

FY07 Enable Your Mobile Workforce Customer Campaign

Microsoft White Paper

Introduction

As the business world evolves, the way people work together—whether in the office or in the field—is very different today from even a couple of years ago. A key factor in this change is mobility. No longer just a toy for the tech-savvy, mobility is rapidly becoming a significant component of how people do business. However, many companies have found mobility to be a double-edged sword. While tools such as mobile PCs or cell phones work well for specific tasks, many midsize businesses are experiencing an overall disconnect between people, data, and devices. Microsoft’s mobile solutions can help midsize companies overcome this disconnect between people, data, and devices, empowering people to achieve new levels of success wherever business takes them.

This white paper begins with a look at the challenges faced by midsize businesses like yours. It then reviews current trends in mobility, presents some examples of how midsize businesses are helping make their mobile workforces more productive, and discusses why they are choosing Microsoft solutions. It ends with some suggestions on the first steps you can take toward enabling your mobile workforce.

Midsize Business Challenges

Midsize companies often feel squeezed between smaller competitors, who might provide more intimate service, and larger competitors, who can leverage economies of scale to offer reduced prices. Even midsize businesses that are achieving industry success are continually looking for a competitive advantage and market differentiation through enhanced productivity, increased responsiveness, and greater adaptability.

So what is the key ingredient that will help midsize businesses overcome these challenges? It all comes down to one element: *people*. Businesses don’t garner insights or make decisions. Businesses don’t close deals or develop new products or find new efficiencies. People do. Companies excel when they empower their people. Certainly, setting priorities, organizing a company efficiently, and providing motivation and effective leadership all help prepare a business for success. But it’s also critical to give people the right tools, information, and opportunities. Companies that do this are poised for success. We call them “people-ready businesses.”

The role of technology in a people-ready business is to harness information, enabling people to convert data into insight, swing ideas into action, and transform change into opportunity—and mobility solutions have a key role to play in this regard. They can help your people connect with the information, colleagues, clients, and applications they need to be as productive and effective *away* from the office as they are at their desks.

Trends in Mobility

Today, more people are working through remote or mobile access than ever before. To stay competitive in an interconnected world, organizations are extending their resources, data, and connectivity to people wherever they are: in face-to-face customer engagements; in operational settings, such as retail, logistics, or field service; and on the road, whether they're in their car, on a plane, or in a hotel.

As mobile technologies become more reliable and wireless standards are more widely adopted, midsize companies are looking at solutions that extend beyond islands of mobility—solutions that will create positive business results and generate a measurable return on their investment (ROI) across the company. In short, mobility is rapidly becoming an integral part of the technology infrastructure for midsize businesses.

Business analysts have taken note of the growing importance of mobile applications, predicting that by 2009, over a quarter of the world's workforce will be mobile. They note that:

- Some 60 percent of midsize organizations are piloting or running one or more mobile applications—and nearly 75 percent support wirelessly enabled mobile PCs.¹
- Midsize organizations are pleased with the results they are getting from their mobile applications: 80 percent of those that have mobilized at least one application reported that it met or exceeded their expectations.²
- Mobility is a high technology priority for midsize companies, ranking third in their priority list for 2006.³

Clearly, this growth in the adoption of mobile applications by midsize organizations indicates that these applications are meeting some very real needs. They are helping the people who are key to the organization's success be more productive and responsive and stay better connected to their colleagues and clients—and they are also helping midsize businesses adapt more easily to changing conditions.

Enabling Mobile Workforces Helps Businesses Succeed

Microsoft's mobile solutions can help businesses grow and prosper by bringing together people, processes, and technologies. Today, we hear a lot of hype concerning what is possible with PDAs, mobile PCs, and mobile phones—particularly in regard to home or remote offices, mobile sales representatives, and traveling executives. But how will these new technological wonders actually help a business? For instance, can mobile solutions improve a company's ROI? Can they enable mobile workforces to be more productive, better connected, and more informed?

¹ IDC, "Mobilizing the Enterprise in 2006," Doc. #33677, July 2005.

² *Ibid.*

³ Gartner Press Release, "Gartner Survey of 1,400 CIOs Shows Transformation of IT Organization is Accelerating," January 2006.

The answers are Yes and Yes. By providing seamless connectivity to colleagues, clients, and applications, Microsoft mobile solutions can help businesses:

- **Enhance employee productivity.** Because Microsoft® mobile solutions are based on familiar and easy-to-use software, such as Windows® and Office, they simplify the process of going mobile, reducing employees' learning curves and helping them stay organized and productive when they're away from the office. One key reason is the seamless communication experience that Microsoft solutions help provide—both from one context to another (for example, from mobile PC to mobile device) and across various tools (for example, e-mail, instant messaging, and collaboration spaces). Microsoft mobile solutions also promote collaboration, enabling employees to work together productively regardless of how far apart they may be geographically.
- **Increase responsiveness.** Microsoft mobile solutions help employees to be more responsive to customers, partners, and colleagues when out of the office by giving them up-to-date access to a variety of data streams—for example, to the corporate directory through Global Address Lookup, to line-of-business applications, and to information residing on the corporate network. As a result, employees can quickly get customers the information they need.
- **Be more adaptable.** The combination of a powerful, flexible platform plus versatile programs and applications make it easy to tailor mobile solutions to your employees' unique needs. Microsoft's mobile solutions are also compatible with a wide range of industry-specific applications, enabling businesses to equip their mobile workforce with customized mobile tools. Microsoft solutions can allow you to extend the technology you already have, rather than purchasing additional infrastructure. And Microsoft's mobile solutions are scalable, growing with you as your business grows.

Challenge: How can I help my team collaborate and stay productive when they are out of the office?

Whether your employee is waiting to board an airplane, waiting for a meeting to begin, or waiting for a document to download, that wait is costing your business money. With Microsoft's mobility solutions, your employees can make efficient use of any wait time they experience. For example, they can catch up on e-mail, schedule meetings, participate in Live Meeting sessions, edit a Word document, work on an Excel® spreadsheet, or rehearse a PowerPoint® presentation all while in a taxi, riding a train, or any number of on-the-road situations. Depending on the space and time employees have, they can use their laptop or a more compact mobile device—whatever works best for them and the situation.

Consider Kevin, the marketing director of a regional chain of retail clothing stores. In order to stay ahead of the rapidly changing retail market, Kevin is always looking for ways to do more in less time. Today, as Kevin spends the morning on the road and prepares for a presentation that he's giving in the afternoon, he faces three challenges:

- Remotely accessing and updating the data he needs for his presentation.
- Making use of downtime while traveling.
- Consulting with a teammate in another location.

Solution

Fortunately, with Microsoft's mobility solutions, Kevin is able to overcome all three challenges. Let's look at how the mobile solutions of familiar Microsoft Office applications help Kevin stay productive when he's on the road:

- 8:00 a.m.—On the train on his way to visit a branch office, Kevin receives an e-mail from the CFO on his Windows Mobile[®] powered device, asking for Kevin's monthly report two days early. Using a mobile version of Outlook[®], Kevin forwards the request to his assistant, asking her to send him the draft Excel spreadsheet.
- 8:10 a.m.—Since Exchange Server 2007 gives him up-to-date connectivity to the corporate network, Kevin receives the draft report from his assistant within 10 minutes. Using Excel Mobile to edit the spreadsheet and Outlook Mobile to then send an e-mail with the Excel attachment to the CFO, Kevin quickly finishes his task, all on the train using just his device.
- 8:45 a.m.—When Kevin arrives at the branch office, the branch manager asks Kevin about the latest marketing plan. Using Office Groove 2007—a solution that enables employees to create and customize collaborative workspaces to get up-to-the-minute project information wherever they are—Kevin accesses the corporate plan and captures up-to-date suggestions from the branch manager.
- 9:00 a.m.—While meeting with the branch management team, Kevin receives an instant message on his Windows Mobile device asking if he can present earlier than expected at the executive meeting. Using Office Communicator IM Mobile, Kevin responds that he can. Office Communicator enables Kevin's assistant to see when he is online, and then allows her to ask a question and him to answer without interrupting his meeting.
- 11:00 a.m.—On his way back to the office, Kevin receives an e-mail with his updated presentation from his assistant. Using PowerPoint Mobile, Kevin rehearses his presentation on his Windows Mobile powered device.

So what are the benefits of Microsoft's mobile solutions providing access to people and data, helping employees maximize their time and work together more efficiently, no matter where they are?

Benefits

Key productivity benefits that midsize companies can realize from Microsoft's mobility solutions include:

- **Improved ROI as a result of increased productivity.** As an example, consider Eurodata Systems, a U.K. IT solutions provider whose sales representatives spend much of their time on the road. Being able to use their Smartphones to manage their e-mail and schedules while traveling has enabled Eurodata's sales representatives to free up at least two hours of work time per week. As a result, the sales team as a whole has an extra 160 hours per week available to spend on serving customers and winning new business.

- **Increased sales velocity.** The ability to communicate with colleagues and quickly obtain the information that prospective clients need can help sales teams close sales more rapidly. For example, Cakes for the Connoisseur, a U.K. supplier of cakes and other snacks, gives mobile employees up-to-date access to company data systems through Windows Mobile powered solutions. Now staff in the field can place orders on the mobile devices, reducing order times from several days to a few minutes. By giving the sales team mobile access to key corporate information and enabling customers to specify their preferred delivery day, the solution also has virtually eliminated incidents of out-of-stock orders and customer queries about pending orders.
- **Greater work satisfaction.** Because mobile solutions enable employees to be productive wherever they are, they can more effectively balance their lifestyle to meet the needs of work and home. For example, an employee can attend to a family emergency and still stay in touch with the office through e-mail—or work on a document from home. The added flexibility that mobile solutions give employees enhances their job satisfaction. For example, Centrica, a U.K.–based international supplier of gas, electricity, and telecommunications services, recently upgraded its IT systems to support the rollout of Windows Mobile technology and equipped executives and senior staff with mobile devices, including Pocket PCs, Smartphones, and Tablet PCs. As Kirk Downey, chief technology officer at Centrica, puts it, “This technology has given our users a far better work/life balance, so they can use their time during the day more efficiently. It means they have to spend less time catching up with tasks in the evenings and early mornings.”

Challenge: How can my people manage customer requests and stay responsive while traveling?

Mobility is a fact of life for field sales representatives. But whether they are in the office, out on a sales call, or traveling, they have to keep their customers happy. That means they need to be able to respond quickly to customer queries—wherever their business takes them. To do so, they need to be able to communicate with their customers both by e-mail and by phone when they’re on the road. Whether they are presenting to new customers or cultivating the relationship with existing customers, sales representatives need mobile access to comprehensive customer and product information in order to respond to various customer questions—whether a new customer is requesting a price quote or an existing customer is wondering why the product ordered hasn’t been delivered yet.

Consider Nancy, for example. An account representative for a distributor, Nancy is on the road at least three weeks a month. She belongs to a team of sales people who live in different cities across the continent. Nancy needs to respond to customer questions immediately, drive sales opportunities forward, and stay up to date on client reporting and tracking—even when she’s on the road. Today, on her way to a very important customer presentation, Nancy faces three challenges:

- Addressing last-minute pricing changes in her presentation
- Accessing up-to-date information to accelerate customer decision making
- Preparing and delivering proposals while on the road

Solution

Let's see how Microsoft mobility solutions help Nancy meet these challenges:

- 7:05 a.m.—While driving to the customer's site, Nancy receives an e-mail on her Windows Mobile powered device alerting her to a pricing change, with new discounts available for specified order volumes. Direct Push e-mail means she receives the message as soon as it arrives in her Exchange Inbox, without any action required on her part.
- 7:30 a.m.—Pulling into the customer's parking lot, Nancy checks her e-mail and then uses her Windows Mobile powered device to access Microsoft Dynamics™ CRM Mobile 3.0, so she can find out if her customer's order will be affected by the price change. CRM Mobile provides Nancy with complete customer information through a single data repository—and Nancy finds out that her customer will qualify for a discount if the order volume is bumped up slightly.
- 7:40 a.m.— Minutes before this important meeting, Nancy meets with her colleague in a café next door to the client's offices to apply the last-minute pricing changes to her presentation. Setting their Windows Vista™ system-enabled mobile PCs next to each other, they simultaneously proof and edit using Windows Meeting Space. With just minutes to spare, Nancy and her colleague head over to make this important presentation.
- 8:20 a.m.— As Nancy greets her customer, she adjusts her Windows Vista Presentation Settings on her mobile PC to ensure that it stays awake and that system notifications are turned off during her presentation.
- 8:50 a.m.—After Nancy completes the formal presentation, during the question-and-answer session, the customer asks about lead times. Using Microsoft CRM Mobile 3.0, Nancy quickly obtains an estimated delivery date. The customer agrees to a contract renewal and increases the order quantity based on the new pricing discount. Before heading home, Nancy uses her Windows Mobile powered device to access Microsoft Mobile CRM and update the customer's file with the results of the meeting.

So what are the benefits of Microsoft's mobility helping mobile workers improve their responsiveness to customers, partners, and colleagues by keeping them connected to vital information when they are away from their desks?

Benefits

Midsized businesses employing Microsoft mobile solutions have found that these solutions enable their people to be more responsive to customers. As a result, these businesses can:

- **Build stronger, more profitable customer relationships.** For example, the 73 shipping brokers at Norway-based Lorentzen & Stemoco have found that improved access to information and connectivity on the road—achieved through Microsoft Office Mobile programs and an information portal built on Windows SharePoint® Services—is enabling them to get better deals for their clients and provide better customer service. As a result, they have increased sales and improved their competitive position.
- **Enhance decision quality.** The Nassal Company, a specialty contractor for entertainment-related projects, has found that Microsoft mobility solutions significantly

enhance the quality and the timeliness of key decisions. Previously, field managers would fax project photos to team members, but the faxes were hard to read and often needed clarification and follow-up. Now they use Microsoft Office OneNote® on Tablet PCs to share visual information, using pen and ink input to annotate directly on digital photos and sending them by e-mail. Clear visuals and notes that can be read immediately by design teams lead to quick decisions, decreasing time lag between approvals by 37 percent and reducing downtime for construction workers. As a result, teams can complete projects faster, saving tens of thousands of dollars in some cases.

Challenge: How do I choose a solution that will work with what I have now ... and five years from now?

Midsized businesses have limited IT resources—both cash and people. Consequently, they need solutions that create a positive end-user experience, are secure and easy to manage, can be integrated with their current infrastructure, and will scale up as the company grows. The last requirement—the need for solutions that will grow along with the company—is particularly critical for midsize businesses, since they tend to grow more rapidly than large corporations.

Take the case of Tim, for example—the CIO of a manufacturing company. Tim’s key role is supporting senior executives in achieving their business objectives by identifying opportunities to leverage IT for competitive advantage. Today, Tim is considering how to incorporate the mobile employees from a newly acquired company into his company’s IT infrastructure. In doing so, he needs a mobile solution that is:

- Compatible with his current infrastructure.
- Flexible and scalable, so it can accommodate business growth and changing needs.
- Secure, offering protection for the company’s devices and data.

Solution

Let’s take a look at how Microsoft mobility solutions help Tim meet these challenges:

- 8:00 a.m.—Tim receives an e-mail from the CEO requesting a report on the systems integration progress for the new acquisition. Tim views the request while visiting the new acquisition’s facilities, using Windows Mobile 5.0 on his mobile device.
- 8:15 a.m.—On the phone, Tim talks with his systems administrator, Chris. Chris tells Tim that they can easily add the 200 Windows Mobile device users in the acquired company because of last year’s investment in Exchange Server 2003. Exchange Server offers built-in Windows Mobile support for thousands of employees—with no extra servers needed. In addition, with Windows Imaging Format, Chris can enable remote and unattended installations with single-image deployment.
- 9:00 a.m.—At a vendor meeting, Tim learns about a robust mobile version of the company’s current CRM application that will work both for users in Tim’s company and for users in the company they are acquiring. Microsoft Dynamics CRM Mobile 3.0, part

of a Microsoft Dynamics CRM solution, can be used by a group ranging from a few employees to a company of thousands—and it will scale seamlessly on multiple servers as a business grows.

- 1:00 p.m.—While meeting with the IT manager at the new acquisition’s offices, Tim learns that most new users in the acquired company are running Windows XP on their mobile PCs. He wonders if this will be a problem, since he has upgraded his company to Windows Vista. Tim calls his IT manager and learns that there will be no problem, since Windows Vista-enabled PCs can run multiple versions of Windows at the same time. That way, people can continue to run applications built for earlier versions of Windows while still benefiting from the security and management improvements in Windows Vista.
- 1:30 p.m.—While speaking with his IT manager, Tim learns that an executive from the acquired company has not accepted his company’s terms. His IT manager uses Windows BitLocker™ to protect sensitive company data on the executive’s laptop; using Windows Vista provides unique new security features.
- 2:45 p.m.—Nancy, a field rep with Tim’s manufacturing company, calls regarding a technical problem using her Mobile PC. Tim is able to use Remote Assistant to access her Mobile PC and give her step-by-step instructions. The time he spends lately troubleshooting with field reps has been dramatically reduced with Windows Vista’s built-in self-diagnosis and troubleshooting tools, such as Windows Disk Diagnostics, which automatically detects and diagnoses common problems.

So what are the benefits of Microsoft mobile solutions providing the adaptability that midsize businesses require?

Benefits

Microsoft’s mobile solutions are highly adaptable, offering compatibility, flexibility, and extensibility that reduce your TCO. In addition, because these solutions decrease training, deployment, and management time, they make life easier for resource-strapped IT departments.

For example, consider the case of Lynx Technology, a leading IT solutions provider offering onsite services to clients. Lynx engineers in the field relied on mobile phone conversations with a call center to access the company’s central information systems—an approach that was time-consuming and costly for both field staff and call handlers. After rolling out a Windows Mobile CRM solution running on Pocket PC Phone Edition devices, Lynx increased its call center productivity by 500 percent, achieved an 80 percent reduction in telephone costs by reducing the number of calls made, and expects to realize a return on its investment within one year—plus the solution is flexible enough to meet future demands. According to Richard Proud, a Lynx Principal Consultant, “Windows Mobile offers a reliable platform that integrates into the company’s existing Microsoft environment, reducing total cost of ownership and enhancing manageability and security.”

While addressing important business needs—enhanced productivity, increased responsiveness, greater adaptability—Microsoft mobile solutions also address a primary concern of midsize businesses: security. Microsoft mobile solutions provide security by:

- *Protecting data on mobile devices* by allowing IT administrators can remotely manage devices and enforce corporate IT policy “over the air,” allowing them to mandate passwords, remotely wipe out mobile device data, and reset a device back to its factory settings. Data stored on these devices can be encrypted to prevent unauthorized users from accessing data on lost, stolen, or inappropriately decommissioned devices using BitLocker Encryption Technology. In addition, Windows Firewall and Windows Update stops malicious software from infecting mobile PCs and helps users obtain the latest security updates. Windows Defender scans and removes malicious software, protects critical areas of mobile PCs with up-to-date monitoring agents, and automatically updates malicious software definitions before each scan to provide better protection.
- *Protecting wireless data* by helping protect data that is transmitted over wireless networks, ensuring that it is viewable only by the intended recipient and that malicious users who intercept your wireless data are unable to view your company's sensitive information. Windows Vista broadly supports the latest wireless security protocols.
- *Protect mobile devices and the corporate network while exchanging data* by helping you reduce the risk of contaminating your corporate network with infected mobile devices by allowing your network administrator to centrally control and limit access to the corporate network using Group Policy Management, creating a set of minimal security requirements for devices accessing the network and deny access to devices that do not follow these requirements and pose a threat to the corporate network. In addition, users can receive alerts when security software is not up-to-date or users have potentially insecure security settings from Windows Security Center.

Why Microsoft?

Microsoft can help your Midsize company be more nimble, more productive, and more responsive to your customers by giving mobile employees access to the critical information they need to make good decisions. Through familiar Microsoft technologies—from server and desktops, to laptops, PDAs, Smartphones, and mobile phones—mobile solutions from Microsoft provide you with a secure, adaptable, and integrated mobility platform, enabling your IT professionals to reduce costs and complexity.

Meeting Your Core Business Needs

Microsoft’s mobile solutions are designed to help you meet the three core business needs discussed above:

- **Productivity.** Microsoft’s mobile solutions can help your people increase their productivity by extending the familiar tools and business applications they use in the office to their mobile devices and laptops—and by keeping information synchronized between office and mobile systems.
- **Increased responsiveness.** Microsoft’s mobile solutions can keep your employees connected to vital information when they’re away from their desks, providing up-to-date information access, collaboration, and enhanced communication.

- **Greater adaptability.** Microsoft's mobile solutions can help your business be more adaptable by providing a choice of mobile devices; broad compatibility with your existing infrastructure; secure and reliable access; and flexibility, extensibility, and scalability. Not only do these solutions result in a lower TCO, but they also simplify the IT department's tasks, reducing training, deployment, and management time.

Four Key Benefits

As a leader in mobile solutions, Microsoft is the only leading software solutions vendor in the industry that can provide midsize organizations with integrated solutions that are:

- **Innovative.** Microsoft makes innovative software products and solutions that continually evolve to meet your needs.
- **Familiar and easy to use.** Your employees already save time and maximize their productivity with familiar Microsoft products. Microsoft mobility solutions extend these products, along with your business's other programs and applications, to mobile PCs and devices, so your employees can be equally productive when they're away from their desks. And because the products are all familiar, your employees will find them easy to use and will be able to immediately start increasing their productivity on the road.
- **Widely used and supported.** Microsoft mobility solutions are widely used and supported by the world's largest community of partners, developers, and support professionals. Furthermore, because the solutions are from Microsoft, they are designed to work with other Microsoft products seamlessly, with fewer integration hassles.
- **Easy to integrate and connect.** Microsoft solutions work seamlessly with other products that your mobile employees use, making them easy for your IT team to integrate with other applications and tools—today and in the future.

Broad Array of Mobile Solutions for Midsize Businesses

Microsoft is making a significant investment in mobile solutions for midsize businesses—now and in the future. Our mobile assets include a dynamic development platform, a robust suite of servers and tools, a Windows operating system designed especially for mobile PCs and mobile devices, and a suite of applications that work seamlessly on top of Windows. Key elements of Microsoft's mobile investments include:

- **Applications**, including Microsoft Office Communicator 2007, Microsoft Office Groove 2007, and Microsoft Dynamics CRM 3.0.
- **Operating systems**, including Windows Mobile and Windows Vista.
- **Infrastructure**, including Microsoft Exchange Server 2007, Microsoft Office Professional Plus 2007, Microsoft Live Communications Server 2005, Microsoft Office Communicator 2007, Windows Server System™, Microsoft Dynamics, and SQL Server™ 2005.

In order to help enable customers to deploy new systems more effectively thereby maximizing their mobile solutions investment, Microsoft also provides a variety of technical support

offerings, ranging from online self-help support to a managed support relationship. You can choose the right solution for your business needs. Visit our technical support site <http://www.microsoft.com/essentialsupport> for more information.

Enabling Your Mobile Workforce—Getting Started

Here are some steps you can take to learn more about how Microsoft's mobile solutions can help your mobile workforce enhance its productivity and be more responsive to your customers, while also giving your business the adaptability it needs:

1. Visit the Microsoft Mobility Web site at <http://msdn.microsoft.com/mobility/windowsmobile/default.aspx>
2. Learn how others have benefited from mobile solutions at www.microsoft.com/resources/casestudies
3. Download the mobility white paper to better understand Microsoft's mobile solutions <http://www.microsoft.com/windowsmobile/default.mspix>
4. Discover the features and functionality available in Windows Mobile 5.0 by downloading a demo at <http://www.microsoft.com/windowsmobile/default.mspix>

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