

WHITE PAPER

Worker Flexibility and the Customer-Centric Business: Mobility Solutions Drive Business Value

Sponsored by: TELUS Business Solutions

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EXECUTIVE SUMMARY

Wireless and mobility solutions are gaining traction among Canadian businesses as the workforce becomes more mobile. Based on IDC research, half of Canadian workers have needs, while at their primary business location, in the field, in transit, or working at home, that require mobile services. Yet, with the exception of email, Internet access, and the mobilization of core business applications, adoption of other mobile applications is limited. Furthermore, there is very little evidence of, but clear demand for, the integration of mobile applications in business processes.

To achieve outstanding benefits from mobility applications, a considerably stronger effort will need to be placed on enabling this integration. The linking of application systems to each other (e.g., time management to scheduling, inventory, and payables) will increase the strategic value from the applications and drive customer retention and satisfaction, improve cash flow, and enhance competitive advantage.

Our analysis indicates that organizations need to place a stronger priority on completely understanding the needs and dynamics of the increasingly mobile workforce, defining linkage to processes and technology, and implementing an investment strategy to realize and drive adoption and integration. This would address what our analysis found to be the leading inhibitor to mobility application and integrations, namely the lack of a comprehensive strategy. Our guidance to those interested in adopting and deploying mobile solutions includes:

1. Develop a strategy. Businesses have too many mobile workers to let them go unmanaged.
2. The importance of extending the business to include mobile technologies must be part of a central theme. As such, IDC recommends the executive team make mobilization of applications and services a central ICT theme.
3. You can almost never go wrong focusing on your customers, before someone else does. Let that drive your strategy.
4. Start modestly. Build up and out. Experiment and gain value through the best practices shared by your suppliers.
5. Adopt mobility solutions aggressively by learning from peers inside and outside of your organization.

Research Methodology

Over the past several months, IDC has been engaged in a study of mobility and wireless technology adoption in Canada in an effort to better understand the differences facing small and large organizations in their adoption, implementation, and success criteria. Firstly, we examined current status of organizations with regards to outlining and agreeing on mobility strategy to meet their business requirements; this was done through a series of in-depth, phone-based interviews with Canadian business leaders. To bolster these initial findings, IDC then fielded an online quantitative survey to examine the adoption and integration of mobile technologies into the business to gain an understanding of the value received from an additional 14 key use cases. Finally, we deployed a Web-based survey to help us understand the broader buying preferences, perceived benefits, technology obstacles, and inhibitors associated with implementing mobility applications.

Demographics

Our research respondents represented a broad distribution of industries, roles, and company sizes. In total we have collected data from over 780 respondents, 29% of them from small organizations (1–99 employees), 32% from medium-sized organizations (100–499 employees), and 39% from organizations with 500 employees or more.

The participants also represent a broad spectrum of job levels and roles. 34% are executives, 46% are managers, and 20% represent staff levels. 29% are from business operations and administrative functions, 34% are from ICT organizations, 16% from marketing and sales, 15% from business general management, and 6% from other functional areas.

KEY FINDINGS

Canadians Workers are Consistently Mobile

Almost 50% of Canadian workers have a need for mobility and wireless applications. This includes employees that are mobile on site, in transit, in the field, or working at home on a consistent basis. Smaller companies demonstrate even higher mobility requirements.

Integration is Key — Buyers are Seeking the Value of People, Process, and Technology

The technology works. Fast and reliable coverage is in place, devices are available to support advanced applications, and applications are fairly simple to move to a mobile environment. What appears to be lacking is the integration of technology with people and business processes. For example, linking the application used for workflow and planning (e.g., email or calendar) with customer relationship management (CRM) and time, attendance, and scheduling, combined with enhanced employee training and restructured business processes, can improve cost advantage and enhance customer support capabilities — or the integration of inventory management and field service ticketing with back-office financials for billing can reduce payment cycle times. The full

integration of these examples can increase customer retention, satisfaction, cost advantage, productivity, and cash flow. Line-of-business (LOB) executives and IT staff need to develop strategies like these to drive business value.

Benefiting From Growth Requires Deep Understanding of the Business Processes

A lack of a comprehensive mobility and wireless strategy appears to be a key factor limiting adoption. Business value achieved from current applications is largely tactical (cost reduction, productivity, and end-user service), but there is a considerable amount of evidence that key applications are linked to success with customers. Achieving strategic advantage from a broader mobility applications portfolio will require a strategic approach to business and ICT investments. That approach will be based on developing a deep understanding of the business processes impacted, the various mobile workforce needs, and the applications, services, infrastructure, system, and device requirements.

SECTION I: MOBILITY IN CANADA

Workforce Dynamics

Almost 50% of Canadian workers are consistently mobile to some extent. The participants in our research were asked to allocate their workforce (including full-time, part-time, and contract workers) into the following categories:

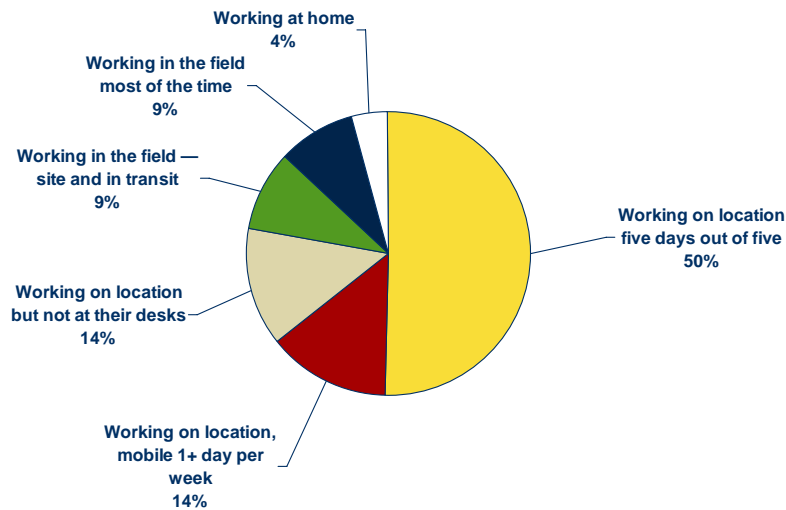
- People working primarily on location, at their desks typically five days out of five
- People working primarily on location, at their desks, mobile more than one day per week
- People working primarily on location but not at their desks (for example security, IT staff, mail management, restaurant servers, warehouse, factory)
- People working primarily in the field, who work both at a site and while in transit (for example delivery staff and sales staff)
- People working primarily in the field most of the time (for example, construction workers)
- People working primarily at home

The overall distribution of our participants' responses is depicted in Figure 1.

FIGURE 1

Understanding the Mobile Workforce: Mobility Classes

Question: To the best of your ability, please estimate the percentage of your company's workforce that work in the following locations.



Source: IDC Canada, 2007
n=309; Canadian companies and organizations

Just over 50% of the workforce of all participants was allocated to working on location, at their desks typically all week. Not surprisingly, the most mobile business function was marketing and sales (67%), with most other business functional areas measured at close to the overall mean. IDC's research found the following percentages of workers to be mobile:

- ☒ 54% of small business workers (less than 100 employees)
- ☒ 46% of medium-sized business (100–499 employees) workers
- ☒ 49% of large business workers (500 or more employees)

From an industry perspective, the percentage of mobile workers was led by agriculture (90%) and followed by services (73%), mining (71%), education (66%), healthcare (66%), utilities (63%), and construction (58%).

Specifically "how" workers define mobility is indicative of the types of solutions (applications, connectivity, and devices) that are necessary to support them. For example, workers who are mobile "primarily on location, but not at their desks" typically have different connectivity requirements (e.g., voice and data over wireless LAN) compared to field workers requiring remote or long-distance communications, or who need applications that can work as an island, but then connect back to the corporate network as the opportunity arises. Application requirements are also likely to change based on the type of work required. For example, professionals based out of their home may require access to the full compliment of business data and voice applications, while those working while in transit from their home location and field destination may only require access to applications that support specific functions (for example, service staff requirements for customer information, technical information, dispatching, navigation, and service management applications).

Key take-away → Mobility requirements are not defined by the business, but by the job a worker is tasked with doing on an on-going basis. This is augmented by their environment, from which the need for mobility devices, applications, and services cascades.

Mobility Management

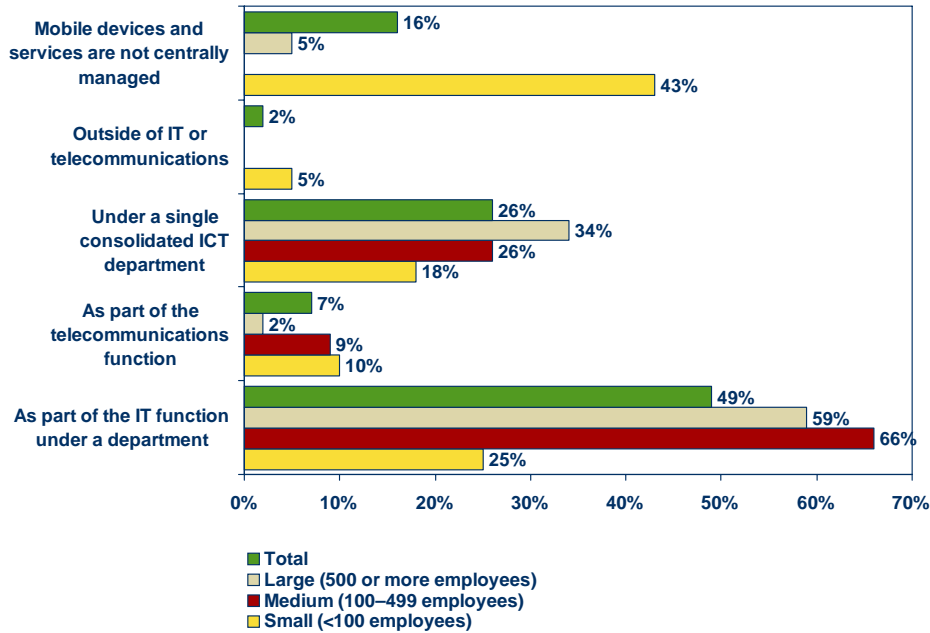
How mobility (devices and services) is managed differs considerably across company sizes and industry. Figure 2 depicts the distribution of management models by company size. In general, 84% of businesses provide some form of centralized management while small businesses (less than 100 employees) demonstrate a high degree of decentralized management (43%).

Professional services, retail, and resources companies demonstrate above average decentralized management. Utilities, oil and gas, and financial services companies exhibit an above-average degree of centralized management. In managing mobile solutions, IDC believes centralized management can contribute to a more thoughtful and broad-reaching strategy.

FIGURE 2

Mobility Management Approaches

Question: Which of the following best describes how your organization's mobile devices and services are managed?



Source: IDC Canada, 2007
n = 116; Canadian companies and organizations

Key take-away → Based on IDC's findings, the growth in integrated applications across wireless and wireline technology is occurring. Yet decentralized management, evident in some organizations, may inhibit the implementation of integrated applications and the development of a cohesive mobility strategy. While we recognize that early adoption of certain applications can stem from niche or departmental needs, broader oversight is eventually more beneficial to the enterprise. Without it, businesses will face increased costs or limited ability to leverage valuable mobile solutions across the organization.

SECTION II: MOBILITY AND WIRELESS APPLICATION ADOPTION

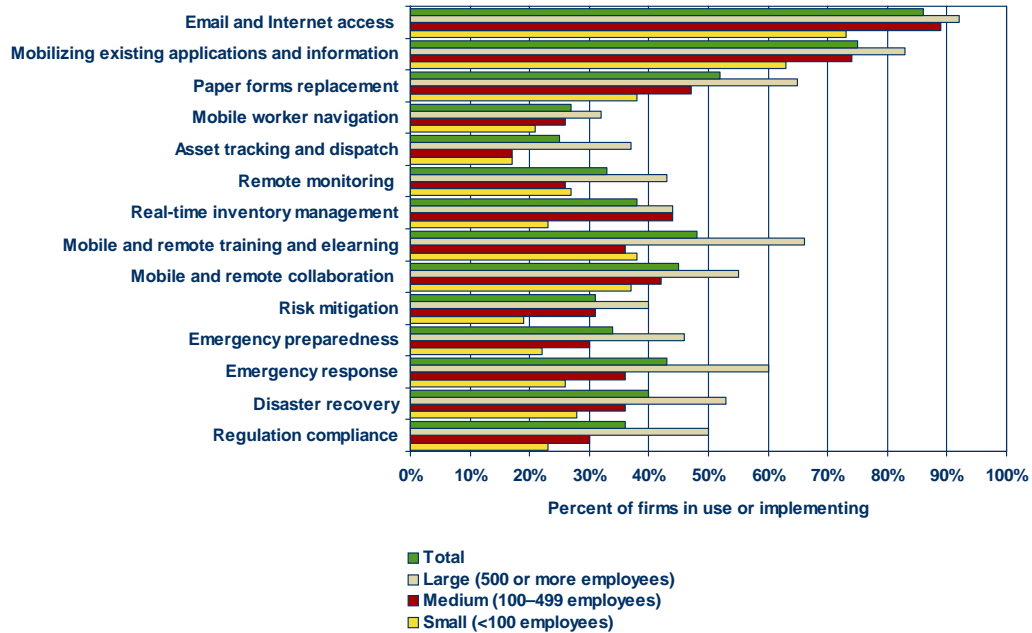
Adoption of Solutions

In an effort to determine the most valued mobility applications in today's organizations, IDC quantitatively tested 25 applications identified in our earlier qualitative research. The adoption of 14 of these is shown in Figure 3.

FIGURE 3

Applications in Use or Implementation

Question: Which of the following best describes the status of the following business processes or applications?



Source: IDC Canada, 2007
n = 588; Canadian companies and organizations

The research showed that the current adoption of mobility and wireless applications in Canada is led by email and Internet access, with 86% of firms either using or implementing this to support mobile workers. This was followed by the mobilization of existing applications and information (75%), paper forms replacement (56%), mobile and remote training and elearning (48%), and mobile and remote collaboration at 45% (see the appendix for definitions of the applications in the chart).

Comparing Industries

Not surprisingly, given the nature of their respective workforces, healthcare, energy, and transportation industries led in the adoption of the mobility applications IDC asked about, while manufacturing, financial services, and education lagged in the adoption of the applications tested:

- ☒ Healthcare had significantly above-average adoption rates in the areas of forms replacement, training, collaboration, emergency response, and compliance.
- ☒ Energy had significantly above-average adoption rates for forms replacement, navigation, asset tracking, remote monitoring, emergency response, and training.
- ☒ Transportation had significantly above-average adoption rates for mobilizing existing applications and information, navigation, training, and compliance.

We included enterprise resource management, CRM, post sales customer service and support (CSS), supply chain management (SCM), and human capital management/human resources (HCM) as well as a general group of "other" applications in the applications grouped under "mobilizing existing applications and information". Mobilization of this group of applications was led by ERP (64%), CRM (64%), and CSS (63%), and followed by NCM (54%), and SCM (49%).

Other tested applications that show promise for future adoption include mobile payment (29% adopted, 10% planned), mobile marketing data collection (29% adopted, 8% planned), and mobile marketing content deployment (28% adopted, 6% planned).

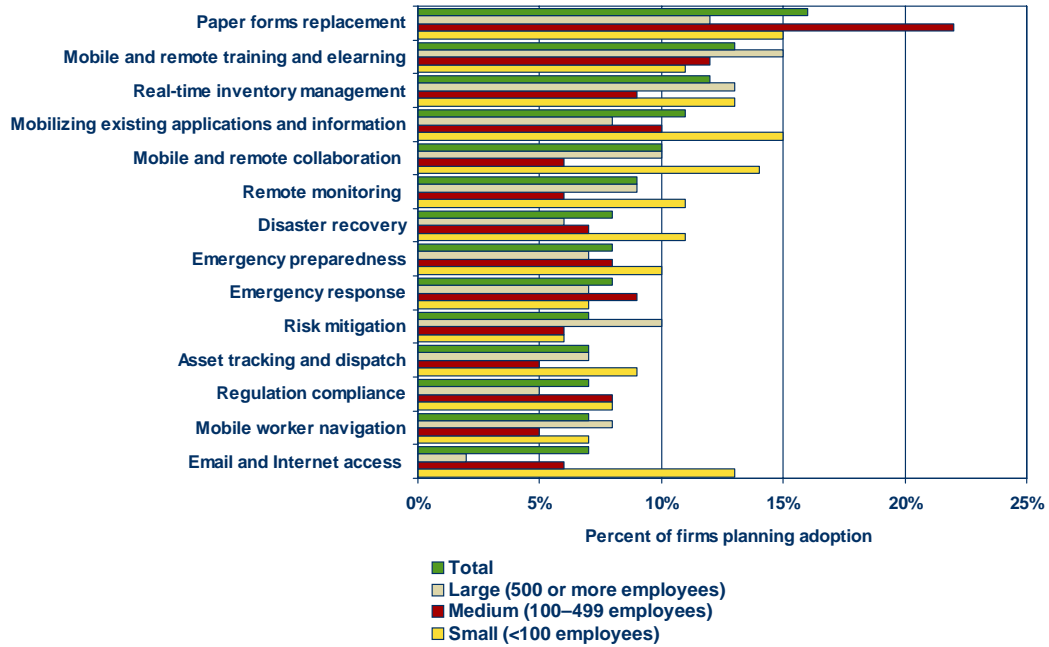
Adoption Will Continue to Grow

Figure 4 shows the percentage of firms expecting to adopt a specific application in the next two years. Overall, planned adoption of mobile and wireless applications we tested was led by paper forms replacement (16%), mobile and remote training and elearning (13%), real-time inventory management (12%), mobilizing existing applications and information (11%), and mobile and remote collaboration (10%). As a percentage of current adoption (currently in use or implementation) adoption is led by real-time inventory management (32%), paper forms replacement (31%), asset tracking and dispatch (29%), remote monitoring (27%), mobile and remote training and elearning (26%), and mobile worker navigation (25%).

FIGURE 4

Planned Adoption by Organizations

Question: Which of the following best describes the status of the following business processes or applications?



Source: IDC Canada, 2007
n = 588; Canadian companies and organizations

Across the board, small and medium-sized firms are expected to adopt at a higher rate than large ones, in large part to play catch up. In many cases they will come close to achieving parity with large firms. Transportation and healthcare (both of which already have high adoption rates) have the strongest plans. Other industries, including manufacturing and field services, will do some catching up.

SECTION III: MOBILITY AND WIRELESS BUSINESS VALUE

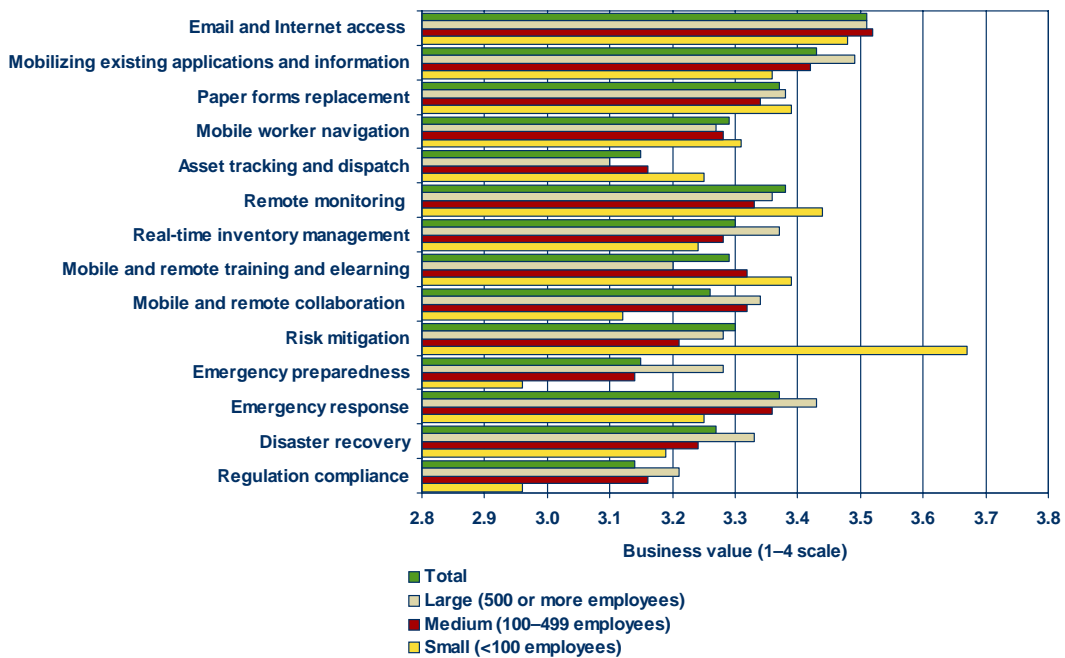
Current Business Value

The business value reported by those that currently have or are implementing mobile applications is consistently high. Across all applications tested, 40% found significant business value, 51% found moderate business value, 8% found not much value, and 1% reported no value received (see Figure 5). In general, value received was highest for email and Internet access, mobilizing existing applications and information, mobile worker navigation, and paper forms replacement. IDC believes that these simply allow businesses to extend the value of readily available ICT assets to mobile workers.

FIGURE 5

Business Value

Question: How much business value do you perceive you are receiving or will receive from providing _____ to your mobile workers?



Source: IDC Canada, 2007
 n = [78,498]; Canadian companies and organizations

With the exception of email and Internet access, business value of specific applications varied considerably by industry (in descending order of business value):

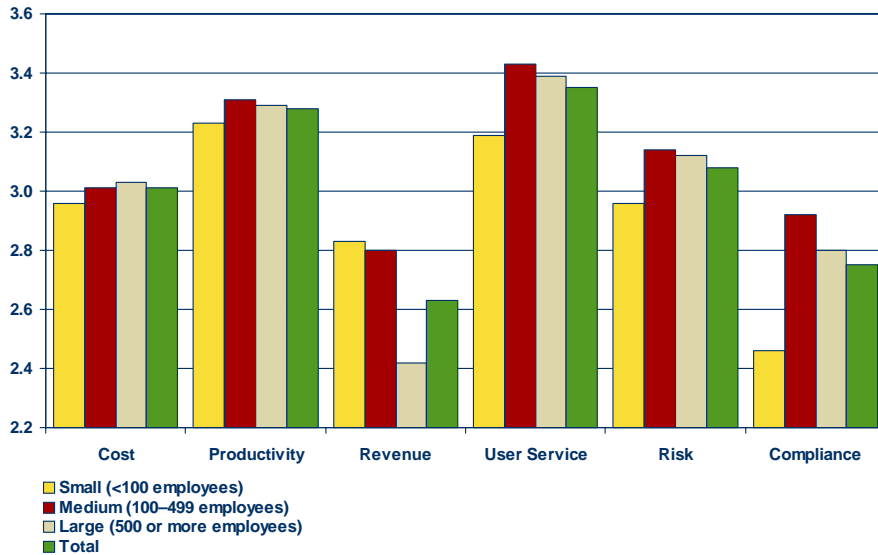
- ☒ Mobilizing existing applications and information — highest in healthcare and hospitality
- ☒ Paper forms replacement — highest in field services, manufacturing, and transportation
- ☒ Mobile worker navigation — highest in government, field services, transportation, and distribution
- ☒ Asset tracking and dispatch — highest in construction, field services, and transportation
- ☒ Remote monitoring — highest in field services, professional services, and transportation
- ☒ Real-time inventory management — highest in government, healthcare, and transportation
- ☒ Mobile and remote training and elearning — highest in construction, healthcare, oil and gas, and transportation
- ☒ Mobile and remote collaboration — highest in government, healthcare, and hospitality
- ☒ Risk mitigation — highest in government, manufacturing, and construction
- ☒ Emergency preparedness — highest in government, healthcare, oil and gas, and manufacturing
- ☒ Emergency response — highest in manufacturing, healthcare, and government
- ☒ Disaster recovery — highest in manufacturing, government, and healthcare
- ☒ Regulation compliance — highest in government, field services, finance, and distribution

Business Value Impact

To be successful, technology must positively impact the business. In the case of mobility business value impact, IDC tested across six areas, namely cost reduction, improving worker productivity, generating additional revenue, improving service to end users, reducing business risk, and supporting compliance to regulations. The following chart (Figure 6) depicts the results by business size.

FIGURE 6**Business Value Impact**

Question: To what extent is the business value impact from _____?



Source: IDC Canada, 2007

n = [54,362]; Canadian companies and organizations

In general, the highest impact was in areas where worker productivity and improving service to end users were ranked the highest. In our research, both averaged above moderate (moderate = 3). While cost reduction and risk avoidance both averaged close to moderate across all applications and business sizes — thus illustrating some business value, but definitely with room for improvement.

Generating additional revenue, while generally not a high-value impact area, tells an interesting story from a business size perspective, where small and medium organizations relate the impact of their mobility applications much more closely to revenue generation than large ones. This may be caused by the level of the participant — small business and medium business participants tended to be higher level executives and less likely to be technical staff compared to participants from large organizations.

Supporting compliance to regulations also shows differences between small and medium/large organizations, where larger organizations see more impact. In this case, this may be based on the applicability of the regulations (more for larger organizations) than the level of the participants.

Key take-away → Decision-makers examining mobile solutions for their respective organization can look at specific application areas or industries and compare themselves to those businesses analyzed here. Peer comparisons are useful in building awareness among senior executives who may not have the background in wireless and mobile applications and services.

SECTION IV: MOBILIZING APPLICATIONS AND THE BUSINESS BENEFITS, DRIVERS, INHIBITORS AND CHALLENGES

Highest Business Value Application

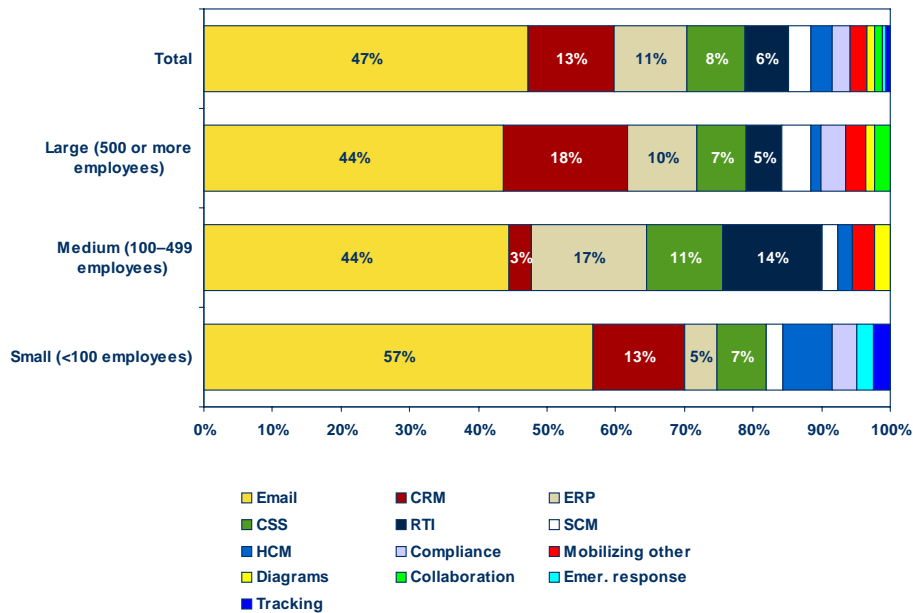
Participants in the research were asked to select their highest business value application and provide deeper information about it. Email and Internet access was selected 47% of the time across all business sizes, and 57% for small business. This was followed by CRM (13%), ERP (11%), customer support (8%), and inventory (6%).

LOB participants viewed a broad collection of applications as being of the highest value, and were much less likely than ICT participants to name email and Internet access as most valuable (41% versus 62% respectively). Organizations with a high percentage of field workers and work-in-transit personnel tended to select core business applications more frequently than email. It is likely that they are dependent upon specific business applications to accomplish their high mobility job functions.

FIGURE 7

Highest Business Value Mobile Application

Question: Which of the following applications drives the highest business value for your company or organization?



Source: IDC Canada, 2007

n = 319; Canadian companies and organizations

Research participants were asked to describe the most important benefit gained from implementing their highest value application. For the rest of this section we have grouped the applications into two categories: email and Internet access and mobilizing "other applications".

Top Benefits – Improved Customer Satisfaction Leads the Way

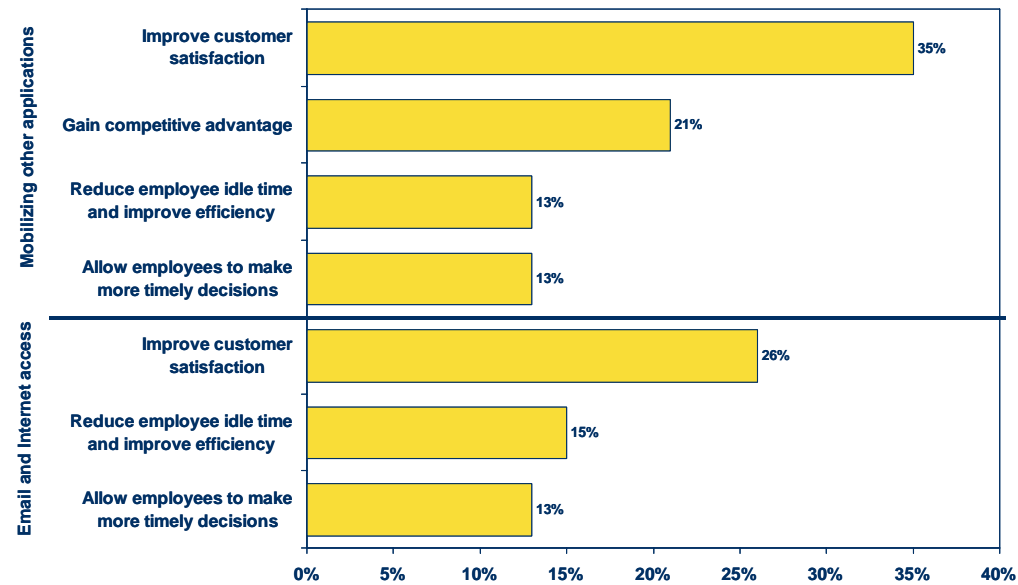
For their highest value application research participants were asked to describe the most important benefit gained from implementation. Interestingly, improved customer satisfaction emerged as the top benefit in both email and Internet access and mobilizing other applications (see Figure 8). "Other applications" consists primarily of core business applications — CRM, ERP, and customer support so it is not surprising that the second most frequently named benefit is competitive advantage. For email, the second and third most-commonly named benefits are oriented toward internal needs and productivity:

- ☒ Small business participants were more likely to select improved customer satisfaction (33% for email and 44% of other) as the most important benefit compared to their larger counterparts.
- ☒ LOB respondents were more likely to select customer satisfaction and competitive advantage than ICT respondents who generally focused their selections on productivity and risk reduction-oriented benefits.

FIGURE 8

Top 3 Benefits of Mobile Solutions

Question: From the following list, what do you consider to be the most important benefit of adopting your _____ solution?



Source: IDC Canada, 2007
n=227; Canadian companies and organizations

The analysis of "adoption triggers" for specific highest value applications leads to some interesting insights. It appears that there is a disparity between the factors that motivated the implementation of mobility applications and what are eventually perceived as their most important benefits. Key items mentioned as "triggering" events include compliance, implementation of a new core application, reorganization, merger or acquisition, or company relocation. Reducing service wait times for the customer is also mentioned. These triggers appear reactive in nature, when compared to the benefits of improved customer satisfaction, competitive advantage, and productivity. Our analysis indicates that mobility and wireless applications are in a reactive state of maturity and are generally not implemented as part of a cohesive strategy; the purchase triggers and the eventual perceived benefits are dramatically different. Moreover, the event that pushes an organization "over the line" may be unrelated to a technology decision, such as a relocation or regulatory compliance issue.

Inhibitors to Adoption of Mobility Applications

The key inhibitors stated for participants' highest value mobility application include end-user resistance, lack of management support, and lack of financial support for mobilizing other applications. For email and Internet access, however, key inhibitors included lack of awareness of the benefits and lack of financial support (Figure 9).

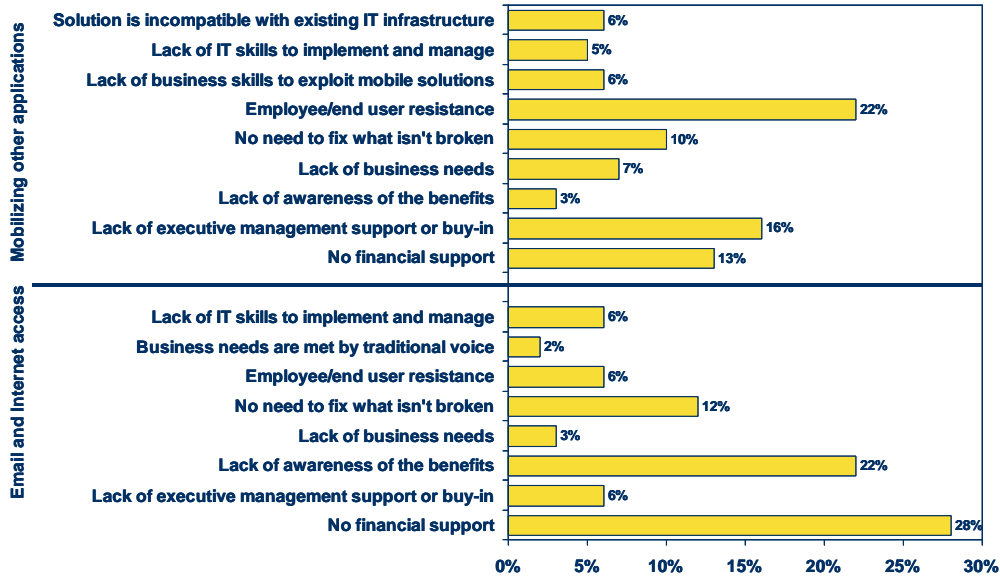
Following the list of inhibitors that thematically deal with lack of support for these applications is a lack of skills to implement and manage them and, in the case of other applications, incompatibilities in existing infrastructure.

Key take-away → With the most common obstacle to mobilizing applications being employee end-user resistance, there is a concerted effort required to build and communicate the wireless strategy with employees. In doing so, build awareness of technology benefits to employees — make sure there is an upside to adoption from a user perspective and ensure adequate resources are allocated to end-user training.

FIGURE 9

Inhibitors to Mobility Solution Adoption

Question: From the following list, what do you consider to be the most significant business inhibitor of adopting your _____ solution?



Source: IDC Canada, 2007
 n = 227; Canadian companies and organizations

Remembering that these are the participants' highest-value mobile applications, it is again apparent that the adoption of mobility and wireless applications is fairly reactive and unplanned.

Technology Challenges

The leading technology challenges associated with deploying the participants' highest value applications were skills (26%) and quality of service (24%) for mobilizing other applications, and security (32%) and integration with existing systems (20%) for email and Internet access.

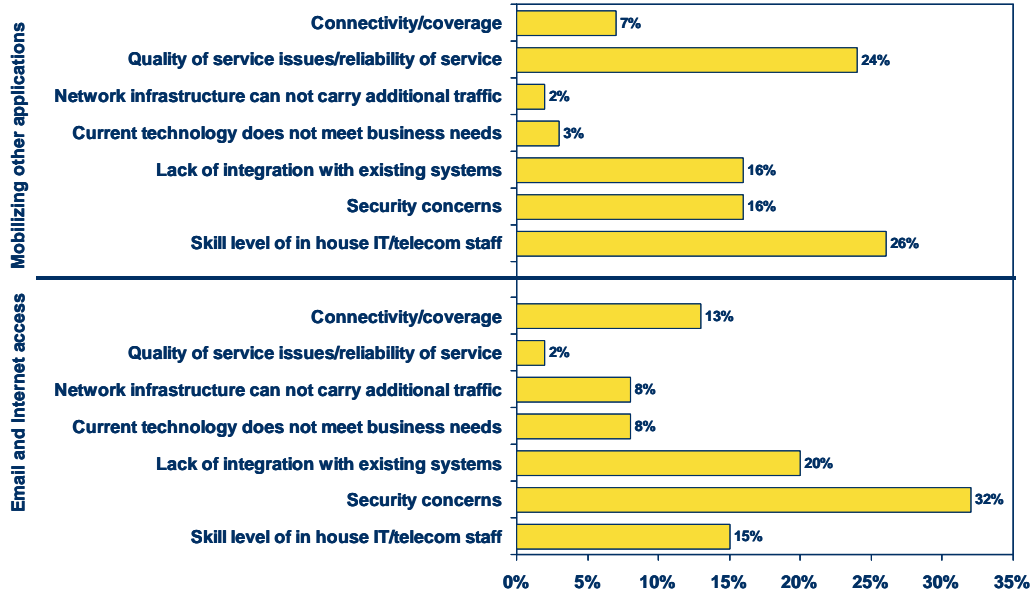
Participants from small businesses named lack of integration and skills as their chief challenges, whereas medium-sized and large business participants named skills and security as their chief challenges. For large business participants, security was overwhelmingly their largest technical challenge. This result is reinforced in most of our research. The largest technology challenges cited continue to be security, skills, and integration with existing applications.

ICT participants were considerably more likely to name security as a key challenge compared to LOB participants who were more concerned over integration with existing applications and the skill level of the in-house ICT staff.

FIGURE 10

Technology Challenges in Adopting Mobility Solutions

Question: From the following list, what do you consider to be the most significant technology challenge with regards to deployment of your _____ solution?



Source: IDC Canada, 2007
n = 217; Canadian companies and organizations

SECTION V: BUYING MOBILITY AND WIRELESS SOLUTIONS

Buying Preferences

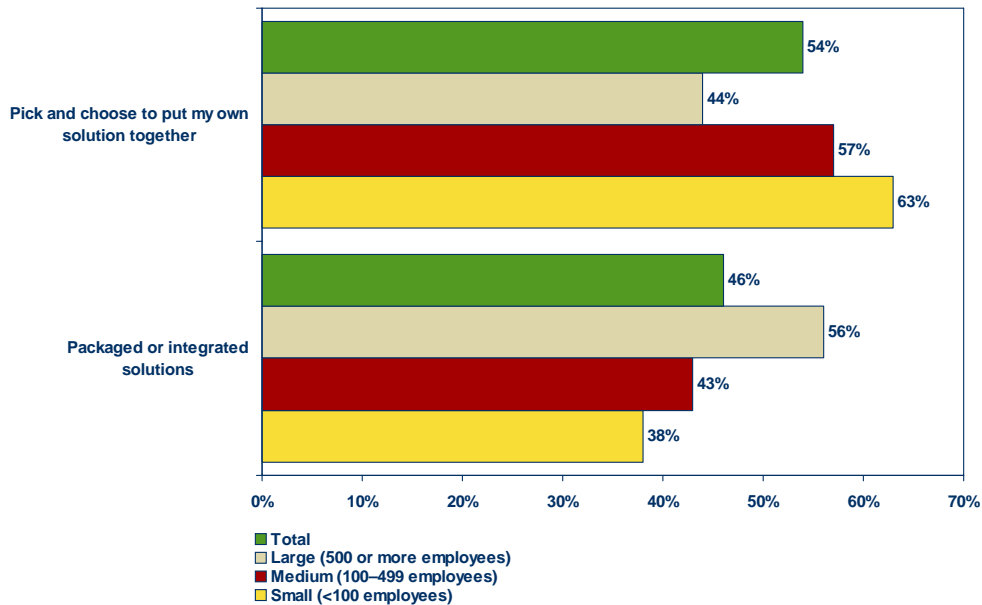
The preferential split between buying integrated solutions (46%) and building your own (54%) appears, on the surface, to be inconsistent with other data points from the research project. While there are differences between various sub-populations, they are not very statistically significant.

- ☒ Participants from small businesses show a preference for building their own (63%) and large business participants prefer buying integrated (56%).
- ☒ LOB participants also demonstrate a mild preference for building their own (56%) and ICT participants prefer to buy integrated solutions (55%).

FIGURE 11

Buying Preferences

Question: Which of the following do you prefer when making purchases?



Source: IDC Canada, 2007
n = 116; Canadian companies and organizations

Key vendor selection criteria include price competitiveness, ease of integration or compatibility, customer support, and the availability of integrated and industry solutions. Not surprisingly, small business and LOB participants are particularly focused on customer support when making a vendor decision. ICT participants are interested in the vendor's past performance, and everyone cares about price and compatibility/integration.

Providers of Mobile and Wireless Solutions

Participants were asked to provide their insights on the vendor types they considered when making mobility and wireless acquisitions and the most likely vendor type they would eventually choose. Overall, telecommunications service providers were named as the most likely provider (30%), followed by mobile device providers (28%), and IT hardware or equipment companies (15%):

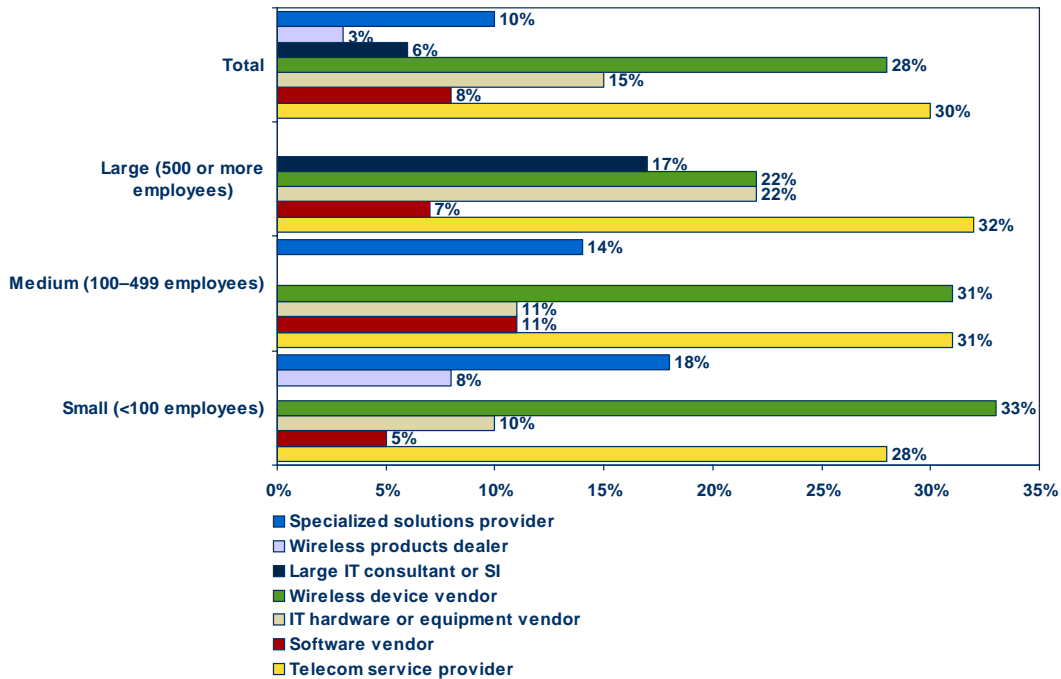
- ☒ Small business participants were most likely to choose wireless device providers (33%), followed by telecommunications service providers (28%).
- ☒ Medium business participants were equally likely (31%) to go with device providers or telecommunications service providers.
- ☒ Large business participants were likely to select telecommunications service providers (32%), followed by mobile device providers and IT hardware or

equipment companies (both 22%). Large business participants were the only group to select large IT consultancies or systems integrators.

FIGURE 12

Solution Provider Preference

Question: What type of provider are you most likely to turn to for your mobile solution?



Source: IDC Canada, 2007
 n = 116; Canadian companies and organizations

SUMMARY

Our research reveals that almost 50% of Canadian workers are consistently mobile to some extent, and that there are many types of mobility. It is important to have a clear understanding of the two basic dimensions of wireless mobility that will help formulate a strategy for planning, building, and implementing mobile solutions.

- ☒ The need for wireless connectivity: from intermittently connected, to usually connected, to always connected.
- ☒ The need for physical mobility: from stationary, to portable, to moving.

Decentralized management of mobility and wireless is likely to be an inhibitor of the implementation of integrated applications. Decentralization is particularly strong in small businesses. It is evident from the strong planned adoption of applications by small businesses and their demand for integrated applications that they will have to consider restructuring their mobility and wireless decision-making into an ICT organization or function.

Organizations that are implementing mobility and wireless applications are getting value from their investments as highlighted by the business value rating of 90% for moderate or significant business value across all applications adopted. While the areas most impacted from the applications are productivity and end-user service, there are strong indications from the write-in comments made by some participants that customer responsiveness and service are also key areas impacted by mobility and wireless applications.

Customer satisfaction leads the list of top benefits for highest value applications, followed by competitive advantage and productivity. Real value, described in business terms, is being achieved. The highest value applications are clearly different, depending on the role and mobility habits of the participants. LOB people and highly mobile workers tend to regard specialized business applications as most valuable, while ICT respondents tend to see email and CRM as the most valuable. Understanding the specific needs of your workforce and their business goals is of paramount importance in defining a sound mobility strategy.

It is apparent that there is a gap between application adoption and the business value achieved by adopters. Specialized mobility and wireless applications such as navigation, remote monitoring, mobile payments, emergency response, and dispatch demonstrate this gap the most strongly. Even the highest value applications selected by the participants were inhibited by lack of awareness of benefits, end-user resistance, and lack of executive and financial support.

The most significant technology challenges cited in implementing key mobility and wireless are security, in-house skills, and integration with existing applications. The technology itself, reliability, and coverage does not appear to be a limitation, but adoption is still lagging.

Our analysis is that mobility and wireless applications are still in a reactive state of maturity and generally not implemented as part of a cohesive strategy. In 2006, IDC asked 300 medium and large companies if they had a mobile strategy. While a minority (36%) said 'Yes', the majority, did not, or did not know, an obvious indicator of a low awareness of the strategic benefits of wireless and mobile solutions. We view this as one of the key impediments to the current adoption of mobility solutions.

KEY ACTIONS AND RECOMMENDATIONS

- ☒ There is significant evidence that there will be substantial growth in the adoption of mobility and wireless applications. In order to implement the applications in a planned manner and with intent, developing and implementing a cohesive strategy is essential. A sound strategy should help manage risk and complexity. More importantly, it should drive competitive advantage. Strategic partners with a knowledge of similar industries or functional roles can be tremendously valuable in helping to define and articulate mobile solutions.
- ☒ Based on our research, it is clear that today's mobility and wireless applications drive real business value. What is important to recognize is that the value they drive is perceived differently by various constituencies. Furthermore, the benefits of implementing them are often different to the business triggers that prompted their adoption. A sound mobility strategy should be based on a deep understanding of the business processes impacted, the various mobile workforce needs, and the application, services, infrastructure, system, and device requirements. Key elements of the strategy should be shared with employees to build awareness. More importantly, training and education is critical for overcoming potential end-user resistance to adopting new processes and technologies.
- ☒ Finally, aligning the purchase of mobility and wireless hardware and connectivity and enterprise software for growth and competitive advantage is essential. Having a strategy that addresses acquisition and incorporates a strategy for integration and the alignment of technical and business resources will help you achieve outstanding value and create a strong competitive edge.

LEARN MORE

This white paper is the second of two that IDC Canada has published about enterprise mobility. The first paper was the result of research phase 1 and 2 (qualitative interviews, more than 360 quantitative surveys, as well as other on-going IDC panel research). The first white paper supports the premise of an impending tipping point in the growth of integrated mobility applications and provides guidance on key considerations that are critical to developing a mobility strategy that can support and drive strategic advantage.

This second white paper, resulting from phase 3 (additional quantitative interviews for a total n-value of 780 respondents), explores in detail the organizational benefits and dynamics of mobile solutions beyond voice, email, and personal productivity tools, including an-depth review of findings across all potential areas of mobile adoption, as well as highlighting best practices for implementing mobile solutions.

Online Assessments

TELUS has two online tools that can be used to augment the information contained in this paper.

The Online Wireless Solutions Roadmap (WSR) tool can help you gain a benchmark of which mobility solutions peer companies are implementing and how they are doing it.

The TELUS Business Value of Integrated Communications (BVIC) tool will allow you to benchmark your project approach to drive the maximum possible business value from your communications solutions.

Request a login to the TELUS tools at telus.com/businessvalue.

Related Research

- ☒ *Worldwide Mobile Worker Population 2005–2009 Forecast and Analysis* (IDC #34124, October 2005) Stephen Drake, Randy Giusto, Raymond Boggs, Merle Sandler, Kevin Burden
- ☒ *From Wireless to IP Networks: Canadian Business Telecom Survey* (IDC Canada #CA14TM7, April 2007) Tony Olvet, Steve Yang and Lawrence Surtees
- ☒ *Canadian Wireless Services 2006–2010 Forecast and Analysis* (IDC Canada #CA9TM6, December 2006) Lawrence Surtees, Steve Yang and Tony Olvet

TELUS Corporation Online Tools

- ☒ The Online WSR is an online experience that illustrates what is possible with today's wireless technology, quantifies the amount of business value leading organizations are realizing by adopting various wireless solutions, and offers personalized assessments that are intended to benchmark an organization's mobility deployment against peer organizations. The comparisons built into the TELUS tool are based on the data collected in this study.
- ☒ The BVIC tool provides a benchmark of a specific communications project against comparative data, initially collected by IDC in 2006, and augmented by several hundred assessments completed online since then. The intent of the BVIC tool is to provide best practices information on how to gain the maximum benefit possible from an integrated communications solution.

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APPENDIX

Solutions Tested

The study focused on collecting information about the current adoption level for 25 solutions— 14 of which are highlighted in this paper. Where participants indicated they were either using or planning a solution, further information was collected regarding the extent of business value received (or expected) from the solution, and identifying the business value drivers.

The applications were grouped into two sections.

Improving mobile worker productivity and reducing costs: Extending the organization's business solutions to mobile and remote workers to optimize business processes and productivity, and to reduce costs.

Email and Internet access	Accessing email, messaging, and the Internet
Email and Internet access	Accessing email, messaging, and the Internet
Mobilizing existing applications and information	Extending access to existing company information and business solutions
Paper forms replacement	Replacing paper forms with electronic information capture
Mobile worker navigation	Driving directions and location information
Asset tracking and dispatch	Tracking the locations of vehicles, assets, and workers, and communicating information in real time
Remote monitoring	Reporting machine-based monitoring information
Real-time inventory management	Linking remote and mobile data capture to inventory management solutions
Mobile and remote training and elearning	Providing training content accessible from anywhere
Mobile and remote collaboration	Delivering collaboration and conferencing anywhere

Safety and security: Achieving higher levels of safety and security with lower operating costs.

Risk Mitigation	Avoiding costly disruptions, loss of life, and damage to property
Emergency preparedness	Preparing for rapid and effective response to incidents
Emergency response	Responding in the event of an incident
Disaster recovery	Recovering quickly in the event of an incident
Regulation compliance	Collecting information and reporting on compliance and governance issues