Nemertes Research
PilotHouse Midmarket Mobility Summary Report

Mobile Device Management

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Introduction

The Nemertes Research Mobility PilotHouse study includes input from 501 IT professionals along with Nemertes’ analysis of vendors’ strategies, roadmaps, and financial viability. Combined, this analysis aims to help IT executives make purchasing decisions when evaluating Mobile Device Management (MDM), Mobile Application Management (MAM), Mobile Application Development Suite (MADS), Wireless LAN (WLAN), and Mobile Operating Systems (OS).

The goal of the PilotHouse program is to help IT executives effectively evaluate potential vendors and service providers, with in-depth analysis and feedback from their peers that helps them:

- Understand how IT professionals view their MDM, MAM, MADS, WLAN, and mobile OS tools and providers.
- Recognize how IT professionals rank their vendors’ technology, value, customer service, and trusted advisor skills for each of these categories.
- Determine the importance of those rankings.
- Identify which providers meet their customers’ expectations in important areas.
- Understand how IT executives rate their Value-Added Reseller (VAR) and the importance of those ratings.
- Know each vendor’s strategy and roadmap.

Nemertes also evaluated vendor loyalty, buying patterns, and pervasiveness for each technology. This year’s research includes the following reports:

- PilotHouse Mobility Summary Report (Enterprise)
  - Mobile Device Management
  - Mobile Application Management
  - Mobile Application Development Suite
  - Wireless LAN
  - Mobile OS
- PilotHouse Mobility Summary Report (Midmarket)
  - Mobile Device Management
  - Mobile Application Management
  - Mobile Application Development Suite
  - Wireless LAN
  - Mobile OS
Summary of Overall Mobility Findings
Nemertes evaluated vendor ratings, customer loyalty, and buying patterns and strategies, for all rated technologies, as well as mobile platform pervasiveness for mobile devices.

Buying Patterns
Organizations are more likely to buy all rated technologies, MDM (58%), MAM (60%), MADS (61%), WLAN (57%), and mobile OS (60%) directly through a vendor; a smaller percentage purchase through a VAR. An even a smaller percentage used a mixed purchasing strategy, buying both directly from the vendor, as well as through VARs.

Customer Loyalty Barometer
Nemertes publishes a barometer for each technology area and each market segment. For the entire Mobility PilotHouse program this year, we found intriguing results. Regardless of size and technology, roughly 75% of all organizations are committed to their current vendor for the next two years.

Across all technologies, Figure 8 shows how PilotHouse research participants answered the customer loyalty question. Among those who cannot say definitively that they are staying with their current provider, 11.9% of midmarkets say they are leaving for sure, compared to only 7.7% of enterprises. Bottom line: There is slightly more uncertainty in the enterprise yet enterprises have a better chance of retaining a higher percentage of customers by swinging just a few of the “Unsures” to “Yes.”

<table>
<thead>
<tr>
<th>Are you staying with your current vendor for the next two years?</th>
<th>Midmarket</th>
<th>Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>75.2%</td>
<td>78.7%</td>
</tr>
<tr>
<td>No</td>
<td>11.9%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Unsure</td>
<td>12.9%</td>
<td>13.6%</td>
</tr>
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</table>

Figure 1: Customer Loyalty, All Mobility Technologies

IT leaders show the highest vendor loyalty to their WLAN vendors with 79% planning to stay with their WLAN vendor for the next two years. The most movement between vendors is with MADS, which received the lowest percentage of those stating they planned to stay with their social vendor for the next two years (70%) and had highest percentage of those stating they had definitive plans to leave their vendor (16%). The remainder is unsure of their future plans.
Midmarket Lighthouse Performance

Provider performance varies from technology to technology. The highest possible score is 100, though it is extremely difficult to achieve based on Nemertes' algorithm, which takes into account weightings, ratings, and consistency in provider performance based on standard deviation of the ratings. As evidenced by the overall top midmarket scores (below), many of the vendors ended with very close scores.

- IBM: MADS 85.3
- HP: WLAN 83.6
- Cisco: WLAN 83.2
- AirWatch: MAM 82.5
- Microsoft: MADS 82.1

Scorecard Metrics

Across all technology categories and segments, one thing becomes apparent: trusted advisor skills take a backseat to all other rating categories. Technology, value, and customer service all score within a less-than-one-tenth-point window. Trusted advisor skills fall roughly four-tenths behind. A special note must be made for mobile OS. Since most organizations do not have any interaction with mobile OS vendors, technology and value are more highly weighted, while customer service and trusted advisor skills are scaled back.

Each provider in the PilotHouse program has a scorecard that displays its overall performance. Below, we provide the overall means using our same algorithm across all vendors in each technology segment. Keep in mind the research participants rated vendors on the first four bars only (two in the case of mobile OS); Nemertes rating is the last bar (strategy and roadmap).

**MDM**: Ratings from midmarket and enterprise are similar, with trusted advisor skills the highest by a narrow margin. Research participants point to value as the lowest overall score in the group across both midmarkets and enterprises.
**MAM**: Technology shows to be the highest rated area within MAM in both midmarket and enterprise, with a slightly higher score coming from the enterprise. Both markets look at value as the lowest, showing that, as a whole, ITEs look at MAM as an expensive tool.

**MADS**: When it comes to mobile application development tools, midmarkets and enterprises differ in their opinion. Enterprises rate very evenly across all sections, with trusted advisor skills leading by a narrow margin. On the midmarket side, more variation exists, with technology being the highest rated, and value coming in the lowest.
**WLAN:** Compared to other technologies covered, WLAN scores higher, overall, across the board. Both markets align very nicely. Both midmarket and enterprise rated the technology itself highest, with value as lowest.

**Mobile OS:** Ratings are nearly identical, as a whole in term of mobile OS scores. Since most organizations do not have any interactions with the different OS vendors, technology and value make up a much larger aspect of the total scores. Both midmarkets and enterprises give technology a two-point edge over value.
Figure 6: Overall Mobile OS Scores
Mobile Device Management

Overview

Mobile Device Management (MDM) is germane to the hardware and Operating System (OS) of mobile endpoints such as smartphones and tablets. This includes the enrollment of employee- or company-owned devices with internal management such as LDAP. For security, MDM includes functions such as wiping and locking devices, restricting/enabling device-based features such as the camera or GPS, VPN tunnels for secure access to data repositories, establishing, deploying, and enforcing mobile security policies, and enforcing OS and/or app updates.

Most midmarket customers buy their MDM solution directly from the vendor; 16% buy their MDM through a mix of both the vendor and a VAR. (Please see Figure 7.) Most midmarket MDM consumers also plan to stay with their current MDM vendor for the next two years. (Please see Figure 8.)

Figure 7: MDM Purchasing Methods

Figure 8: MDM Vendor Loyalty
Nemertes received enough participant ratings to individually evaluate eight vendors for mobile device management in the midmarket space (in order of performance): AirWatch, Cisco, Samsung, Citrix, IBM, Microsoft, BlackBerry, and Good. IT professionals rated the vendors on several dimensions of technology, customer service, value, and ability to serve as a trusted advisor. Nemertes also considered and analyzed each vendor’s strategy and financial viability.

Figure 9 shows each vendor’s total score, where they rank against one another, and where they fall on the Nemertes’ Lighthouse. Below the Lighthouse, we provide practical recommendations for what these rankings mean. Figure 10 reflects plans among IT professionals to stay with their vendor or leave within the next two years. Those closer to the left (red) have a relatively lower customer loyalty compared to other vendors, meaning a higher percentage of customers plan to leave within the next two years. Those farther to the right (green) have a relatively higher customer loyalty, meaning a lower percentage of customers plan to leave within the next two years.
These providers should be part of every evaluation of this technology, based on detailed feedback from IT decision-makers and Nemertes’ analysis.

These providers may be part of an analysis after factoring in your key requirements, existing architecture, and future planning. Requires deeper analysis of gaps, alignment with vendor, and explicit feedback from IT decision-makers already using these vendors.

Exercise caution with these providers. They did not score comparatively well with their customers, and/or Nemertes analysis may indicate concerns with strategy, roadmap, or financial viability.

Figure 9: Midmarket MDM Lighthouse

Nemertes asked IT decision-makers if they planned to stay with their provider for the next two years. We then calculated the mean percentage of companies planning to stay with their provider, and compared vendors against one another and against the mean.

**High:** These providers have a relatively high percentage of organizations planning to stay with them for two years, and a low percentage planning to leave or are unsure.

**Average:** These providers align with the mean and have an average percentage of customers planning to stay and an average percentage planning to leave or are unsure.

**Low:** These providers have a relatively low percentage of customers planning to stay, and a high percentage planning to leave.

Figure 10: Midmarket MDM Loyalty Barometer
AirWatch is the MDM Top Provider for midmarket in this year’s PilotHouse study.

IT professionals rank AirWatch consistently across all metrics, with technology being the highest scored. Cisco, Citrix, IBM, Microsoft, and Samsung also scored highest in technology. Customer service leads the way for Good, while trusted advisor skills is the top-rated area for BlackBerry.

Figure 10 shows where each vendor falls on Nemertes’ customer loyalty barometer. All vendors besides BlackBerry and Citrix have above average customer loyalty. Cisco has a sizeable lead when it comes to loyalty.

**MDM Scorecards**

As stated, Nemertes asked PilotHouse research participants a series of questions about their primary WLAN provider that boiled up to rankings in the following areas:

- **Technology**: Includes product features, reliability, interoperability, management capabilities, and technology roadmap.
- **Value**: Includes clarity of pricing structure, licensing flexibility, actual cost, and value (ie, bang for the buck).
- **Customer Service**: Covers pre- and post-sales responsiveness, break-fix responsiveness, accuracy and timeliness of invoices.
- **Trusted Advisor Skills**: Includes provider’s ability to be a trusted advisor, rating expertise, credibility, enlightenment, character, and contact management.

Nemertes analysts also evaluated vendors’ strategy and financial viability. To calculate the total for each bar in the overall scorecard, Nemertes evaluates individual questions that make up that overall metric (ie, technology, value, customer service, etc.), as well as calculations for the overall standard deviation and weighting (measuring how important that metric is to IT professionals).
AirWatch

AirWatch Scorecard vs. Average: MDM

- Technology: AirWatch 82.4 vs. Average 79.9
- Value: AirWatch 80.4 vs. Average 77.3
- Customer Service: AirWatch 81.8 vs. Average 78.2
- Trusted Advisor Skills: AirWatch 79.3 vs. Average 78.5
- Strategy/Roadmap: AirWatch 66.3 vs. Average 91.0

Figure 10: MDM, AirWatch Scorecard vs. Average

- IT professionals who use AirWatch score the vendor relatively consistently across all metrics, with technology being its highest, and trusted advisor skills the lowest. AirWatch’s high strategy score, rated by Nemertes, is driven by breadth of EMM offerings, and deployment architecture flexibility.
- Customers rate AirWatch’s management capabilities and security features as the leading factors to its technology score. Customers rate contact management and post-sales responsiveness lower.
- AirWatch scores well across the board, scoring near the top in every metric, while leading the way in customer service.
- When asked the most important factor when looking for MDM solutions, AirWatch customers point to value as the most important. While AirWatch scores well in value, compared to competitors, it is not its highest scoring area.
- Customer loyalty toward AirWatch is relatively high compared to the industry. Slightly less than 7% of customers plan to leave within the next two years.
Cisco

Cisco Scorecard vs. Average: MDM

- Cisco scores well in all metrics IT professionals rate, achieving top scores in three of the four areas. Nemertes strategy score was comparatively low, most notably due to lack of deployment options, and shallow depth of mobility partners.
- Technology is Cisco’s highest scoring area, followed closely by value, both of which lead all other vendors.
- To make up its technology score, Cisco does well in interoperability with different solutions, as well as security features.
- Cisco customers point to value as the most important contributing factor in rating their MDM vendor. Cisco scores well in value, aligning fairly well with customer priorities. Interestingly, its customers note technology is least important, which is Cisco’s highest scoring area.
- Customer loyalty among research participants using Cisco is extremely high relative to its competitors. Nearly 90% of customers have no plans of leaving Cisco within the next two years.
**Samsung**

![Samsung Scorecard vs. Average: MDM](image)

Figure 12: MDM, Samsung Scorecard vs. Average

- Samsung scores well in the metrics research participants rate, with technology coming out well ahead, the highest score among all in midmarket MDM.
- Samsung’s strategy score falls below the scores of its competitors, mainly because of its lack of device choices by being limited to only Android, and limited partner depth.
- Samsung’s customers point to the reliability and security features as two major contributing factors to its overall technology, rating them highly. Both are the highest rated of any of the MDM vendors.
- The most important metric among Samsung customers is customer service, followed by trusted advisor skills, and technology.
- Customer loyalty is high among Samsung customers, with about 7% planning on leaving within the next two years. This is one of the better ratings.
Citrix

Figure 13: MDM, Citrix Scorecard vs. Average

- Citrix scores fairly evenly among three of the four IT professional rated areas: value, customer service and trusted advisor skills. All three are within three-hundredths of a point from each other. Citrix’s strategy score is driven by its wide support of multiple types of devices, as well as the breadth of enterprise mobility offerings.
- Technology, Citrix’s highest scoring metric, is well above the other three, by nearly 2.5 points, and third overall among its competitors.
- Citrix receives a considerable boost in technology from its scores in management capabilities, security features, and technology roadmap.
- Citrix customers, overwhelmingly, point to technology as the most important factor when evaluating an MDM solution, which aligns well with its scores.
- Citrix is relatively average when it comes to customer loyalty, falling right in the middle. Slightly more than 10% of customers have plans to leave Citrix within the next two years.
Figure 14: MDM, IBM Scorecard vs. Average

- IBM scores vary in this year’s midmarket MDM Pilothouse program, ranging from the high of nearly 82 in technology, to a low 76.7 in trusted advisor skills. Nemertes’ high strategy score relies heavily the breadth and flexibility of features and functions of its MDM solution.
- Technology, IBM’s highest score, falls almost exactly in the middle of all MDM vendors, which carries throughout each of the other areas.
- Many of IBM’s MDM customers rate IBM’s management capabilities and security features favorably, scoring near the top in both categories.
- When asked what the most important aspect in selecting an MDM solution, IBM customers point to value, which is IBM’s second highest rated area and shows reasonable alignment with customer priorities.
- In terms of customer loyalty, IBM fares relatively well, with slightly more than 8% of customers planning to leave within the next two years, better than the industry average.
Microsoft

Figure 15: MDM, Microsoft Scorecard vs. Average

- Technology is Microsoft’s highest score in this year’s midmarket MDM Pilothouse. Compared to its competitors, Microsoft scores slightly above average.
- Microsoft’s strategy score from Nemertes is higher than average but not among the highest. Factors leading to the score include the shallowness of its partner network within the MDM industry and limited breadth of enterprise mobility solutions.
- Microsoft’s technology rating is bolstered by higher scores in reliability and management capabilities. Microsoft also receives high individual marks when it comes to invoicing, as part of customer service, and contact management.
- Microsoft customers point to customer service, closely followed by value as the most important factors when considering an MDM solution, which do not align with its actual performance.
- When looking at customer loyalty, Microsoft’s MDM users are more loyal than average, with slightly less than 9% expressing a desire to leave within the next two years.
**BlackBerry**

![BlackBerry Scorecard vs. Average: MDM](image)

**Figure 16: MDM, BlackBerry Scorecard vs. Average**

- BlackBerry scores relatively low in this year's midmarket MDM Pilothouse, failing to achieve higher than 76.3 in any rated category. Nemertes’ low strategy score reflects the lack of advanced security features like geofencing and session time-outs, and less flexible architecture. While BlackBerry excelled in the past in security, it has not moved forward as quickly as competitors.
- Customers note BlackBerry’s technology feature set and interoperability as major detriments to its solution, contributing to BlackBerry’s low technology score.
- BlackBerry performs significantly better in trusted advisor skills and customer service compared to its technology and value scores, yet is still behind most of its competitors.
- BlackBerry MDM customers point to customer services as the most important factor when evaluating solutions, with technology being the least important. This aligns with BlackBerry’s performance.
- Customer loyalty among BlackBerry customers is relatively low, with more than 14% already committed to switching solutions within the next two years, highest among all competitors.
Good scores evenly among each metric, including Nemertes’ strategy score. Although relatively even, the scores are well below those of its competitors, with none reaching 75.

Good’s strategy score is driven by the breadth of enterprise mobile product offerings and architecture flexibility on the high end, and smaller partner ecosystem, and lack of advanced security features on the low end.

Good scores highest in customer service and trusted advisor skills, led by invoice timeliness and accuracy in customer service, and credibility in trusted advisor skills.

When asked what the most important aspect in selecting an MDM solution, Good customers point to technology, which does not align with how Good scores. Technology comes ahead of only value in scoring.

Customer loyalty is relatively average among Good MDM customers. About 10% plan to leave within the next two years, which is average for the midmarket MDM industry.
Conclusion

From looking at the sheer number of vendors who qualified for the midmarket Pilothouse for MDM, it becomes evident the space is ripe for consolidation as dominant leaders emerge.

Between those top six, they all score very similar in terms of technology. The real differentiators lie in value and customer service. Technologically, most of the solutions achieve the same functions desired by customers, but the ones who are better with the interpersonal skills get the edge.

Overall, value is the most important metric when evaluating MDM, followed closely by technology. The main consensus is that customers want products that work well, and are inexpensive to own and operate.

In the midmarket, MDM is showing a mild amount of turnover, slightly diminishing customer loyalty. More than 10% of research respondents already plan to switch vendors within two years.
Methodology

Summary

Nemertes Research conducted a study in the spring of 2014 with 501 IT decision-makers and influencers. We asked them to identify their primary providers in the following mobility technologies:

- Mobile Device Management
- Mobile Application Management
- Mobile Application Development Suite
- Wireless LAN
- Mobile Operating Systems

We asked research participants a series of questions about their primary provider in each of the areas, as well as their Value-Added Resellers, where applicable. The questions asked participants to rate their provider’s technology, customer service, value, and trusted-advisor characteristics. We also asked participants if they planned to stay with that provider for the next two years. We included a required field for research participants to add open-ended comments about what they liked most and least about each provider.

In addition to the participant ratings, Nemertes analyzed two other areas. Analysts evaluated vendors’ strategies and roadmaps, by identifying key features, functions, and practices and then assessing their capabilities against those criteria. We also evaluated their financial viability. We see financial viability as a key concern when making a provider selection. To assess it, we relied on Standard & Poor’s long-term debt rating and other metrics; we included an alert in the analysis for any vendor S&P rated D or below.

Data Gathered from IT Professionals

For each primary provider in all technologies, we asked specific quantitative questions covering several metrics. We did not distinguish between each provider’s specific products in this research. Rather, we focused on how the provider addressed the particular technology area with any product.

First, we asked research participants to weight how important technology, customer service, value, trusted-advisor characteristics, financial viability, and strategy/roadmap are on a 1-to-10 scale, with 10 being most important.

Then, we asked them to rate each provider, also on a 1-to-10 scale, on several questions. Nemertes developed an algorithm to calculate a total score, and a per-category score, for
each of the vendors. Each category score (i.e., technology, customer service, value, and trusted-advisor characteristics) comprises the results from the sub-questions within that category (see below). We asked questions about the following:

- **Technology**
  - Features
  - Reliability
  - Interoperability with other vendor solutions
  - Management capabilities
  - Security features
  - Technology roadmap

- **Value and pricing**
  - Pricing/licensing clarity
  - Pricing/licensing flexibility
  - Actual cost of product/service
  - Value for the money spent

- **Customer service**
  - Pre-sales responsiveness
  - Post-sales responsiveness
  - Break-fix responsiveness
  - Accuracy and timeliness of invoices

- **Trusted-advisor skills:**
  - Expertise *(Possesses expertise with, experience in, training on these technologies. Understands your industry, business issues, and company.)*
  - Credibility *(Has done well for you in the past, has solid referrals, good reputation. Provides value with measurable results.)*
  - Enlightenment *(Forward-thinking; thinks of things you haven’t.)*
  - Character *(Honest, trustworthy, displays a shared value system. Says what you need to hear vs. what you may want to hear. You trust their judgment.)*
  - Contact management *(Effective both proactively and reactively. Timely response to your needs, concerns, and opportunities. Proactively reaches out with useful information; leaves you alone when not needed.)*

Separate from the ratings, we asked the research participants the following additional questions:

- Plans for staying with the vendor for the next two years (this provides us with the data for the Customer Loyalty Barometer)
- Purchasing method
VAR identification and ratings, if VAR is the selected purchasing method

- Open-ended questions asking what they like most and least about the provider
- Demographics

**Sample and Responses**
The research participants came primarily from Nemertes’ own research database; some came from a partner’s research database to expand the pool of providers covered in the ratings. We conducted stringent integrity checks, with test questions during the survey, as well as correlation analysis after the survey. We eliminated all responses that did not adhere to our integrity testing.

We required research participants to answer qualifying questions to validate

1.) They were IT decision-makers or influencers;
2.) They met the employee-size requirements;
3.) They were not from a vendor organization.

We also gathered data on the annual revenue, IT budget, industry, title, and IT culture.

We received 501 valid ratings. Of those, roughly half was midmarket companies (up to 2,500 employees), and the other half was enterprises (greater than 2,500 employees). We collect raw data on number of employees, and therefore, can conduct additional correlation analysis for clients.

To include a provider in our published findings, we required that it had a minimum of 4% of the total response segment in which they were rated (i.e., midmarket, enterprise, or both). Responses aligned fairly well with the provider’s market share.

<table>
<thead>
<tr>
<th>Technology</th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDM</td>
<td>4%</td>
<td>27%</td>
</tr>
<tr>
<td>MAM</td>
<td>4%</td>
<td>24%</td>
</tr>
<tr>
<td>MADS</td>
<td>4%</td>
<td>23%</td>
</tr>
<tr>
<td>WLAN</td>
<td>4%</td>
<td>46%</td>
</tr>
<tr>
<td>Mobile OS</td>
<td>7%</td>
<td>51%</td>
</tr>
</tbody>
</table>

*Figure 18: Range of Response, Total % of N*

As is evident by the “high” percentages in the figure above, each of the software technology areas are extremely competitive, with market share more evenly spread out. The
hardware-based technologies of WLAN and Mobile OS (each OS is limited to specific hardware), show a tendency towards a large market leader, with others following.

**Key Components of Research**

Nemertes analyzed the data and developed an algorithm to calculate a score for each provider. The total possible score is 100. To measure each provider, we combined the provider’s weightings and ratings provided by IT leaders, calculated a measure of variation in the ratings to reward those with more consistency in their ratings, and factored in Nemertes’ strategy and roadmap score. With these results, we published three quantitative results:

- **Nemertes Lighthouse Ranking**: This provides an at-a-glance look at the stack ranking of the vendors in each technology and segment, with the relative gaps between them. The lighthouse is color-coded to describe how IT decision-makers should approach each vendor based on our analysis. We also note as “Beware” in the lighthouse any company with a “D” rating or lower in S&P’s credit rating. No vendors in the mobility research received this alert. Each vendor’s total score is an average of its scorecard ratings (see next item).

- **Nemertes PilotHouse Scorecard**: This shows the average score for the vendor for each of the top-line areas rated (i.e., technology, customer service, value, trusted advisor skills, and strategy/roadmap). The highest score in each area is 100. Though we do evaluate financial viability, we only use these findings to issue warnings for companies with problematic financial performance and/or outlook.

As stated, we also asked organizations if they planned to stay with their provider for the next two years. The possible answers were yes, no, and unsure. We evaluated this data and created the following item:

- **Nemertes Customer Loyalty Barometer**: This evaluates all providers in a given technology and segment. We calculate the mean percentage of research participants who have stated that they planned to leave the provider in the next two years. We then evaluate the distance from mean for each provider. Those with fewer customers planning to leave have “high” customer loyalty, and those with more customers planning to leave have “low” customer loyalty. The remainder is “average.” Please note that it is possible to score high on the Lighthouse and low on the Barometer, and vice versa. This is possible because a research participant could rate the provider high across the board, but because of a variety of possible factors it will not be using that provider moving forward. Likewise, a research participant
could rate a provider low across the board, but because of contractual obligations, have no intention of leaving the provider in the next two years.

Finally, Nemertes subject-matter experts evaluated key areas of strategy and roadmap for each vendor, and gathered information to populate tables included in a separate research project, called the "Key Trends" analysis.

**Research Deliverables and Dissemination**

The PilotHouse program includes several research deliverables, described in this section. We provide the following reports and output as part of the PilotHouse program:

1. **Mobility Overview**: Two reports that summarize the overall findings for all technology areas—one report describing the midmarket and another for the enterprise.

2. **Technology Summary reports**: 10 reports; one for each technology in each segment.

3. **Webcast**: Summarizing the findings for our enterprise and midmarket clients, as well as research participants.

4. **Collection of charts and data about each provider**: Two data repositories (one for midmarket, one for enterprise) that include all Lighthouses, Scorecards, and Barometers, as well as per-vendor drill-downs of the detailed questions, VAR ratings, customer expectations vs. reality, etc.

5. **Social media**: Blogs, Tweets, and posts on Facebook and LinkedIn describing the findings.

6. **Competitive analysis**: Those purchasing access to the track may receive detailed correlation analysis for their own services and up to two competitors, and high-level data for all competitors. Nemertes analysts present these findings, along with detailed recommendations, in an on-site session.

7. **Technology evaluation and selection**: Scorecards and detailed analysis customized for enterprise and midmarket end-user IT clients to assist in technology purchasing decisions.

**Research Recipients**

Nemertes’ goal is to make the research available to a wide audience so IT leaders can use the information from their peers and Nemertes to help them make the best technology and provider decisions. Figure 16 details who receives the PilotHouse research deliverables.
**Research Participants: Demographics**

We gathered demographic data on all participants. The research study was U.S.-focused, though many participants were from U.S.-based multinationals. Most of the individuals who provided ratings were high-level IT decision-makers: 30.5% were C-level, 25.3% were director-level, and the balance were either VPs, managers, or a combination of “other” titles. We did not seek specific titles, but only required that each participant was an IT decision-maker or influencer. These are the titles that resulted within those confines.

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<table>
<thead>
<tr>
<th>Research Deliverable</th>
<th>Available to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>PilotHouse UC track clients (vendors)</td>
<td>✔ All Nemertes enterprise, midmarket clients</td>
</tr>
<tr>
<td>All Nemertes enterprise, midmarket clients</td>
<td>✔ PilotHouse research participants</td>
</tr>
<tr>
<td>PilotHouse research participants</td>
<td>✔ Any vendor rated</td>
</tr>
<tr>
<td>Mobility research overview</td>
<td>✔</td>
</tr>
<tr>
<td>Technology summary reports</td>
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</tr>
<tr>
<td>Webcast</td>
<td>✔</td>
</tr>
<tr>
<td>Collection of charts</td>
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<td>Social media</td>
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<tr>
<td>Competitive analysis</td>
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<tr>
<td>Technology evaluation and selection</td>
<td>✔ (Optional. Includes detailed charts per vendor)</td>
</tr>
<tr>
<td></td>
<td>✔ (Optional. Includes detailed charts per vendor)</td>
</tr>
</tbody>
</table>

Figure 19: Who Receives PilotHouse Research?
The study included a range of industries, with the top being manufacturing, healthcare, higher education, financial services, retail, and professional services. Figure 55 shows the breakdown of industries included in the study. A combination of several industries is in the “other” category.
As stated, the size of organizations is evenly split between midmarket (2,500 and fewer employees) and enterprise (greater than 2,500 employees) organizations. By revenue, nearly 50% have revenues with more than $100 million. The largest grouping of research participants (23.5%) has $100 million to $500 million in revenue, and the smallest (2%) has less than $10 to $20 billion in revenue.
The research also included a look at IT culture. We define IT culture as:

- **Conservative**: We view IT as a cost center/utility function and deploy new technology conservatively, typically only if it can be demonstrated to save money.
- **Moderate**: We view IT as a cost center/utility function and deploy most technologies conservatively, but make exceptions for individual technologies that offer clear business value.
- **Aggressive**: We see IT as a strategic investment and deploy promising new technologies promptly to maintain parity with our industry/other companies.
- **Bleeding-Edge**: We see IT as a strategic investment and competitive differentiator and deploy promising new technologies as quickly as possible to gain a sustainable competitive advantage over other companies.

The majority of research participants are moderate, followed by aggressive, conservative, and bleeding edge.
Figure 23: IT Culture

**Plans for Future Projects**
Nemertes plans to update this research annually and also may provide results by vertical industry.