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The Forrester Wave™: Enterprise Mobile Management, Q3 2014

by Christian Kane, Tyler Shields, September 30, 2014

KEY TAKEAWAYS

IBM, Citrix, MobileIron, AirWatch by VMware, Good Technology, BlackBerry, Soti, Symantec, SAP, and Sophos Lead The Pack

Forrester's research uncovered a market in which 10 vendors lead the pack. Trend Micro, Absolute Software, LANDesk, Kaspersky Lab, and McAfee offer competitive options. The Leaders balance OS, app, and data management functionality while providing flexible container options and productivity apps, and have demonstrated a strong vision and road map to help customers bring their PC and mobile management strategies together.

Analytics, Intelligence Aggregation, And Policy Automation Create A Complex Environment

More devices, platforms, applications, and data access mean a more complex environment for I&O pros to manage, and without additional headcount, skill sets, and other resources, you will not be able to support this environment. To overcome this challenge, you must use policy automation to help recapture time.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.

The Forrester Wave™: Enterprise Mobile Management, Q3 2014

The 15 Providers That Matter Most And How They Stack Up

by Christian Kane, Tyler Shields
with Christopher Voce, Michelle Mai

WHY READ THIS REPORT

Infrastructure and operations (I&O) professionals face a difficult mandate: Enable the workforce to navigate the ever-changing landscape of mobile scenarios while continually ensuring that their company's compliance and security needs are met. Mobile device management (MDM) solutions are effective tools to help deliver on this mandate and provide applications and resources to employee devices without sacrificing employee productivity. In Forrester's 27-criteria evaluation of enterprise mobile management vendors, we identified the 15 most significant MDM providers — Absolute Software, AirWatch by VMware, BlackBerry, Citrix, Good Technology, IBM, Kaspersky Lab, LANDesk, McAfee, MobileIron, SAP, Sophos, Soti, Symantec, and Trend Micro — and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help infrastructure and operations professionals select the right partner for their enterprise mobile management.

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Related Research Documents

Top Technologies For Your BT Agenda
July 29, 2014

Brief: The Future Of Mobile Device Management
June 6, 2014

Re-Engineer Your Business For Mobile Moments
January 24, 2014

The Forrester Wave™: File Sync And Share Platforms, Q3 2013
July 10, 2013

EMM OFFERINGS WILL ACCELERATE EMPLOYEE DECISION-MAKING

We're witnessing the mobile mind shift — an expectation that workers can be productive whenever, wherever they are.[1] There's a surge of innovation in mobile technology as a part of broader business technology engagement platforms to ensure that employees have access to the information they need to better serve customers during these critical mobile moments.[2] I&O leaders have quickly seen the value of mobile device management solutions to ensure that employees have safe and reliable access to mobile devices and apps.

Early MDM solutions that focused on device management are growing into broader enterprise mobile management (EMM) solutions to better capture the mobile opportunity.[3] These solutions can help I&O professionals mature their mobile strategy by addressing advanced questions such as: What access do we allow in regard to bring-your-own-device (BYOD)? What do we do about part-time or contract workers? Which business apps will help our employees without adding security concerns? There are four key emerging areas that EMM solutions must deliver on, including:

- **A better employee experience.** Technology management is increasingly being judged on the experience employees have with corporate technology. If that experience is poor, business units will purchase their own technology and employees will look toward consumer tools. For example, if employees are required to put in a complex password each time they access any corporate application, adoption will likely suffer. As technology management pros seek to bolster their BT agenda, they will look for tools that can help better serve employees and deliver a better experience with corporate technology and the personal devices they interact with. This means that mobile management tools that recommend applications for employees, offer automation and self-service options, and allow tech management to roll out and integrate more services quickly will be much more compelling.

- **Enhanced reputation services.** Application reputation services allow companies to accurately determine application risk via detection of malicious behavior and allow them to understand the behaviors affecting application privacy. These services also provide organizations with visibility into which applications employees are using, which they would like to use, and which applications peer organizations are using. With device reputation services, companies can allow or reject specific OS versions and also make sure that the new devices and platforms employees want to use have cleared security requirements by using OS sensors.

- **Expanded analytics.** More devices, platforms, applications, and data access mean a more complex environment for I&O pros to manage, and without additional headcount, skill sets, and other resources, you will not be able to support this complex environment. To overcome this challenge, use policy automation to help recapture time. Expanded analytics across the device, data, application, and employees will give companies more data to figure out which apps employees are using or want to use, which devices need to be supported, and which apps are failing to meet employee expectations around experience.

- **More autonomous support.** As mobile devices become more-critical business tools for employees, demand for more and broader support options will increase. I&O pros will need more automation and self-service tools to allow employees to configure and get access on new devices and get all the applications and data access they need to be up and running as quickly as possible. Enterprise app stores allow employees to find the apps they need on whichever device they might be using, while self-service portals give employees the ability to report a lost or stolen device or even wipe the device themselves.[4] Given the number of form factors and platforms that mobile introduces, companies will look toward mobile management solutions that ease the support burden while providing a better experience for employees.

EMM Solutions Target Apps, Data, Identity, And Network

For companies to continue to expand access to corporate services beyond email to mobile devices, EMM solutions need to provide the necessary foundational support. Key components include:

- **Application management.** As companies continue to adopt more mobile applications, the need to set a baseline for application security across all platforms and devices will become an imperative. Apple has helped vendors address this in iOS 7 and iOS 8 by including a number of app management application programming interfaces (APIs) that restrict data access from applications and improve license management for apps. EMM vendors need to manage a diverse set of mobile, web, and virtual applications consistently for technology management organizations using a combination of application wrapping and platform APIs. Vendors also need to include capabilities like license management, application analytics, and single sign-on to effectively manage applications at scale.

- **Data/content management.** The popularity of tools like Dropbox or Box with workers is not surprising — employees need to be able to access and share data on mobile devices as they increasingly work from different locations.[5] Unfortunately, many companies do not provide a corporate-sanctioned way to do that. Data security and compliance concerns with consumer solutions have companies looking to EMM vendors that offer or integrate enterprise file sync and share tools to provide more access and usage controls over data.

- **Identity and authentication.** A people-centric approach to technology management is driving the need for more identity and authentication services that can provide intelligent access control based on location, device, platform, and who the employee is. Forty-two percent of North American and European information workers now use three or more devices for work.[6] As the number of devices and form factors continues to grow, it will be much more realistic for tech management to provision an app or access to data based on the person rather than a single device. The retail companies purchasing tablets to be shared by floor staff are a great example of why identity and authentication services are critical.

- **Network management and visibility.** BYOD, cloud services, and the proliferation of wireless radios in all types of devices have redefined the boundaries of the corporate network. Understanding where corporate data is flowing and applying the appropriate controls is critical to successfully securing the mobile environment, and securing data in transit via secure network gateways is quickly becoming a requirement for EMM solutions. But data security is only one important part of network management — with more devices connecting and more applications being pushed to employee devices across the globe, there will be significant challenges with network bandwidth, guest networks, and load balancing, which will cause a negative user experience and a decrease in productivity.

EMM Hits Primetime

The EMM vendor landscape has changed significantly over the past two years as large technology vendors have made mobility a core pillar of their offerings. These vendors are working to integrate their mobile solutions with existing offerings in client management and security, virtualization, mobile security, application development, and analytics to differentiate their products and give customers much more robust tools than those that were available a few years ago. Still, the EMM market also has a number of mobility specialists who continue to innovate and push the market forward in their own right. These specialists will likely feel the push from the larger vendors' immense channel and partner pressure over the next year.

ENTERPRISE MOBILE MANAGEMENT EVALUATION OVERVIEW

To assess the state of the enterprise mobile management market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top enterprise mobile management vendors.

This Evaluation Highlights Product Capabilities, Vendor Strategy, And Market Reach

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 27 criteria, which we grouped into three high-level buckets:

- **Current offering.** The vertical axis of the Forrester Wave graphic reflects the strength of each vendor's product offering, including its architecture and scale; email and directory support; mobile platform support; configuration; employee experience; operating system security; network security; reporting and analytics; containerization; app management; app security; enterprise app store; data management and security; administration; and secure apps and productivity apps.

- **Strategy.** The horizontal axis measures the viability and execution of each vendor's strategy, which includes the company's mobile market experience, future vision, integration strategy, global presence, engineering staff, and support capabilities.

- **Market presence.** The size of each vendor's bubble on the Forrester Wave graphic represents each vendor's presence in the EMM market, based on its install base, revenue, training service, product staffing, and partner ecosystem.

This Evaluation Focuses On The Top 15 Enterprise Mobile Management Solutions

Forrester included 15 vendors in the assessment: Absolute Software, AirWatch by VMware, BlackBerry, Citrix, Good Technology, IBM, Kaspersky Lab, LANDesk, McAfee, MobileIron, SAP, Sophos, Soti, Symantec, and Trend Micro. Each of these vendors has (see Figure 1):

- **Components that were available as of March 15, 2014.** Any feature or product releases after March 15, 2014, were not part of the product evaluation but were considered in the strategy portion of the evaluation. Additionally, the majority of the products in this evaluation have had updates since we collected data. While Forrester feels this evaluation provides a fair assessment of the market, Forrester encourages customers to ask vendors about most recent updates.

- **Platform relevance.** All included solutions were able to manage and secure devices running two or more of the following platforms — Android, BlackBerry, and iOS — at the time of our evaluation cut-off date.

- **A large install base.** Forrester evaluated each EMM vendor based on its amount of mobile seats, active users, and application downloads as of December 31, 2013. The vendor needed to have more than 100 customers with a minimum of 500 mobile devices under management. Additionally, the total number of devices under management needed to be greater than 500,000.

- **More than $10 million (USD) in revenue in 2013.** The vendor had more than $10 million annually in mobile management products in 2013.

- **Significant enterprise interest.** Vendor participants are all frequently mentioned and asked about by our clients via Forrester inquiries and projects.

Figure 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated
Absolute Software	Absolute Manage Version 6.4.3
AirWatch by VMware	AirWatch Enterprise Mobility Management
BlackBerry	BES10
Citrix	XenMobile
Good Technology	Good Secure Mobility Solution
IBM	MaaS360
Kaspersky Lab	Kaspersky Security for Mobile
LANDesk	LANDesk Mobility Manager; Wavelink Avalanche
McAfee	McAfee Enterprise Mobility Management
MobileIron	MobileIron Platform
SAP	SAP Mobile Secure
Sophos	Sophos Mobile Control
Soti	Soti MobiControl
Symantec	Symantec Mobile Management Suite
Trend Micro	Trend Micro Mobile Security

Vendor selection criteria
Any feature or product releases after March 15, 2014, were not part of the product evaluation but were considered in the strategy portion of the evaluation.
All included solutions were able to manage and secure devices running two or more of the following platforms — Android, BlackBerry, and iOS — at the time of our evaluation cut-off date.
Forrester evaluated each mobile device management vendor based on its amount of mobile seats, active users, and application downloads as of December 31, 2013. The vendor needed to have more than 100 customers with a minimum of 500 mobile devices under management. Additionally, the total number of devices under management needed to be greater than 500,000.
The vendor had more than $10 million annually in mobile management products.
Vendor participants are all frequently mentioned and asked about by our clients via Forrester inquiries and projects.

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EVALUATION ANALYSIS

The evaluation uncovered a market in which (see Figure 2):

- **Ten vendors lead the pack.** The 10 vendors come from completely different backgrounds; some have been acquired, others have acquired smaller MDM vendors, and a few have remained their own enterprise. Despite their contrasting history, there is a shared focus on two initiatives: enterprise mobility and security. The companies separated themselves from the other vendors by introducing strong security background without disruption for the employee. The Leaders neatly balance OS, application, and data management functionality while providing flexible container options and productivity applications. These vendors have also demonstrated a strong vision and road map to help customers as they bring their PC and mobile management strategies together.

- **Five vendors offer competitive options.** The Strong Performers all provided the mobile management and security basics but fell short in one or two areas, such as containerization or productivity apps. The vendors offer a solid MDM capability with more nuanced features, which helps them in different mobile security instances. Trend Micro offers a wide variety of security solutions for both midsized and large enterprises. Absolute has great concentration on simplifying the MDM experience. LANDesk, Kaspersky, and McAfee have shown a strong focus in specific areas like app reputation and ruggedized device support, but they lacked the comprehensive functionality of other vendors. Each of these solutions has its strengths but needs to work on closing the gaps to round out a more complete portfolio offering. Recent acquisitions and road maps by these vendors are a step in the right direction to a broader offering.

This evaluation of the enterprise mobile management market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 2 Forrester Wave™: Enterprise Mobile Management, Q3 '14

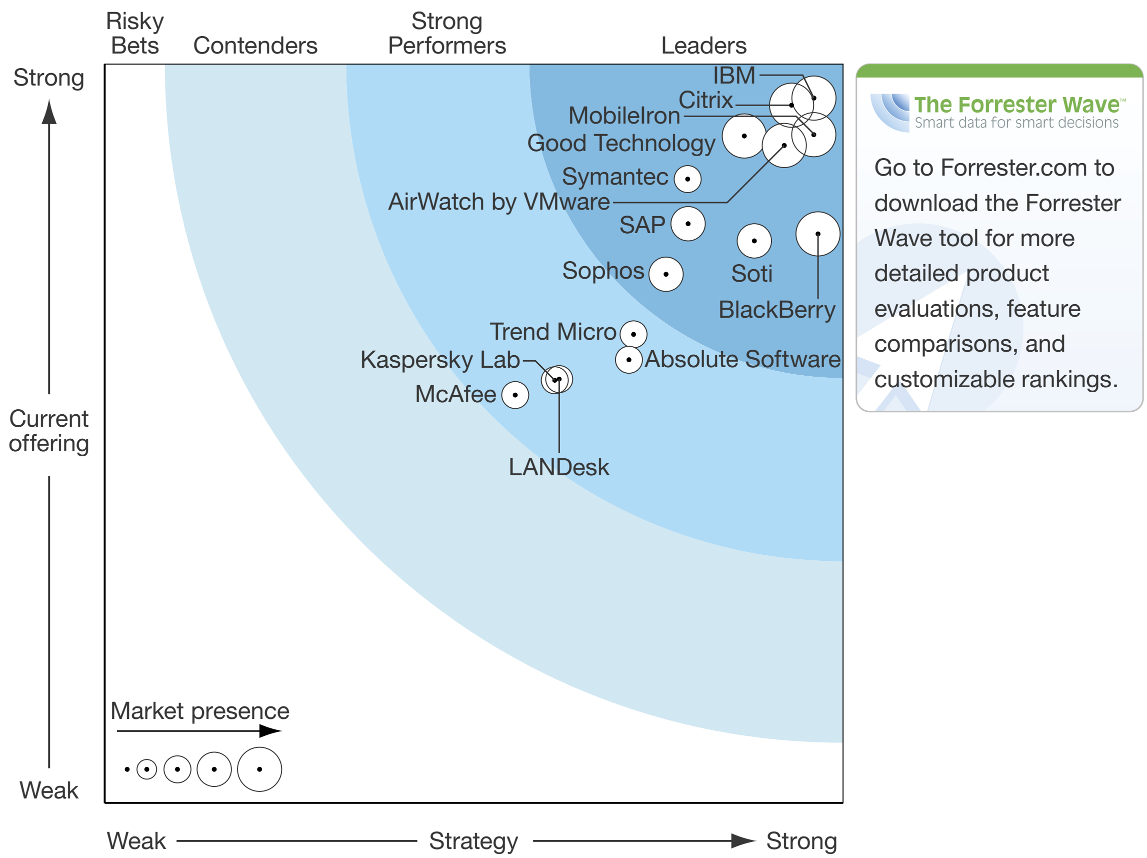

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Figure 2 Forrester Wave™: Enterprise Mobile Management, Q3 '14 (Cont.)

	Forrester's Weighting	Absolute Software	AirWatch by VMware	BlackBerry	Citrix	Good Technology	IBM	Kaspersky Lab	LANDesk	McAfee	MobileIron	SAP	Sophos	Soti	Symantec	Trend Micro
CURRENT OFFERING	50%	3.00	4.45	3.85	4.72	4.52	4.77	2.86	2.87	2.76	4.52	3.92	3.58	3.80	4.22	3.17
Architecture and scale	9%	4.00	5.00	4.50	5.00	5.00	5.00	2.50	4.50	1.50	5.00	5.00	5.00	4.50	3.50	2.00
Email and directory support	5%	3.00	5.00	4.00	5.00	4.00	5.00	2.00	4.50	2.50	4.50	4.50	5.00	4.00	4.50	3.00
Mobile platform support	7%	3.50	4.50	3.50	4.50	3.50	5.00	4.50	3.50	3.00	4.00	4.00	4.50	4.00	3.50	4.00
Configuration	7%	5.00	5.00	4.00	5.00	5.00	5.00	3.00	4.00	3.00	5.00	4.00	4.00	5.00	5.00	2.00
Employee experience	3%	3.00	3.00	4.00	3.00	2.50	3.00	3.50	3.50	3.50	3.00	3.00	5.00	3.50	3.50	4.50
Operating system security	5%	4.00	3.00	4.00	3.00	4.00	4.00	3.00	4.00	3.00	4.00	4.00	3.00	4.00	4.00	3.00
Network security	8%	4.00	4.00	5.00	5.00	5.00	4.00	3.00	4.00	4.00	4.00	4.00	3.00	4.00	5.00	4.00
Reporting and analytics	3%	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00	4.00	5.00	5.00	5.00	5.00	5.00	5.00
Containerization	10%	1.00	5.00	4.00	5.00	5.00	5.00	2.00	1.00	2.00	5.00	3.00	1.00	2.00	4.00	1.00
App management	9%	3.00	4.00	4.50	5.00	4.50	4.50	4.00	2.00	3.00	4.50	4.00	3.00	4.00	4.50	4.00
App security	9%	1.00	4.50	2.00	4.00	3.50	5.00	3.50	1.00	3.50	4.50	3.00	3.50	3.50	5.00	3.00
Enterprise app store	5%	3.50	4.50	3.00	5.00	4.50	5.00	3.50	3.00	3.00	4.50	4.50	4.50	3.50	4.50	5.00
Data management and security	8%	2.00	3.50	4.00	5.00	5.00	5.00	2.50	1.00	2.00	4.00	3.00	4.00	5.00	4.00	4.00
Administration	5%	4.00	5.00	3.00	5.00	5.00	5.00	2.00	4.00	3.00	5.00	5.00	3.00	4.00	3.00	3.00
Secure app and productivity apps	7%	2.00	5.00	3.50	5.00	5.00	5.00	1.00	2.00	2.00	5.00	4.00	3.00	2.00	4.00	3.00
STRATEGY	50%	3.55	4.60	4.83	4.65	4.33	4.80	3.05	3.08	2.78	4.80	3.95	3.80	4.40	3.95	3.58
Mobile market experience	20%	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00	3.00	5.00	5.00	3.50	5.00	5.00	5.00
Future vision	20%	4.00	5.00	5.00	5.00	4.50	5.00	3.50	3.50	3.00	5.00	3.50	4.50	5.00	4.50	3.50
Integration strategy	15%	4.00	5.00	4.50	5.00	4.50	5.00	2.00	2.50	2.50	5.00	4.00	4.00	5.00	4.00	2.50
Cost	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	0.00	5.00	0.00	5.00	5.00	5.00	5.00
Global presence	20%	2.00	3.00	4.50	4.00	2.50	4.00	4.00	2.00	2.50	4.00	3.50	4.00	4.00	2.50	4.00
Engineering staff	15%	3.00	5.00	5.00	4.00	5.00	5.00	3.00	2.00	2.00	5.00	3.00	2.00	3.00	3.00	2.00
Support	10%	3.00	5.00	5.00	5.00	5.00	5.00	2.00	3.00	4.00	5.00	5.00	5.00	4.00	5.00	4.00
MARKET PRESENCE	0%	2.70	4.90	5.00	5.00	4.80	4.10	2.10	2.40	2.40	4.30	3.50	3.50	4.00	2.90	2.70
Install base	30%	2.00	5.00	5.00	5.00	5.00	3.00	1.00	2.00	2.00	4.00	4.00	4.00	5.00	2.00	3.00
Revenue	30%	2.00	5.00	5.00	5.00	5.00	4.00	2.00	2.00	2.00	4.00	3.00	3.00	3.00	2.00	2.00
Training	10%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Product staffing	20%	4.00	5.00	5.00	5.00	5.00	5.00	1.00	2.00	2.00	5.00	3.00	2.00	3.00	4.00	1.00
Partners	10%	2.00	4.00	5.00	5.00	3.00	5.00	5.00	3.00	3.00	4.00	3.00	5.00	5.00	4.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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VENDOR PROFILES

Leaders

- **IBM.** Fiberlink was acquired by IBM at the end of 2013 to complement its MobileFirst portfolio. A comprehensive and user-friendly multi-tenant EMM offering that allows customers to easily add modules with appropriate functionality as they need them has helped IBM earn its Leader position. Customers also have access to a rich set of analytics and data to compare their policies and configurations against similar companies using the platform. Future integration of the EMM product with other IBM MobileFirst products like Worklight and delivery through IBM's large channel and professional services will drive competitive advantages moving forward.

- **Citrix.** Citrix led the most recent wave of market consolidation with its acquisition of Zenprise at the beginning of 2013, which allowed it to embrace its vision to provide employees with new ways to work. Its success with creating a mobile workspace solution that unites its EMM solution with its virtualization products and secure network gateway helped earn Citrix a Leader spot. Citrix has demonstrated a strong commitment to user experience across all of its products and continues to innovate with collaboration tools like ShareFile and GoToMeeting.

- **MobileIron.** MobileIron launched its EMM solution in 2009 and is one of the few dedicated EMM providers to not be acquired by a larger technology company, instead going public in June 2014. MobileIron earned its Leader position with its comprehensive solution that combines device, application, and data management with a secure mobile gateway. MobileIron also offers its @Work applications for secure collaboration. Forrester clients consistently have MobileIron on their vendor shortlists for EMM consideration.

- **AirWatch by VMware.** VMware acquired AirWatch in the beginning of 2014, adding one of the most mentioned EMM vendors among Forrester clients to its portfolio. AirWatch's dedication to user experience and simplifying mobile management for administrators filled a major gap in VMware's strategy, which looks to provide unified workspace management tools for all devices and employee scenarios. Forrester's data collection took place just as the acquisition closed, so there was little integration at the time of evaluation. Therefore, Forrester encourages customers to investigate further as they evaluate products.

- **Good Technology.** Good's strong commitment to security and investment in its containerization options and network operations center (NOC) has long made it a popular choice among financial services and other highly secure customers. However, its work to improve user experience and extend its EMM product beyond just containerization has enabled Good to extend the product to a much larger audience and has helped it achieve a Leader spot. In addition, Good's work around its collaboration applications and Good Dynamics product has helped many customers accelerate their mobile application development and deployments to employees.

- **BlackBerry.** As other vendors have rushed to offer competitive alternatives to BlackBerry's platform, the company has had to reinvent itself around the characteristics that made it a Leader previously — and its strong commitment to enterprise mobility and security has paid off. Over the past two years, BlackBerry has built strong cross-platform management capabilities, including a secure workspace, into BES while keeping support for its large existing customer base. Continued investments in collaboration applications and a strong vision that incorporates a strategy for Internet-of-Things management and automotive support have placed BlackBerry in a Leader position.

- **Soti.** Soti's solution is differentiated by its additional wide focus on rugged and semi-rugged devices, Android+, and its remote control and support tool. Many customers leverage Soti to manage their new and legacy rugged and semi-rugged mobile devices in addition to those used by information workers. Soti's Android+ technology will provide additional controls on Android and its BlitFire 10x technology, which allows for remote control and support on Android as well as iOS and has helped make it a Leader.

- **Symantec.** Symantec has made several acquisitions of mobile management products over the past several years, first with its acquisition of MDM vendor Odyssey Software and later with the acquisition of mobile application management (MAM) vendor Nukona. Symantec also purchased secure email vendor NitroDesk, who makes the popular Touchdown email client for mobile devices. Odyssey, Nukona, and NitroDesk all have a strong offering in their respective areas, but Symantec, until recently, has been slow to integrate all products into a comprehensive solution.

- **SAP.** SAP's EMM offering is differentiated by its integration with the greater SAP application portfolio and its mobile application development and analytics solution, all which leverage the SAP Hana Cloud. This focus on application analytics and support of those applications helped earn SAP a Leader spot. While SAP does have some app management functionality, the app wrapping and app security is delivered through its partnership with Mocana.

- **Sophos.** Sophos is largely focused on the mid-market and integrates its EMM product with its wide set of security tools, including endpoint, web, and network protection. Sophos has limited containerization options today, but its secure network gateway and strong data protection features helped it earn a spot as a Leader.

Strong Performers

- **Trend Micro.** Trend Micro's solution combines mobile security and threat protection with Trend's greater security platform, giving customers visibility and control over all end points employees use for work. While the vendor doesn't offer as many containerization options as other vendors in the market, it does differentiate with Virtual Mobile Infrastructure, which allows users to access a hosted Android OS from a mobile application to access their work items securely. This provides firms that have concerns about putting corporate data onto BYODs with a way to still support those users.

- **Absolute Software.** Absolute Software's vision is based upon simplifying the admin experience while managing all devices. Its solution offers client management and EMM together in a single product. The vendor's unique persistence technology, Computrace, provides customers with a constant connection to track, manage, and protect devices and help locate and return lost or stolen devices. These differentiators contribute to Absolute's position as a Strong Performer.

- **LANDesk.** LANDesk's Total User Management offering combines client management, EMM, and service management to give tech management administrators a solution to manage all of their users' devices. In addition, LANDesk's acquisition of Wavelink has added significant ruggedized device support, which is a major differentiator. At the time of the evaluation, LANDesk had limited data and network security support. However, it recently acquired LetMobile, which should help fill these gaps.

- **Kaspersky Lab.** While Kaspersky has been in the mobile security market for some time, its EMM product is relatively new. The vendor's solution boasts strong application and data protection functionality with differentiators including application reputation and anti-malware. The integration with its greater enterprise security portfolio will help customers with overall threat management for their users across all devices. Kaspersky is largely focused on the small and medium-size business (SMB) market, and larger enterprise customers might not find everything they need in the product.

- **McAfee.** McAfee sees EMM as one component of its user-based security coverage. The product stands out with application reputation and anti-malware support but lacks many containerization options and is only offered on-premises today. Strong network security functionality helped it reach the Strong Performer position.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of 15 data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with 15 of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

All of Forrester's research, including Forrester Waves, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

ENDNOTES

[1] The mobile mind shift is the expectation that your customer can get what she wants in her immediate context and moments of need. This shift means the battle for your customer's attention will be waged in mobile moments — any time she pulls out a mobile device. Because mobile devices are pervasive in life and work, mobile moments have a pervasive impact on your company. See the January 24, 2014, "Re-Engineer Your Business For Mobile Moments" report.

[2] In today's competitive environment, investing in business technologies is central to companies' ability to win, serve, and retain customers. Your customers now expect unified, cohesive experiences across touchpoints. The most important technologies of your BT agenda will help your firm obsess about and interact with your customers throughout the life cycle. They include life-cycle solutions and engagement platform technologies. Engagement platforms support a modular, four-tier architecture that allows you to tie life-cycle solutions together to deliver these experiences. Forrester refers to the first tier as "interaction." See the July 29, 2014, "Top Technologies For Your BT Agenda" report.

[3] As mobile strategies mature, companies demand more from management technology than just device management components. Forrester believes that MDM solutions will evolve into broader enterprise mobile management (EMM) solutions. See the June 6, 2014, "Brief: The Future Of Mobile Device Management" report.

[4] The service desk can produce challenges to hardware and software; for more information around a customer-centric service desk, see the November 15, 2013, "This Isn't Your Grandfather's Service Desk" report.

[5] For more information on the proliferation of file sync and share, see the July 10, 2013, "The Forrester Wave™: File Sync And Share Platforms, Q3 2013" report.

[6] Source: Forrester's Forrsights Global Workforce Benchmark Survey, Q4 2013.

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