



Upwardly Mobile

Redefining business mobility in Britain



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Introduction

Mobile technology is changing the way British people live their lives. Searching for information on people, places, products and services using a mobile device influences decisions on who to meet, where to go, what to do and what to buy.

Mobility is a cultural revolution, an unstoppable wave of change. People have come to expect this way of interacting with the world around them to get more done in their day. Equally, they expect to be able to do more with mobile devices at work.

This report explores what British businesses understand by the notion of *mobility*, what they have done so far to respond to this new movement and how British workers view the part mobility plays in their working day, compared to the place it holds in their personal lives. Through extensive research, gathering the opinions and experiences of employees at over 1,000 large British businesses, the report uncovers insights that are intuitive yet startling, disheartening yet optimistic.

In framing this topical discussion, we offer the following points and supporting facts:

- Despite high technological readiness, Britain has been relatively slow in integrating mobile-enabled processes and practices into the fabric of large organisations.
- Adoption of smartphones among British adults is at 61 per cent, but there is a large and growing disparity between how they use these devices in their personal and professional lives.
- British businesses still see mobile technology as a cost, rather than a strategic enabler. Cost, along with perceived security risks, has led to a lost decade of under-investment in mobility. Consequently, 41 per cent of respondents say the mobile devices they use for work are old and not fast enough, and one in five UK employees use personal mobile devices at work to compensate.
- Generation Y workers, who have grown up with mobile technology, see it as an essential part of their working life. Over three quarters of Gen Y respondents to our survey want to be able to do more with their mobile devices at work. In three to five years, Gen Y executives will begin to move into leadership positions of Britain's largest blue chip companies. When they do, they will bring about a sea of change in the way those organisations operate.
- Mobility at work is dependent on how extensively employees are able to use mobile technology to complete a wider range of tasks. Currently, only 21 per cent of employees in large businesses are equipped to work away from their desks.
- A new world view of mobility is more than just technology enablement. Trust, not technology, is the defining characteristic of a business that adopts this view. Today, 60 per cent of employees say that presenteeism still exists in the workplace, and half of employees are discouraged from working away from their desks.

This report places a spotlight on an issue that is more urgent than many executives give credence to. We contend that large businesses can either begin to recognise and plan for these progressive changes now, or they can ignore the approaching 'mobility watershed' and risk disruptive change or worse. The report examines why we believe this to be the case.

Mobility is a cultural revolution, an unstoppable wave of change. People have come to expect this way of interacting with the world around them

Ignore the approaching 'mobility watershed' and risk disruptive change

Despite high technological readiness, our research suggests that British businesses have suffered a 'lost decade' of mobility

Business mobility: a new world view

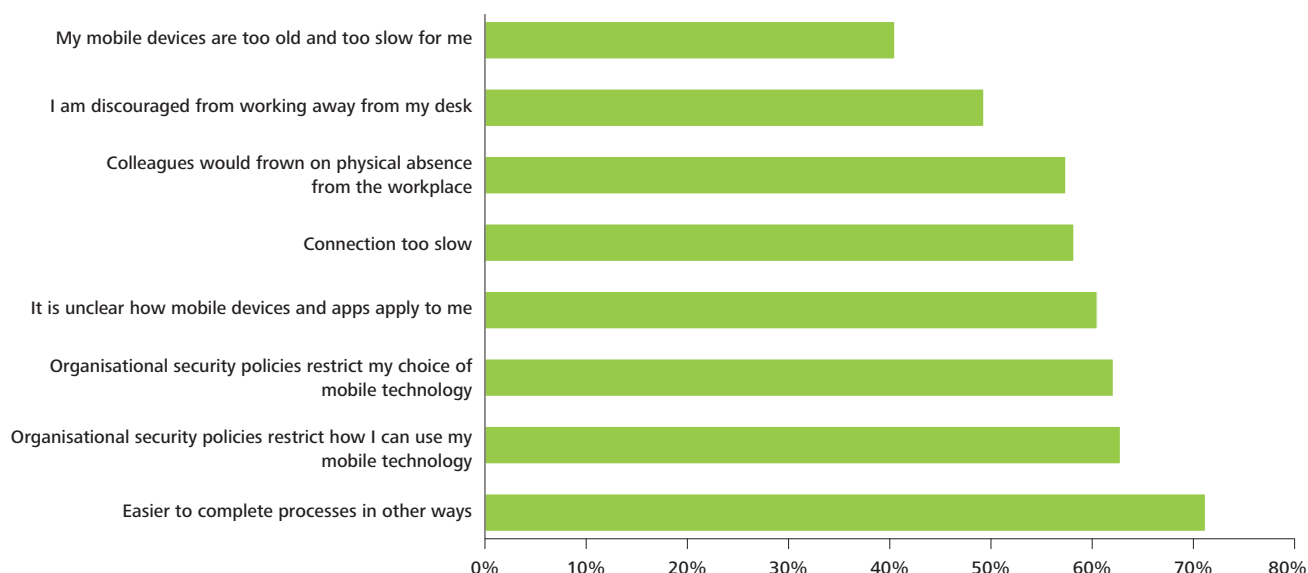
Picture the scene. A shopper walks into a department store in her local town. She sees a discounted product. Is it a good deal, she wonders. With three touches on her smartphone screen, she discovers it is and purchases the item. Research carried out in October 2012 suggests that this scenario is becoming ever more commonplace. Nearly six per cent of transactions on the high street are influenced by information accessed on mobile devices, amounting to £15 billion of revenue. By 2016, this number could be as high as £43 billion.¹

61 per cent of British adults now own a smartphone² and by 2016 as many as 80 per cent of the population will have the facility to quickly find information on products and services from a mobile device.¹ But businesses trail behind consumers in their use of mobile technology, with only 35 per cent of employees of large businesses in the UK that use a smartphone in their job.³

Despite high technological readiness, our research suggests that British businesses have suffered a 'lost decade' of mobility in which they have fallen years behind the workforce and businesses in other countries. In no industry is this more apparent than in retail. In Africa, \$500,000,000 worth of mobile transactions are processed each month.⁴ Yet in the UK, less than 1 per cent of consumers have used their mobile phone to pay for an item in store.⁵

Data from Cisco suggests that global mobile data traffic grew 70 per cent in 2012. And with a 4G smartphone generating 19 times more data on average than a non-4G connection,⁶ increased adoption of 4G technology will exponentially increase the disparity between consumers and businesses in their access to decision making information on the move.

Figure 1. Proportion of respondents who recognise the following factors as barriers to mobile working



Weighted base: All respondents (1,031)

Source: Deloitte, Opinion Matters Upwardly Mobile Survey, UK, May 2013

Businesses need to consider how they view mobility and what it means for their employees to be 'mobile'. Many small businesses in Britain are centred around mobility, yet as businesses get larger, its use declines such that only 21 per cent of employees in large organisations are equipped to work away from their desks.⁷

A redefined notion of mobility calls for cultural and organisational transformation, where companies effect operational change by integrating mobility processes and practices into daily workflow and routine tasks. Mobility in business currently focuses almost exclusively on mobile technology, rather than changes in ways of working. Consequently, British businesses have systematically introduced mobile technology without much thought to operational impact, with suitably underwhelming results. No wonder many CIOs feel they can't justify the investment.

Our research suggests that, for British businesses, the barriers to adopting mobility as a transformational pathway are more cultural than technological, more philosophical than financial. As Figure 1 shows, large organisations face significant challenges in overcoming these barriers. In this report, we examine what can be done to unlock the full potential of mobility and mobile technology.

Overcoming barriers to mobility in business

We believe that employees who have options to work in ways that make the location of work arbitrary are able to respond faster, innovate more readily and ultimately to be more productive, engaged team members. In turn, this enables businesses to interact more fluidly, enhancing their performance individually and that of UK PLC as a whole.

Generation Y workers⁸ in particular are frustrated by the absence of a 'mobility culture'. Three in every four Gen Y respondents to our survey would value greater use of mobile technology and mobility practices at work if they were made available to them.⁹

But despite this clear opportunity, our interviews show that the barriers to wider adoption are still as relevant as ever. Among those mentioned most often are the cost of technology and the threat to confidential data and intellectual property. 63 per cent of respondents agree that organisational security policies restrict their choice and use of mobile technology, and 82 per cent of large organisations that employ them have not invested in corporate apps.¹⁰ We contend that, when the value of mobility is properly understood, these concerns can pale away.

Barriers to mobility are more cultural than technological, more philosophical than financial

63 per cent agree that organisational security policies restrict use of mobile technology

“Organisations need to look further than the costs involved in becoming mobile and understand how it improves the customer journey, with the resulting impact this has on retention.”

Paul Harlington, Group Indirect Procurement Executive, TUI Travel Plc

Mobility and the Generation Y workplace

No section of society sees the benefit of mobility more clearly than Generation Y. As Jack Welch, one of the most celebrated business leaders of the 20th Century,¹¹ put it in an interview with CNBC: *"Generation Y is the most exciting group in the world. They want to do their own thing, they want to change the world. Technology's changed so fast. The internet's come, they can do it."*¹²

It is highly probable that there will be a Gen Y CEO of a FTSE company by 2016

Although Gen Y is now in the boardroom, often as advisors to executives, they have not yet ascended to leadership positions in British businesses. Given that there are already a number of Gen Y directors in the UK,¹³ those who are 33 or younger, we consider it highly probable that there will be at least one Gen Y CEO of a FTSE company before 2016, yet it could be another ten years until Gen Y is in the majority in UK boardrooms.

Even so, we are approaching a 'mobility watershed', where the future leaders will demand that organisations make use of mobility in a way that is not evident today. Gen Y's influence is growing, unquestionably so, not least because by the end of the decade they will make up half of the workforce.¹⁴

Our interviews with today's senior leaders suggest that Gen Y CEOs will bring new characteristics to the workplace, as Figure 2 suggests.

Figure 2. What does the Gen Y leader look like and what does it mean for business?

Characteristics of Generation Y leaders	Implications for business
Generation Y leaders are inclusive and collaborative decision makers who prefer to enable others to be leaders rather than dictate.	Having access to a wide network of expert collaborators will become crucial, as more views will be required for decision making. Pervasive data networks will become even more important to business operations, as data and insight will be required across many more locations and channels to support distributed decision making.
Generation Y leaders are deeply cognisant of the strengths, values and needs of individuals. They work to shape the business to suit its talent as much as they shape talent to the business.	The workplace, working practices and tools of business will become much more personal and customisable. Presenteeism, the 'cube farm' and other recent cultural hallmarks of business will cease to be relevant. The working environment will become more flexible and human.
Generation Y leaders are passionate about fast progress, innovation and entrepreneurship. They persistently challenge the status quo.	Speed of decision making will become paramount in a wider variety of businesses. Access to data and insight will become real time in order to support 'fast twitch' responses to problems and exploitation of opportunities.

56 per cent of Gen Y respondents believe increased mobile working would improve their productivity

The early evidence we have gathered from our interviews suggests that Generation Y leaders carry their experiences as employees into senior roles. They do not adapt their style to that of previous generations in order to conform to the management group they have joined.

Characteristically, Gen Y prefers casual, frequent interactions with each other, invariably using technology, so that in the business community in years to come, organisations are likely to have many more touch points with each other. Being able to support a wide range of communications technologies will thus become a significant advantage, given that 56 per cent of Gen Y respondents believe mobile working improves their productivity.¹⁵

“We need to ensure we are building in flexibility for the longer-term.”

Richard Law, IT Director, Mail Operations, Royal Mail

Generation Y are the heaviest users of mobile technology in their personal lives, using on average 6 apps per day and spending over 2 hours on their smartphone for personal use.¹⁶ The portfolio of apps and content on a mobile device is a very personal thing in a way that has not been true of a productivity tool before. Perhaps it is for this reason that 78 per cent of Gen Y respondents to our survey would value greater use of mobile technology at work.⁹

Research indicates that for Gen Y, flexibility in the workplace will become increasingly important when considering an employer.¹⁷ Tellingly, 61 per cent of employees want to work in an organisation where they can use the very latest technology.¹⁸ And given the average cost of hiring a new employee is around £5,300, enhanced employee satisfaction and, consequently, reduced attrition is a significant reason to invest in mobility.¹⁹

In return for creating this flexible working environment, businesses stand to benefit greatly from the commitment of a generation that is at worst measurably harder working²⁰ and more probably, if Jack Welch is to be believed, that will be transformational for British businesses.

Gen Y consumers use 6 apps per day and spend over 2 hours on their smartphone on average

78 per cent of Gen Y respondents would value greater use of mobile technology at work



Mobility and the British worker

Business mobility requires a complete definition. It comprises an organisation's decisions on the mobile technology it provides, its security and HR policies and the workplace culture it advocates. Together, these factors determine how effectively its employees are able to work both within and outside of designated work locations.

In light of this, our survey found that only 21 per cent of employees in British businesses are equipped to work away from their desks.⁷ This is a startling statistic for a nation that has been at the forefront of mobile technology development for thirty years.

Only 21 per cent of British employees are equipped to work away from their desks

This is in spite of the fact that mobile devices, and smartphones in particular, have reached a high penetration in the consumer market. The global installed base of smartphones is forecast to reach two billion in 2013²¹, while 61 per cent of British adults own a smartphone and 93 per cent have at least one mobile telephone.² Accordingly, 43 per cent of employees told us that their personal experience of using mobile devices has led them to demand greater mobility in the workplace.²²

Today, two types of mobility in business are apparent: the conventional and the emerging. Figure 3 shows some major differences between these two experiences. In this chapter we outline the key data points that support the case for a new wave of business-enabled mobility for British workers.

Figure 3. The diverging approaches to business mobility

Conventional mobility	Emergent mobility
A technology-centric workplace, with the PC at its centre, in which all employees use one of a small set of common tools.	A people-centric workplace in which tools and technology are enablers, not dictators, of the optimum ways of working.
A 'push' workplace in which employees have very limited choice in what tools, techniques and processes they use. The business dictates what is the best way for employees to work.	A 'pull' workplace, where employees can choose the best ways to work, the best people to collaborate with and the best tools for them.
A gadget culture in which seniority, not function or need, determines the tools employees are given or are allowed to use.	An 'everyone first' culture where work tool requirements are defined by employees and bringing personal mobile devices to work is accepted and unchallenged.

68 per cent highlighted a discrepancy between the mobile experience at home and in the workplace

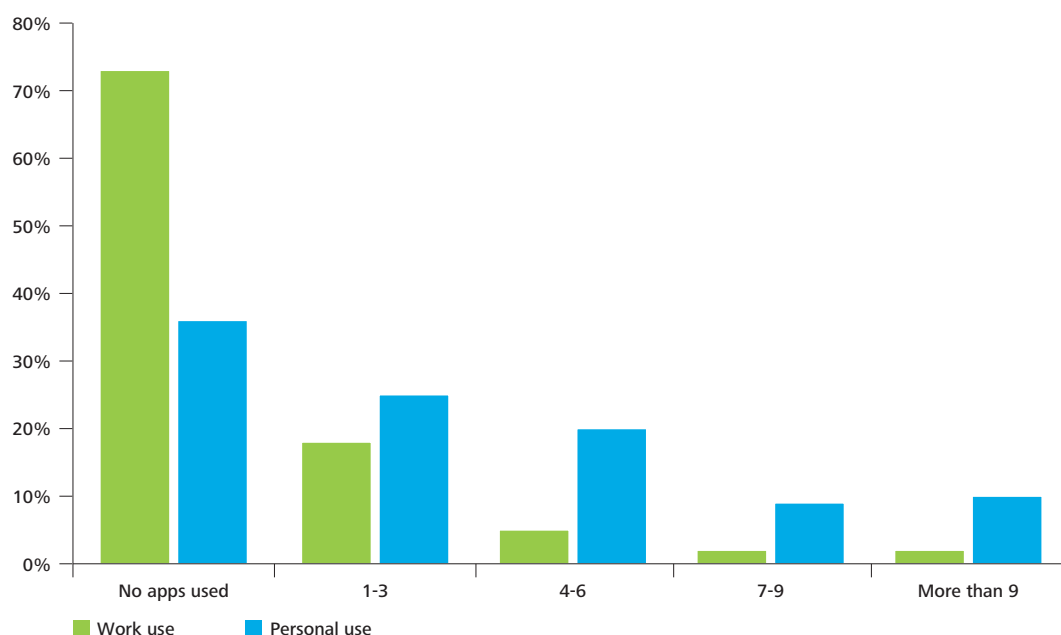
Cisco is a clear example of emergent mobility in business. Through effective companywide policies Cisco has been able to empower employees wishing to use their own mobile devices to complete work. Providing employees with this flexibility reflects a progressive approach to managing an increasingly fragmented estate of mobile devices. Response to this approach has been overwhelming. Cisco now provides support services for over 43,000 employees who have brought over 67,000 smartphones and tablets into the enterprise. This is the kind of change that all organisations can benefit from if they focus on identifying new ways of working by listening to their workforce.

Reticence by British businesses to move to a more people-centric workplace is in spite of the fact that the proliferation of billions of devices supplemented by millions of apps has created a rich and almost infinitely variable experience for consumers all over the world. Sadly, 68 per cent of respondents highlighted a clear disparity between the mobile experience at home and at work.²³

This disparity is most striking in the contrast between the variety of applications developed for consumers and those developed for use at work. As Figure 4 shows, 64 per cent of respondents use apps daily in their personal lives compared to only 27 per cent using apps for work.²⁴

Corporate mobile apps seem few in number and basic in function. Just 18 per cent of organisations provide mobile apps to employees, but only three per cent of employees use them to complete admin tasks, and just five per cent use mobile devices to access company information sources.²⁵ 45 per cent of respondents said that they would value more access to mobile apps in the workplace.²⁶

Figure 4. Average number of apps used for work and personal purposes



Weighted base: All respondents (1,031)

Source: Deloitte, Opinion Matters Upwardly Mobile Survey, UK, May 2013

Organisations that have successfully tapped the potential of corporate apps have realised tangible business benefits. UNITE, the UK's leading operator of purpose built student accommodation, introduced an app for their facilities maintenance team, allowing them to view and update information about maintenance jobs. The app increased the number of completed jobs by up to 30 per cent.²⁷

Tellingly, a third of employees can imagine better ways of working using mobile technology in their everyday jobs, but are not being given the opportunity.²⁸ Concerns over the cost of provision, which can be alleviated partly through bring-your-own-device, and over security remain barriers to capitalising on this opportunity.

“Organisations need to understand their end-users from the start for mobility strategies to work: everyone is an individual, with individual needs that need to be understood – by role, age, location for example.”

Steve Reynolds, Managing Director, TBS Mobility Ltd

*45 per cent
complain that
mobile technology
obliges them
to work during
personal time*

“Businesses need to be careful to manage work expectations when giving people an ‘always on’ device. We need to foster a culture where people feel comfortable saying: ‘sorry, I’m not working right now.’”

Andy Harrower, Head of Broadcast Licensing, PRS for Music

Our research shows that employees continue to explore the possibilities presented by mobile technology to pack more into their working day. Nearly half of respondents have completed work on mobile devices while in meetings. More interestingly, 17 per cent work on a mobile device while queuing, 8 per cent work from the beach, and nine respondents even did work while on honeymoon.²⁹

There are, however, potential downsides to ‘always on’ connectivity. Although the majority of employees agree that mobile technology enables them to improve work-life balance, 45 per cent complain that it impacts their personal lives by obliging them to bring work home.³⁰ This is compounded by evidence of a widely prevalent culture of ‘presenteeism’ in British organisations. Worryingly, 60 per cent of respondents told us that this was a characteristic of their working environment.³¹

*60 per cent of
respondents say
‘presenteeism’
characterises their
company’s work
culture*

Whether allowed to or not, many employees are meeting their mobility needs by using personal devices. 19 per cent use a personal smartphone at work, almost as many people as those that are supplied one by their employer.³² Those organisations that are not committed to mobility are simply ignoring the fact it is already happening and are letting slip an opportunity to make use of personal mobile devices that employees bring into the workplace.

Whether businesses grasp these opportunities or not, employee expectations for mobility will only grow in future as consumers become more and more sophisticated users. Half of smartphone owners still use their device to read emails or browse the internet.³³ But when they follow early adopters and begin to use their devices for a wider set of tasks, the pressure on British businesses to provide a similar experience during working hours will intensify.



Learning from the lost decade of mobility

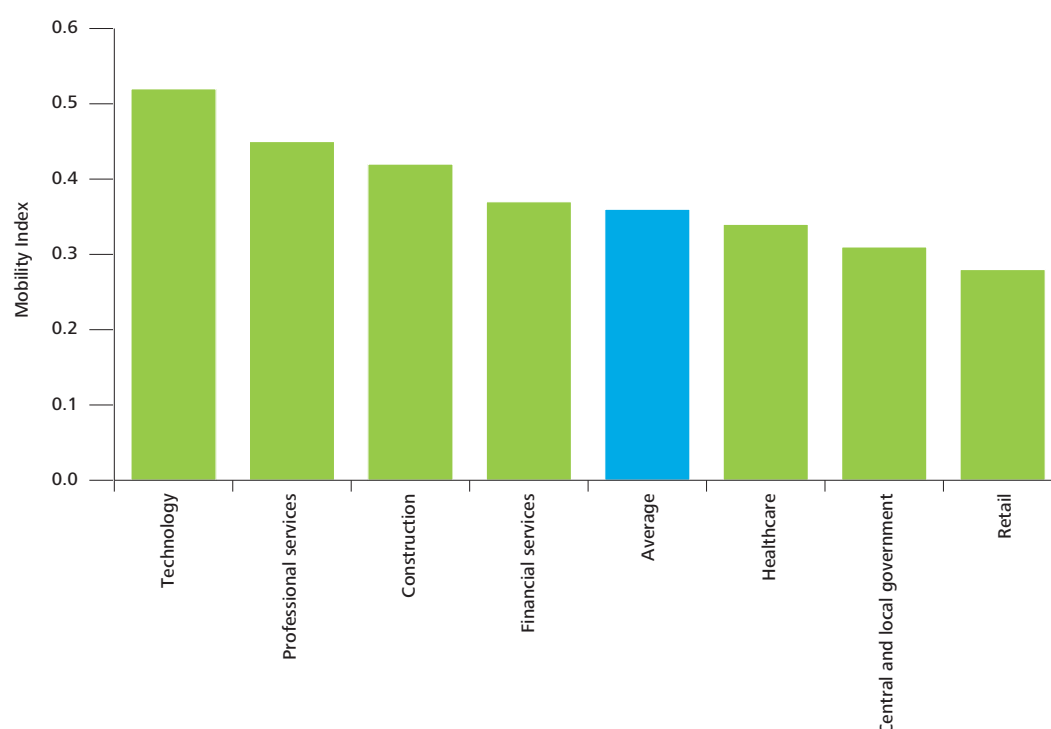
Our survey clearly shows that British employees of all roles and seniority want the rich, engaging and life enhancing benefits of mobility that they experience in their personal lives to be widely available in their working lives.

In addressing this call for change, we have completed an evaluation of how well British private and public sector organisations are responding to this weight of opinion. Our *mobility maturity index* assesses the readiness of British business to effect operational change by integrating mobile-enabled processes and practices into daily workflow and routine tasks. We have formulated the index in line with the responses of our employee panel, against four dimensions:

- **Mobility strategy:** how well the organisation uses mobility as an enabler of its corporate goals
- **Mobile processes:** how much time employees spend completing tasks in a mobile way and how mobility enables maximum utilisation of their time
- **Mobile technology:** the appropriateness and sophistication of the technology, software and connectivity that organisations make available to their employees
- **Mobility culture:** how supportive the organisational culture is towards mobile working practices both in and out of the fixed office

A score of 1 on the index would represent an employee who faces no barriers, perceived or actual, in choosing the most effective method and location to carry out their work. Therefore it is an ideal of complete locational freedom for an employee to customise their working style. Our research suggests that large organisations would gain additional operational advantages by achieving an index score of 0.6 – 0.7. The optimum point in relation to this benchmark would then be determined by organisation-specific factors.

Figure 5. Deloitte mobility maturity index industry ranking



No industry sector in the UK ranks above 0.55 on the Deloitte mobility maturity index

Source: Deloitte, Opinion Matters Upwardly Mobile Survey, UK, May 2013

41 per cent of employees say corporate mobile devices are too old and too slow

The mobility challenge facing British industry

Figure 5 shows how seven major sectors of the British economy perform against this index. What is apparent is that British workers remain for the most part chained to their desks. Even our most mobile sectors – professional services, technology and construction – are no more than average in each dimension. On this basis, we conclude that the decade since 3G mobile broadband services launched has largely been a lost opportunity for British businesses in terms of mobility.

These findings highlight how opportunities to extend and redefine mobility have been overlooked. ‘Roaming’ workers, such as nurses and retail store staff that move around within a fixed location, are obvious mobility candidates but are at present relatively underserved. Clearly, real-time access to information on products and market preferences would indisputably enhance the retail experience for consumers.

Across all sectors, 37 per cent of employees believe that mobile applications would have no benefit in their working life, reflecting an overall difficulty in understanding how mobility can better enable certain segments of the workforce.³⁴ Over half of employees said they don’t receive tailored advice or technology to help them do their jobs better on the move. Surprisingly, this view is most prevalent in retail and healthcare, industries that typically have high numbers of roaming workers.³⁵ Even many that do have a company mobile device are underserved, with 41 per cent saying that their devices are old and not fast enough.³⁶

The retail sector in particular underperforms on enabling employee mobility. At a time of continuing disruption to high street retailers by online competitors, mobility offers an opportunity to create a differentiated, personalised experience at the point of sale. The way Apple has enabled its store staff to sell products and answer questions from anywhere in the store, or Starbucks’ use of technologies like Square³⁷ to radically change the process of ordering and purchasing your morning coffee, should act as examples to British retailers seeking to enhance the customer journey.

M&S is rolling out tablets to sales assistants so they can check stock from the shop floor on request

Some British organisations have made strides forward in mobilising their point of sale operations in similar ways. Fashion retailer Oasis equips its sales assistants with tablet computers to give them real-time access to stock information.³⁸ In-store employees also use the devices to take photographs of customers wearing different garments to assist them in making a final purchasing decision.

British retail giants are also looking to capture mobile opportunities to improve the customer experience. Marks & Spencer, for example, is rolling out tablets to sales assistants so they can check stock from the shop floor on request.

In the public sector, British police forces are following their American counterparts by running trials in which patrol officers use smartphones to aggregate and overlay cloud-based data analytics of case histories, live feeds and geospatial data to pinpoint crime spots in response to new cases.³⁹

“The key benefit of mobility to management is convenience. With smartphones there is greater functionality and flexibility, so it makes sense to make more processes available at your fingertips. It also supports instant decision making.”

Mark Sandham, SVP Organizational Effectiveness & HR Operations, Thomson Reuters

In healthcare, clinicians at the Birmingham and Solihull Mental Health NHS Foundation Trust are using smartphones with digital dictation applications to prepare doctors' letters immediately after patient consultations.

These examples demonstrate there is no fundamental economic or creative reason why all British businesses could not follow these mobility leaders. We believe large organisations need to introduce a planned and progressive mobility strategy now, rather than risk disruptive change within a decade when new leadership forces this change.

Future prospects for business mobility redefined

The UK scores high on technological readiness relative to other countries,⁴⁰ yet many of the most interesting applications of business mobility come from abroad. These range from apps built to quality check mobile masts in India to sales and field force optimisation in Brazil.⁴¹ Closer to home, French farmers are using machine-to-machine connected heat sensors to monitor when cows go into labour, using a mobile device.⁴²

Forecast developments in the technology landscape will continue to drive the mobility agenda, as device penetration continues to expand in the coming years.⁴³ Tablets are already beginning to proliferate among British consumers. Alongside this, the mobile app market is expected to grow at a compound annual rate of 30 per cent between 2009 and 2014.⁴⁴

Likewise, the corporate apps market is expected to increase in size. Customer relationship management apps, for instance, are forecast to reach over 1,200 different apps by 2014, while a quarter of organisations are expected to have an enterprise app store by 2017.⁴⁵

Alternative information displays such as wearable computers, virtual reality headsets and smart watches could each be the zeitgeist technology of 2014. Despite their novelty, 42 per cent of employees said they would like smart watches to be available to them for work use, while over a quarter would consider using smart glasses in the workplace.⁴⁶ Similarly, our survey respondents showed openness to exploring new mobile technologies, with a fifth acknowledging they would use a telepresence robot if presented with the opportunity.⁴⁷

There is no doubt that every one of these technologies could have a use in large organisations in the UK. Our survey showed that 39 per cent of employees thought they would be more productive at work if they could perform tasks from more convenient locations.⁴⁸ For a high-end retailer with 400 sales staff, if this percentage of the workforce increased productivity by just one per cent, the revenue uplift would be £20m annually.⁴⁹

In healthcare, clinicians are using smartphones with digital dictation applications to prepare doctors' letters to patients

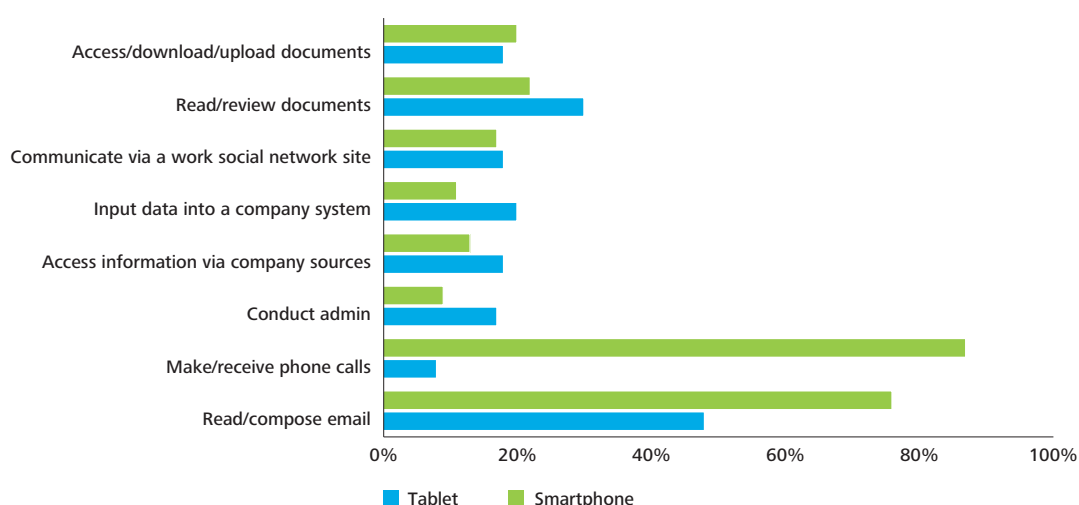
Farmers in France are using M2M connected heat sensors to monitor livestock using a mobile device

42 per cent of employees would like smart watches available for work use

Mobile-enabling work processes

In the 2000s, the original BlackBerry device changed the way employees thought about email, but today being mobile should be more than having access to email, contacts and web browsing on a mobile device. While mobile enablement is not conducive to every work process,⁵⁰ organisations should challenge themselves to identify opportunities to allow employees to complete a wider range of tasks on mobile devices. As Figure 6 shows, the large majority of British employees still use mobile devices predominantly for email.

Figure 6. Of those that use a mobile device for work purposes, what tasks do they use them to complete?



Weighted base: All respondents that use the device for work purposes (Smartphone: 363; Tablet: 143)
Source: Deloitte, Opinion Matters Upwardly Mobile Survey, UK, May 2013

When deciding which processes to enable on mobile devices, organisations should begin with those that routinely preoccupy employees. Examples would be submitting expenses, timesheets or workflow requests. Small, incremental changes are specific, measurable and collectively impact productivity. Figure 7 sets out six steps that organisations can consider when mobile-enabling.

Figure 7. Be smart when mobile-enabling work processes⁵¹

Six steps to mobile enabling work processes:

1. Evaluate and prioritise which departmental groups would yield high productivity gains
2. Define processes in a granular way to understand how they can best be mobile-enabled
3. Select processes according to the greatest achievable improvement in functionality
4. Develop mobile apps for the operating systems most used by each departmental group
5. During the design phase, aim for a user experience that is intuitive and requires little training or effort to use
6. Consider the best use of device functionality to enhance usefulness (e.g. camera, geo-tagging, near field communications, Bluetooth)

Whether through providing simple workflow tools on mobile devices or more complex technologies, such as Google Glass as a replacement for bar code scanners, CRM systems linked to face recognition cameras, offer-creation algorithms in high street fashion, or editable key performance indicator dashboards for senior executives, the opportunities for mobility to enhance many operational processes across the organisation are clear. The crucial question is why so much value is being left on the table.

Unlocking a generation of mobility gains

Our interviews reveal that the leaders and employees of British businesses see a new work environment emerging. They see a human-centric environment built on flexible working practices that encourage a diversity of working styles. That this change of perception will take hold and proliferate is in no doubt. All that remains is the rate at which this change will take place.

“Enabling mobile working is about taking an employee-centric approach. To do this effectively, decision makers need to stand in front of people and look into the whites of their eyes.”

IT Infrastructure Manager, Tier 1 security provider

Until now, business has understood mobility to mean the functional enhancement of discrete processes through the use of mobile technology. This leads to a disparate and inconsistent experience of mobility across the organisation, with some groups being well served without consideration necessarily being given to whether mobile technology is being appropriately applied or not, or whether other departmental processes should take priority.

This behaviour opposes the self-discovery and experimentation that characterises the personal mobile experiences of most employees. Without a culture that supports mobility across all job functions, productivity and innovation are stifled and the organisation treads water.

If properly applied and managed, mobility can be a significant accelerator for the cultural shift from conventional organisational structure to the more free-flowing environment called for by Generation Y.

By changing their world view, organisations can begin to break down the barriers that currently prevent the adoption of a redefined mobility. In social terms, the changes being brought about by the proliferation of mobile devices are analogous to the early days of the internet, when the full extent of its impact was not foreseen or fully understood.

Fundamentally, what appears to be lacking in British businesses is trust in the people they employ to do what they're employed to do. If they can overcome the tendency towards presenteeism and give their employees licence to decide the best ways to meet their responsibilities and accomplish the tasks entrusted to them, businesses will see productivity rise alongside morale.

Mobility is a significant accelerator for the cultural shift from conventional organisational structure to a free-flowing work environment

What appears to be lacking in British businesses is trust in the people they employ to do what they're employed to do

“At Cisco we believe that work is a thing you do and not a place you go. As such, the decision to mobilise business processes should be driven by business and user requirements. Organisations need to understand the major processes their employees do and subsequently the business benefits from enabling them on mobile devices”.

Brett Belding, Senior IT Manager, Cisco Systems

Assessing mobility maturity in business

There are many places to begin the journey depending on departmental and individual responsibilities, and priorities of the business. Figure 8 presents a mobility maturity self-assessment that senior executives can use to decide where to start.

If you're a CEO or CFO, it's a case of setting a vision for mobility in a way that enables the strategic goals of the organisation, rather than focus on technology procurement exclusively from a cost point of view. For COOs and HR Directors, mobility is a crucial productivity enhancer and change enabler, particularly for younger employees. For CIOs and CTOs, the challenge is to change the discussion around mobility from being one focused on technology to one of culture and transformation, in a language that is understood by all in the organisation.

The self-assessment is designed as a starting point in addressing the respective challenges facing these executives, outlining the most common according to our research findings. It highlights that a redefined notion of mobility is not the exclusive responsibility of the CIO. It will take the collective will of the senior leadership team to work through this ten-point guide to formulate a transformational mobility strategy. The five first steps outlined in Figure 9 would follow this initial assessment.

Figure 8. Mobile maturity self-assessment

CEO, CFO		
1	What is your vision for a mobile organisation?	Senior executives should begin by challenging themselves to come up with a target state vision for mobility. Future-gazing about the role mobility can play encourages the formulation of a mobility strategy based around driving organisational value.
2	How does the mobility vision support delivery of corporate objectives?	The purpose of mobility is to deliver against organisational goals, be it delivering market-leading services by getting closer to customers, or getting the most from a busy workforce by maximising time spent conducting value-additive tasks. Understanding the alignment between mobility and organisational strategy helps to articulate the mobility strategy.
3	Is mobility understood by the leadership as an organisational enabler?	Mobility requires investment and in many cases a shift in organisational culture to a new way of working. It will be an uphill challenge to improve the level of mobility without executive leaders that understand mobility and buy-in to its strategic significance.
CIO, CTO		
4	Can you accommodate a range of mobile devices, are these devices fully enabled as enterprise tools with relevant data, applications and connectivity?	Technology enablers are crucial to mobility, and key to success is providing a range of devices, apps and connectivity that can meet the varying user-cases across an organisation.
5	Do security policies/concerns restrict the mobile devices that you allow employees to use and what you allow them to access on mobile devices?	Security remains a key concern for organisations in all industry sectors, however the threat must be put in context. Organisations need security policies that focus on data security, not device, and so can still support mobile ways of working.

COO, HR Director		
6	Have work processes been designed around the mobility opportunity?	Mature mobile organisations have considered what can be made possible by mobility and designed work processes around the opportunity. In the field this has meant minimising the number of trips workers must make back to the office; and in retail it has meant re-designing the customer's in-store experience with staff.
7	Do you provide mobility training, support and incentivisation?	Mobility is in part an organic process that relies on empowering employees with choice to work in the most appropriate way for them. At the same time, the organisation should support and steer mobility to ensure the opportunity is maximised. Proper training, support and incentivisation stand at the heart of technological and cultural readiness.
8	How do you measure the level of mobility and its benefits?	Organisations that put in place and measure key performance indicators of mobility stand to deliver incremental improvements to work processes and ensure maximum delivery against corporate goals.

HR Director		
9	Have you drafted HR policy to steer and support mobile working practices?	Organisational culture is a crucial bedrock of mobility, and HR policy is the clearest statement that can be made of an organisation's attitude to mobile ways of working.
10	Does management across the organisation understand and support greater mobility?	Management stand at a critical junction between executive leadership and the wider organisation, and so play an important role in transferring executive buy-in for mobility across the rest of the organisation.



More than 66 per cent say their employer does not assist them in usefully applying mobility to their jobs

Five first steps to begin the journey to new world mobility

Mobility is a message that must permeate all corners of the organisation and be championed by its leaders.

We encourage all managers to ask their employees how they'd like to use their mobile devices at work.

Today, more than two-thirds of companies do not assist their workforce in understanding how the latest tools and technologies can be usefully applied to their jobs.⁵²

Having completed the self-assessment, the five first steps shown in Figure 9 set out a series of logical actions to begin the journey to a redefined notion of business mobility. Seeing mobility as a corporate strategy enabler rather than a technology procurement decision would be a positive step to cultural change.

Adapting corporate policies and technology provision to accommodate the use of personal mobile devices at work allows employees to customise their working environment, providing a baseline of capability and education within the organisation.

Nominating a mobility champion, whose role it is to evaluate and drive uses of mobile technology across the organisation, encourages a mind set in which the organisation asks first what it can do to better enable their employees and then addresses how to make this happen. Through this lens, barriers such as security become practical challenges to be overcome and not inhibitors of action.

Acting on more targeted efforts to mobilise operations should begin with a more granular view of business processes. Micro tasking processes enables quicker, cheaper and more targeted mobility solutions to be developed and avoids over-engineering. Requirements can be identified for different segments of the workforce as defined by level of mobility, grade or business unit. Implementation should then work through practical steps including security requirements, user experience requirements, testing and support.

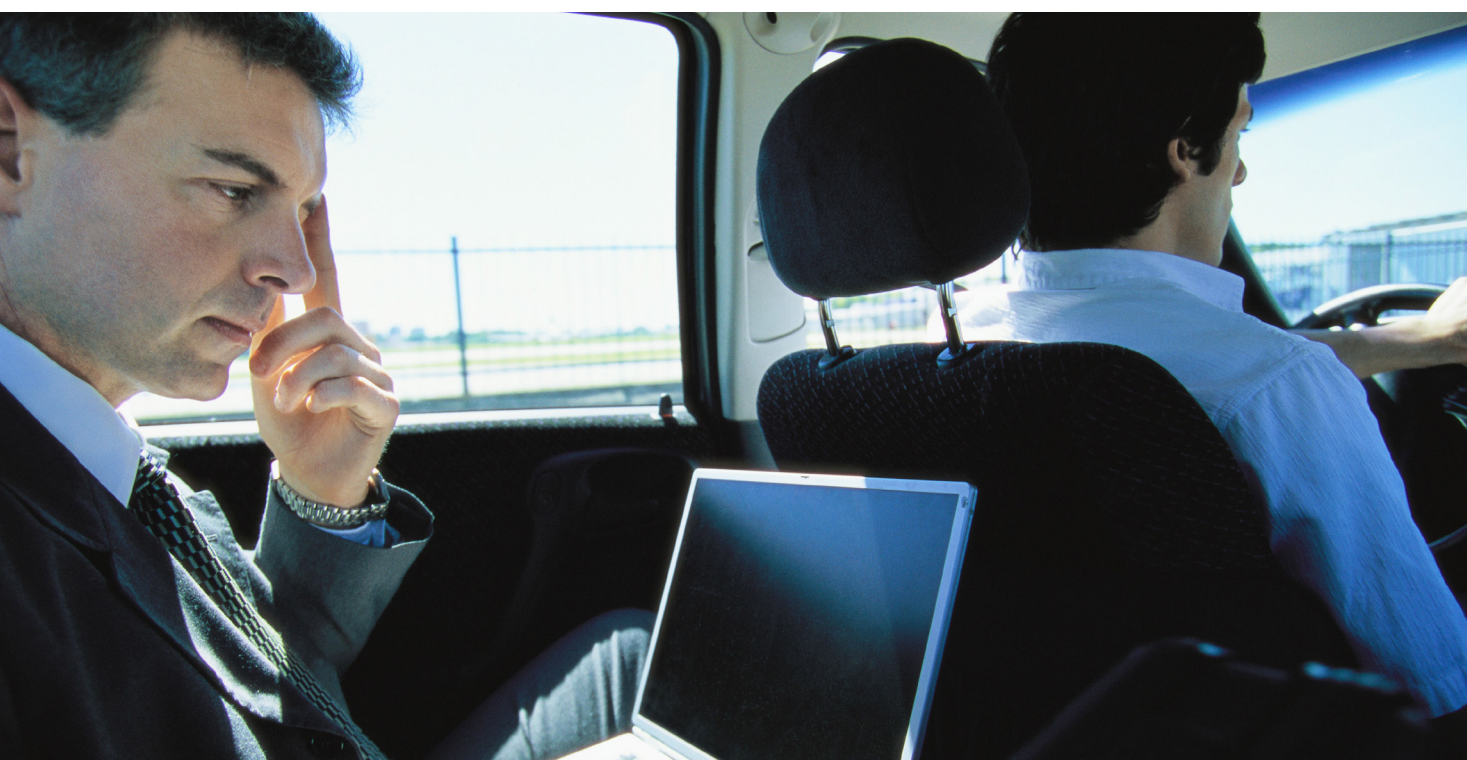


Figure 9. Five first steps to business mobility



Incremental gains can bring transformational change

By opening the organisation up to mobility in this way, and creating an environment of accountability and trust among individuals, you will have begun a journey that will bring your organisation closer to those dynamic, fast growing start-up businesses that compete so well in the market.

As it happens, incremental gains have been very important to Britain in the recent past. During the London Olympic Games, British Cycling's Head of Marginal Gains, Matt Parker,⁵³ instituted a campaign of small improvements to improve performance in the margins. These were small things, such as having athletes wash their hands consistently and cleaning dust off the wheels of the bikes between races to enhance grip off the line. On the track the British Cycling team won seven of the ten gold medals available.⁵⁴

Marginal gains, it seems, are the secret for powering Britain to success in international competition. And this could equally be true of British businesses once they embrace new world mobility.

About the research

Our research sought to understand the current level of UK enterprise mobility and its importance to organisations going forward. Our research methodology was based on a survey of UK employees and interviews with senior industry figures.

The survey was carried out by Opinion Matters, an independent research firm during May 2013, using an online methodology with 1,038 respondents. All respondents worked for organisations with more than 1,000 FTEs and we applied minimum requirements for the number of respondents in seven selected industries to understand mobile maturity. These industries and the number of respondents in each were:

- Central and local government (105)
- Construction (100)
- Financial services (108)
- Healthcare (105)
- Professional services (100)
- Retail (103)
- Technology (100)
- Other industries (317)

Where references to UK employees or overall survey respondents are made in the report we have weighted the industry respondents according to the relative size of that industry as a proportion of the UK workforce (based on Office of National Statistics Data, May 2013). We expect a slight bias from respondents given that they reflect only those in larger organisations (respondents worked in organisations of 1000+ FTEs). There may also be a bias given that research was based on an online panel reflecting a relatively technologically-savvy respondent base (albeit one third of respondents were not 'early adopters').⁵⁵

We also ran an interview programme with over 20 senior industry leaders, which included (but not limited to):

- Neil Binnie, Head of IT Infrastructure, Kier Ltd
- Steve Reynolds, Managing Director, TBS Mobility Ltd
- Julian Burnett, Head of IT Architecture, John Lewis Partnership
- Daryl Wilkinson, Head of Group Digital Development, Nationwide Building Society
- Mark Sandham, SVP Organizational Effectiveness & HR Operations, Thomson Reuters
- Richard Law, IT Director, Mail Operations, Royal Mail
- Luisa Childs-Brown, Head of Mobile Strategy and Programmes, Royal Mail
- Stewart Marshall, Enterprise Architect, Oxfam GB
- Peter Ransom, CIO, Oxfam
- Derek Winskill, IT Director, Hanson
- Andy Harrower, Head of Broadcast Licensing, PRS for Music
- Nick Grant, Strategy Director, Cancer Research UK
- Ian Ross, Group Head of Audit and Assurance, Morgan Sindall Group Plc
- Monica Parker, Head of Workplace Consultancy, Morgan Lovell
- Paul Harlington, Group Indirect Procurement Executive, TUI Travel Plc
- Andrew Perry, Programme Director, BP Lubricants
- Karen McSweeney, Telecommunications General Manager, NHS Greater Glasgow & Clyde
- Shakil Patel, Head of information, Communication and Technology, Birmingham and Solihull Mental Health NHS Foundation Trust

Notes

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2. Source: Deloitte, Mobile Consumer Survey 2013
3. Proportion of respondents reporting that they use a smartphone for work purposes. For the purposes of this report 'large' organisations are defined as those with more than 1,000 FTEs. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
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6. Source: Cisco, Cisco Visual Networking Index: Global Mobile Data Traffic Forecast Update 2012-2017, February 2013. See: http://www.cisco.com/en/US/solutions/collateral/ns341/ns525/ns537/ns705/ns827/white_paper_c11-520862.html
7. 21 per cent of respondents described themselves as being mobile, able to work from multiple locations, or able to work from home. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
8. For the purposes of this report respondents are classified as Gen Y if they answered being aged between 16 and 33. 'Generation Y' is typically used to describe those born between the early 1980s and early 2000s. Source: Wikipedia, Generation Y, 2013. See: https://en.wikipedia.org/wiki/Generation_Y
9. Of those respondents aged 16-33 78 per cent agreed with the statement 'I would value greater ability to use mobile technologies to support me at work'. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 207 UK respondents, May 2013
10. 63 per cent of respondents agreed on net that organisational security policy restricts how they can use their mobile technologies while 82 per cent of respondents answered that their employer doesn't provide them with mobile applications. Source: Deloitte, Opinion Upwardly Mobile Britain Survey, weighted base 1,031 UK respondents, May 2013
11. Source: Business Insider, The best CEOs of the past 20 years, 8 July 2011. See: <http://www.businessinsider.com/best-ceos-past-30-years-2011-7?op=1>
12. Source: CNBC, I am American business. See: <http://www.cnbc.com/id/100000780>
13. There is currently one Gen Y member that sits on a board of a FTSE 350 company. There are 10-12 figures that are Gen Y that sit at the level below boardroom at FTSE 350 companies. Source: Korn Ferry International, 2013. There are also a Gen Y executives at Aim-listed and other organisations. For example see: <http://realbusiness.co.uk/article/17896-business-must-see-young-people-as-the-solution-not-the-problem>
14. Source: CNN, 'Generation Y' set to transform office life, 21 August 2012. See: <http://edition.cnn.com/2012/08/20/business/generation-y-global-office-culture>
15. Of those respondents aged 16-33 56 per cent recognised that increased mobile working would be beneficial to them. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 207 UK respondents, May 2013
16. Of those respondents with smartphones, average time spent using a smartphone for personal use and average number of apps used for personal use each day. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 747 UK respondents, May 2013
17. Source: The Information Daily, Flexible working patterns could attract graduates into business, 17 December 2012. See: <http://www.theinformationdaily.com/2012/12/17/flexible-working-patterns-could-attract-graduates-into-business>
18. 61 per cent of respondents agreed with the statement 'I want to work in an organisation where I can use the latest mobile technologies'. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
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20. Source: Deloitte, Generation Y: Changing with the times, 2011. See: http://www.deloitte.com/assets/Dcom-Ireland/Local%20Assets/Documents/Consulting/IE_Con_Generation_Y_Report_0311_final.pdf
21. 'Smartphone' is defined as any device perceived by consumers as being a smartphone. Source: Deloitte, Technology, Media & Telecommunications Predictions, 2013. See: <http://www.deloitte.com/view/enGX/global/industries/technology-media-telecommunications/tmt-predictions-2013/index.htm>
22. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
23. 68 per cent of respondents agreed with the statement 'In my personal life my experience with mobile technologies is better than in my work life'. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
24. Number of apps used during an average working day. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
25. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
26. 45 per cent of respondents agreed that they would value more mobile applications to help them do their job. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
27. Source: Mubaloo, UNITE: UNITE Maintenance App, 30 July 2013. See: <http://mubaloo.com/clients/unite>
28. 34 per cent of respondents answered yes to the question 'Based on your experiences using mobile technologies in your personal life, can you imagine better ways of completing your work with the same technologies'. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
29. Proportion of respondents that stated they had conducted work including reading email and making calls from the following locations. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
30. 45 per cent of respondents agreed with the statement 'Mobile technologies disrupt my personal life by bringing my work home with me'. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013

31. 60 per cent of respondents agreed with the statement 'My organisation has a culture of presenteeism (e.g. a need to show your boss that you are working by physically being in the office)'. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
32. 19 per cent of respondents reported using a personal smartphone that they paid for to complete work. 17 per cent of respondents reported using a smartphone given to them by their employer to complete work. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
33. Source: Deloitte, Media Consumer Survey 2013: Love in a cold climate, 2013. See: http://www.deloitte.com/view/en_GB/uk/industries/tmt/media-industry/media-consumer-survey-2013/
34. 37 per cent of respondents replied that they do not think mobile apps would be beneficial to them. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
35. Roaming workers are defined as those employees spending 4 hours or more moving around within a work location during the course of an average working day. Just over 180 respondents identified themselves as roaming workers with over 30% of these working in the retail industry. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
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43. Source: Deloitte, Technology, Media & Telecommunications Predictions, 2013. See: <http://www.deloitte.com/view/enGX/global/industries/technology-media-telecommunications/tmt-predictions-2013/index.htm>
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Source: Gartner, Gartner Says Number of Mobile CRM Apps Downloadable on App Stores to Grow to Over 1,200 by 2014, 11 April 2013. See: <http://www.gartner.com/newsroom/id/2421015>
46. Proportion of employees that would use smart watches and smart glasses in the workplace if provided by their employer. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
47. 21 per cent of respondents showed a willingness to use telepresence robots to carry out work remotely if given the opportunity. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
48. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
49. This example is based on a retailer with annual in-store transactions of over 6 million, an average transaction value of £100 and an in-store sales force of over 400. Source: Deloitte analysis
50. Although PCs, tablets and smartphones all have processors, memory, storage, connectivity and user interfaces, each form factor has a unique mix of these attributes that makes it better suited to certain tasks. For example due to larger screens, full- or mid-sized keyboards and mice or trackpads PCs are generally preferred for content creation tasks. Source: Deloitte, Technology, Media & Telecommunications Predictions, 2013. See: <http://www.deloitte.com/view/enGX/global/industries/technology-media-telecommunications/tmt-predictions-2013/index.htm>
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52. Only 30 per cent of respondents agreed that their organisation helps them to understand how mobile tools and technologies can support them at work. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013
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54. Source: BBC Sport, Medals in Cycling – Track, 13 August 2012. See : <http://www.bbc.co.uk/sport/olympics/2012/medals/sports/cycling-track>
55. 33 per cent of respondents acknowledged they 'only replace technology products when they go wrong or are broken' or 'sometimes buy new technology products but only when I really like them'. Source: Deloitte, Opinion Matters Upwardly Mobile Survey, weighted base 1,031 UK respondents, May 2013

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