Global Survey: Consumer Technologies are Changing Long-Standing Business Processes and Work Cultures – And Impacting the Bottom-Line
Work Redesigned
Research shows that companies are enabling consumer technologies to allow employees to get work done in new ways.

Consumer devices are storming the workplace
60% of companies report most employees use personal computing devices at work

Employees use smartphones and tablets for basic and advanced business functions:
54% Basic
42% Advanced

Companies are deriving greater value from consumer technologies
73% are more likely to report improved sales and new customer acquisition through the use of their collaboration tools than other companies
58% report greater ability in bringing new products and services to market
54% are more likely to report increased profits than businesses not embracing change

The gap between C-level executives and IT leaders hinders widespread embrace of new technologies to enable new ways of getting work done

70% of companies have changed at least one business process
20% of companies have changed at least four or more business processes

56% of C-Suite executives are focused on capitalizing on potential benefits
55% of IT Leaders are focusing on minimizing potential risks

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In the past, technology use at work has been dictated by business requirements. Executives authorized technology purchases based on corporate needs and objectives — new regulations led to email archiving systems and bigger customer rosters led to centralized customer relationship management (CRM) systems.

Recently this dynamic has begun to shift. By now, it’s well-known that the use of certain technologies in the workplace is increasingly being influenced by employees. Corporate policies, business processes and organizational roles are catching up with the changes ushered in by these employee-driven technologies, especially mobile devices and consumer technologies.

What has been less known is if and how business and IT leaders were capitalizing on these disruptive technologies to improve business results. Until now.

Avanade research shows that the majority of companies globally report widespread use of consumer and mobile technologies in the workplace. This is accompanied by extensive change in more relaxed and inclusive workplace policies and improved collaboration among employees. As a result, these new technologies and policies are leading to fundamental changes in how work gets done.

In September 2012 Avanade surveyed nearly 600 executives and IT decision-makers in 19 countries about the impact of the employee-driven workplace and how companies are taking advantage of this shift. Results showed that the most progressive businesses are building entirely new business processes around these trends — and seeing surprising impact in growth, product development, employee satisfaction and collaboration.

Survey Methodology: Avanade’s survey was conducted by independent research firm Wakefield Research. It surveyed 599 C-level executives, business unit leaders, and IT decision makers, ages 18 and older, at the top companies in the following countries: U.S., Australia, Belgium, Brazil, Canada, Denmark, Finland, France, Germany, Italy, Malaysia, the Netherlands, Norway, Singapore, South Africa, Spain, Sweden, Switzerland and the U.K. The study was conducted between August 20 and September 13, 2012.

Mobile and Consumer Technologies Lead the Shift; Executives Enable the Change

Mobility is becoming the norm. According to Morgan Stanley Market Trends, in 2012 more than half of network devices will ship without a wired port. Incredibly powerful and convenient mobile phones and tablets are driving consumer technologies deeper into the workplace. According to Juniper Research, there are over 150 million smartphones and tablets used in the enterprise today and this figure is expected to more than double to 350 million by 2014.

New research from Avanade shows that large companies are open to change — even if it disrupts “business as usual.” Rather than shut out mobile and consumer technologies, Avanade’s survey of business and IT executives shows companies are not only embracing these technologies in the workplace, they’re enabling them.

For example, more than six in ten companies (61 percent) report the majority of their employees now use personal computing devices in the workplace. Avanade research shows that 54 percent report the majority of their employees use smartphones for basic work tasks such as checking email, reading online documents and managing schedules.

But the way tablets are being used in work settings is more surprising — it breaks with conventional wisdom.
Like smartphone use above, one-third of companies (33 percent) report the majority of their employees use tablets for basic work tasks. Further, the exact same number of respondents – 33 percent – report the majority of their employees use tablets for advanced business purposes such as CRM, project management, content creation and data analysis. This finding dispels conventional wisdom that tablets are primarily designed as content consumption devices. And it shows how engrained these devices have become in the workplace in less than three years since the original iPad launched.

Avanade’s January 2012 study of the consumerization of IT reveals that business leaders support the shift from content consumption to the use of core enterprise functions on personal devices. In fact, 65 percent of company leaders said creating content or accessing business applications is an acceptable use of personal devices at work.

Personal smartphones and tablets are increasingly being used by employees for a wider variety of advanced business purposes, including improving collaboration. In fact, collaboration is becoming a key piece of the puzzle for companies focused on this new way of work. In an interview with CIO Magazine, Jacob Morgan, author of “The Collaborative Organization,” stressed the importance of collaboration in the enterprise. Morgan noted that, “When organizations invest in collaboration tools and strategies, it not only positively impacts the lives of employees at work but also outside of work. Employees will have more flexible work schedules, feel less stressed out about work and will feel more passionate and engaged about the work they do.”

Companies are taking notice of the benefits of emerging technologies. It turns out, this broad adoption of mobile and consumer technologies is causing companies to rethink their policies and business processes to manage and take advantage of these technologies in the workplace.

Business Processes are Being Built to Capitalize on Mobile and Consumer Technologies

We are witnessing a profound redesign of the building blocks of business – roles, processes and policies – in order to take advantage of mobile and consumer technologies in the workplace. Avanade’s research reveals many executives and IT decision-makers are modifying business processes in key functions such as sales and marketing, and critical roles inside companies, such as HR.
to leverage mobile devices and other consumer technologies to their company’s benefit.

Rather than dictating technology use, corporate policies and processes are, in this case, playing catch-up with technology.

As a result, many executives are taking steps to adjust their business to realize the potential of this trend. In fact, more than 7 out of 10 (71 percent) companies surveyed have changed at least one business process – including IT management, sales and marketing, HR, customer services – in an effort to leverage these emerging mobile and consumer trends. Notably, 20 percent of companies have changed four or more business processes to capitalize on the rise of mobility and consumer technologies at work.

According to this survey, there is still a question of who owns this transformation in a company. Major business change involves many functions and departments, but Avanade’s research shows that more than half of respondents (56 percent) believe that IT departments are now responsible for managing elements of the company not traditionally in the job description of IT – such as improving business processes and collaboration across the business.

The research shows that IT and HR are seen as each playing roles (51 percent cite IT; 28 percent cite HR) in creating and supporting new styles of work that include the use of consumer tablets and smartphones for both basic and advanced business purposes. Mobile and consumer technologies are being more deeply embedded in business organizations and their processes.

Over time, a growing number of companies have become more comfortable with consumer technologies in the workplace. Arguably, we have reached a tipping point in acceptance, and now rather than fighting to keep personal devices out, companies are embracing the use of consumer technologies by mainstream employees.

**Companies that Capitalize on New Ways of Work are Seeing Stronger Growth and Happy Customers**

In early 2012, an Avanade survey (see Avanade’s report) showed that executives recognized the potential of consumer devices and began making investments to support their adoption. A year later, research indicates these investments have helped some companies use mobile and consumer technologies to improve the way work gets done and realize important benefits.

Business goals will dictate where companies are seeing the most benefits from capitalizing on these tools, but early indicators show these changes are making a measureable impact on sales, profits, product development and employee satisfaction.

For example:

- **Stronger sales** – Companies are deriving greater value from collaboration technologies. They are 73 percent more likely to report improved sales and new customer acquisition through the use of their collaboration tools than other companies.

- **Increased profits** – Companies that have adopted emerging mobile and consumer technologies, and established progressive policies and business processes to support them, also see positive business impact. Those companies are 54 percent more likely to report increased profits than businesses not leveraging these technologies, policies and processes.

- **Greater agility** – Similarly, those same companies that have embraced these new technologies in the workplace, policies and processes are more nimble than other companies. They are 58 percent more likely to report improvement in bringing products and services to market.

- **Improved job satisfaction** – The benefits these new work methods bring to business are not just measured in time and money. Companies that redesign how work gets done also have happier employees. They are 37 percent more likely to report improved employee satisfaction. They also report a greater emphasis on creativity and greater ability to solve problems.

Among these measureable business benefits, the age-old hurdles of security and control concerns exist, especially inside IT departments. But are these challenges great enough to outweigh the benefits?

Companies that have embraced collaboration technologies are **73%** more likely to report improved sales and new customer acquisition.
C-level Executives Say “Go,”
IT Leaders Cautious – Closing the Gap
As with other emerging technology cycles, early adopters are optimistic when calculating benefits, while mainstream users focus on challenges to overcome before adopting emerging technologies. In the case of mobile and consumer technologies in the workplace, the vast majority of business and IT executives view the use of mobile and consumer technologies, and accompanying policies, from significantly different perspectives. The disconnect between C-level executives and their IT staff may be the biggest factor limiting more widespread redesign of business processes enabled by mobile and consumer technologies.

C-level executives tend to be more mobile, traveling to visit partners, suppliers and customers more than rank-and-file employees. So it’s no surprise that the C-suite is leading the change in attitude regarding mobile technologies and accompanying processes to benefit from them. When asked, 71 percent of C-level executives believed the rest of the company could accomplish work tasks outside of the office walls – 39 percent higher than the rate of IT staff and business unit leaders who reported the same.

Similarly, C-level respondents surveyed tend to be more optimistic when it comes to reaping the benefits of allowing consumer and mobile devices in the workplace, while IT staff is more focused on security and policy enforcement risks that these technologies may bring. Take the top priorities they reported, for example. When considering allowing employees to use personal computing technologies in the workplace, the C-suite is more focused on capitalizing on potential business benefits (56 percent), while the IT department is more focused on minimizing potential risks (55 percent). These are two different lenses through which C-level executives and their IT counterparts view the same emerging technologies and corresponding business impacts.

IT staff’s focus on managing risk is well-placed. Avanade’s January 2012 study shows 55 percent of global companies report they have already experienced a security breach as a result of personal technologies flooding the enterprise. But security measures only get an organization part way to the goal. Training employees to use devices to the benefit of the business is part of the journey. In our 2013 research more than one-third of businesses (35 percent) report “training for all employees” as the top investment in the next 12 months to better support consumer technologies in the workplace.

Clearly, companies must enable these technologies to take advantage of their benefits while managing the risks.

Conclusion
Companies have seen a rise of consumer technologies at work and have begun redesigning processes to capitalize on the benefits of these technologies. Avanade research indicates that progressive companies are enabling the change with many reporting a surprising impact on their business. For more insights on where Avanade is seeing companies adjust processes, please read www.avanade.com/WR-POV
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