable insight through reporting, analytics, or alerts is challenging for their organization. These issues highlight that many companies do not have internal resources or expertise to conduct predictive analysis of mobile device performance and operational issues (see Figure 5).

FIGURE 5

Feature Importance Driven By Challenges

"How important are the following features and functions of your asset-level management and operational management functions? How challenging is it for your firm to address asset-level management and operational management functions?"

	Importance	Challenging
Identify actionable insight through reporting, analytics, and alerts	82%	59%
Give users some proactive, recommended actions to fix the device or address a problem before it becomes an issue	79%	58%
Use operational and asset insight to improve efficiency of managing mobile devices	79%	60%
Use operational and asset insights to move from reactive to proactive device management	79%	59%
Have the ability to integrate the operational management solutions into our existing mobile device management solutions	77%	62%
Set parameters for the upper and lower thresholds for each criteria to determine when alerts are enabled	77%	59%
Use current and historical operational and asset performance data to guide business decision-making processes	77%	55%
Use predictive analytics to identify the probability that something will go wrong with the device within 30 days	75%	61%
Do self-service onboarding of individual devices through a portal interface	74%	56%

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA

Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016
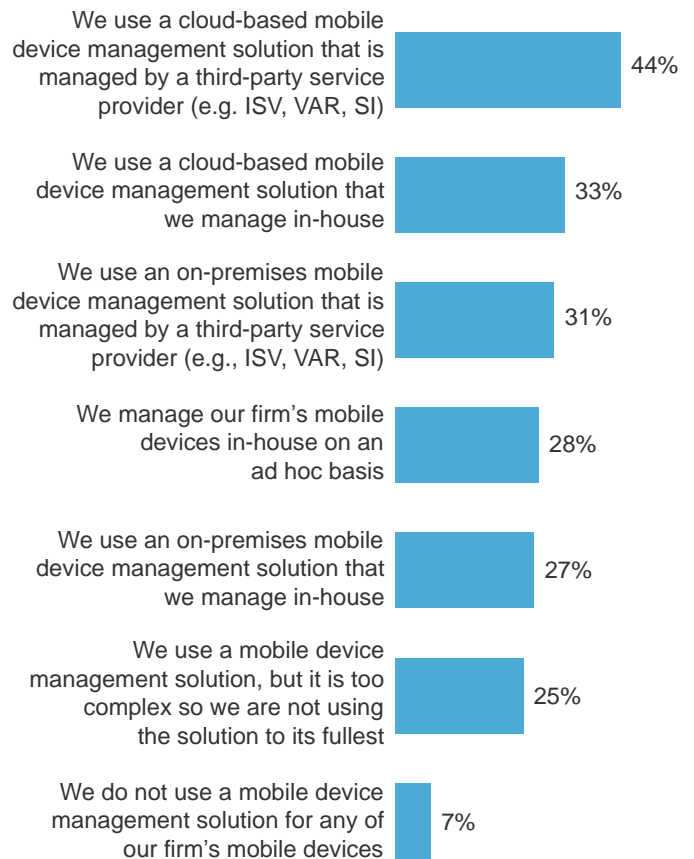
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Firms Turn To Managed Service Providers For MDM Assistance

To fill in gaps in their ability to manage, monitor, and track the operational visibility and mobile device performance, many firms are seeking assistance from third-party partners. Specifically:

› **Firms are turning to third-party service providers and cloud-based solutions.** Nine out of 10 companies use a mobile device management solution, but the deployment models vary. More than a quarter of companies manage mobile devices in-house with an ad hoc system. Many firms are leveraging cloud-based solutions. In fact, 44% of firms use a cloud-based mobile solution managed by a third-party service provider, while 33% of firms use a cloud-based MDM solution that they manage in-house. In addition, 31% of firms use an on-premises MDM solution managed by a third-party service provider (see Figure 6).

› **Device identification and reporting services are the most desired from managed service providers.** Three-quarters of firms seek mobile managed service providers with the ability to identify devices meeting specific criteria and identify out-of-contact devices. In addition, more than 70% would like mobile managed service providers to provide a whole host of reports, including repair reports, printer utilization reports, lost or stolen device reports, and device operation reports. Seventy-three percent of companies would like to view data in a customizable dashboard format, and 69% desire a user-friendly dashboard (see Figure 7). These results highlight how important it is for managed service providers to offer reporting capabilities as part of their comprehensive mobile device management solutions.

› **Mobile managed service partners must meet table stakes requirements.** Firms seeking mobile managed service provider partners are looking for partners with specific characteristics. Specifically, mobile managed service partners must be able to provide good customer service and support while speeding and simplifying implementation. End user customers also seek operational and efficiency metrics and care about reporting capabilities.

FIGURE 6

Third-Party Mobile Managed Service Providers May Be The Answer

"What is your current approach to managing your firm's mobile devices (e.g., smartphones, tablets, rugged mobile computers, scanners, or printers)?"

We use a cloud-based mobile device management solution that is managed by a third-party service provider (e.g. ISV, VAR, SI)	44%
We use a cloud-based mobile device management solution that we manage in-house	33%
We use an on-premises mobile device management solution that is managed by a third-party service provider (e.g., ISV, VAR, SI)	31%
We manage our firm's mobile devices in-house on an ad hoc basis	28%
We use an on-premises mobile device management solution that we manage in-house	27%
We use a mobile device management solution, but it is too complex so we are not using the solution to its fullest	25%
We do not use a mobile device management solution for any of our firm's mobile devices	7%

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA

Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

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FIGURE 7

Services Desired From Mobile Managed Service Providers

"How interested would your organization be to receive these services from your mobile managed service providers?"
(Very interested)

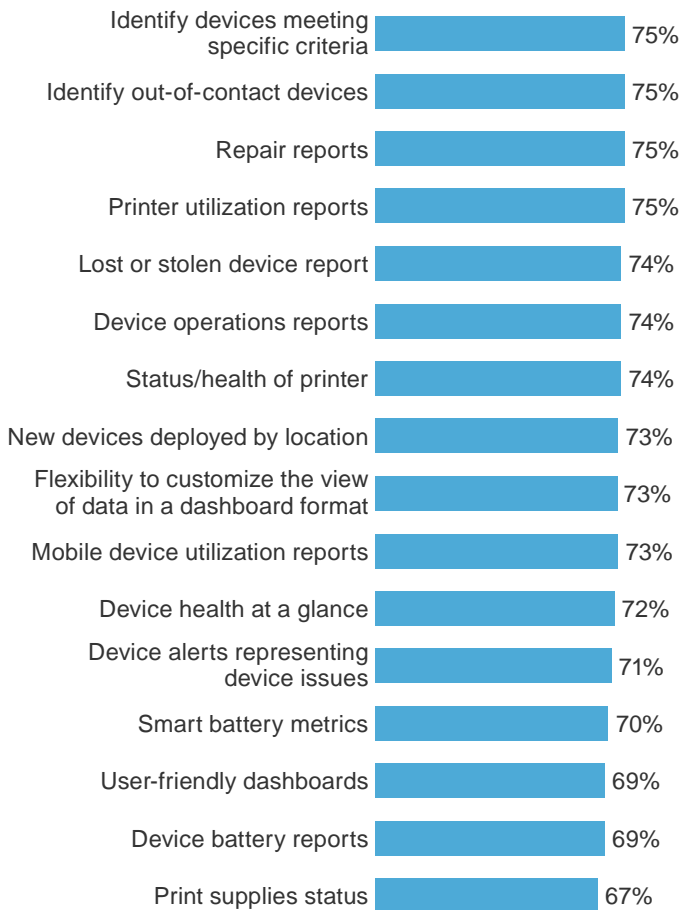| Service	%
Identify devices meeting specific criteria	75%
Identify out-of-contact devices	75%
Repair reports	75%
Printer utilization reports	75%
Lost or stolen device report	74%
Device operations reports	74%
Status/health of printer	74%
New devices deployed by location	73%
Flexibility to customize the view of data in a dashboard format	73%
Mobile device utilization reports	73%
Device health at a glance	72%
Device alerts representing device issues	71%
Smart battery metrics	70%
User-friendly dashboards	69%
Device battery reports	69%
Print supplies status	67%

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA

Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

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Key Recommendations

Enterprises of all sizes across many different industries are deploying a fragmented array of mobile devices, connected printers, smartphones, tablets, and applications to transform workflows, enhance productivity, and improve business performance. Managing, monitoring, and identifying the operational status of these mobile devices and assets is challenging, resulting in worker inefficiencies, increased device downtime, and decreased ROI on the investment for these business-critical devices. As such, many firms are actively seeking third-party assistance to unlock asset and operational visibility solutions within their existing device management initiatives. Forrester's in-depth quantitative survey with senior-level IT and corporate management decision-makers responsible for selecting managed service providers for mobile device management and asset visibility services yielded the following key recommendations:

› **Be prepared to manage an increasingly fragmented array of mobile devices and assets.** Corporate technology decision-makers are challenged with establishing a comprehensive strategy to deploy, manage, monitor, and capture insight from a wide variety of smartphones, tablets, mobile devices, connected printers, and other assets. Ensuring the productivity of employees using these mobile devices requires firms to do the following: monitor the condition, location, and utilization of mobile devices; determine whether they are working properly; and proactively identify issues of concern.

› **Evaluate the range of asset and device management functions to enhance your firm's capabilities.** Mobile device and asset management solutions incorporate a wide variety of functionality, which is important to corporate decision-makers. Key asset management functions identified as important to many firms include identifying actionable insight through reporting, analytics, and alerts; proactively giving users recommended actions to fix device issues; and using operational insight to move from reactive to proactive device management. It is important to evaluate the functionality of mobile device management solutions to ensure they include the specific functional requirements your firm is seeking to deploy.

› **Use third-party mobile device management partners to fill integration functionality gaps.** Most firms identify that it is difficult to deploy and seamlessly integrate mobile device management solutions into their overall operations. Firms that lack the resources, time, and technology solutions necessary to implement a seamless mobile device management strategy often seek assistance from third-party mobile managed service providers. Important services that end users are seeking from their third-party mobile managed service providers include: identifying devices that meet specific criteria, identifying out-of-contact devices, and providing reports that highlight elements such as device repairs, printer utilization, and lost or stolen devices.

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Appendix A: Methodology

In this study, Forrester conducted an online survey of 309 organizations in the US, Canada, the UK, France, Germany, China, and Japan to evaluate opportunities for companies to increase employee productivity, reduce inefficiency, and take proactive actions to enhance operational and asset visibility of their workers' mobile devices. Survey participants included decision-makers in IT and senior business leadership. The study began in August 2016 and was completed in September 2016.

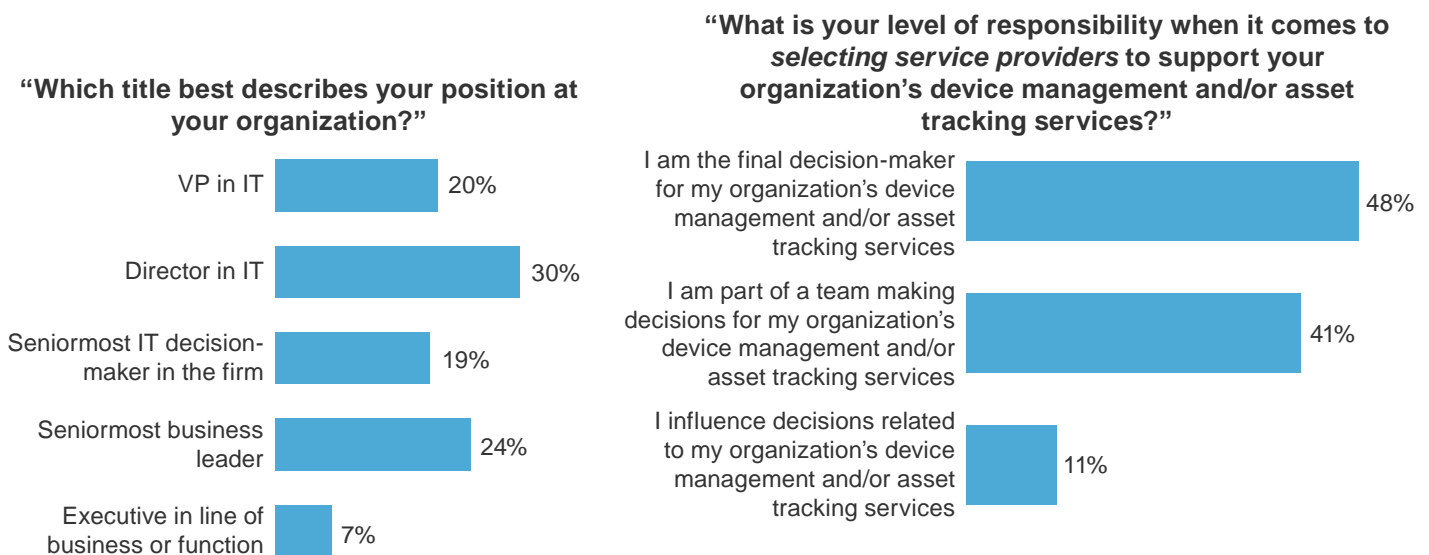# Appendix B: Supplemental Material

RELATED FORRESTER RESEARCH

"Market Overview: Mobile Device Life-Cycle Services," Forrester Research, Inc., June 18, 2015

"Brief: Master Mobile Device Life-Cycle Management," Forrester Research, Inc., February 4, 2015

Appendix C: Demographics/Data

FIGURE 8
Job Title And Level Of Responsibility

"Which title best describes your position at your organization?"

VP in IT	20%
Director in IT	30%
Seniormost IT decision-maker in the firm	19%
Seniormost business leader	24%
Executive in line of business or function	7%

"What is your level of responsibility when it comes to *selecting service providers* to support your organization's device management and/or asset tracking services?"

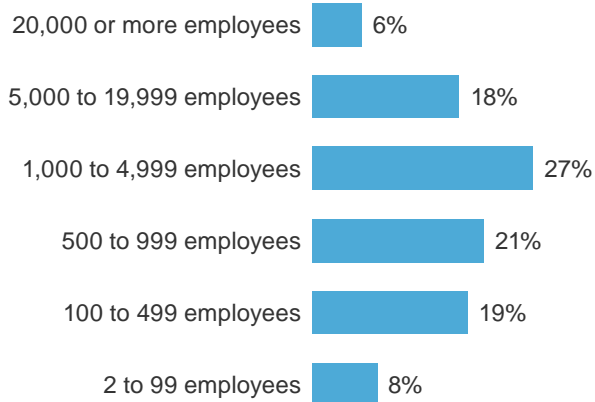|	
I am the final decision-maker for my organization's device management and/or asset tracking services	48%
I am part of a team making decisions for my organization's device management and/or asset tracking services	41%
I influence decisions related to my organization's device management and/or asset tracking services	11%

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA
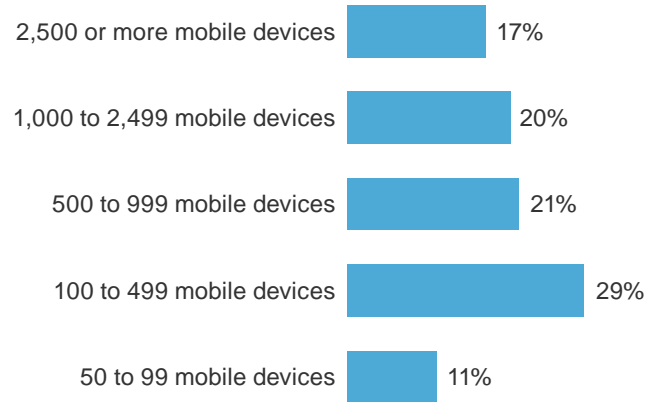Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

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FIGURE 9
Company Size And Number Of Mobile Devices Deployed

"How many employees work for your firm/ organization worldwide?"

20,000 or more employees	6%
5,000 to 19,999 employees	18%
1,000 to 4,999 employees	27%
500 to 999 employees	21%
100 to 499 employees	19%
2 to 99 employees	8%

"Using your best estimate, how many *mobile devices* are currently deployed in your organization?"

2,500 or more mobile devices	17%
1,000 to 2,499 mobile devices	20%
500 to 999 mobile devices	21%
100 to 499 mobile devices	29%
50 to 99 mobile devices	11%

Base: 309 decision-makers directly responsible for their organization's device management and/or asset tracking services within NA, Asia Pacific, and EMEA (percentages may not total 100 because of rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of Zebra, September 2016

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