



# BYOD: Putting Users First Produces Biggest Gains, Fewest Setbacks

A Vanson Bourne survey commissioned by Dell

## Foreword

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During the past few years, smartphones, tablets, laptops and other mobile devices have entered the corporate workplace in increasing numbers. The Bring Your Own Device (BYOD) phenomenon is one of the most visible incarnations of the wave of consumerization surging through IT. As a result, major cultural, technological and business shifts have occurred in the relationship between company and employee, facilitating unprecedented gains in productivity, efficiency and collaboration while creating new security risks and information governance concerns.

At Quest Software, now part of Dell, we closely followed the BYOD trajectory within our own organization and moved quickly to empower our employees by giving them access to the apps and data they need, regardless of device. Instead of managing individual devices, we chose to manage the identities of our user base—from the moment an employee enters the organization to the moment they leave—regardless of which device they use, or where they use it from.

When we looked across our worldwide customer base, we discovered that when organizations took a similar user-centric BYOD approach, they were able to reap the greatest and most immediate rewards while experiencing the fewest setbacks. These companies used BYOD as a strategic

competitive advantage and also were able to resolve some of the biggest BYOD problems, including security, access rights and data leakage.

We were curious to learn where other companies were in their BYOD journeys and if indeed those that took a more holistic, user-centric approach were most successful. We commissioned this research to explore how far along companies were in their adoption of BYOD and to show the opportunities ahead for organizations that choose to embrace BYOD in the way Dell has.

Our overarching goal was to gauge the level of organizational maturity with existing BYOD strategies, along with realized and anticipated benefits and problems, to help organizations understand what can be gained from managing BYOD properly. As BYOD continues to take root and the device list grows, we want to help our customers put in place an end-to-end BYOD strategy that positions them well for the future. We want them to be able to do what Dell has done—to use BYOD as a catalyst for continuous improvement in IT as well as alignment and responsiveness to the business.

*Carol Fawcett, CIO  
Dell Software*

# Contents

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<b>Introduction</b>	<b>1</b>
Background	1
Methodology	1
Strands of the research	1
An introduction to the idea of the BYOD journey	2
Summary of key findings	2
<b>Should companies focus on users or devices when developing a BYOD strategy?</b>	<b>3</b>
What is BYOD to a user-centric organization?	3
Why are some organizations user-centric and some not?	4
<b>Do organizations realize the value of user-centric BYOD management?</b>	<b>5</b>
BYOD is user-driven as well as user-centric	5
There are benefits for the business too (with a few caveats)	5
Users also stand to benefit – particularly in more mature organizations	6
<b>What are the pitfalls and risks, how widely are they recognized and are they limiting BYOD uptake?</b>	<b>7</b>
Risk and reward	7
Things are getting more complex – and the IT department isn't helping	8
Challenges to be addressed	9
Gaps in current BYOD management	10
<b>Conclusions</b>	<b>11</b>
The future of BYOD	11
How to become a winning organization	11

# Introduction

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## Background

**By listening to its customers around the world, Dell has identified that many organizations build BYOD policies and infrastructures with the principal focus being the management of the device. This has limited their ability to respond to the changing and potentially contradictory demands of the organization and the users.**

With this in mind, Dell commissioned independent technology market research firm Vanson Bourne to examine the prevalence of this approach to BYOD, whether it affects perceptions of BYOD in general, and specifically, whether businesses benefit when the user - as opposed to the device – is at the center of BYOD thinking and implementation.

## Methodology

Vanson Bourne interviewed 1,485 IT heads from across the globe, from enterprise-sized organizations in these countries:

- UK
- France
- Germany
- Spain
- Italy
- US
- Australia
- Singapore
- India
- Beijing region of China

Specific sectors – both private and public - were covered, namely: financial services; manufacturing; retail, distribution and transport; other commercial organizations; education and healthcare.

## Strands of the research

This research seeks specifically to answer the following questions:

- Should companies focus on users or devices when developing a BYOD strategy?
- Is BYOD solely user-driven or do companies realize the value of BYOD to the business?
- What are the pitfalls, and how widely are they recognized?
- Are the pitfalls putting a brake on BYOD uptake and if so, is there a link to BYOD maturity?
- Does the organization's level of BYOD maturity indicate a different approach to answering these questions?
- What does an organization need to do to be a BYOD winner?

## An introduction to the idea of the BYOD journey

**Throughout this report we refer to organizations being more or less mature. The more mature an organization, the farther along they are in their BYOD journey. Whenever their maturity is mentioned, this emerges from answers given to a previous question.**

For example, when we asked how fully-formed an organization's BYOD policy was, those who have not yet started their journey (deemed the least mature) answered that either they have no policy in place, or that they actively discipline against it – effectively halting the journey before it's even started. Those who are on track with BYOD either are developing policies, or allow BYOD in a limited fashion – suggesting that they are beginning to see the value of the BYOD paradigm, but have yet to embrace it fully. This, though, is exactly what the organizations we describe as the most mature have done; they allow - and even encourage - BYOD, actively managing and supporting any devices that users wish to use. This small group of just 17% of all respondents is setting the bar for their competitors, and later on, the report will show what the mature organizations have done to get to that stage – steps that your organization can take in order to enjoy the same commercial advantages.

There were regional differences uncovered in this study too; for example, it is worth noting here that while overall, only 17% of organizations say they allow and encourage BYOD, actively managing and supporting all devices this reaches 38% in the USA. Furthermore, while just 10% overall are actively disciplining against BYOD – this is 29% in Germany.

## Summary of key findings

**Not everyone understands BYOD or if it's something they should be doing. A large minority is yet to sign up to the idea of BYOD. However, those that have, taking a user-centric approach to management, seem able to drive the business benefits, satisfy their users and build competitive advantage. They also seem to meet fewer setbacks on the way.**

A common viewpoint is that data and people are key cornerstones of any business. Attending to their demands, where they contribute to business performance, makes business sense. We have seen that organizations introduced to BYOD initially by employees are beginning to embrace it. Understanding individual user needs increases user morale and productivity. So everything looks rosy; these organizations stand to benefit hugely. But can it all go wrong?

All organizations surveyed know there to be some risk associated with BYOD. In more mature, user-centric organizations the potential benefits are seen to outweigh those risks; they encourage and embrace BYOD with fewer challenges than those disciplining against BYOD, whose concerns are yet to be put to rest.

Not all IT departments are committed to BYOD. Some are yet to provide basic user support and in most organizations the business and/or its users are being let down by an IT department not providing the support they need to increase competitiveness and productivity. By contrast, the mature organizations' IT departments do cooperate and are much better at empowering the business and its users.

Most IT heads surveyed admit to gaps in their capabilities in improved productivity, data and device security – but the good news is that many want to close those gaps. So just what does the BYOD future hold? What are the potential benefits? And how can organizations avoid the pitfalls?

# Should companies focus on users or devices when developing a BYOD strategy?

## What is BYOD to a user-centric organization?

When we asked senior IT managers what BYOD means to their organization, the response was varied; 11% of organizations stated that BYOD is just “employees wanting to use their tablets” - these organizations are unlikely to have started their BYOD journey. However, the most sophisticated response, which was chosen by three times that number, (32%), reads:

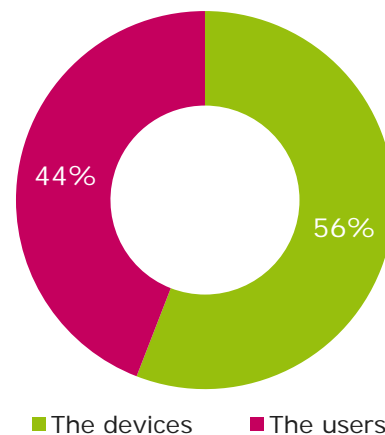
*“The BYOD movement is about much more than managing devices – it's about users, how they do their jobs and the degree to which organizations empower them to achieve maximum productivity - regardless of device or location.”*

And, selecting themselves out of the pack of responses, nearly twice as many (61%) of the organizations whose responses denote them as “mature” in BYOD terms - that actively encourage BYOD - agreed that this description of BYOD is how they see it. We will see later on that a user-centric approach results in greater rewards from BYOD – suggesting that an approach that focuses management on users—their roles, rights, required access—are most likely to bring reward. Those taking the opposite approach, focusing management efforts on the device, are likely to face more setbacks and challenges – such as an abuse of policies, or unauthorized data distribution from BYOD devices - in the future (see page 10).

Organizations seem to struggle more with BYOD if they haven't adopted a user-centric mindset. Yet when we pressed CIOs and IT heads to choose between whether devices or users are more

important to manage in a BYOD context – only 44% chose users.

## Organizations are unsure of a user-centric approach



**Figure 1:** Only a minority believe that managing the user is more important than managing the device when it comes to BYOD

Interestingly, when we look at this from a geographic perspective, those in the USA are least likely to choose users over devices (30%), and Singapore the most (63%). Within EMEA, just 41% of those in Germany would put users ahead of devices compared to 56% in the UK.

There appears to be an array of benefits being enjoyed by the user-centric organization; here is a list of attributes that the research findings align far more strongly with user-centric organizations than the rest:

- The ability to link and manage devices per user
- To be able to track and support each user's level of mobility

- Delivering applications based on a user's role
- Effectively provision devices and required applications when users change roles, leave or buy new devices
- The ability to track and manage users (and their data) when they change roles or leave the company
- To separately manage employees' business and personal data
- To back up all the data on an employee's personal device
- Adherence to governance regulations

All enhance an organization's productivity and data security; meaning that not only is an organization able to do more business, they can be confident that the resulting data flows are safe and secure.

### Why are some organizations user-centric and some not?

Six in ten organizations (59%) say that without BYOD they think they could get left behind – this figure is largely made up of those who are already benefitting from BYOD, and is highest in Italy and the USA (both 72%) and lowest in Germany (39%) – the country who was also least likely to manage users over devices.

Furthermore, this 59% includes 38% of the group who are actively disciplining against the BYOD movement – this raises the idea that if they fear they'll get left behind they must recognize the benefit of BYOD and just don't know how to manage their way into it. It is also worth talking about the other 62% of this group though – the group that are disciplining against BYOD and who don't see the risk of being left behind without it – why are they so opposed? Is it a misunderstanding, or a lack of relevant information, period?

On the other hand there is a larger group embracing BYOD, but why are they doing so? Are they doing so willingly, because they are pushing forward, keen to reap genuine business benefits such as increased productivity, faster response times for customers and improved working processes? Or are they being simply dragged along by user demand?

Whatever the answer, 73% of them think they'd be left behind without BYOD, and we know that this proactive, user-centric group is benefitting – they were likely not under pressure to adopt a BYOD initiative – instead they took the first step, and are now seeing more benefits and facing fewer setbacks than those resisting, perhaps with their head in the sand.



# Do organizations realize the value of user-centric BYOD management?

## BYOD is user-driven as well as user-centric

**After all, as we touched on previously, it appears that the smart organizations realize that users and not devices power the BYOD movement.**

Once organizations recognize the growing user pressure, they can re-establish user support by welcoming their demands and supporting their requirements (just as the mature organizations are already doing); this creates a virtuous circle in which employee and employer drive each other toward a user-centric BYOD approach. The outcome appears to be a more agile, mobile and competitive organization, to the benefit not only of the bottom line but of the users too.

So it's no wonder smart organizations recognize the need to keep (and the value in keeping) the users happy...

## There are benefits for the business too (with a few caveats)

**As we suggested in the previous section, an organization's commitment to BYOD can have a significant, positive impact on business success - if implemented correctly.**

For example: 70% of organizations believe BYOD can improve their work processes and help them work better in the future – this is just 45% among those disciplining against BYOD, but reaches 86% among the user-centric group that embraces BYOD. Similarly while 64% of all organizations believe BYOD can help them meet corporate goals more effectively, views differ by maturity; just 41% of the least mature group sees this as true, compared to 86% of the most mature group.

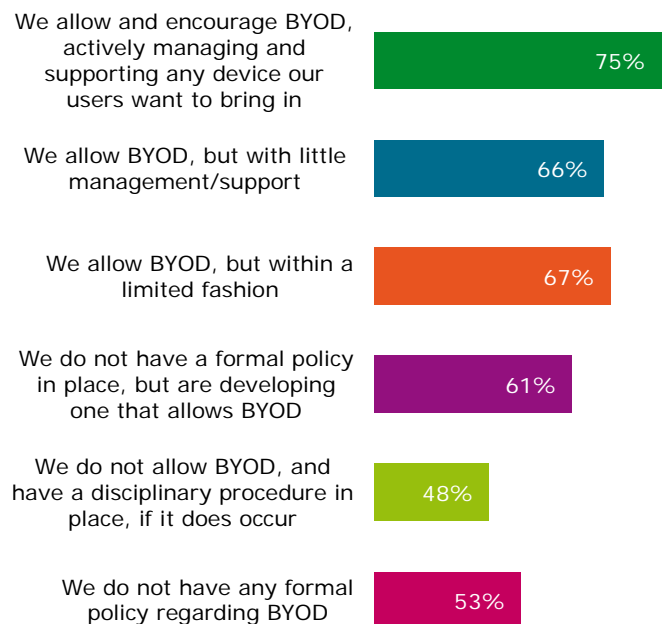
This proves that if done right - BYOD can become a catalyst for improvement and success across all key areas of business and IT.

But only if you serve your users...

Around two thirds of respondents agree that BYOD can only deliver these massive gains if they can understand specific needs and roles of each user.

This view is more widespread among those who have been there and are doing it; 75% of those who hold a user-centric view of BYOD agree that knowing and addressing the needs of the users are critical to acquiring the potential benefits (see below):

## User-centric organizations are more likely to agree that putting user's needs first is essential if BYOD is to be beneficial



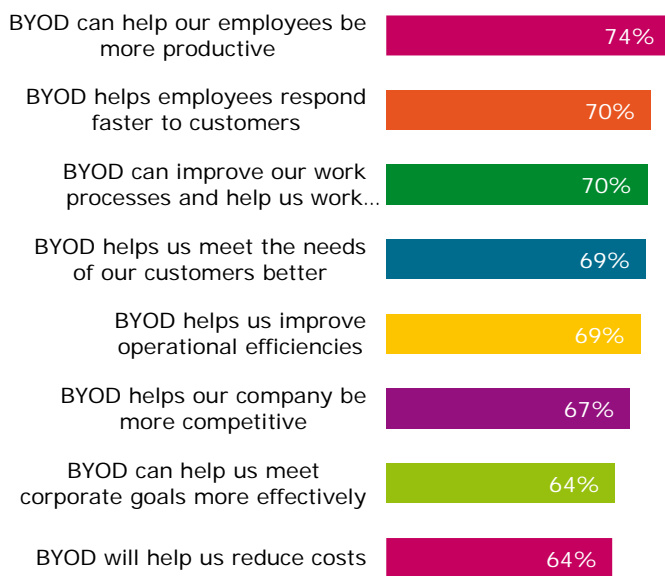
**Figure 2:** Three quarters of those who have embraced BYOD agree that BYOD can only deliver massive gains if they can understand specific needs of each user



To understand the specific needs of individual users, organizations will need to manage the identities of the entire user base so each user's data and applications is delivered promptly from the moment they log in, regardless of what device they use, or where they use it from.

By serving the user rather than just focusing on managing devices, organizations can reap rewards in the areas of data security and increased productivity, but also in the areas of employee productivity, customer satisfaction/retention and many others (see below):

**Potential corporate gains from BYOD**



**Figure 3:** Between two thirds and three quarters of organizations believe BYOD can benefit the areas listed above

All the benefits listed in figure 3 are felt more commonly in Beijing than anywhere else (the lowest percentage recorded for any of the above being 78%). Australia, the UK and Germany are all less likely to believe that BYOD can offer the above. Is this, along with previous data, an indication that those in Germany have not been exposed to the benefits offered by BYOD?

**Users also stand to benefit – particularly in more mature organizations**

**There is another huge benefit to a user-centric approach; improved employee morale.**

This may seem like a less significant benefit than improving the company's competitiveness and meeting clients' needs more effectively, but there are two reasons why it is not. Firstly, and obviously good employee morale contributes hugely to organizational performance. On the other side of the argument, an improving picture for jobs and employee mobility means that BYOD may soon be on a job-hunter's checklist.

Organizations need to be ready to compete for the best talent – after all, 65% of all respondents (rising to 83% among those who have embraced a user-centric BYOD approach) think that BYOD can help them to attract and retain talent, and 71% think BYOD improves workforce morale.

Further benefits of user-focused BYOD approach include:

- Enabling more flexible working hours for employees (77%)
- Gaining more creativity from employees (73%)
- Speeding up innovation by allowing people to share ideas at anytime from anywhere (71%)
- BYOD is a catalyst for teamwork and collaboration (70%)

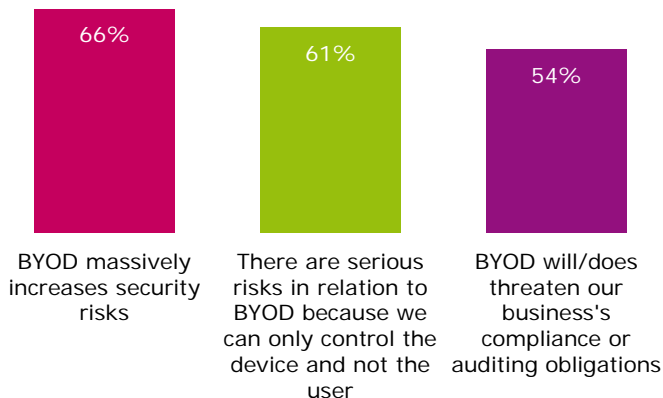
All these benefits are felt more greatly outside EMEA – most commonly in the USA, India and Beijing. Additionally, these potential gains are magnified in mature organizations that have proactively embraced BYOD, and least in those actively disciplining against it; sound proof that a user-centric approach not only benefits the bottom line and keeps data safe but also engages and retains the people within it.

# What are the pitfalls and risks, how widely are they recognized and are they limiting BYOD uptake?

## Risk and reward

**There is recognition of risk common to all organizations; 66% feel that BYOD could massively increase security risks, 61% agree there are serious risks in relation to BYOD because they can only control the device and not the user and 54% feel that BYOD has the ability to threaten compliance or auditing obligations.**

### BYOD increases risk



**Figure 4:** Organizations understand that a new initiative, such as BYOD, increases risk

When we look at impacts (not necessarily risks), 56% of all IT heads cite that BYOD has - or could - completely change the IT culture of the organization. This drops to just 40% among those who discipline against BYOD, and rockets to almost twice that number (76%) of those who have embraced BYOD with a user-centric mentality.

The same pattern applies when we look at perceptions of how BYOD can alter the business

culture. In total 54% of those interviewed agree that this could or has happened, but this is just 42% among the groups actively opposed to BYOD, rising to 72% among those with a user-centric approach.

The fact that so many organizations believe that their IT or business culture could be affected is not surprising – nor is it necessarily a bad thing. Of course with more devices to manage, the IT department’s culture will be altered, but if managed properly using the fewest resources and resulting in the fewest risks, IT can change from being perceived as a deterrent to becoming an enabler to the business. Similarly, if BYOD empowers employees to work from anywhere, at any time with no restraints and with increased scope for collaboration and innovation then naturally the business culture is likely to change – hopefully for the better.

When it comes to the potential rewards offered by BYOD, the story is slightly different; we saw the potential benefits listed in figure 3 were recognized more commonly by those who have taken a user-centric approach. The same can be said for the potential employee gains. Perhaps the groups who are opposed to BYOD are somewhat blind to the potential gains offered or need hard evidence of their existence. We have already seen that they are very clear on the risks so it seems that they are obscuring a view of the upside BYOD offers. Either way, without embracing BYOD, they could be left behind – and four in ten of them know it.

It is interesting to note that those based in Beijing are more likely to recognize the potential corporate benefits to their organization. When it comes to gains that staff might experience, this same group,

along with respondents in the USA and India, are more aware of what BYOD can offer.

However, when we look at the risks, organizations in the USA are most likely to state that:

- BYOD massively increases security risks (80% compared to 66% total)
- There are serious risks in relation to BYOD because we can only control the device and not the user (74% compared to 61% total)
- BYOD will/does threaten compliance or auditing obligations (66% compared to 54% total)

Yet as we saw on page 3, US-based respondents were least likely to have a user-centric response to BYOD.

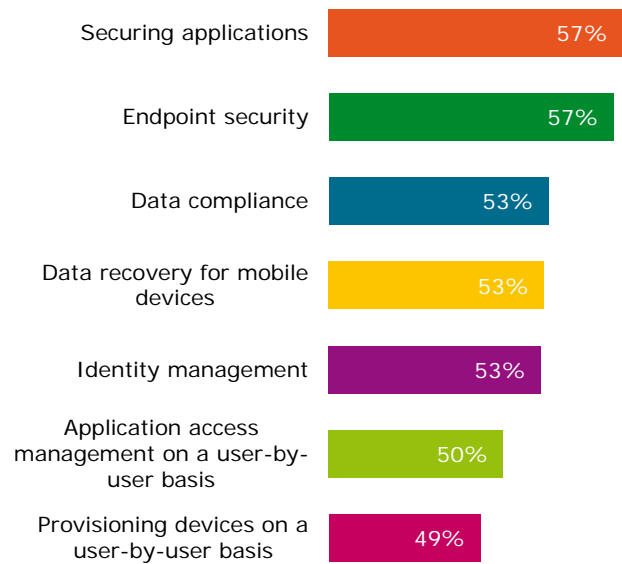
### Things are getting more complex – and the IT department isn't helping

**As with every new IT trend - be it cloud, desktop virtualization or BYOD, unmanaged early adoption can create complexities that an organization needs to work around (and ultimately iron out) as it establishes a regimen for management and ordered roll-out. And all innovations, no matter how beneficial do bring their own baggage.**

Complexity has increased in the areas listed in figure 5 (above right) as a result of BYOD in around half, to six in ten organizations.

When thinking about what has become the most complex, overall, respondents endpoint security comes out on top. Different regions are facing different challenges regarding complexity though, in Germany, the area of securing applications has become the most complex, in Italy and Australia it is identity management, and in Beijing it is the provisioning of devices on a user-by-user basis that has increased in complexity the most.

### BYOD is resulting in increased complexity



**Figure 5:** Areas of increased complexity as a result of BYOD in enterprise organizations worldwide

But IT can't - or perhaps won't – uniformly support the BYOD movement. The following are all support aspects that around one in five organizations say they will **not** support:

- Referrals to online support and chat sites (22%)
- Assistance with purchasing warranty/support agreements (22%)
- Full IT device management support – for any device or operating system (20%)
- Helpdesk support via phone – regardless of device or operating system (19%)
- Helpdesk support via web – regardless of device or operating system (17%)

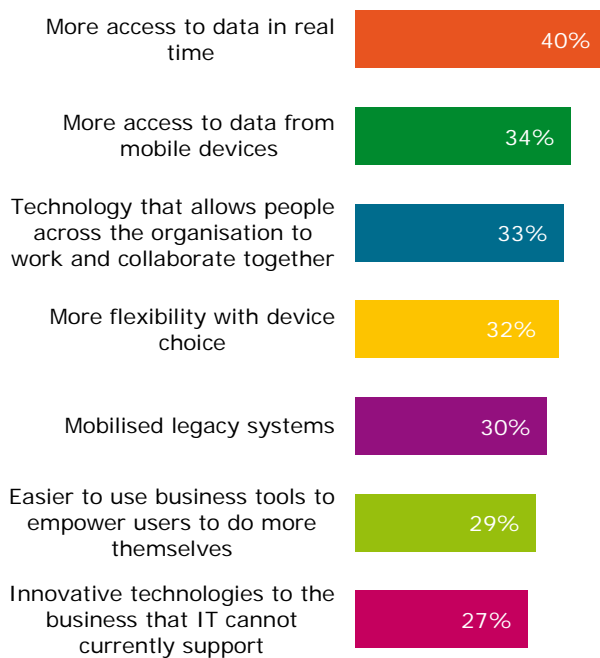
However, in each of these cases above those who have taken a more user-centric view of BYOD are more likely to be providing this support – or at least planning to – more evidence that they see the

value of encouraging and allowing BYOD for any device employees wish to use.

In addition to this, respondents identified the following aspects that they think line of business managers in their organization want, but that IT cannot deliver.

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### IT is not delivering what the business needs



**Figure 6:** 92% of IT heads say that business managers want things that IT cannot deliver - a lot of which involve BYOD

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Organizations embracing BYOD with a user-centric management mentality are less likely to experience business managers wanting things that IT cannot deliver. Perhaps their user-centric approach to BYOD is simply an extension of their approach to corporate IT - if it doesn't meet user needs then it isn't effective.

Regardless of where an organization is in terms of its BYOD journey, or whether they are user-centric or not, the fact is, in order to realize the potential

benefits offered by BYOD, the organization, and the users themselves need the backing and the support of the IT department. Some countries have this more than others; those in Germany and France are least likely to be inhibited by their IT departments, and India the most. Could this be because those in India are simply trying to do more? They, alongside the USA and Beijing see the most potential benefits from BYOD, and those in EMEA – particularly Germany - see the least. As a result, is it fair to say that the more an organization wants the more the IT department struggles? After all, resource, bandwidth and budget are all finite.

But other than internal demand from business managers, what else is the IT department having to deal with?

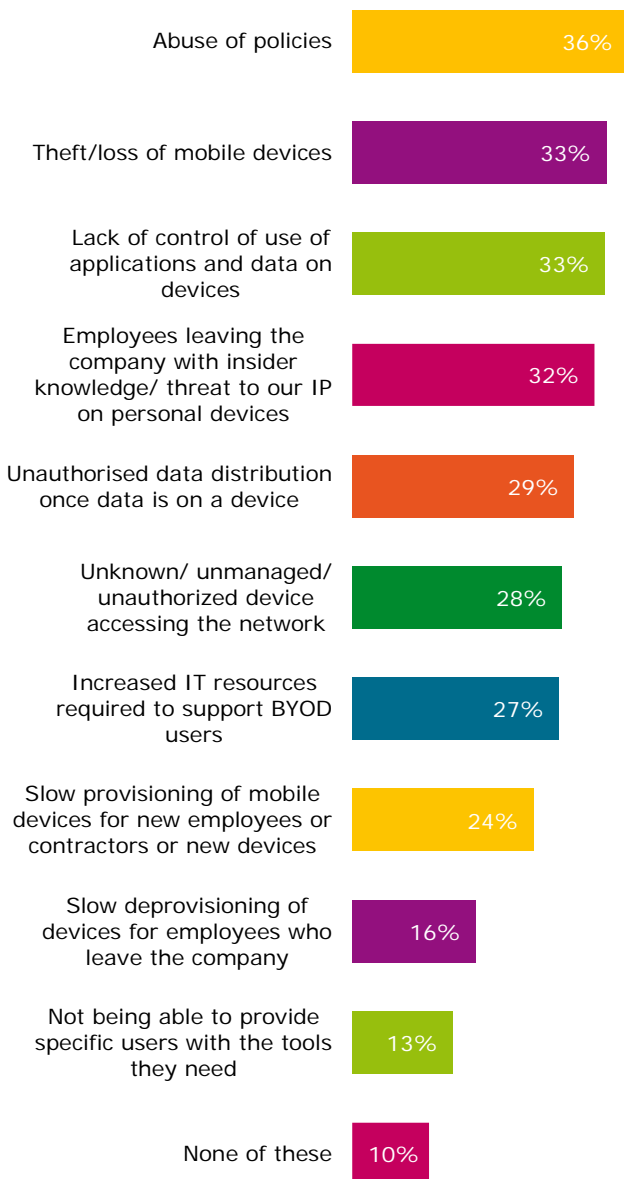
### Challenges to be addressed

**Currently, only two thirds of organizations say their employees access the correct applications; 11% say employees access too many (unauthorized access) and 21% do not have access to the applications they need to efficiently do their job. There are downsides in both of these scenarios: unauthorized access poses a security risk, whereas limited access reduces staff productivity.**

A similar challenge seems to apply when it comes to mobility; only half of the enterprises we surveyed said that the right people had access to corporate applications remotely; in 14% of organizations employees have unauthorized access, and in 36%, employees are without the access they require to do their job.

Only 10% of organizations globally said that they had NOT experienced any issues in relation to BYOD. In fact, organizations report an average of four BYOD-related challenges – the most common of which are shown in figure 7 on the next page:

## BYOD roadblocks



**Figure 7:** 90% of organizations have faced setbacks when deploying BYOD

To repeat, those who have embraced BYOD with a user-centric approach have faced fewer issues. This just goes to show that organizations that resist will experience a tougher journey – a positive commitment looks like a better stance to take for an easy(ier) ride.

## Gaps in current BYOD management

As we saw on pages 3 -4 more mature organizations are more likely to be able to do things like link and manage devices on a user-by-user basis, associate applications to roles and separately manage users' personal and corporate data, among other things.

The table below shows what organizations from all stages of the BYOD journey can currently do, and what they would like to be able to do in terms of productivity, data security and device security.

Aspects	Can currently do	Can't currently do, but would like to do
Deliver applications to users based on their role	38%	30%
Effectively provision devices & required applications when users change roles, leave, or buy new devices	31%	29%
Link and manage devices per user	42%	28%
Associate applications to roles	37%	26%
Prevent unauthorized application downloads	27%	20%
See each user's application history	36%	20%
Adhere to data governance regulations	25%	17%
Effectively deal with outages on personal devices	17%	16%

**Figure 8:** Organizations have gaps in their capabilities that they want to address

The fact that such a high number of organizations can't currently perform the management functions listed but would like to, illustrates awareness that the gaps in BYOD processes need to be addressed before it can truly deliver all its promises.

# Conclusions

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## The future of BYOD

**BYOD is happening now, and in some early adopter organizations it has been happening for a while, so it is no surprise that when we look ahead it is only going to become more prevalent.**

We have established that the main benefits of BYOD include improved employee productivity, faster customer response time and better work processes – all of which are multiplied when BYOD is fully embraced with a user-centric approach. Furthermore, according to more than half of IT heads surveyed, BYOD has changed their business and IT culture – making them more agile and mobile, better able to deal with customer requests and increasing productivity.

And not least, as successful BYOD implementation can deliver satisfied and productive employees, who will be working for successful businesses that have embraced BYOD taking into account the user's needs, with an IT department offering assistance, management and support.

This all sounds great, but as we've seen there will be increased levels of complexity in various areas within the IT department, and also setbacks caused by the users and technology itself.

## How to become a winning organization

**Undoubtedly, there will be winners and losers; those who are currently pushing back against BYOD are yet to realize the business benefits offered and are therefore missing out.**

The winners are - and will continue to be – those who are embracing BYOD with an open mind, allowing and supporting employees to use whatever devices they want and leveraging the user base for the foundation of management, rather than the device. This group is experiencing fewer problems with BYOD and also experiencing more benefits – a win-win situation for those out in front.

But how do you become one?

Embrace BYOD – don't fight it. We've seen the potential benefits it can offer, and the pitfalls to avoid, and this is all easier with two things – an open and encouraging mind, and a little help from the right technology. Organizations that win, deploy technologies that allow a clear and consistent view of the user base, in order to deliver the right data and apps, the right access rights, and the right device provisioning. This creates a holistic, one-view management of the entire dynamic environment, enabling more empowered, productive users and more competitive businesses.

One final question: BYOD **will** be the future of any successful enterprise... are you ready?



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**About Dell:**

Dell Inc. (NASDAQ: DELL) listens to customers and delivers worldwide innovative technology, business solutions and services they trust and value. For more information, visit [www.dell.com](http://www.dell.com).

**About Vanson Bourne:**

The research was conducted by Vanson Bourne, a research based technology marketing consultancy offering clients analysis and advice based on incisive, rigorous research into their market environment. Vanson Bourne's clients range from start-ups to well-known companies that need expert guidance, delivering robust and credible research-based analysis