

# The CIO's Guide to Mobilizing the Enterprise

Investing in mobility is like investing in any other important business activity, and its success will largely depend on how closely it is aligned with both business and IT drivers. A successful mobility plan should focus on 'mobilizing' your critical business processes and include planning phases for discovery, development and deployment. This Guide focuses on how to build an effective mobility plan while providing valuable insight into the benefits of mobilizing your business applications.






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# Executive Summary

Many organizations have discovered that supporting mobile employees with important business tools such as voice and email can turn downtime into productive time. They are looking to further increase the ROI of mobility by moving beyond these simple applications. Enhanced efficiency, productivity, employee/customer satisfaction, improved regulatory compliance and reduced mobile security costs are all potential benefits of business mobility. The key to successful business mobility is careful mobility planning. Successful mobility plans should focus on ‘mobilizing’ your critical business processes and include planning phases for discovery, development and deployment. This document details some of the benefits of business mobility and provides a methodology for building an effective mobility plan. It expands on the findings of the September 2009 report from Forrester Research Inc., titled *Economic Impact Of A BlackBerry Solution In North American Enterprises - A Study Of The Adoption And Total Economic Impact™ (TEI) Of BlackBerry At Enterprise Organizations*. This study was completed by Forrester Consulting on behalf of Research In Motion (RIM).

# Making the Case for Mobility

Mobility is seen by many as a fundamental requirement of today's business environment. Organizations have identified business mobility as one of their top IT/IS priorities. After early successes with wireless email and calendaring, many companies are developing and deploying mobile Line-of-Business (LOB) applications to further improve employee productivity and decrease costs. Strategic enterprise applications such as Customer Relationship Management (CRM), Sales Force Automation (SFA) and Enterprise Resource Planning (ERP) are all being 'mobilized.' Many marketplace trends are combining to create a perfect environment for business mobility. More workers are spending more time on the road and away from their desks. At the same time, rapidly advancing technology is creating more powerful mobile devices that allow the mobile worker to stay connected and productive no matter where they are or what time of day it is.

Some companies have embraced business mobility quickly, while others have taken a more conservative approach. In September 2008, Research In Motion (RIM) commissioned Forrester Consulting to conduct a research study to examine the potential ROI enterprises can capitalize on by deploying BlackBerry® solutions and smartphones to their employees. The results from these quantitative surveys and qualitative interviews allowed Forrester to segment enterprise into three 'Mobile Maturity Stages' based on how pervasive the organization's use of BlackBerry smartphones and applications are, and how well integrated they are with the organization's key business process.

## Reactive Deployment Stage

Enterprises in the reactive stage focus their BlackBerry smartphone and solution deployments primarily on CXO executives, sales personnel, and managers who are road warriors. Mobile applications are primarily focused on email, calendar, and PIM. These reactive enterprises are followers when it comes to deploying new mobile technology initiatives.

## Proactive Deployment Stage

Organizations in the proactive stage deploy BlackBerry smartphones and mobile solutions to a broader range of employees including not only senior executives, managers, and sales personnel, but also to personnel in the customer service business units. These organizations are also likely to use more than one type of mobile operating system platform to address the smartphone device and mobile solution requirements of various types of business users in the company.

## Integrative Deployment Stage

Companies in the integrative deployment stage are the most progressive in their smartphone and mobile solution initiatives. These organizations view BlackBerry smartphones and mobility solutions as key strategic initiatives. BlackBerry smartphone deployment is wide reaching in these companies with deployment to a wide variety of employees including executive assistants, IT and finance personnel, and customer service agents, in addition to CXO's, managers, and sales force personnel.

Beyond simply segmenting BlackBerry users into these three stages, Forrester goes one step further and calculates an estimate of BlackBerry ROI for each stage. It is clear that the more 'mobilized' an organization is, the greater the return on their mobility investment. However, investing in mobility is like investing in any other important business activity - it is important to keep a focus on the organization's business goals and build a strategy designed to meet those objectives. The next step on the path to business mobility is Mobility Planning.

Source: Forrester Research Inc., Sept 2009 - Economic Impact Of A BlackBerry Solution In North American Enterprises - A Study Of The Adoption And Total Economic Impact™ (TEI) Of BlackBerry At Enterprise Organizations.

# Mobility Planning Phases: Discover, Develop and Deploy

Many successful organizations have made mobility a primary business goal; they want to use the wireless environment in their daily business activities. Sometimes the rush toward business mobility can blind an organization to what it is they want to achieve. It is easy to fall into a common trap, thinking ‘What application should we mobilize first?’, or ‘What application can we deploy most quickly?’ Sometimes this will drive organizations to prioritize their existing applications and select some low-hanging fruit for their first foray into business mobility. The selected application is often used on PC browsers and the ‘mobility strategy’ is to simply make that application work on a mobile device browser. Unfortunately, attempts at deploying an existing application this way can backfire as a PC and a mobile device are used in very different ways.

## Success Factor Considerations

1. Mobilize the business process and not the application.
2. An existing business process means that metrics may be available to measure the benefits of mobility.
3. Sometimes a business process cannot easily be mobilized. This indicates that the business process needs to be updated, subdivided or changed to make it work with mobility.

Whether you are in the midst of a large mobile application deployment, or just starting to think about enterprise mobility, it is never too late or too early to consider an enterprise mobility plan. A well-designed mobility strategy can help the organization decide which mobility projects to pursue in what order to produce the best results. This will vary as it depends on a number of factors including the priority of an organization’s business drivers, the mobility choices already made, applications deemed critical, IT security policies, available funds and how your employees view mobility. This is why taking time to determine your business process needs is so important.

# Discovery Phase

The Discovery Phase allows the organization to gather the information that is required to develop an effective deployment plan. The Discovery Phase is the time for brainstorming how mobility can help propel the enterprise forward. It is the time to examine current status and qualify the desired outcome.

Key questions to ask are:

- How confident are we with our user information (User segmentation is a key success area in the mobility space)?
- How can expanding mobility help employees (help users be more productive, for example)?
- How will they use their enhanced mobility, and what applications and information do they need mobile access to most?
- How can mobility help us increase satisfaction with our end-users and customers, and open doors for extra revenue generating opportunities?
- How can mobility help us reduce costs? How can we quantify ROI?
- How can we ensure security?

## Segment Your Users

Understanding your mobile users is an important step in being able to make the right mobility decision for your organization. The success of your project can depend on the uptake and the use of mobile applications. As a result, it makes sense to start with an understanding of who within your organization is mobile. How mobile are they - and what devices, processes and applications do they require to do their job? This information can be used to help create a segmentation model, which provides a view to understand current and predict future mobility needs, and to build your plan for mobility.

Be sure to canvass all applicable user groups when you gather information. Categorizing the tasks and requirements of each user group makes it easier to determine how to support them with mobility. It is also important to understand how people within each user group view their growing mobility. Their attitude and perspective is important for the success of your mobility planning and deployment.

## Identify Key Champions and Resources

Securing an executive leader to champion your mobility strategy demonstrates the organization's commitment to enterprise mobility and its role in the organization's overall business objectives. The IT department will most likely be expected to provide criteria and reporting methods for measuring the benefits of new mobility projects. Both the executive leader and IT should be prepared to consider the following factors:

- Understanding the efficacy of key operational processes and the linkage to enterprise applications.
- Executive sponsorship for business alignment, direction, issue escalation, and more.
- Early and ongoing user input and engagement.
- Developing security policy for mobile devices that matches or exceeds security for desktop PCs and laptops.

## Identify Which Processes to Mobilize

The mobility plan will help prioritize your business processes for mobilization. While prioritizing those applications that can be rolled out most quickly and easily is tempting, greater weight should be assigned toward those applications required to support the business processes you have identified. Spending and resources should be focused on processes that provide the highest benefit and return on investment potential.

- What information would add significant value if it was readily available, regardless of time or location? What are the risks of not having real-time access to this critical information and which areas are affected: revenues, costs, efficiency?
- Is there one application or process that brings staff back into the office when they are more productive in the field? Which business process is affected the most by delays - can it be made available for use out of the office and on the move?
- Which enhanced business processes offer the greatest recovery opportunity? You may wish to quantify the cost of time when considering the payoff, as recovery of time may lead to benefits such as customer satisfaction due to timely response, and these are often important drivers for project funding.
- Which internal processes drive business results? Consider four strategic action areas:
  - Workflow (core customer facing processes),
  - Knowledge (information that supports the workflow),
  - Reporting (decision making support), and
  - Transaction (key exchanges within a workflow).

# Development Phase

During the Development Phase, the goal is to build a mobility roadmap to position future deployments for optimum results. The more time and effort that was taken during the Discovery Phase to segment users and to review how enterprise mobility goals align with business objectives, the easier it will be to form a workable plan. Mobility strategies should be dynamic so they can adapt to competitive pressure and internal changes. Even for a small project it is wise to go through the effort and make a plan. The plan makes it easier to accommodate changing business requirements.

Important considerations include:

- What solution can best meet the needs of our users while providing for flexibility and the security of our critical business processes?
- What milestones must we reach to deploy on time and on budget?
- How will we integrate with our existing environment?
- Do we need support and/or training to execute this plan?

Some organizations choose to employ consultants who advise and guide the development of a mobility plan and business case. An experienced consultant can provide a step-by-step methodology for developing a mobility plan, and provide insights into building custom applications.

## Avoiding Pitfalls through Planning

In the rush to rise to the mobility challenge, some organizations fall victim to common pitfalls that could have been avoided with a well thought out mobility plan. For example, many organizations that have evolved an in-house application over many years have ended up with a complicated application for a relatively straightforward business process. Some companies then make the mistake of developing a mobile version of these complicated applications. The goal is to target the business process, not the legacy application.

Another common pitfall is the lack of a contingency plan.

A contingency plan prepares an organization for unexpected issues and allows them to react quickly and effectively. The easiest place to start is to identify potential issues, their root cause and possible impact on a project. Once the issues have been identified proactively, it is easier to formulate an appropriate response. Building contingency actions, funds and timing into the mobility plan reduces the risk of late and or de-railed mobility projects.

# Deployment Phase

The Deployment Phase executes the mobility plan that was created during the Development Phase. Its success is often dependant on the time and effort that was put into the Discovery and Development Phases. As stated previously, the mobility plan should align with the organization's business objectives. In addition, a successful plan should have its own timeframe, dedicated resources and be consistent with the culture of the organization. These are the critical attributes of a mobility plan leading to the success of a project. Fortunately, it is not necessary to 'reinvent the wheel' - beyond the simple guidance of this document, there are many external resources and expertise available to help you with your mobility project. An example of a successful mobility project is the story of Volkswagen Financial Services UK (VWFS). The significant benefits that they realized in their first mobility project have prompted them to look for further mobility opportunities to realize even greater benefits.

## Case Study: Automobile financial services company improves audits

### The Customer

Volkswagen Financial Services UK (VWFS), established in 1994 and head-quartered in Milton Keynes, offers finance and insurance services to over 700 car dealers representing the seven brands of the Volkswagen Group. The UK operation is the second largest finance subsidiary after the German parent company.

### The Challenge

Between the time when a car leaves the factory and when it is sold at the dealer, it is financed by VWFS. The dealer inventories are audited daily to verify which vehicles are in stock. VWFS found these audits were conducted using a paper-based system that was error-prone and slow, thus impacting the quality and speed of the information that was required for risk management.

### The Solution

VWFS's goal was to automate the existing paper-based audit process within one year. They wanted to develop a mobile application that would satisfy users and which could be deployed as smoothly as possible. VWFS teamed up with Professional Services staff from Research In Motion (RIM) to develop and deploy a mobile stock audit (MSA) application for the auditors in under five months.

### The Results

Once the new stock audit system was in place, VWFS estimates that productivity increased by approximately 25% and administrative overhead was reduced by over 100 days a year. The project goals of increased quality of information and speed of access were satisfied and risk management was improved.

*\*To read the full case study visit [uk.blackberry.com/newsroom/success](http://uk.blackberry.com/newsroom/success)*



# Mobility Planning Summary

It is possible to transform an enterprise by adding mobility to its key business processes - but it takes mobility planning to do it right. Mobile application deployment offers unique complexities and benefits and should not be considered similar to rolling out a desktop application. To summarize, here are some final suggestions to help you get started down the right mobilization path.

## Before You Begin

- Determine your organization's Mobility Maturity: reactive vs. proactive vs. integrative.
- Make the BlackBerry platform part of your organization's DNA (Devices, Networks, Applications). Standardize on your BlackBerry platform and enjoy its key features and benefits.

## Start Building Your Mobility Strategy

- Ensure business and IT goals are aligned: do you need to optimize and/or re-engineer your business process (long term vs. short term)?
- Create and consult cross functional groups to uncover mobility opportunities.
- Consider your organizational needs locally, nationally, and globally, as well as horizontally by functionality.

## Define Your Mobility Roadmap

- Build mobility into the business process, not just as standalone mobile applications.
- Consider a holistic approach first and then identify low hanging fruit processes that support your business processes.
- Involve all stakeholders, and the sooner the better, to get an early buy-in to encourage adoption.
- Develop relevant IT policies to manage and grow business mobility.



# Conclusion

Business mobility is rapidly increasing. Increased worker mobility, improved mobile device capability and wireless network growth are combining to create the perfect environment for business mobility. However, business mobility has moved well beyond simple email and calendaring on the smartphone. Many companies have started to equip more than just their C-level and sales force with smartphones. In addition, companies are starting to ‘mobilize’ their strategic line-of-business applications such as SFA, CRM and ERP. A broader distribution of BlackBerry devices within the organization’s workforce, combined with these new applications may improve the return on investment of mobility.

## BlackBerry ROI across Mobile Maturity Stages

Mobility Maturity Stage	Reactive Deployment	Proactive Deployment	Integrative Deployment
Number of functional areas with applications beyond email	0 - 1	2 - 3	4 plus
Three year risk-adjusted ROI	560 - 827%	825 - 1251%	1589 - 2829%

Source: Forrester Research Inc., Sept 2009 - Economic Impact Of A BlackBerry Solution In North American Enterprises - A Study Of The Adoption And Total Economic Impact™ (TEI) Of BlackBerry At Enterprise Organizations.

Companies that are starting to ‘mobilize’ their business processes will benefit from thorough mobility planning. One mobility planning method for use is the three stage Discover, Develop and Deploy model. This model will make it easier for projects to succeed and it provides a strong foundation for additional mobility projects in the future. Every project is different, but the same basic principles apply for planning and execution. The good news is that there are lots of success stories and plenty of expertise available in the marketplace. Companies do not have to ‘go it alone,’ but can consult with experienced vendors, VARs, carriers and consultants to help them with their enterprise mobility strategy.

## For More Information

RIM offers a number of different resources to learn more about wireless solutions in general and BlackBerry® solutions in particular. The web site [www.blackberry.com](http://www.blackberry.com) is a good first place to start. The Technical Knowledge Center [www.blackberry.com/support](http://www.blackberry.com/support) on the site can help you get answers to particular questions. To find other CIO Guides, including the CIO’s Guide to Wireless, the CIO’s Guide to Mobile Applications, the CIO’s Guide to FMC and more, visit [www.blackberry.com/getthefacts](http://www.blackberry.com/getthefacts).



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