

2018 Mobile Strategy Research Report

Industry research by
Mobile Thought Leaders and Vox Mobile™



Enterprise mobility strategy: Rapid steps to expansive impact.

Introduction

Mobility, especially as part of efforts toward Digital Transformation, is advancing at a dizzying pace that has many IT organizations gasping for air and other departments tackling mobility matters on their own – often neglecting a holistic approach to security. These are just some of the insights surfacing in the fourth annual strategy research study by Mobile Thought Leaders (MTL) and Vox Mobile.

This year's study indicates that many mobile technologies and tactical elements that were previously either on the radar or in the works have made significant advances both in maturity and adoption. Personal mobility is largely a foregone conclusion for most organizations. The transition to cloud-based productivity, including the deployment of MS Office 365 or Google for Work, now occupies a prominent position in the "Already in Place" category, opening up resources, considerations, and unfortunately, threats that have changed the priorities and approaches across MTL membership.

Other 2017 accomplishments include some forms of mobile device management and mobile application management as critical factors for mobility success. Efforts to sort out identity and access management are progressing, as well. All of these elements are present in the typical mobile programs we're seeing today: ones that are technology-focused and run by IT.

In addition, IT is being challenged by issues surrounding mobility solutions that are easily purchased ("there's an app for that") or do-it-yourself departmental creations ("IT impedes innovation"). At the other end of the spectrum? Strategic mobility initiatives with an enterprise-level focus. Within this landscape lie very real and growing concerns over mobile threat detection and secure communication.

Figuring out where security belongs is not a small task – especially when you're simultaneously working to get the right interface with the right info at the right time for the right person. As we discovered from our respondents, sometimes small, incremental steps in mobility make the best path to a breakthrough.

Another take away from our study, was that healthcare and retail organizations represented the majority of our respondents – as has been a growing trend over the last several years. Therefore, we will also speak to our perspectives on the driving forces specific to these industries for each mobility trend highlighted in this year's study.

"I believe we're entering a kind of strategic renaissance as we thread together more mature mobility management tools and more finely-grained security solutions. The strategy discussion is much more nuanced and sophisticated than a few years ago. Then, IT was figuring out if mobile was important. Today, everyone knows it's imperative."

Kris Snyder, CEO, Vox Mobile

What we set out to learn.

We've said it before. Where mobility is concerned, collective wisdom can provide exceptional guidance. Our 2018 research report provides MTL members a greater perspective on three key questions regarding enterprise mobility:

- What is mobility's strategic value to your organization?
- Who is initiating and driving mobile initiatives?
- How is the business leveraging mobility, and which use cases are being prioritized?

2018 Trends & Highlights

5 Key Trends Emerged as Pivotal Realities in the Research

Below are highlights of key questions and viewpoints shaping priorities and achievements in 2018

*Click on any trend or topic below
to jump to that section*

TREND 1

► Mobility and Digital Transformation are a strategic priority for most organizations.

TREND 2

► Business Lines sidestep IT to address specific mobile needs

TREND 3

► With personal mobility a foregone conclusion, other infrastructure and technologies are gaining focus.

TREND 4

► Security and support are high IT priorities, but tackling them is getting more complex.

TREND 5

► Enterprise mobility is being advanced by small, incremental steps, yet offering big returns.

■ Final Thoughts

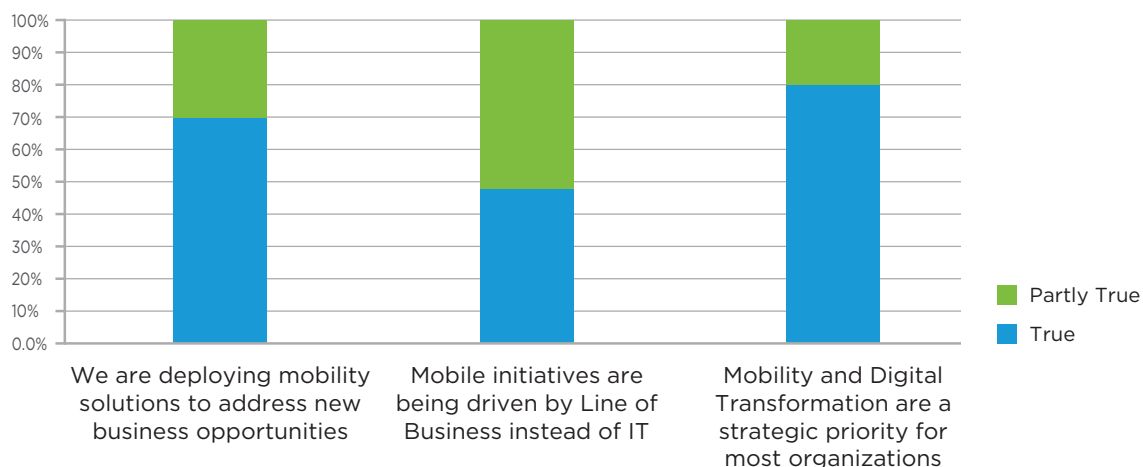
■ A word of caution: Beware of the M-gap

■ About the Research

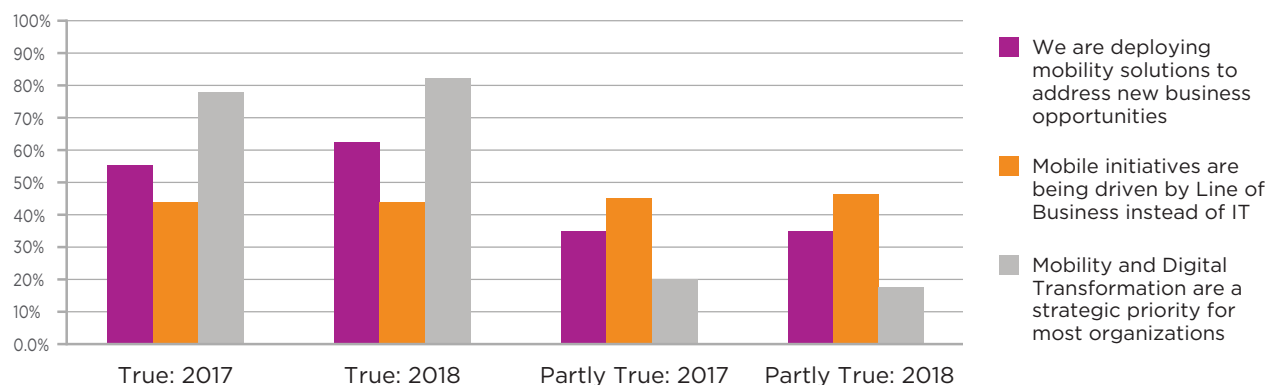
TREND 1

Mobility and Digital Transformation are a strategic priority for most organizations.

Respondents overwhelmingly agreed that mobility is becoming a more strategic factor in their organization. This ongoing trend hasn't abated, but it is changing complexion as individual departments are becoming more independently involved in driving mobile initiatives. Projects driven by Line of Business tend to lack the level of integration and strategic alignment that central efforts possess but still return benefits (see Trend 5). Often they involve single-use devices and applications, whereas the company's overall strategy might be focused on using mobile devices for numerous different purposes.



Year to Year Comparisons. 2017-2018



The year over year comparison for "Deploying mobility solutions to address new business opportunities" saw the largest increase in responses – demonstrating the strategic role mobility is playing across all industries.

MTL PERSPECTIVE

It's human nature. Take note.

Sometimes there's a clear delineation between mobility solutions intended to solve a business problem and those that create new opportunities. But not always. Plenty of significant initiatives may be happening in the middle. More and more, mobile programs are being driven by how technology interacts with people based on the way they think and act. This is critical. Beacon technology didn't boost brick-and-mortar sales as expected primarily because customers don't tend to download apps or take out their phones when entering a retail store. Nevertheless, the software is starting to take off in several other industries – such as professional sports, hospitality and financial services, where beacon-integrated ATMs display personalized ads to banking customers or provide critical data for improving customer experience.

MARKET DRIVERS FOR STRATEGIC MOBILITY



Retail | Save the Sales from Retail Apocalypse

Market disrupters such as Amazon and Wal-Mart have disrupted the retail industry – crushing competition that doesn't match their willingness to innovate. Every retail business must build strategies on how to compete against these new forces to survive. Mobility has been used to level the playing field, allowing retailers to engage customers in stores to match online prices or give customers access to global inventory for right color and right size availability. Mobile pick up at Starbucks is another great example of a retailer using mobile as a competitive advantage – wouldn't you rather call in your order and have it ready at Starbucks rather than get in a long line at the coffee shop across the street?



Healthcare | Financial Health & Differentiating Care

The \$2.9 trillion U.S. healthcare industry is facing huge transformational changes at blistering speeds. While medical innovation has been the focus for decades, operational transformation, patient experience management and cost management are new, challenging disciplines that are taking priority. New requirements for quality of care and proof of continuum of care – both of which can impact a provider's financial health are existential threats for many organizations. On the pharmaceutical front, there are intense speed-to-market pressures which make efficient, accurate trials a strategic business need. Mobility is playing a big part in meeting these industry challenges – however not without complications introduced by the critical life factors involved and stringent HIPAA compliance requirements.

VOX MOBILE Spotlight

Mobile-enabled training and support helps restaurant's 20,000 staff members deliver a great dining experience.

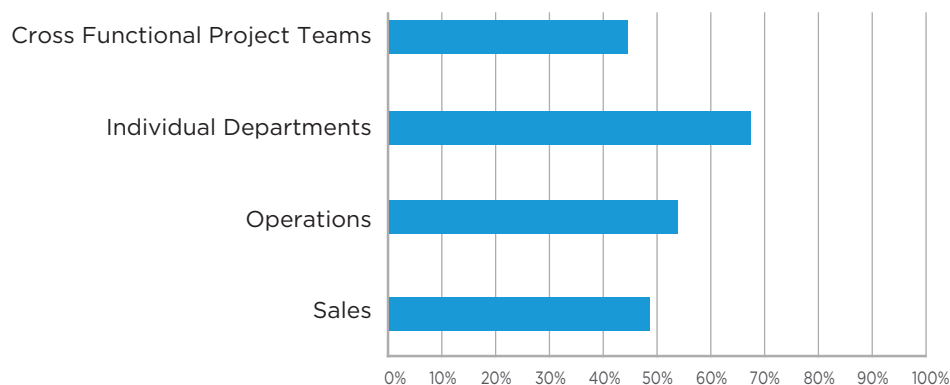
Rapid expansion was a strategic initiative for a leading U.S. based restaurant chain. One of the largest challenges the company faced was how to train an ever changing wait staff of over 20,000 people across the nation as they executed their expansion plans. The restaurant has a menu of more than 300 items and seasonal changes, with a staff that can have high turnover. The company turned to Vox Mobile to help develop a plan for using mobile devices to deliver ongoing training content to the staff. This successful initiative was instrumental in the chain's expansion to 200 locations – with zero negative impact to staff or guests.

TREND 2

Business Lines sidestep IT to address specific mobile needs.

A full 90% of survey respondents either totally or partially agreed with the statement that the Line of Business, not IT, is driving most of the mobile initiatives. This underscores the prevalence of individual departments acting as the initial drivers of mobility programs. The initiatives may range from something as simple as downloading an app version of Salesforce.com or the development of custom applications. Often IT is not involved in launching new projects, mainly because it can be viewed as getting in the way of innovation, rather than supporting it. Therein lie several potential problems. A case in point: as departments intent on knocking down a specific problem may not be considering the possibilities/ benefits of future integration. Or the dangers of sketchy security.

Which departments are initiating mobile projects?

**MTL PERSPECTIVE****Bridging the chasm between departments and IT.**

In many cases, various departments' narrow perspective separates their third-party apps and rogue development projects from the larger tapestry of enterprise mobile strategy. They lack IT's grasp of the benefits and pitfalls their undertaking might present. Cross-functional teamwork can help bridge the chasm between user-initiated apps and IT. We see more and more instances where an internal analyst is given the dual roles of reporting up to IT and participating in the business unit. This scenario brings creativity and insight to mobile development, while ensuring project visibility across the organization. Conversations about interfaces and user experience occur sooner, rather than afterwards. IT can supply policy, process and security in support of business case outcomes. Analysts can be assigned to a number of cross-functional operational teams. As a result, needless efforts can be culled. Existing projects can be refined and expanded to other departments. And "Insight at the Point of Action" can take place more often, more effectively.

"When supporting mobile users and mobile applications, it is imperative to be able to respond to use support, security and application availability issues. This requires having the right systems and expertise in place that can assess a situation and respond immediately – this is having Insight at the Point of Action."

Kris Snyder, CEO, Vox Mobile

MARKET DRIVERS FOR DEPARTMENTAL INITIATIVES



Retail | [Getting it Done](#)

It is no secret that staff turnover is a big challenge in retail – including restaurants. When the learning and knowledge development group of a \$2 billion market leading restaurant group in upscale casual dining wanted to leverage mobile tablets for online training its store staffs and management – IT’s answer was “NO”. The result was that the Line of Business (LOB) management took matters in its own hands, came up with the budget, hired outside expertise and successfully rolled out the initiative. LOB driving mobility may not be a bad thing, but in this case because IT was shut out, they bought devices and EMM software that didn’t leverage price advantages and duplicated existing licenses.



Healthcare | [Financial Health](#)

In hospitals many initiatives will be driven by individual departments because of budget constraints and/or political weight that comes with being one of the biggest revenue producers – like cardiology. Good or bad, technology solution decisions by these departments are often made without the IT department’s involvement. For example, a research department for a drug trial used mobility to make sure the study participants were following protocol steps and taking the doses on time to ensure validity of trial. While departmentally driven, the IT help desk, and data security and device control issues were significant and required IT involvement and speed to response.

VOX MOBILE Spotlight

Leading independent American pharmaceutical company specializing in innovative gastrointestinal treatments, deploy mobile tablets to improve clinical trial results and user experience.

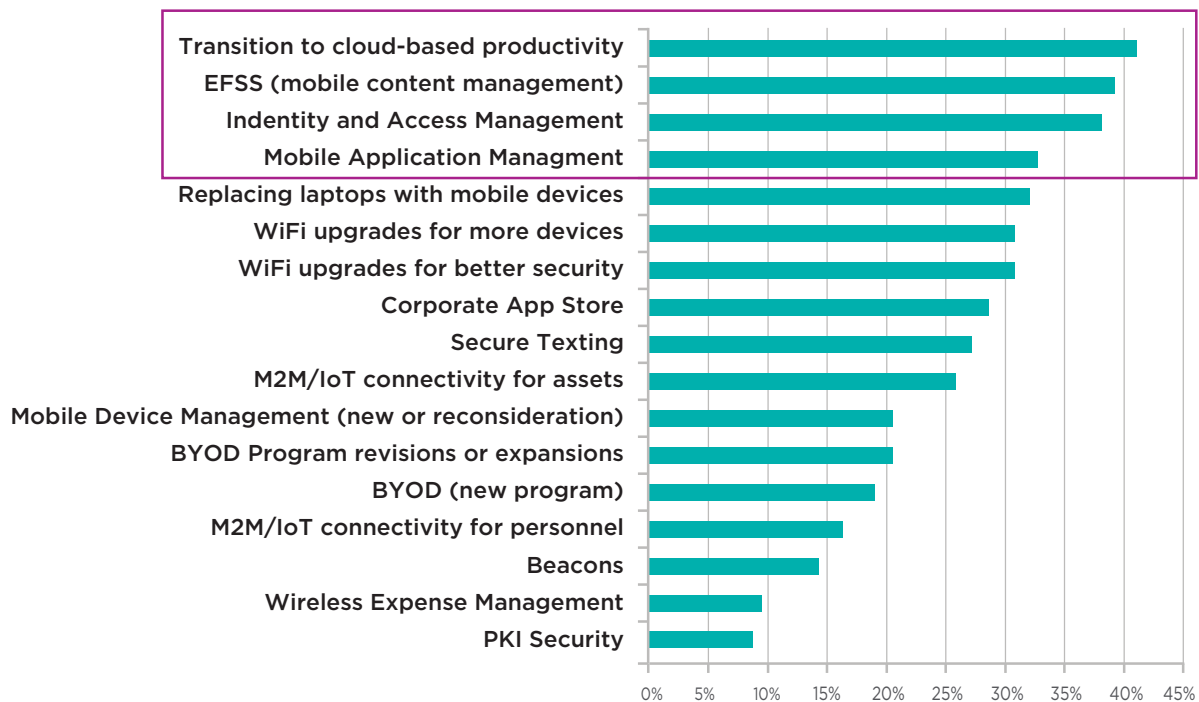
The clinical trials department wanted to leverage iPad™ Minis in the field to capture data for its treatment trials. One of the specific objectives was to better engage trial participants by providing them the ability to benefit from their own use of the iPads for the 3 to 6 months they were involved in the study. However, this added significant complexity to the program because it would require two separate environments to co-exist on the same device. Because of the sensitivity of the clinical data being captured, the two environments could not mix and had to be tightly secured. Vox Mobile was engaged to apply its engineering innovation to architect a secure and cost effective mobile iOS solution. Vox also managed all the device provisioning, administration and a secure process for wiping devices clean when re-provisioned to new participants. It was critical that no residual data be left on the device. Through this departmentally driven initiative, the company realized significant improvements in the quality of trial data and the speed/efficiency of reporting results.

TREND 3

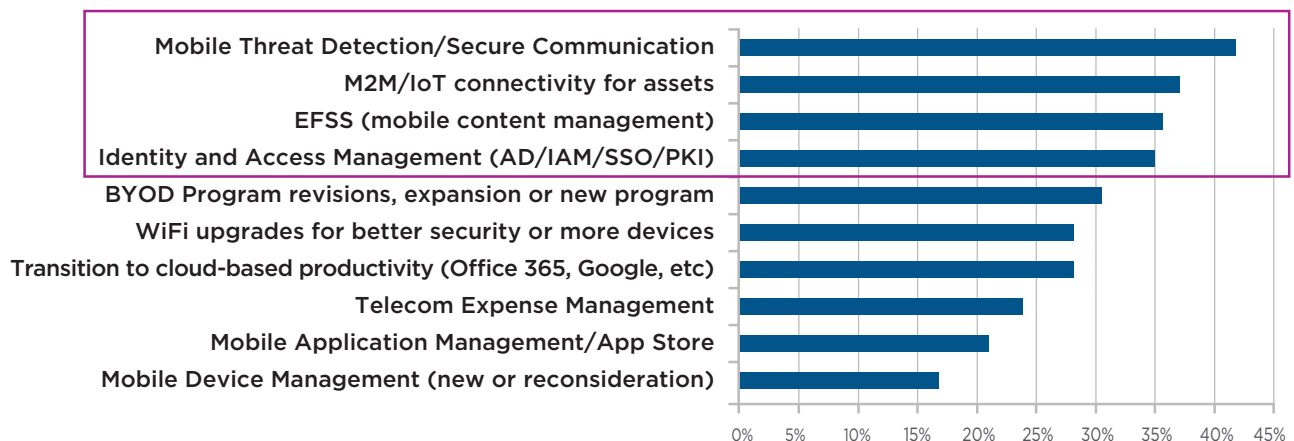
With personal mobility a foregone conclusion, other infrastructure and technology priorities are gaining focus.

Last year, the top initiative on the roadmap was the transition to cloud-based productivity tools. This year's #1 spot goes to mobile threat detection/secure communications, with M2M/IoT connectivity making a dramatic climb to the #2 position. These changes spotlight the fact that providing users with more capabilities, but also maintaining a higher level of security, is a tough balance to achieve.

Infrastructure projects or technologies on the roadmap for 2017



On the roadmap for 2018



MTL PERSPECTIVE

Deploying new technologies does not mean “mapping it over.”

Companies that are transitioning to new EMM systems often ask, “Why not just apply the rules we had from the previous EMM to the new one?” That’s not the question. It should be, “Based on our new use cases and new tool set, what’s a more intelligent way to think about security?”

A great deal of creativity is emerging around security. New advances are providing considerable insight and control. But knowing where to apply them, where you shouldn’t and how to communicate that to the user base, is harder than people realize. It’s where everyone gets stuck.

While not addressed in this paper, the transition from Enterprise Mobility Management (EMM) to Unified Endpoint Management (UEM) will be a major topic for MTL during 2018.

IT should make sure they’re not slowed down or distracted from leveraging technology for growth and efficiency. Everyone in the group should be focusing on business outcomes and participating in the technology selections. However, the latest EMM systems, security and mobile threat detection solutions are still in flux. There’s no point in trying to get good at them.

MARKET DRIVERS FOR TECHNOLOGY PRIORITIES



Retail | Growing Use and Variety of Mobility

Most large retailers have made significant infrastructure investments which include EMM systems. However, with the speed of mobile device and application deployment – not all controlled by IT – these infrastructure and support capabilities must be revisited. Many organizations are learning the hard way that what is in place is not addressing the current mobile world.

In the case of a leading jewelry retailer, the organization developed a new mobile point of sales solution which would eliminate all registers in its stores. However, when the application was ready to roll out, the project came to a screeching halt. The legacy infrastructure was not equipped to adequately support Wifi in all the stores, and its encryption capabilities were not at a level to securely handle payment card processing. This is a perfect example of the cost of excluding IT from the equations.



Healthcare | Support, Compliance and Care Oh My

Healthcare organizations utilize predominantly third party systems and many of them are mission critical in nature. These vetted solution providers have made mobile application capabilities available which can speed mobile app deployments exponentially. In the past it was easier for healthcare organizations to control that users could only get mobile access if it was on a company owned asset. But now for virtual workers with contract doctors, some of which can only admit but not discharge patients, BYOD is a must have, and a physician that has admitted a patient may not be on staff at the hospital but will need access to systems while treating their patient on-site. Therefore, the infrastructure, support and security requirements are an urgent need for this industry more than most.

VOX MOBILE Spotlight

*Leading U.S. Outdoor Specialty
Retailer hands shoppers mobile tablets
to “save the sale” in over 175 stores.*

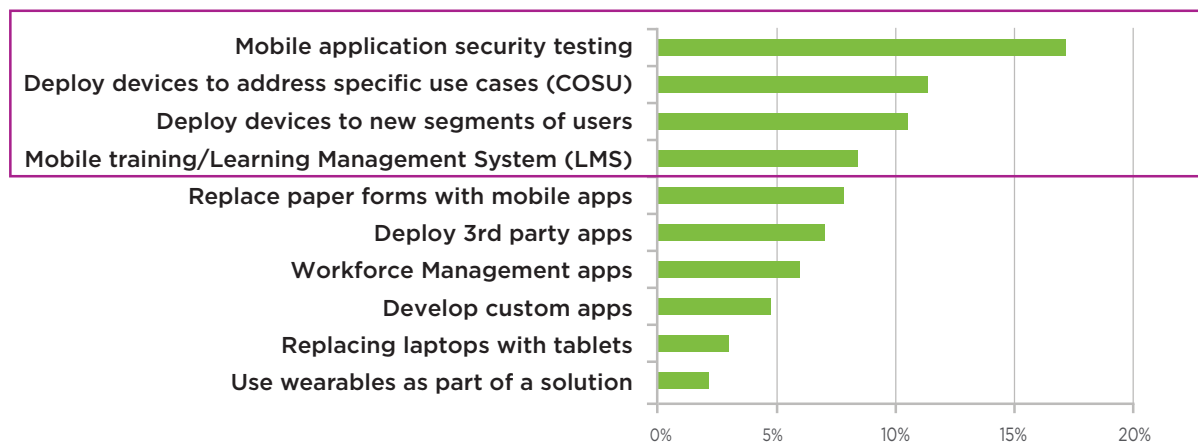
This retail market leader had a business-critical need to prompt in-store sales that would otherwise go to a competitor. Consumers would frequently visit the retailer’s stores in order to view and examine desired merchandise – then compare other prices from their mobile device, leave and order online from a competitor. Vox Mobile deployed more than 400 tablets to just over 175 of its stores, allowing salespeople to save the sale by matching competitors’ prices on the spot. Customers now purchase merchandise directly from the salesperson’s tablet. In addition, these tablets have nearly replaced all cash registers nationwide, while significantly improving the customer experience.

TREND 4

Security and support are high priorities, but tackling them is getting more complex.

Mobile Application Security Testing was far and away the highest mobile priority for 2018. The type of security people are asking about has changed. First in importance was single sign-on. Respondents also raised questions about the best ways to make the mobile experience both better and more secure.

Top-priority initiatives for 2018



MTL PERSPECTIVE

Single Use Devices v. Strategic Purchasing; App Store v. Security Precautions.

Members have expressed, many times, that individual departments have developed apps and deployed them on new devices without considering the full lifecycle of devices, apps, support, security and identity. While this is troubling, newer reports have exposed that even the apps developed with the support of the IT department can expose the organization to hidden risks from the less understood lifecycles of APIs and SDKs. Mobile App Development, whether completed in-house or sourced externally, almost always involves webs of connecting services and stacks of development kits that make it very difficult for even the most diligent stewards of security and management to grapple with. New policies and processes for development governance and the use of new Mobile Threat Detection systems should help, but this is an emerging threat that is likely to expose organizations in unexpected ways.

MARKET DRIVERS FOR SECURITY AND SUPPORT PRIORITIES

**Retail | Fraud and Data Breaches**

Even some of the world's biggest retailers (Target, Apple, Barnes & Noble, CVS, and more) have been in the headlines for data breaches. The consequences of a data breach can cost dearly. There are well publicized studies of the significant costs a company that has reported a breach including: 5% drop in average stock price on the day a breach is announced, 7% loss of customers, 31% of consumers discontinue the relationship. While retail market dynamics are driving the need for mobility innovation, more frequent data breaches has put extreme pressure on IT departments to respond with enterprise fraud protection and data security measures.

Support is another hot priority. The critical need for speed and responsiveness to support mobile users in retail can be demonstrated with retailers such as Scott's and American Greeting Cards. They employ many contract merchandisers and if the mobile apps go down these field personnel can't do their jobs. Also securing the merchandising information (customer lists, feet of space, products being merchandised, etc.) is a mission-critical business concern because it can cost a retailer their competitive advantage.

**Healthcare | HIPAA**

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) is U.S. legislation that provides data privacy and security provisions for safeguarding medical information. With the onset of departmentally-led mobility initiatives and more mobile/virtual care providers (contract physicians, home health providers and more), healthcare IT departments are scrambling to secure a wide variety of devices and technologies while ensuring HIPAA compliance and meeting their mobile users' needs.

VOX MOBILE

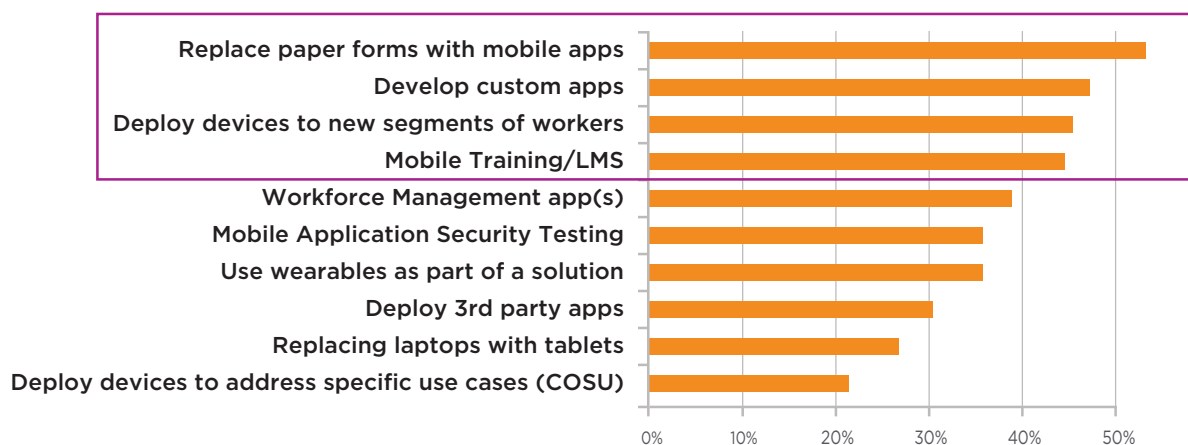
Spotlight

Hospital Group arms employees with HIPAA-compliant mobile content and enhances patient experience.

A large northeast Ohio hospital system needed to provide its physicians, nurses and other employees with access to secure and sensitive information via mobile devices. The challenge was to ensure HIPAA compliance while simultaneously providing ease of use, enhancing meaningful use and boosting patient engagement. Extending its relationship with Vox Mobile, the hospital group selected the Vox Admin offering to provide remote instance administration for all EMM instances across all mobile devices. Vox Mobile will also help deploy a new mission-critical application that puts the power to make life-altering decisions in the palm of a user's hand. This application deployment will expand the hospital group's number of mobile devices to more than 20,000.

TREND 5**Enterprise mobility is being advanced by small, incremental steps with big returns.**

This year's survey indicates a huge shift away from a focus on personal mobility to a much stronger emphasis on use cases. Many of these initiatives are low-cost, incremental mobility steps – and dramatic improvements can come from them. The reality is, organizations in a mature mobile program aren't necessarily investing in something that's hugely different from what they're already using – and two of the best benefits realized from very small investments are positive feedback and almost immediate impact. Instead of a giant new initiative, many IT teams are considering the next “smallish” tasks that can be made easier by a person interacting with a mobile device. If an app rolled out in one department works well, the teams learn from it (and any mistakes along the way), make needed changes in the app and customize a version for another department – extending the enterprise's mobility footprint steps at a time.

Use case projects and technologies on the roadmap**MTL PERSPECTIVE****Inefficiency drives up costs.**

The fact that replacing paper forms with mobile apps is still so strong underscores an important reminder. This use case was last year's top priority, and this year IT remains deeply engaged in capturing the organization's data. With good reason. A great deal of value is yet to be derived from getting data to the people who need to act on it, and we shouldn't lose sight of what makes “Insight at the Point of Action” actually work. Sometimes very expensive technology is provided to managers, but not to people performing the jobs in the field – which is where the real business gains would be realized through mobility.

MARKET DRIVERS FOR TECHNOLOGY PRIORITIES

**Retail | Fraud and Data Breaches**

Small, incremental mobility improvements can payoff big in the end. A U.S. provider of self-storage units, has over 1,400 facilities across 38 states and is approaching \$1 billion in annual revenues. Its business model is much more like a chain of mom and pop businesses versus a very large retailer. Often a facility will only have one person working at a time so being at the desk to take customer calls is a challenge. Security and accessibility are also a logistical challenge. Providing mobile phones and Wifi for the facilities may not be sexy and is a small incremental improvement, but the payoff was huge in revenue growth and customer satisfaction.

**Healthcare | HIPAA**

A healthcare industry example of making small incremental steps in mobility that delivers big rewards involves a pharmaceutical manufacturer with roots in Jerusalem. They underwent an initiative to investigate all the company's mobility uses – users, devices, usage, and provider contracts across the entire enterprise. The result was financially significant to the tune of a \$3.5 million mobile spend savings by simply eliminating over 1,400 unused or underutilized devices and gaining the visibility to better manage mobile spend centrally. This kind of savings can fund some really valuable innovative projects

VOX MOBILE
Spotlight***Restaurant Chain provides mobile-enabled training and support to a staff 20,000 strong.***

Delivering a great customer experience is the #1 priority at this popular restaurant chain. With a 300-item menu that changes seasonally, training for a wait staff of over 20,000 is a key ingredient in customer satisfaction. The restaurant asked Vox Mobile to collaborate on a plan for delivering training content on mobile devices. The plan in place, Vox Mobile now provides 24/7 end-user support, device procurement, configuration and deployment of DEP enabled devices, billing expense management of Verizon-enabled devices and administrative service for the EMM. Partnering with Vox Mobile has helped the restaurant successfully expand its operations to more than 200 locations without any negative impact on its staff or guests.

Final Thoughts

For most companies mobile technologies are helping fulfill strategic business initiatives, especially those well on their journey of digital transformation. However, many times these projects are being driven at a Line of Business with little or no participation from IT- at least initially. Although these individual uses cases may deliver incremental gains in mobility for the enterprise, this approach puts IT organizations in catch-up mode. IT is often addressing critical issues such as security, fraud protection and cost control after the fact. At the core of the long-term answer is tackling the elephant in the room – IT organizations are widely seen as the department of “No”. IT organizations must become an instrumental resource working with LOB leadership to achieve mobility innovation and while safeguarding the enterprise.

A word of caution: Beware of the M-gap.

As we see in this year's survey responses and respondent questions, many obstacles interfere with an enterprise's ability to innovate through mobility. We call this the M-gap, and Vox Mobile focuses on helping enterprises overcome it by bridging the challenges that create a gap between vision and execution.

Multiple factors force companies to spend more time, budget and resources on less strategic areas such as mobile infrastructure management and administration that could otherwise be invested in powerful mobility initiatives.

It's clear that companies must use mobility to be more competitive and innovative, but it's not that simple. Lack of executive alignment, budget constraints, and the inability to support the sheer volume of devices and users, the variety and the velocity of change are some of the huge hurdles companies must overcome. Companies get mired in the management and administration of current mobility demands rather than using their time and expertise on transforming the business.

Only by overcoming M-gap challenges can enterprises true mobility innovation and deliver exceptional customer and employee satisfaction levels. With M-gap obstacles removed, companies can shift their focus towards truly strategic mobility.



[Click to download](#)

More can be learned in the Vox Mobile white paper, [Why Companies Fail at Mobile Initiatives](#). Gartner strongly supported the paper's message: "The M-gap concept is compelling, unique, entertaining and informative. The points made in the white paper are true and the checklist is useful. Our analysts couldn't stop listing M-gap examples after reading the study."

Additional Resources

For more information, click to download.

M-gap White Paper
[Why Companies Fail at Mobile Initiatives](#)

Research
[The State of BYOD and its Impact on Mobile Innovation](#)

Checklist
[Complete Mobility Management](#)

Checklist
[You know you have M-gap problems if...](#)

Take a Mobility Benchmark Survey

Accelerate your organization's transition to a innovative digital business. Take our Mobility Benchmark Survey and one of our experts will present the findings to a team of your executive decision makers.

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About the Research

The Mobile Thought Leaders (MTL) annual study provides a global report that reflects what over 2,000 MTL members are experiencing in leading mobility decisions and strategies for their businesses. Our membership is made up of business executives and mobile professionals that are at the forefront of making mobile initiatives successful and, even more importantly, strategic for their companies. MTL and Vox Mobile join forces each year to publish the report of our findings to provide informative and useful views of trends that are currently shaping the role of mobility in the enterprise. We also want to shed light on the real challenges organizations are facing in taking full advantage of mobile technology while safeguarding data integrity and security.

About the Sponsors



Mobile Thought Leaders

A community of business and IT professionals who work with or are responsible for enterprise mobility programs, Mobile Thought Leaders (MTL) is dedicated to helping its members keep pace with emerging mobility best practices and advanced case studies by networking with their peers. Providing an open forum for inspiration and commiseration, MTL is a continuous source of momentum and innovation for its members. More about MTL is available [here](#).



Vox Mobile

A founding partner of Mobile Thought Leaders, Vox Mobile provides complete Enterprise Mobility Management as a service – addressing mobility technology planning and architecture, deployment, infrastructure management and user support. Vox Mobile helps global and U.S. based companies overcome M-gap challenges to develop and execute mobile strategies that deliver on application and business success. Vox Mobile managed services drive high user satisfaction and productivity, data security and mobility benefits for any business model. Learn more about Vox Mobile [here](#).