The Importance of Effective Wireless Policy

Report

Industry Research from AOTMP

February 2010

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"Based on previous AOTMP research, enterprises with a formal wireless mobility governance policy spend 40% less per user on mobile voice services."

Executive Summary

The need for wireless policy has never been greater. AOTMP research indicates that wireless expenses represent 35% of total telecom spend and this figure will undoubtedly grow. Furthermore, with recent increases in the number of Smart Devices containing sensitive company-related information and the number of applications being deployed onto these devices, companies must ensure policies are in place in order to deter inappropriate behavior and avoid unintended consequences. Policy is an integral part of wireless mobility management, regardless of whether an organization institutes a corporate or employee liable management strategy.

There are many reasons for the existence of wireless policies. Some of the common drivers behind policy development include:

- Protecting intellectual property
- Reducing company liability
- Providing support to wireless users
- Preventing additional expense
- Enhancing workflow processes

The benefits of wireless connectivity in the business world are immense; they come in the form of flexibility, convenience, portability and increased productivity. The policy that governs wireless mobility management can also provide positive outcomes for the organization. For example, based on previous AOTMP research, enterprises with a formal wireless mobility governance policy spend 40% less per user on mobile voice services. In addition, policy can provide soft dollar savings in the form of improved workflow processes and reductions in help desk management time. Preventative savings are also achieved when policy dictates specific actions that are forbidden.
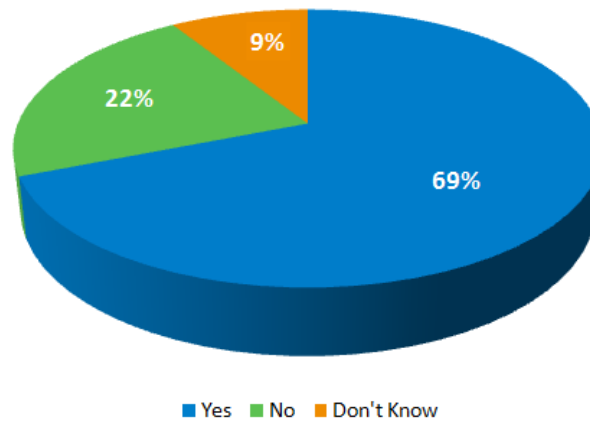
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Policy creates a set of rules and standards for users to follow and facilitates accountability. Based upon AOTMP research, 69% of enterprises have a formal wireless mobility policy in place leaving the remaining 31% vulnerable to device misuse and abuse. Furthermore, as *Figure 2* demonstrates, enterprises implementing a corporate liable management strategy were significantly more likely to adopt wireless policy in comparison to their employee liable counterparts.

"Based upon AOTMP research, 69% of enterprises have a formal wireless mobility policy in place leaving the remaining 31% vulnerable to device misuse and abuse."
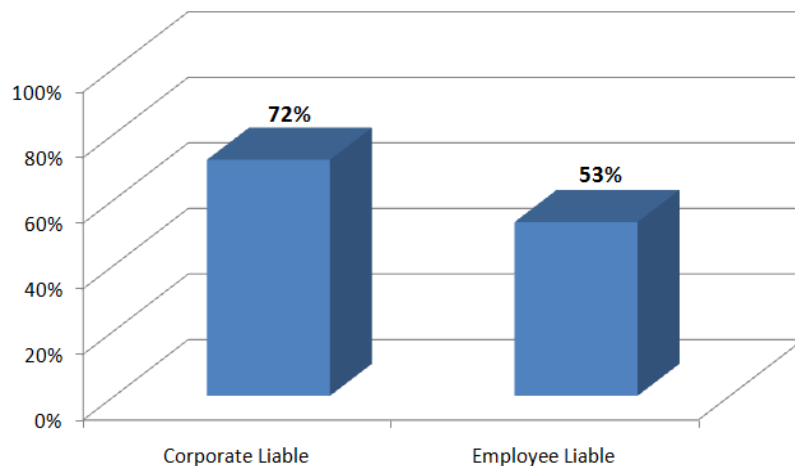
Figure 1: Wireless Policy Adoption - Overall

■ Yes   ■ No   ■ Don't Know

Source: AOTMP, February 2010

Figure 2: Wireless Policy Adoption – Corporate vs. Employee Liable Management Strategy
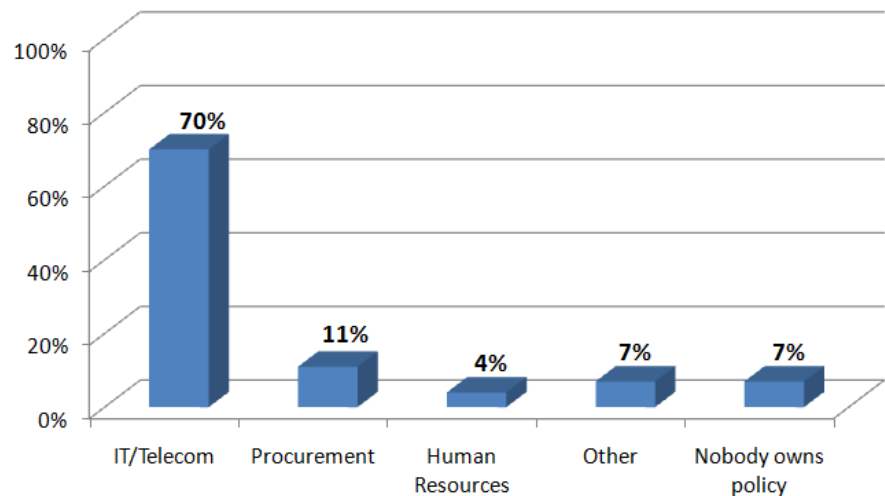

Source: AOTMP, February 2010

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Chapter One: Establishing Wireless Policy

One of the first decisions an enterprise must make when developing wireless policy is to determine who will create the initial document and then modify the elements based upon changing business needs. Based upon AOTMP research, 70% of enterprises express that the IT/Telecom department owns the creation of wireless policy for the organization. However, this process should not exclude others within the organization from providing input towards the content contained within the policy. For example, a company may decide to insert language around potential consequences in the event an employee does not return the device to the organization upon termination. Although IT and telecom managers have many responsibilities, determining the ramifications of employee behavior is not their area of expertise. This particular topic will be better addressed by a representative within the Human Resources or Legal department. Working collaboratively with other departments across the entire organization will result in the most complete and effective wireless policy.

*Figure 3: Who Creates/Modifies Policy?*

Source: AOTMP, February 2010

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Monitoring compliance of policy elements is an important aspect to ensure policy success. Oftentimes, policy is established without consideration into how on-going monitoring will take place. Based upon AOTMP research, a majority of enterprises indicate that the IT/Telecom department is responsible for this activity. In practice, however, other departments should also take responsibility of supporting policy compliance. For example, if an employee attempts to order a device that is not authorized by the company, the procurement department should have the authority to decline the request and report the incident.

Figure 4: Who Monitors Policy Compliance?
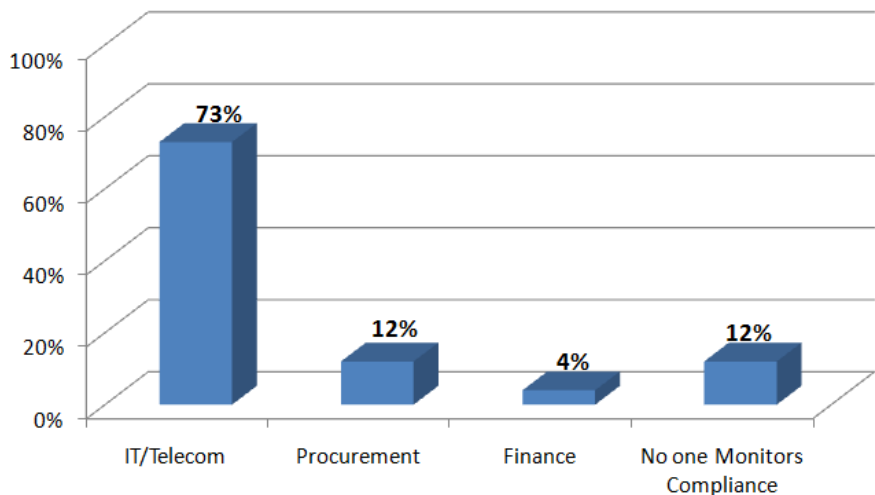
Source: AOTMP, February 2010

Elements of Wireless Policy

There are many elements which may be contained within an organization's wireless policy. Content is typically driven by the goals and objectives set forth by the enterprise, business need and other unique circumstances within the organization. Based upon data gathered by AOTMP for this study, the five most common elements within today's wireless policies include acceptable use guidelines, eligibility and approval of wireless devices, purpose and scope of policy coverage, ownership of the phone number and notification procedures in the event a device is lost or stolen.

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Figure 5: Most Common Elements within Today's Wireless Policies

Rate of Adoption	Element
88%	Acceptable Use Guidelines
88%	Eligibility/Approval of Wireless Device
88%	Purpose/Scope of Policy Coverage
75%	Ownership of Phone Number
75%	Notification Procedure for Lost/Stolen Device

Source: AOTMP, February 2010

Acceptable use guidelines provide specific direction in terms of how devices are to be used. Documenting device eligibility and approval requirements will ensure employees understand if they qualify for a device and who needs to approve the request. The purpose and scope outlines why the policy has been implemented, who the policy pertains to and what devices are covered. Documenting ownership of the phone number leaves little ambiguity as to who owns the rights to the number when employees exit the company. Providing guidance regarding who to contact when a device is lost or stolen will expedite the notification process and reduce the chances of sensitive information falling into the wrong hands.

Acceptable use guidelines provide the foundation in terms of how devices can be used. By providing these rules, enterprises help deter inappropriate behavior while alleviating help desk ticket volume. In terms of the specific areas being addressed within acceptable use guidelines today, the most frequent elements include general voice and data requirements, followed by more specific areas including SMS/Texting and personal call guidelines.

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Figure 6: Areas Addressed Under Today's Acceptable Use Guidelines
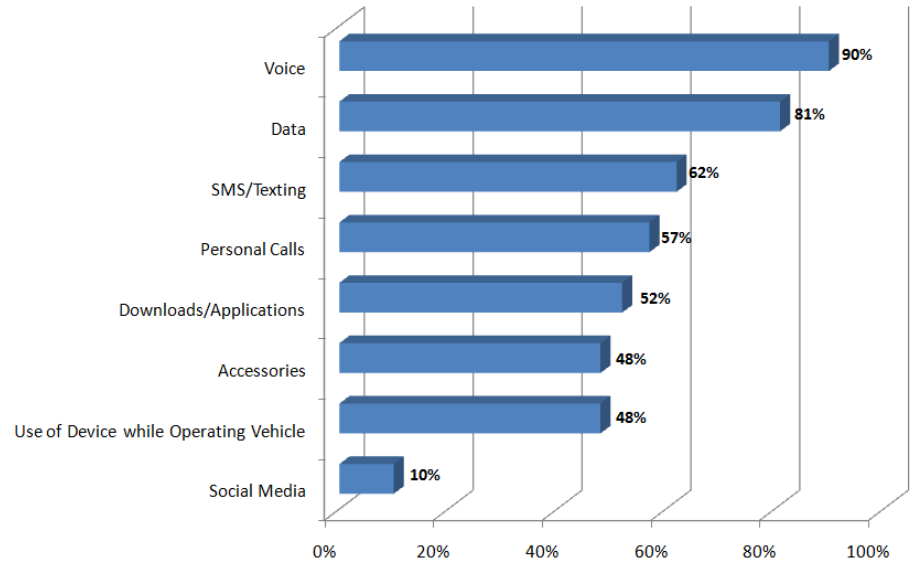
Source: AOTMP, February 2010

In terms of wireless activity, areas such as texting, personal calls, application downloads and social media are all commonplace within today's society. In fact, social media applications such as Facebook (#2), YouTube (#4) Twitter (#12) and LinkedIn (#19) rank among the top accessed websites across the globe[1]. Furthermore, as of December 2009, there were over 126,000 applications available for the iPhone[TM][2]. With these trends, determining whether to allow access to these types of applications and activities requires much consideration. Some questions that you can ask to assist in making the decision include:

- Does it have a legitimate role within the organization?
- What are the risks of allowing or prohibiting usage?
- How will the company be affected by the decision?
- How will employees be affected by the decision?

[1] *Source: Alexa 1/10*

[2] *Source: 148Apps 1/10*

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Conversely, it is as important to identify the areas which less frequently appear within company wireless policies in order to gauge where deficiencies may exist. Compared to *Figure 5* which identifies the most common elements within wireless policies today, *Figure 7* represents elements less frequently present. Based upon AOTMP research, international travel guidelines and equipment refresh cycles, followed by procedures related to reimbursements and allowances, legal responsibility in the event of device misuse and ownership of data are areas within wireless policies with less than 60% adoption today.

Figure 7: Elements within Today's Wireless Policies with Less than 60% Adoption

Rate of Adoption	Element
58%	Ownership of Data
54%	Legal Responsibility for Device Misuse
42%	Reimbursement and Allowances
29%	Equipment Refresh Cycle
29%	International Travel Guidelines

Source: AOTMP, February 2010

Although these areas appear in fewer policies, addressing these items can provide benefit. For example, without specific instructions regarding wireless device usage and international travel, it leaves the organization vulnerable to incurring excessive charges when the employee returns to the office. Inserting timeframes as to when employees are eligible for a new phone will reduce the number of requests for new devices. Finally, providing clarification as to who owns the data on the device will ensure sensitive information is not exposed.

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Policy within the enterprise must be reviewed and updated on a frequent basis in order to keep up with wireless technology and changing business needs. *Almost half* of all enterprises indicate there is no established timeframe for refreshing policy and that updates are performed as needed. This reflects a reactive approach towards policy governance and reduces the likelihood that inappropriate behavior will be curbed before it begins. A proactive approach which continuously monitors the wireless environment and business requirements is needed to sustain an effective policy.

Figure 8: Frequency of Policy Updates
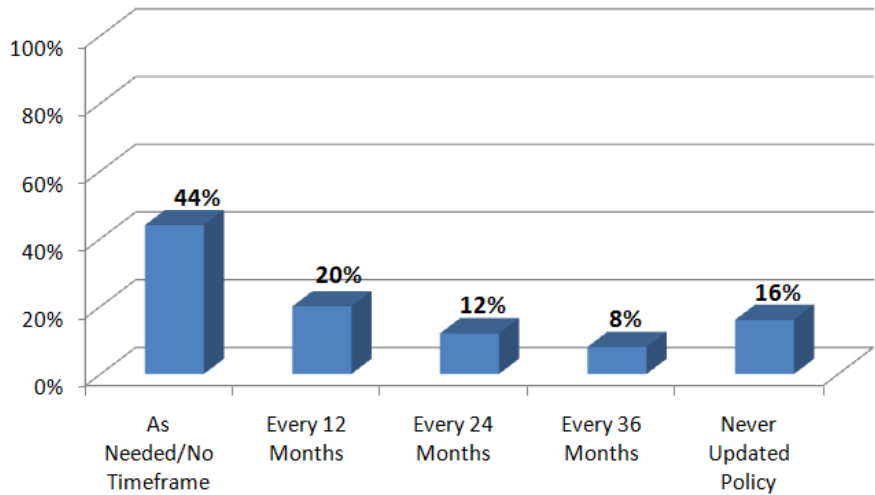
Source: AOTMP, February 2010

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Chapter Two: Challenges within Wireless Policy

Developing wireless policy certainly does not come without challenges. Based upon AOTMP research, challenges regarding wireless policy today include monitoring and enforcing wireless policies, followed by educating wireless users regarding the policy, developing policy content and gaining internal approvals for policy updates.

Figure 9: Challenges Regarding Wireless Policy Today

Degree of Challenge	Challenge
76%	Monitoring Policy Compliance
68%	Enforcement of Policies
56%	Educating Wireless Users Regarding Policy
24%	Developing Policy Content
20%	Gaining Internal Approvals for Policy Updates

Source: AOTMP, February 2010

Monitoring and Enforcing Policy

Incorporating procedures related to policy compliance can be a difficult proposition for enterprises. Ensuring that carriers are blocking anything your company deems unacceptable such as unauthorized devices, texting or application downloads can help alleviate some of the concern. Wireless Mobility Management suppliers can also automate policy compliance through the implementation of business rules within their technology. Establishing metrics, such as percentage (%) of exceptions can help evaluate the effectiveness of your policy.

Educating Wireless Users Regarding Policy

Often, policies are established without adequate notification or explanation on how they apply to the user. Certain elements of the policy may be unclear and interpreted differently from user to user, so it becomes critical that wireless users comprehend and understand the policy. Establishing periodic workshops or seminars to explain each area within the policy is an effective way to congregate employees to

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ensure policy is clearly understood. Furthermore, as part of any new hire orientation, include policy training as part of the curriculum.

Developing Policy Content/Gaining Internal Approvals

Establish a cross-functional team responsible for developing and reviewing policy content. Include representatives from areas such as IT/Telecom, Finance, Human Resources, Legal, and Procurement as well as any other areas which may offer expertise and insight into your wireless policy. This collaborative approach will also facilitate the review and approval process as all decisions should be made and agreed upon during your meetings. Once your policy is established, meet annually (at a minimum) to review and update the content.

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Chapter Three: Standards and Best Practices

AOTMP's Telecom Environment Management model is based on a framework for managing a telecom environment across seven disciplines. Our approach to telecom environment management considers the contributions and responsibilities across every discipline in order to achieve the best possible return on telecom and IT services. AOTMP has also defined 11 core management activities within Telecom Expense Management (TEM) and Wireless Mobility Management (WMM) which influence the seven disciplines of telecom environment management.
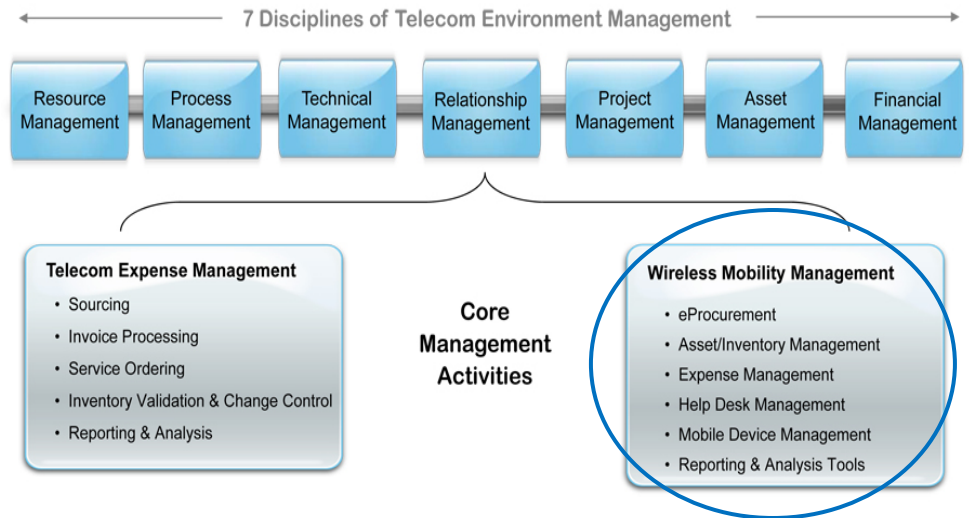
Integration of these practices into the management of your telecom environment provides the ability to drive effectiveness across operational performance, financial performance and technical performance objectives, and their contribution to overall business requirements.

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Central to AOTMP's standards and best practices is methodology that promotes informed decision making and success monitoring to achieve intended results. AOTMP outlines the following considerations when establishing a wireless mobility policy for the organization:

- Establish cross-functional team who will develop and update policy.

- Evaluate how employees in different departments and job functions currently use wireless services and mobility applications.

- Perform a cost benefit analysis for current applications and new technologies to determine which capabilities provide optimal benefits for employee productivity based on job role.
  - The cost benefit analysis should compare cost savings with productivity gains. Often the real challenge is not productivity justification; it centers on personal preferences. Corporate culture may determine the outcome.

- Determine what regions/divisions are covered.

- Identify and group the mobile workforce into categories based on job roles that best fit the tasks and functions performed.

- Business use and personal use should be clearly defined with acceptable cost deviance thresholds by dollar and percentages.
  - Evaluate potential tax implications regarding personal calls on corporate liable devices.
  - Monitor IRS position regarding taxation by visiting: http://www.irs.gov/govt/fslg/article/0,,id=167154,00.html

- The policy should define if employees can download applications, ring tones, games, and screen savers. It should also specify whether visits to social media sites are accepted.

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- If downloads are permitted, the policy should identify who pays for these items, and how they will pay for them.

- Define who owns the data on devices including those devices owned by employees that may have access to e-mail and other enterprise data.

- Ensure compliance monitoring and enforcement procedures are established

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Appendix: Research Methodology

Research Demographics

AOTMP collected benchmark data from a variety of industries to examine wireless policy strategies. The findings in this report represent benchmark data from 280 enterprise professionals across 24 different industries that had knowledge of overall wireless policy strategy within the organization.

Job Title/Function:

- Sr. Mgt/CIO/CFO/VP   6%
- Director/Manager   52%
- Staff   34%
- Other   8%

Geography:

- North America   95%
- Europe   4%
- South/Central America   1%

Annual Revenue:

- Above $1 billion   44%
- $50 million - $1 billion   36%
- Less than $50 million   20%

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About AOTMP Research

AOTMP research is supported through data collected from a variety of sources. Data points are collected through enterprise and supplier benchmarking projects, training and certification events, research surveys, frequent hot topic polls, virtual conference audience polling, live conference audience polling, and AOTMP Access benchmarking events. AOTMP's data point contributors include over 60,000 IT, telecom and business professionals, supporting domestic and international enterprises and industry suppliers. Data points contributing to research are carefully analyzed using advanced statistical methods. Research findings are confirmed through test/retest validity methodology and, therefore, paint an accurate picture of the industry. The clarity and detail of AOTMP research is unmatched in the practice of telecom environment management, and AOTMP expertise translates analysis into actionable findings representative of the industry and all related industry segments.

About the Authors

Timothy C. Colwell, AOTMP Vice President of Knowledge Operations

Tim Colwell leads the teams responsible for standards & best practices, research, benchmarking and training & certification. Tim has 17+ years of industry experience in helping Fortune 500 and Forbes Private 50 enterprise and industry supplier organizations achieve excellence in the financial, operational and technical performance management of a telecom environment.

A thought leader in telecom environment management, Tim's expertise spans performance benchmarking, process engineering, budget management, contract negotiations, asset & inventory management, and relationship management. Tim is a patent author and leads product development for TEMOS, a performance management system designed to optimize enterprise telecom environments. Prior to joining AOTMP, Tim spent three years as Director of Support Services for a telecommunications consulting firm where he refined and implemented telecommunications best practice methodologies across 500+ client consulting engagements. Tim holds a BA in Telecommunications from Indiana University.

Scott Lawrence, AOTMP Director of Research

Scott has over 14 years of experience developing and collecting market research on behalf of global Fortune 500 enterprises within the telecommunications and IT industries. In his previous role as a senior research manager, Scott led teams to accomplish research objectives by designing studies that yielded actionable information while helping clients understand the impact of the results. Scott has a B.S. in Marketing from Ball State University.

Scott is responsible for designing and managing AOTMP's research activities which includes research publications, market landscapes and benchmarks within the areas of telecom expense management and wireless mobility management. Scott also works as an advisor and subject matter expert for AOTMP's research services.

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About AOTMP

AOTMP is the leading provider of information solutions to drive efficiency and productivity across fixed and wireless telecom environments in the enterprise. Our industry research, advisory services, events, educational programs and performance management systems focus on People, Process and Performance to deliver measurable improvement in efficiency and productivity.

We invite you to learn more about how AOTMP can help you improve efficiency and productivity across:

Driving efficiency + productivity across

People   Process   Performance

People

Improve performance and productivity of telecom/IT staff through comprehensive knowledge resources and industry-leading training and certification programs to improve execution of tactical and strategic initiatives.

Process

Optimize telecom environment management operations by integrating best practices and methodologies to improve workflow processes, operational procedures, departmental policies and supplier/vendor relations.

Performance

Establish meaningful benchmarks to ensure the best possible service and value for your enterprise and its end users, while evolving telecom to serve as a strategic asset for driving business growth.

Additional information on AOTMP publications, programs and research can be found at www.aotmp.com.