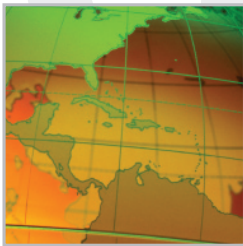


## >> Mobile Knowledge Workers: Emerging Opportunities



### Office Technology & Services



This report will provide a global analysis of opportunities for mobile technology and services in document-intensive business processes, company size segments and vertical industries. The study is designed to help technology vendors with their product development strategies and market development activities for mobile knowledge worker solutions.





# Mobile Knowledge Workers

This study is designed to provide information technology vendors and infrastructure service providers with insights to support their strategic planning, product development, and go-to-market activities related to mobile knowledge workers in developed and emerging markets.

## >>Introduction

The emergence of new mobile devices, operating systems, software, and services has the potential to dramatically increase the productivity of the office knowledge worker and change the competitive landscape in the office technology industry.

InfoTrends anticipates significant changes in how and where mobile knowledge workers create/access/collaborate/print and perform many other information-based business processes. We also believe these changes will happen at different rates depending on the region of the world, company size segment, and vertical industry.

The challenge facing technology vendors and service providers is to provide mobile tools and services that enable knowledge workers to easily plug into the existing IT infrastructure and business processes without creating additional layers of complexity and costs. Complicating this situation is a diversity of competing business models and implementation methods (operating systems, cloud services, applications, etc.) that will force vendors and customers to make critical decisions about their development strategies and operating budgets.

The winning vendors in the new mobile knowledge worker economy will gain critical new profit streams from the sale of devices, software, and services, while the companies that do not adapt are likely to be pushed aside and shut out from this next wave.

This study is designed to provide information technology vendors and infrastructure service providers with insights to support their strategic planning, product development, and go-to-market activities related to mobile knowledge workers in developed and emerging markets.





## >>Who Should Subscribe?

Various market participants will benefit from the information obtained in this study:

- >> Device/Equipment OEMs
- >> Telecom/System Vendors
- >> Cloud/Service Infrastructure Providers
- >> Independent Software Vendors

## >>The Impact on Document-Intensive Business Processes

It is important to understand how the continued influx of mobile knowledge workers and the technologies that support them will impact future business processes, particularly document-intensive processes where the need to create/access/process/output information is critical.

With today's smart phones knowledge workers can easily view and share email, maps, directions, calendars, photos, airline boarding passes, and many other documents that would have been printed in the past. While productivity has been enhanced, many business processes are very similar to the pre-mobile era.

However, with the next wave of smart phones and tablets, along with significant advances in mobile infrastructure, InfoTrends believes a much wider set of applications will go mobile including forms, spreadsheets, bills/invoices, presentations, manuals, reports, and many other documents that are tied to business processes, document management systems and print volumes. The result is likely to be a much more profound change in business processes and knowledge worker productivity.

Many hard copy vendors are hoping to replace some of this lost "traditional" office print volume through mobile printing solutions and cloud-based printing services. While opportunities clearly exist in this area, these vendors need to look beyond output to identify other opportunities within the mobile document workflow. The key to monetizing these areas will come from understanding how and where mobile knowledge workers place value within this new paradigm.

Application, device and services vendors need to "follow the paper" and identify business processes that rely on documents to provide robust business solutions that fully meet the needs of the mobile knowledge worker. Application support, integration with office infrastructure, and tapping into established distribution channels will help accelerate demand for future mobile knowledge worker solutions.

## >>Critical Issues Addressed

The mobile knowledge worker is arguably the fastest-growing segment of the office workforce today. This study is designed to address several key elements related to opportunities and strategies in targeting mobile knowledge workers:

- >> Understand the importance of and requirements for mobility to help knowledge workers create, analyze, process, share, output, and collaborate with information
- >> Identify the critical gaps and unmet needs of the mobile knowledge worker as it relates to business processes and document workflow



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- >> Understand the differences by key regions, company size segments and industries
  - > United States
  - > Germany
  - > Japan
  - > India
  - > Brazil
- >> Review the mobile strategies, business models, and technology offerings of innovative and forward-looking companies
- >> Understand the impact and opportunity of mobile technologies on traditional electronic and paper based processes
- >> Identify critical enablers and barriers to widespread, rapid adoption of mobile business tools and services
- >> Identify potential business opportunities, pricing models, and go-to-market strategies within the mobile knowledge worker value chain
- >> Provide recommendations on target markets, business models, products, services, and go-to-market actions

## >>Project Objectives

- >> Identify and segment the various types of mobile knowledge workers
  - > SMB, Enterprise
  - > Field, office, home
  - > Heavy travel/international
  - > Vertical markets/industries
- >> Size and forecast the number of mobile knowledge workers and key behaviors
  - > Number of mobile knowledge workers by segment

- > Frequency/time spent on key mobile knowledge activities
  - < Create, capture, communicate, collaborate, search, process, share, view, output, store
- > Differences by key geographies and company size categories
  - < Developed vs. emerging markets
  - < SMB vs. enterprise
- >> Understand the critical needs of mobile knowledge workers
  - > Business process/Document workflow
    - < Create, capture, communicate, collaborate, search, process, share, view, output, store
  - > Application support
    - < General office – word processing, spreadsheet, presentation, etc.
    - < Productivity – email, calendar, contacts
    - < Collaboration – document management, conference/video call, chat
    - < Proprietary/specialty – ERP, field service, accounting, etc.
  - > Integration with office equipment
    - < Printers/MFPs
    - < Scanners
- >> Understand the requirements, concerns and priorities of IT managers responsible for deployment
  - > Security
  - > Bandwidth
  - > Network management
  - > Help desk/support





- > Software
  - < PC/server-based
  - < Web-based
  - < Device apps
- > Implementation model
- >> Assess the impact of emerging mobile infrastructure
  - > Devices, interfaces
  - > Operating systems, programming languages, file formats
  - > Wi-Fi, broadband networks
  - > Cloud-based services, mobile-friendly applications
- >> Understand the impact and opportunity on traditional electronic and paper-based workflows
- >> Identify mobile services, software and device opportunities, go-to-market strategies, and potential partners
  - > Device features and integration
  - > Applications and workflow
  - > Print volumes
  - > Managed services
  - > Cloud-based services

## >>Market Research

This study will use a combination of primary and secondary research to determine the market requirements and opportunities for mobile knowledge worker solutions. The study will cover five critical regions including:

- >> United States
- >> Germany

- >> Japan
- >> India
- >> Brazil

The study will focus on key vertical markets including finance, manufacturing, healthcare, and professional services, as well as opportunities in the Enterprise (500+) and small & medium business (SMB) segments to help subscribers focus on areas with the best growth opportunities.

### Secondary Research

InfoTrends has conducted extensive research in the office document market space. Relevant research reports and forecasts will be leveraged as part of this study. We will also thoroughly examine existing market information from a variety of sources, including government, industry association data, and numerous published reports.

### Primary Research

#### Structured Surveys with Mobile Knowledge Workers (300 per country)

InfoTrends will conduct structured web surveys with approximately 300 mobile knowledge workers from each of the five identified countries. The surveys will be critical to understanding current usage of mobile devices, adoption plans, unmet needs, new service requirements, and other factors affecting purchases.

#### Structured Surveys with CIO/IT Managers (50 per country)

InfoTrends will conduct structured web surveys with approximately 50 CIO





and/or IT managers from each of the five identified countries. The surveys will be critical to understanding how mobile technology fits with the current IT structure, barriers to adoption, unmet needs and what it will take to expand the use of mobile technology in the business environment.

### **In-Depth Mobile Knowledge Worker**

#### **Interviews (20)**

InfoTrends will conduct in-depth interviews with qualified end users that are currently using mobile business solutions. These interviews will provide insight into the driving factors for using mobile devices, the expected and actual benefits, and the unmet needs of companies that have experience using these solutions.

#### **In-Depth Vendor Interviews (20)**

InfoTrends will conduct in-depth interviews with leading vendors in the mobile technology space. Interviews will be with global and regional players offering equipment and devices, telecom & system services, cloud and service infrastructure, and/or software services. These interviews will be critical in identifying best practices, challenges, and opportunities within the mobile technology market.

### **>>Analysis & Project Deliverables**

InfoTrends will size and forecast the population of mobile knowledge workers by regions covered in the study, size of company, and key activity (behavior).

- >> Number of mobile knowledge workers by segment
  - > Company size

- > Type of knowledge worker
- >> Frequency/time spent on key mobile knowledge activities
  - > Create, capture, communicate, collaborate, search, process, share, view, output, store
- >> Differences by key geographies and company size categories
  - > Developed vs. emerging markets
  - > SMB vs. enterprise

### **Profiles**

InfoTrends will create profiles to define opportunities and understand the business models already in place:

- >> Profile and segment knowledge workers in key geographic regions, vertical markets, and company size segments. The profile will include taxonomy of the various types of mobile workers, their needs, and long-term implications to business processes
- >> Identify and profile leading mobile knowledge worker applications aimed at business processes, worker productivity, and document workflow
- >> Create a list of business applications and functions that have transitioned to cloud-based services or Internet-based methodology and delivery
- >> Create a list of vendors/providers currently delivering cloud-based business tools and services for mobile knowledge workers





## Summary Report and Supporting Material

Clients will receive a combination of reports, presentation materials, and data for senior management, product managers and planners, and sales and marketing executives. These materials will include:

- >> Executive summary with key findings
- >> Analysis report
  - > Summary of survey results and key findings
  - > Summary of in-depth interviews
  - > Opportunities and recommendations
- >> PowerPoint presentation with charts
- >> Data tabulations

## >>Project Schedule

InfoTrends intends to start the project in August 2010. We plan to be complete the research by November and publish the report in December. We will provide clients with interim data from the structured survey when that research is completed.

## >>Terms & Conditions

### Liability for Advice

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

## Copyrights

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## Confidentiality

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

## Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

## Terms

Clients may have other business units co-fund the study, review the questionnaires, and receive a copy of the report at no additional charge. InfoTrends invoices the first half of the fee upon initiation of the contract and the second half upon delivery of the report.





## >>Authorization Form

Don't miss the opportunity to be a part of a research study that will define where the market transition is today, assess what is needed to move it forward, and identify where the profit opportunities reside.

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Email the completed form to [sales@infotrends.com](mailto:sales@infotrends.com) or fax to +1 781.616.2121.





office technology & services



InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses.

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