



**The adaptive
workplace starts
with mobility**



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1. Introduction

Enabling and empowering a more flexible workforce continues to be an important digital initiative for businesses, especially as demand for more remote and mobile working arrangements increases. Recent world events have accelerated efforts and interest around such programs and brought mobility to the forefront of the digital agenda for most businesses.

Enterprise mobility management (EMM) solutions and services are critical in helping businesses manage, support and enable a flexible workforce. Enterprise mobility provides users with ubiquitous access to business data, workflows and other people. This in-turn enables them to respond to events and take actions quickly, efficiently and in a more informed manner.

From a productivity perspective, the early days of enterprise mobility centred around enabling employees to use basic

applications such as email on a mobile device. Organisations today, however, are increasingly looking to embrace more mature approaches to enterprise mobility. The focus is no longer only on device management and security, but now also on how a variety of productivity applications and mobile network capabilities can support new, more productive ways of working.

This paper will discuss the trends driving interest in enterprise mobility. It will explore the short and long-term important technology considerations businesses must make when embarking on an enterprise mobility initiative, as well as the people considerations, processes and partners that will be vital to success. It will also discuss the importance of mobility in the ever-changing workplace environment, specifically geared around its value in supporting the new ways of working that employees increasingly gravitating towards in a post-pandemic world.

2. Adapting to the new normal

The speed of digital change is rapid.

Time has now passed since a large proportion of the global workforce moved to a working-from-home model in response to lockdowns imposed by governments across the world.

Organisations have given a lot of attention to how digital workplace technologies have helped – particularly those that support remote working, communication and collaboration. But businesses need to consider more than just technology needs.

They must consider taking a calculated and long-term view, specifically in how the needs and demands of the workforce are changing from a people, process and technology perspective. The biggest challenge organisations have (and will continue to face post the global pandemic) is not so much in trying to define or understand the important types of digital change needed, but more in the speed of change that is required.

Employee workstyles are now more mobile and fluid.

Mobility is vital to modern business. Employees want to be equipped to work more fluidly, with the apps and data they need to be productive. Enabling this more mobile-centric approach to work has long been a digital initiative for many organisations, but recent world events have accelerated efforts to deliver against

it. During the pandemic, organisations across the world rushed to provide employees with the tools and resources they need to work remotely – enabling them to be more mobile.

As recent surveys and articles have shown, the general opinion from many large global businesses is that the transition to remote working has been positive for both businesses and their employees. Consequently, many will look to sustain and further improve upon this change over the long-term.

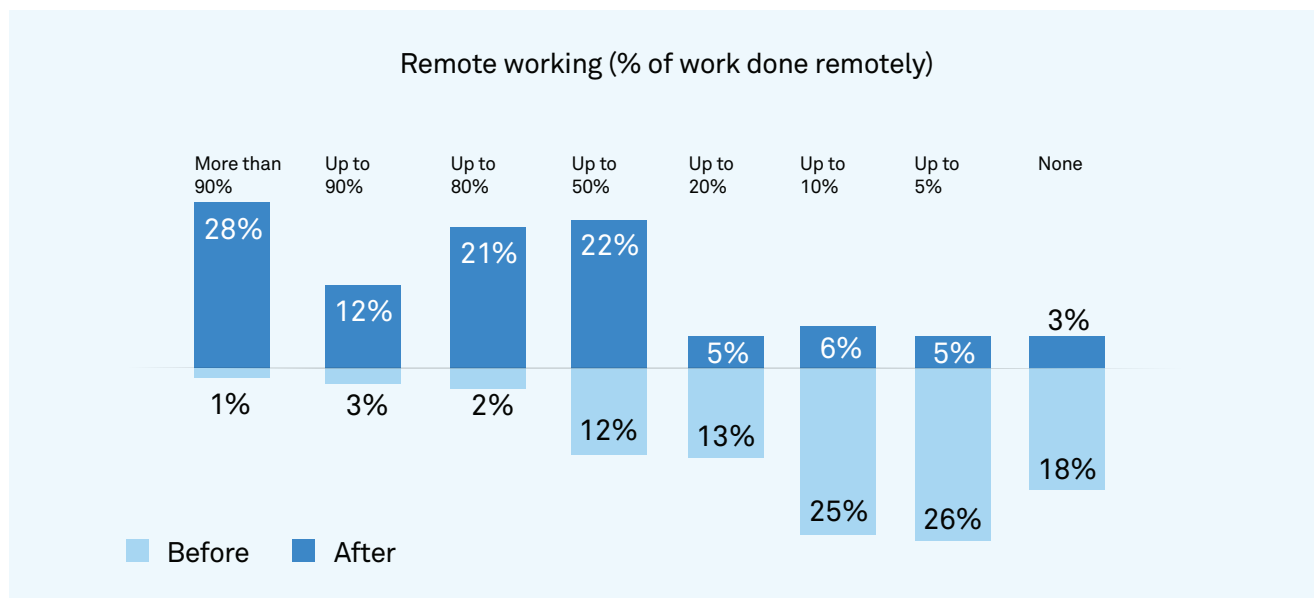
Business efforts around maintaining productivity must focus on ensuring employees are equipped and able to function wherever, whenever and on whatever device they choose to work. Employees must be able to work in and away from the traditional office environment without having to compromise on the type of tasks they can undertake. Enabling a fluid workforce therefore requires businesses to consider not only how to secure and manage a diverse range of devices, but also what types of apps and experiences employees will need while using these devices.

Business demand for mobile tools and solutions is high.

The scale and speed at which many organisations have adopted remote working is well demonstrated by

recent data gathered by Telstra. This data compares the amount of work being done remotely before versus during the pandemic. During the pandemic, the research identified 59 per cent of businesses stated that over half of their work was done remotely.¹ This is a significant shift from just six per cent of businesses pre-pandemic.²

Q: When it comes to working remotely (i.e. at home, or away from the office), what percentage of work was done away from the office before coronavirus? And how has this changed?



Source: Telstra and fiftyfive5 COVID-19 Research Barometer: Wave 1 Results, n=302 business decision-makers April 2020.

Make no mistake: the world of work has permanently changed, and mobility is a key element in this change. There has been a major focus for some time now on enabling employees to work productively and securely with mobile devices and applications. These efforts to ensure employees can work in a more flexible fashion, intensified in response to the pandemic, have however increased demand for greater mobile working practices and technologies from all areas of an organisation. The rapid shift to remote working at scale makes it essential to implement enterprise mobility initiatives. This will remain so even in a post-pandemic world.

Delivering against an enterprise mobility strategy is not solely of interest and importance to IT departments – business functions from across organisations now have an increased and vested interest in the progression of mobile digital initiatives. This shift in priority and broader business interest is important, as a more collaborative and business-wide approach can be adopted to ensure the mobility needs of all employees are met.

It is important that IT departments act on this opportunity to ensure an enterprise mobility strategy is as inclusive as possible. Failure to do so could have a negative impact beyond just employee experiences. As the shadow IT trend has shown, if business users do not have access to the tools, support and resources they feel are important via official channels, they will look to source these things externally and outside of IT's purview – which may put sensitive corporate data at risk.

¹ Telstra and fiftyfive5 COVID-19 Research Barometer: Wave 1 Results, n=302 business decision-makers April 2020.

² Ibid.

3. Businesses expect flexibility and simplicity



Businesses need the flexibility to adapt quickly to change.

The biggest challenge of digital transformation and mobile workforce initiatives is not so much in understanding the type of change that is needed, or even the scale; it is the pace at which this change needs to take place. Having the flexibility to adapt to changing business needs and to respond to disruption is vital. No organisation could have envisaged – let alone prepared for – the types of change needed in response to the recent pandemic, for example. Those organisations that were able to react in a timely and secure way to rapidly changing market dynamics were those built on agile principles with the organisational structure and practices in place to react decisively.

Flexible mobility management services and contracts are no longer a ‘nice to have’ – they are essential.

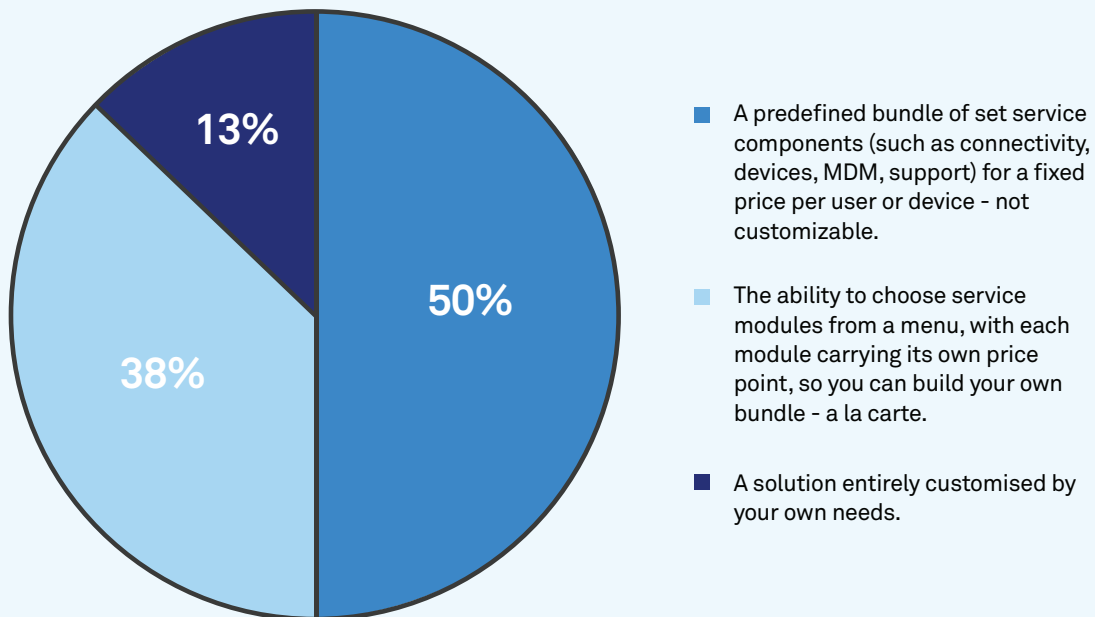
Use of mobile technologies differs throughout an organisation, largely based on role and responsibility. Much like the organisation, the needs of specific employees are subject to

constant change, so having service and contractual flexibility is important to ensure mobility-related costs are controlled and that businesses can scale to meet demand.

Predictability around the costs of mobile services is another important element, especially given the scrutiny that many IT budgets are under. The more able a business is to accurately report on the costs associated with the mobile workforce, the better it can report on the relative value being delivered by any enterprise mobility initiative.

When selecting a service provider to support efforts around enterprise mobility, Australian organisations value services that are more defined over those that are entirely customised. Speed of adoption, well-defined and value-proven services and cost advantages all drive interest in simplified service offerings.

Q: When selecting a managed mobility service provider, which of the following approaches do you prefer?



Source: Omdia study into Australian Enterprise Mobility Managed Service Market, n=314.

In addition to interest around adopting simplified and well-defined mobile services, Australian firms also highly value the ability to add or remove modules during the contract term. In a recent survey conducted by Omdia, 50 per cent of Australian organisations identified the ability to choose modules and customise a solution as preferred.³ As mobile business needs can change quickly, this contractual flexibility must no longer be viewed as a 'nice-to-have' – it must be built into the very core of enterprise mobility service contracts.



³ Omdia study into Australian Enterprise Mobility Managed Service Market, n=314.

4. Evolving support approaches will be built around flexible employee needs

Support needs will evolve as working practices change.

For many employees, the way they work and the locations they work from have changed significantly over recent months. These shifts in workstyle – ones that many businesses will now be looking to support over the long-term, given the benefits realised – bring new employee-support challenges. Firstly, it is important to ensure that employees are comfortable and competent in how to provision and use any new software or hardware required to support remote work. IT departments must ensure that the right technologies are in place for employees to use, and that the processes supporting the provision and adoption of these technologies are well-defined and automated where possible.

To ensure people can work effectively, IT must consider the demands a mobile workforce will have relating to the network, devices and applications. Additionally, employee expectations as to what a good support experience looks like will continue to change; for many, the traditional process of calling a help desk to raise an incident or to request new technology is a behaviour of the past. Support approaches and processes need to be quicker, more proactive and supported

by automation capabilities that help make internal support experiences better. As the workforce becomes more mobile, IT departments must ensure their IT support processes and technology deliver the best employee experiences possible.

Self-service and automation are key to driving new efficiencies.

CIOs must make smart technology decisions when it comes to employee support, and one of the smartest choices they can make is undoubtedly on IT automation and AI capabilities. The enterprise use-cases for these technologies have been especially encouraging and impactful in the realms of IT support. For example, request and authorisation processes that support the provisioning of new IT equipment and applications are increasingly being automated, which dramatically reduces the time taken between an employee raising a request and it being completed.

In more advanced examples, some support solutions monitor and gather a combination of endpoint, application and network data to help establish a baseline of what a good employee experience looks like. This telemetry data aids more proactive employee support approaches, as support teams can be made aware when any deviation

from this baseline occurs – often before the end-user experiences any service degradation themselves.

Organisations are also interested in the combination of automation capabilities with virtual agents – largely because these two technologies help to reduce the manual work needed to resolve many level 1 and 2 support issues. According to a survey conducted by Omdia data, 60 per cent of organisations are either trialling or planning to leverage AI, bots and machine learning at some point over the next 12 months.⁴

Technology is important, but people and processes will also drive success.

Beyond the technology-centric considerations, it is also important to consider how employee support services and approaches must change to meet the needs of a mobile workforce. Organisations can adopt the best technologies or services money can buy, but if those tools are not utilised by an empowered and happy workforce then return on investment will be far from optimal. With any shift in workstyle, having mechanisms in place that can help to understand employees' long-term needs is vital. Business functions (such as IT and HR) must work together to ensure employees have all the resources and support they need to carry out their role safely and effectively, regardless of where they are located.

Health and safety practices and training programs will need to adapt to ensure that employees have a remote working environment that is safe and sustainable. Employee wellbeing programs must also evolve to ensure the needs of a more dispersed workforce are considered – something particularly important given the more isolated nature of home working and the impact this could have on employee mental health.

Outcomes and ongoing support will drive enterprise interest in partnerships.

The support and strategic solutions that service providers and other enterprise mobility partners offer to complement the core and expected set of capabilities will be valuable to organisations going forward. Businesses that look towards a service provider to support their efforts around enterprise mobility, care little about the specific technology being used – they care about the business outcomes that the service capabilities will help deliver.

Service providers either are or will look to implement various capabilities that enhance their core enterprise mobility service offerings. These include the integration of service management processes and capabilities, enhanced consulting and professional services, mobile workstyle profiling, 5G use-cases and mobile insights and analytics.

⁴ Omdia ICT Enterprise Insights 2019/20 – Global: ICT Drivers & Technology Priorities.

5. Security is top of mind, but should always be part of a longer-term strategy

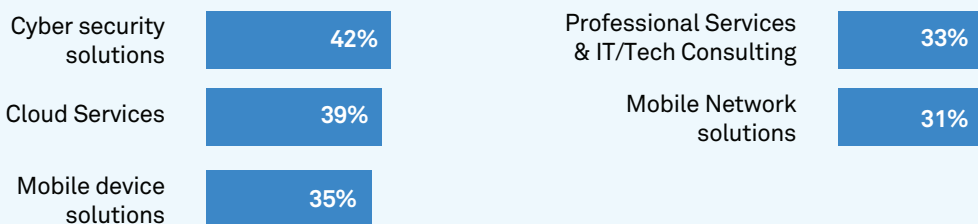
Businesses know that mobile workstyles present inherent threats that need to be managed.

Mobile working provides many opportunities, but it also presents numerous challenges – not least those associated with security and data privacy. As more work takes place across mobile devices and apps, these threats are only going to increase. Organisations need a long-term strategy and approach to mitigate the risks associated with them.

Research from Telstra found that mobile security remains a major source of concern for security professionals.⁵ In Australia, for example, 38 per cent of security professionals identified mobile devices as one of their biggest security issues, with the loss of corporate data via mobile devices being of particular concern.⁶ It shouldn't come as a surprise then that cyber security solutions, along with cloud services and mobile devices, are the key areas that Australian businesses are looking to invest in over the next 12 months.⁷

Q: Thinking ahead over the next 12 months, given coronavirus, how likely is your business to invest in each of the following? This could be new solutions, or upgrades/changes to existing solutions.

Investment in next 12 months



Source: Telstra and fiftyfive5 COVID-19 Research Barometer: Wave 1 Results, n=159 business decision-makers April 2020.

Even where businesses already have the tools and practices in place to support mobile workstyles, they still must overcome many challenges. Security is a vital consideration. Organisations need to embrace robust and flexible approaches to securing the workforce, as the cyber threat landscape is not the same when people are in the office compared to when they are working remotely.

⁵ Telstra Security Report 2019.

⁶ Ibid.

⁷ Telstra and fiftyfive5 COVID-19 Research Barometer Wave 1 Results, n=159 telco decision-makers.

These challenges are compounded by the fact that new security threats emerge so quickly that simply being aware of these threats, let alone being able to respond to them, becomes incredibly challenging.

Organisations that are ill-prepared or poorly equipped to support staff to securely work from home are a likely target for cyber security attacks. These businesses are also more prone to security incidents and breaches that occur accidentally or negligently through staff struggling to use the same systems and comply with the same rules and processes from home as they may have done in the office.

As workstyles evolve, businesses must be ready and able to react to new threats.

The security of organisational data and information should not be considered the sole responsibility of one team or business function. Omdia emphasises the importance of having a 'bigger picture' view of cyber security – one that comprises technology, people and process in equal priority and importance. Furthermore, the influencers on security – governance, risk and compliance – are crucial inputs to an organisation's security posture.

Having this bigger-picture viewpoint is important, especially in supporting and securing long-term workstyle changes. Making the long-term changes required puts an organisation in a

better position to manage and respond to future disruptions and security issues that may arise. This approach should be viewed as an important element of a broader and cross-departmental business continuity plan. This could also include using risk assessment methodology to assess the threats associated with new ways of working and to develop security controls to address these risks according to the organisation's risk appetite. Regular review of security controls will help highlight weaknesses that can be improved upon.

Businesses must balance short-term needs with long-term strategy – the future is uncertain, and they need to anticipate disruption.

The importance of mobile security is not lost on organisations. A recent survey from Omdia of Australian organisations found 78 per cent of respondents identifying mobile security (including improved threat detection) as a top priority when investing in mobile services.⁸ Additionally, 54 per cent advised that identifying malicious activities was their most-important goal in using mobile analytics and reporting capabilities.⁹

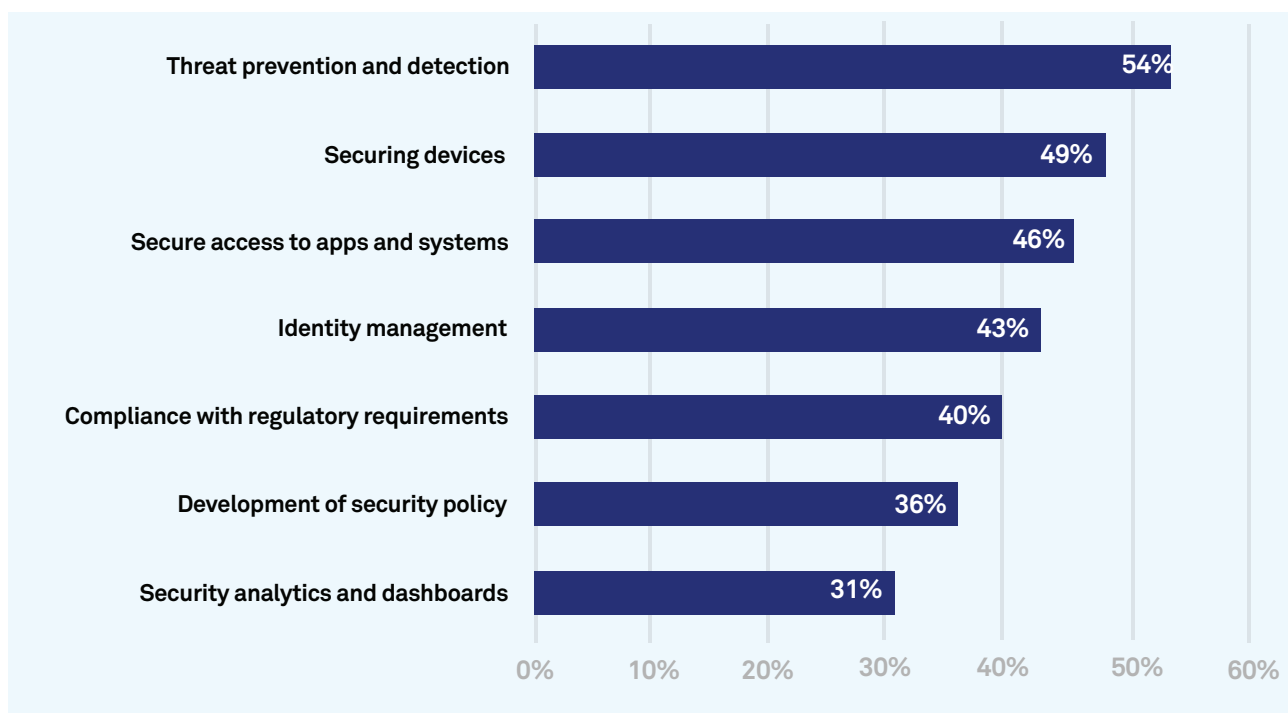
⁸ Omdia (2019) study into Australian Enterprise Mobility Managed Service Market, n=314.

⁹ Ibid.

The speed required to act on digital initiatives such as remote working has accelerated in response to recent world events, which has resulted in many businesses adopting new mobile technology at a rapid rate to support new workstyles. Where this happens, it is essential that security is not overlooked – organisations must ensure threats have been assessed and appropriate security controls are in place. This includes staff training to mitigate the risks associated with the adoption of any new mobile tools.

As with any area of enterprise security, businesses view various mobile security elements and considerations at similar priority levels. In a recent study conducted by Omdia, Australian business across a range of industry verticals and size classes, identified many management priorities in relation to mobile security.¹⁰

Q: When thinking more about mobile security, please indicate your most important management priorities.



Source: Omdia study into Australian Enterprise Mobility Managed Service Market, n=314.

Organisations must take the time and effort to define their own mobile security priorities and recruit the support and capabilities needed to deliver against them. While businesses may be keen to adopt new mobile solutions in support of defined priorities, it is best to resist impulsive decisions. Though the need and demand around new mobile tools and services may be immediate, smart investments require that organisations take a calculated and long-term view to the adoption of any new solutions.

¹⁰ Omdia (2019) study into Australian Enterprise Mobility Managed Service Market, n=314.

Training is critical – not just in relation to technology, but also behaviours.

Security considerations must go beyond those just associated with technology. This is especially true for remote work, as the change in people's work habits and behaviours change considerably when working remotely compared to in an office.

A 2019 report by Telstra found human error is one of the two most widespread types of security incidents identified by security professionals in Australia.¹¹

Attackers are very aware of this type of opportunity. During the Covid-19 pandemic, when many employees suddenly needed to work from home, multiple security vendors reported a sharp rise in phishing emails targeted at remote workers.

It is important to make sure everyone is aware of threats such as these, and that they have easy and accessible means to report suspicious emails or activities. Increased awareness is not enough, though; these measures should be part of best-practice training delivered to mobile workers, where the objective is to change behaviour. Remote working is a new style of working for many and it can introduce new security threats; consequently, everyone has a responsibility to defend the organisation from these threats.



¹¹ Telstra Security Report 2019.

6. Businesses must look for opportunities to differentiate and grow

Innovative companies will be looking to differentiate with services built on next generation mobile technologies.

As mobile devices become increasingly central to business communications and productivity for employees, enterprise mobility technologies and strategies are evolving in exciting ways. As more of the workforce becomes empowered by mobile devices, an organisation's focus will increasingly extend beyond just device management and security and move to explore how new mobile capabilities can be used to help employees work more productively.

Capabilities that will be important in enabling a more productive mobile workforce include accelerating efforts around mobile app development and the 'mobilisation' of legacy systems, improving and automating mobile workflows and evolving mobile analytics to be more closely tied to actual user behaviours across devices/apps. These productivity-focused mobile capabilities will be supported by 5G network connectivity that supports new business use-cases and outcomes.

5G has the potential to be as transformative and impactful for the mobile worker as the wired enterprise LAN was for the office-based knowledge worker. According to Omdia data, 72 per cent of enterprises believe that 5G will have either a moderate or transformative impact on their enterprises.¹²

Q: How would you characterise your understanding of the potential benefits of 5G to your enterprise?



Source: Omdia ICT Enterprise Insights 2019/20 – Global: IoT, Cloud, AI, and 5G, n=459.

¹² Omdia ICT Enterprise Insights 2019/20 – Global: IoT, Cloud, AI, and 5G, n=459.

Regardless of what the mobile technology is or what capabilities it promises, businesses will need help in understanding how they can innovate and realise value by adopting it. 5G is a good example; its speed and latency benefits have been well discussed, but businesses need help in understanding these benefits and opportunities in the context of their organisation.

Reliable and flexible services provided by trusted and experienced partners will be the foundation of successful businesses.

As mobile capabilities have improved and diversified, the complexities faced by organisations looking to use them have also increased. These include understanding different mobility technologies, local and international regulatory guidelines, costs and having resources available to adopt a more strategic and proactive approach to workplace mobility.

Organisations are increasingly looking for support from experienced partners to help them deal with these challenges. This move to embrace a more partner-based approach is driven by challenges in adopting mobility management solutions and integrating them with other important enterprise tools. Simply adopting a set of capabilities is not enough, nor is it a desirable approach for many businesses. Knowing how and where to successfully apply these capabilities is vital both to achieving long-term value and ensuring that organisations realise maximum return on investment.

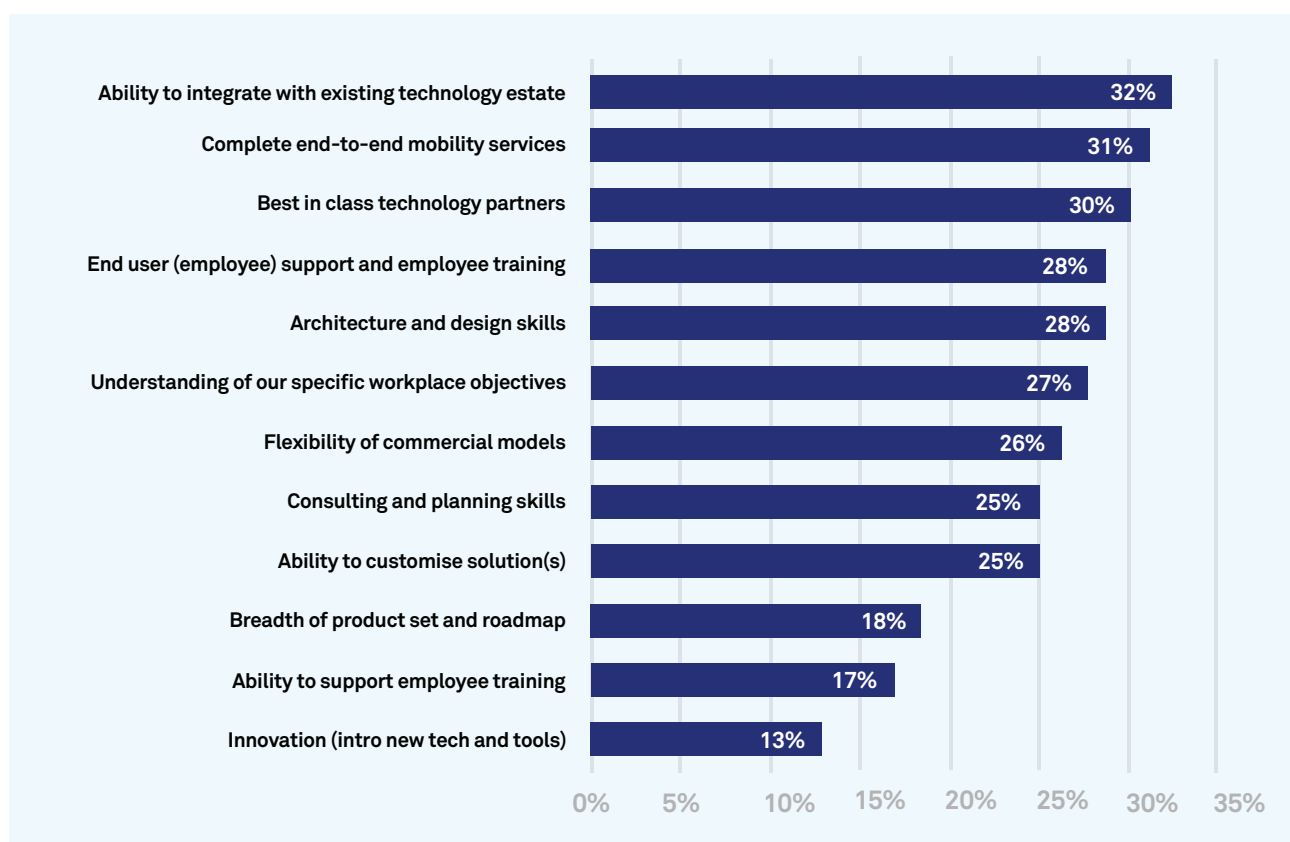
Service providers play an increasingly valuable role in supporting businesses embarking on any mobility initiative. A managed mobility service embodies a range of different but complementary capabilities. These include the network and a means of managing and securing all devices, applications and users, in addition to mobile productivity solutions that enable a mobile workforce with new applications, mobile experiences and workflows.

Organisations will need support from partners to overcome many of the complexities they will encounter. Specifically, businesses need help in making sense of the varied mix of different mobile technologies and solutions that support managed mobility solutions.

Further, businesses may need help in adopting, integrating and using these solutions over the long-term, in addition to needing access to skills and expertise that will support such efforts. Data from a recent Omdia survey of Australian businesses identified what these businesses associate as the most important capabilities when choosing a supplier to support and manage their enterprise mobility activities.¹³

¹³ Omdia study into Australian Enterprise Mobility Managed Service Market, n=314.

Q: What would you consider to be the most important considerations when choosing a supplier to support and manage your enterprise mobility activities?



Source: Omdia study into Australian Enterprise Mobility Managed Service Market, n=314.

The minimal differentiation between capabilities in the previous table is a good representation of the importance businesses attach to a range of different mobility solution considerations, which well exemplifies that a managed mobility solution is about much more than just device management and security. Reliable services that support businesses against the broad range of important managed mobility capabilities will be vital as remote and mobile workstyles become more common.

While new technologies and services will be important for businesses looking to better enable the mobile workforce, it is also important that organisations look to strengthen existing partnerships to get more value from current investments. Ongoing support and access to partner expertise and knowledge is vital in ensuring long-term value is derived from any capabilities adopted.

A successful partnership, regardless of whether it is with a technology vendor or service provider, is one that holds the customers' goals and objectives as a mutual interest and extends well beyond the initial adoption phase of any capabilities.

7. Key recommendations



Employee demand for mobile and more flexible workstyles is increasing.

CIOs must ensure their business is well prepared to deliver against the needs of the modern worker. The biggest challenge many organisations will face is in dealing with the speed of change required, especially given recent world events.



When delivering against any mobility initiative, technology is important, but people and processes will also be imperative to long-term success.

IT leaders must be cognisant of all three areas in supporting mobile workstyles that can improve employee experiences and help heighten user productivity.



Digital initiatives, including those relating to mobility, can bring about great change and opportunity.

The disruptions brought about by these changes are often unexpected and hard to plan for, so IT and other business leaders must ensure the operational processes and technologies are in place to support their efforts to successfully deliver against the opportunities.



While short-term needs are a key driver in the adoption of new technologies and services, CIOs must resist impulse purchasing and take a long-term view when adopting new solutions or services.

Businesses should also engage with current suppliers to see if and where they can maximise their existing investments to take advantage of any additional capabilities that may support their immediate and changing needs.



It is important that CIOs and IT leaders communicate the message that mobile security is everyone's responsibility.

Training programs and regular communications around threats and best practices are important in strengthening an organisation's mobile security posture.



CIOs must view mobility as a vital digital transformation element.

The management and security of mobile devices remains a key focus, but organisations must increasingly look beyond just device management and security by supporting more mobile-centric ways of working that focus on improving employee productivity.



Workplace mobility can be complex and involve many different moving parts.

CIOs must look to develop partnerships with experienced and capable solution providers that not only bring best-of-breed mobile technologies but also the expertise and industry awareness that can support successful mobility initiatives.

