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## How iPads Enter The Workforce

*An Empowered Report: Tablets Open Doors To New Mobile Scenarios*

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### EXECUTIVE SUMMARY

iPad has exploded onto the scene. Who could have imagined that a tablet (a category introduced in 2001) would capture the imagination of employees and IT alike? But it did, and it's kicked off an arms race for smart mobile devices. Every day, a new tablet appears: Cisco Cius, Google Chrome OS tablet, Dell Streak, Samsung Galaxy Tab, RIM PlayBook, HP "PalmPad," the list goes on. These post-PC devices will find a place in your company, but where? This short report introduces a simple framework to guide content and collaboration professionals through employee-fueled tablet scenarios and IT-led tablet projects.

### TABLETS WILL REACH 59 MILLION US CONSUMERS BY 2015

No need to mince words: Apple's iPad has redefined what tablets can do. With an all-day battery life, a seductive form factor and user experience, and a rapidly expanding portfolio of business applications (although missing Microsoft Office), iPad has captivated consumers and employees alike. And it's pushed the device industry to innovate like crazy. Every day a device giant announces a new tablet. Already:

- **Apple has sold more than 3 million iPads, on track to sell millions more by year-end.** As of June 2010, Apple had sold more than 3 million iPads. Forrester has already revised its tablet forecast upward to 13 million units globally by the end of 2010 on a path to 59 million tablets in the hands of US consumers by 2015.<sup>1</sup>
- **Thirty percent of IT shops are piloting or planning tablet apps.** And a further 43% of firms in North America and Europe are interested in tablets.<sup>2</sup> Only one in four firms has no current tablet plans. The motivation is simple: Don't get caught flatfooted when employees bring in iPads.
- **Employees and IT pros watch as device giants announce or ship their tablets.** Every device maker has shipped, announced, or whispered its plans to build a tablet. Mobile phone makers, PC builders, and some new entrants like Google will compete for your tablet attention.

## DISPLACE, REPLACE, NEW PLACE: A SIMPLE WAY TO CATALOG TABLET OPPORTUNITIES

Tablets are entering the workforce in very different ways than smartphones did 10 years ago. BlackBerrys came in as IT-provisioned devices for on-call operations staff and road warriors. Tablets and other smart mobile devices are brought in by eager employees and are opening doors to many new business scenarios, often in places where no computer works today. Forrester has spoken with dozens of companies about their specific business scenarios for tablets. These scenarios fall into three categories that we call displace, replace, new place (see Figure 1):

- **“Displace,” as in use a tablet instead of a laptop.** This is the classic empowered scenario where an employee wants to use a personal iPad instead of a laptop for an overnight business trip or while in a staff meeting. Your employees will exercise their desire to use the best tool for the job following in the path of iPhones.<sup>3</sup>

Every company we talk with is figuring out how to support this today. And unlike in the iPhone scramble, many IT pros are testing and supporting iPads already. For example, Kraft Foods is replicating its success with iPhones and iPods by giving executives iPads. Kraft’s strategy with iPhones was simple: support employee-provisioned iPhones and hope for good things. It must have worked. Kraft built the hot iFood iPhone application to connect with consumers long before its competitors did. It’s hoping for a similar spate of innovation with tablets.

- **“Replace,” as in use a tablet instead of a clipboard.** This scenario gets much more interesting and potentially valuable, particularly as some smart business or IT employee starts thinking about how to improve a business activity. Today, many business activities are still paper-driven, usually because they take place far from an office, often in small meeting situations such as insurance underwriting, pharmaceutical sales, or construction site reviews. Tablets could be much better. In one example, startup Vela Systems uses new construction industry standards to make the entire project plan available to a construction manager on-site in an iPad application. Every giant construction company on the planet would like to solve that problem.

In another example, a large pharmaceutical company is thinking of issuing tablets and home PCs to its home-based sales teams. The logic is simple: you have three minutes to pitch a doctor on a new drug or device in a hallway between patient visits. Wouldn’t it be nice to show her a video and a few slides on a tablet? Much better than heaving potentially out-of-date collateral at her.

- **“New place,” as in use a tablet in places where we use nothing today.** This is potentially the most interesting and valuable category of all. Computers have found their way into many nontraditional places: classrooms, conference rooms, couches, and coffee shops, for example. The same was true with smartphones: soccer fields, New York streets, and any waiting line. Tablets will also find their way into locations and situations where we have only people today. A small nonprofit Forrester spoke with just collected \$1,400 from running race registrants and corporate sponsors from the middle of a field in Massachusetts using a 3G-enabled iPad and a simple Web form. Anywhere access now means anywhere philanthropy too.

It's early going for this kind of radical thinking, so we expect to see dozens more of these as entrepreneurial entropy kicks in. But we want to share three quick examples. Lloyd's of London is piloting iPads with brokers so they can write business directly from the field. A hospital in Connecticut is figuring how to give iPads to doctors in patient settings for patient records, drug conflict databases, and health information to share with patients. Japanese solutions vendor Gotanda Denshi is working with Japanese retailers to use iPads on retail floors for custom orders. The early results indicate higher sales productivity and average order size.

**Figure 1** Tablets Expand The Use Of Connected Devices In Novel Ways

Category	Description	Examples
Displace	Use a tablet instead of a laptop or netbook.	<ul style="list-style-type: none"> <li>• Use a tablet in a traditional selling situation (more intimate than a laptop for small group presentations).</li> <li>• Use a tablet in a conference room (no screen to block your face).</li> <li>• Use a tablet on an overnight trip and leave the laptop at home (lighter weight, get more done in coach).</li> </ul>
Replace	Use a tablet instead of a clipboard or other paper.	<ul style="list-style-type: none"> <li>• Use a tablet on a construction site or manufacturing plant to see drawings and schedules and log actions.</li> <li>• Use a tablet in the field to collect information and determine costs while on site with a customer.</li> </ul>
New place	Use tablets where previously only a person was involved.	<ul style="list-style-type: none"> <li>• Use a tablet on a retail floor to customize a product or service, place an order, or educate a prospect.</li> <li>• Use a tablet in a hospital to access patient records and drug interaction database.</li> </ul>

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Source: Forrester Research, Inc.

### SOME NOVEL WAYS TO MAKE THE BUSINESS CASE FOR TABLETS

You don't have to make a business case if employees are willing to buy their own and support themselves. But for everything else, you might find yourself facing some novel situations where the return on investment takes you into new territory. Here are three novel business cases we've heard about already:

1. **Field sales organization swaps laptops for home desktops and tablets.** In one situation, a sales manager wants to forego the Windows 7 laptop refresh for iPads for in-person pitches and home PCs for everything else. The hardware cost for a basic desktop and iPad is less than for a high-end laptop.
2. **Pharma sales organization uses tablets instead of printed drug literature.** The FDA requires pharma companies to destroy literature if any change must be made in the material. This can waste a \$100,000 print run for a single drug. It adds up. If sales teams can use tablets with always-current material, that can fund the hardware purchase and the application integration.

- 3. Retailer uses tablets to take custom orders from the floor.** This is a more traditional productivity gain argument. If we can increase sales productivity by even 1%, that would fund tablets and applications many times over, particularly if the ordering application is already available in a browser as so many are.

## DEALING WITH THE CHALLENGES

Tablets will bring many new benefits, but they also bring new problems that IT must deal with. The security of post-PC devices is probably not the worst of your concerns, however.<sup>4</sup> It will be controlled chaos, but the modern architectures of these devices reduce the “attack surface” for bad guys. Theft or loss is probably your biggest challenge. We’ve cataloged some blockers as well as benefits and new technologies that content and collaboration professionals need to deal with (see Figure 2). And of course you need to partner with your colleagues in other IT roles to solve issues like:

- **Educating employees on where tablets work and where they don’t.** No, Microsoft Office won’t work on tablets today. That’s a dealbreaker for many “displace laptop” scenarios. You’ll still need laptops until further notice for most employees, making tablets a third device to support.
- **Prioritizing the applications that get built first.** Start with basic applications that every employee needs — email, collaboration, productivity, and communications — and then layer on dedicated applications depending on the scenario.
- **Dealing with the platform proliferation that threatens to clog the market with choices.** iOS, Android, QNX, Windows Phone, WebOS, Symbian, Chrome OS, oh my! Consumers will get confused. So will you. Focus on iOS and Android today and target browsers with HTML5 first. This is an issue to work on with your application development and delivery colleagues.
- **Overhauling the support and reimbursement model for employee-provisioned devices.** This issue is the same as for smartphones. Hopefully you’ve got a process in place to build the model for supporting employee-provisioned smartphones. The same process will work with tablets.<sup>5</sup> This is an issue to tackle with your infrastructure and operations brethren.
- **Amping up the device management and security models.** Tablets use the same security models as smartphones. The tools are advancing rapidly, but each platform has its quirks. RIM and Apple have the best security today, although Android 2.2 Froyo shows the steady improvements in that platform. Work with your security and operations teams on this issue.<sup>6</sup>

**Figure 2** Tablet Benefits, Blockers, And Supporting Technologies

Category	Benefits	Blockers	Supporting technologies
Displace laptops	<ul style="list-style-type: none"> <li>• Lightweight</li> <li>• Handheld</li> <li>• Unobtrusive</li> <li>• Intimate</li> </ul>	<ul style="list-style-type: none"> <li>• No Microsoft Office</li> <li>• No mouse support</li> <li>• On-device storage</li> </ul>	<ul style="list-style-type: none"> <li>• Citrix Receiver</li> <li>• Browsers and HTML5</li> <li>• Cloud services</li> </ul>
Replace clipboards	<ul style="list-style-type: none"> <li>• Familiar experience</li> <li>• Connected</li> <li>• Application-driven</li> </ul>	<ul style="list-style-type: none"> <li>• Durability</li> <li>• Theft</li> <li>• Missing applications</li> </ul>	Plus . . . <ul style="list-style-type: none"> <li>• Third-party cases</li> <li>• 4G networks</li> </ul>
New place applications	<ul style="list-style-type: none"> <li>• Immediate answers</li> <li>• Highly interactive</li> <li>• Intuitive experiences</li> </ul>	<ul style="list-style-type: none"> <li>• Employee acceptance</li> <li>• Back-end integration</li> </ul>	Plus . . . <ul style="list-style-type: none"> <li>• New applications</li> </ul>

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Source: Forrester Research, Inc.

## ENDNOTES

- <sup>1</sup> eReaders face a formidable challenge from the rise of tablet PCs. The iPad is already desired by more people than any single eReader, something we expect to only increase with time. See the July 21, 2010, "[How eReaders Will Fare In A Tablet PC World](#)" report.
- <sup>2</sup> Source: Forrsights Hardware Survey, Q3 2010.
- <sup>3</sup> Forrester's book *Empowered* answers the question, "How do I manage my company in an era of empowered customers?" The answer is to empower employees to solve the problems of empowered customers. And that means opening up support for employee-provisioned devices and applications where possible. Source: Josh Bernoff and Ted Schadler, *Empowered: Unleash Your Employees, Energize Your Customers, Transform Your Business*, Harvard Business Review Press, 2010 (<http://www.forrester.com/empowered>).
- <sup>4</sup> The number of post-PC devices, such as tablets, eReaders, and Internet-capable mobile phones, will eclipse PC devices, such as desktops, laptops, and netbooks. The surge in post-PC devices that do less but do it in more places means that security and risk professionals no longer have the authority to veto the use of mobile devices or limit use to a specific brand. See the October 14, 2010, "[Security In The Post-PC Era: Controlled Chaos](#)" report.
- <sup>5</sup> Enterprises are increasingly scrutinizing corporate mobile usage and device and services spending, which continues to grow rapidly. Sourcing groups at most large firms say they lack good visibility on usage patterns and spending due to decentralized or localized wireless procurement practices. This makes it tough to plan budgets and enforce corporate policies around who qualifies for corporate-liable (CL) mobile services. To remedy this, central IT sourcing groups need to work with central procurement to fully audit both current and past year mobile spending. See the December 3, 2009, "[Cut Mobility Costs By Classifying Users](#)" report.

- <sup>6</sup> Within the next 12 to 18 months, most IT managers worldwide will significantly alter their client computing strategies, and this will have a profound impact on smartphone adoption and management. Necessitating this change is a significant generational shift of information workers — who are an increasingly empowered group — dictating the technology used to solve business issues. See the August 26, 2010, “Market Overview: Smartphone Management” report.