The New Frontier Of Endpoint Management

How Analytics And Security Stacks Are Driving Employee Experience Initiatives For Advanced Firms

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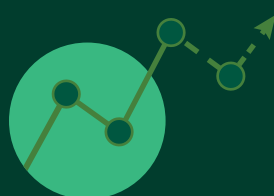FORRESTER®

Executive Summary

As the world adjusts to a rising levels of remote workers, a large increase in remote endpoints, and a unique new feeling of overall uneasiness, how can companies ensure their employees have access to the tools and processes they need to stay productive? The status quo of endpoint lifecycle management has expired, and many companies are scrambling to respond while retaining a happy workforce. Companies must adapt to the new reality of multivendor, multioperating-system environments; that includes updates to their methods of endpoint management.

To provide a strong employee experience (EX), many companies are turning to modern management of their endpoints. Today's IT leaders are faced with a new cohort of challenges to managing their endpoints. The needs of the business and of employees are changing more rapidly than IT leaders can account for; they must learn to tread water or risk drowning.

HP commissioned Forrester Consulting to evaluate how and why companies are transforming their approaches to endpoint management. Forrester conducted an online survey with 779 IT decision-makers with responsibility over or insight into fleet and/or endpoint management to explore this topic. We found that most companies are in the early stages of transforming how they approach endpoint/lifecycle management and are already seeing the benefits of a modern managed fleet and workforce.

47% have experienced/expect to experience increased employee/end-user productivity from modernized management.

KEY FINDINGS

› **Companies are prioritizing modern management of endpoints.** Modern management is more than just a refresh of technology. It's a fundamentally different approach to improving digital employee experience, endpoint management, and security. By investing in modern tools and processes, companies are innovating their way to improved full lifecycle management and, as a result, increased employee satisfaction.

› **Demands for improved end-user/employee experience and productivity are driving companies to modernize.** To determine which technology-related steps will best drive success, IT leaders look to modern management for a new way of harvesting and analyzing data, especially to enable new strategies around cost, EX, and manageability. From endpoint performance data to employee performance data to end-user sentiment, companies are looking to data analysis to help them make better decisions. By using tools like artificial intelligence, deep learning, and data aggregation against data lakes, companies are finding that improved data gathering and analysis are key to an overall improved EX.

› **Improved analytics help companies deliver on their EX goals.** As the relationship between employees and their companies grows and changes, IT leaders are interested in learning more about what their employees need and expect from them. How can they best serve their employees and keep them productive and innovative? Actionable analytics insights and improved lifecycle management offered by modernization will help them adjust to provide for their employees in a new and more efficient way.

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Modernization Of Endpoint Management Is Gaining Steam

As the world plays pandemic catch-up, companies are focused on adjusting to the explosion of remote or hybrid workers. How do we support our workforces through strategic shifts in endpoint management? How do we ensure the safety of our proprietary, employee, and customer data on our endpoints? In surveying 779 enterprise IT decision-makers across various industries, we found that:

> › **Modernizing endpoint management is center stage for many firms.** Modernization can solve for a clear and present threat to security and employee productivity. The main IT priorities for the next 12 months, after endpoint management, are security for the full environment, consolidating IT systems for better manageability, and improving operational efficiency and productivity; this includes a shift from on-prem to cloud-based systems.
>
> More specifically for endpoint management, IT leaders are prioritizing increased predictive analytics, increased security for the full environment, increased support for remote workers, and automation of endpoint management tasks (see Figure 1). This shift in priorities will look different for every company as they learn to tailor their endpoint management strategies for their unique user and endpoint needs, but security, support, and data and analytics will lead the charge. Gleaning valuable insights from predictive analytics will keep firms competitive in the realms of break/fix and EX, overall.
>
> › **Companies are embracing cloud and comanagement, but the path to modernization has several other roadblocks.** Eighty-six percent of decision-makers say they have either already adopted or are planning to adopt cloud as part of their endpoint management strategies, while comanagement/coexistence (assisted management of systems through a third-party partner) is expected to grow over the next two years. With cloud-based environments and collaboration tools, workers can spend more time being productive and less time focusing on how to reach and share with their physically distant colleagues. Respondents are aware that improved productivity will rely on increased flexibility for remote workers and decreased downtime through speedier break/fix and better support that a third-party partner could provide rather than being sourced internally. Many companies are moving toward a more flexible model of cloud or comanagement, rather than be hindered by a costly lack of skilled personnel or the right tools. Not only does a comanagement model enable an improved EX, but it also allows for a smoother transition while phasing out legacy apps and infrastructure, rather than a jarring rip-and-replace method.

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› **Leaders know modernization is key to enabling their workers but struggle to activate advanced strategies.** Decision-makers also want greater understanding of employee sentiment. While companies scramble to enact the new pieces of their strategies that they believe will bring them success, they seek to understand what their employees really want in order to increase productivity and engagement. What is the best way to harvest meaningful feedback, and how do companies go about enacting similarly meaningful change? An enabled hybrid or flexibly remote workforce is the destination, but some companies are struggling in the early stages of their journey.

While many companies are using qualitative methods to gather employee-centric data, many of them are looking to level up their data gathering and make sense of that data once it is aggregated (48%). Business leaders are hungry to understand the full picture to identify the best way forward, and that must include a comprehensive understanding of employee sentiment and objective insights via quantitative data.

Figure 1

"What are you prioritizing in your device management strategy update?"
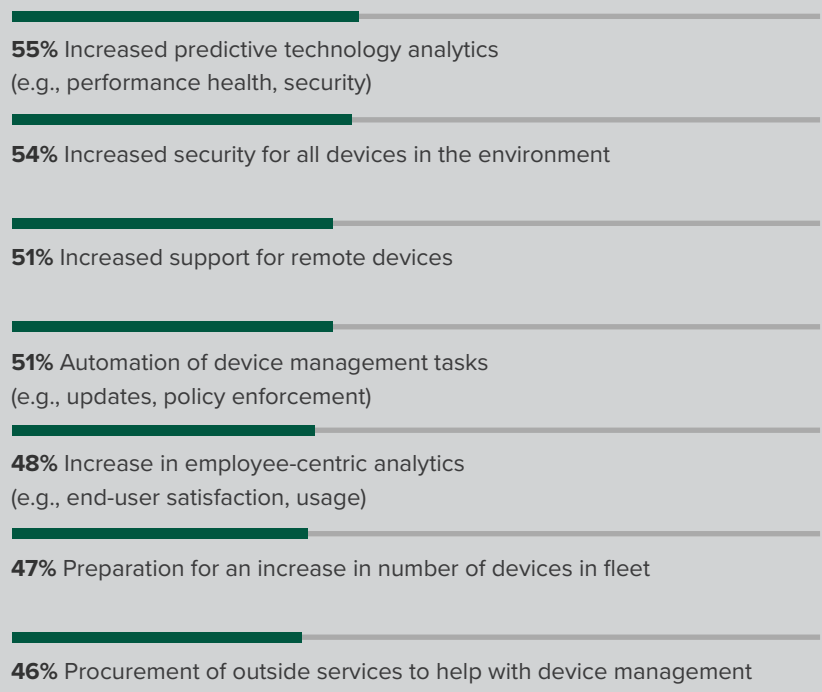
55% Increased predictive technology analytics
(e.g., performance health, security)

54% Increased security for all devices in the environment

51% Increased support for remote devices

51% Automation of device management tasks
(e.g., updates, policy enforcement)

48% Increase in employee-centric analytics
(e.g., end-user satisfaction, usage)

47% Preparation for an increase in number of devices in fleet

46% Procurement of outside services to help with device management

Base: 779 IT decision-makers with responsibility over or insight into fleet and/or device management
Source: A commissioned study conducted by Forrester Consulting on behalf of HP, September 2020
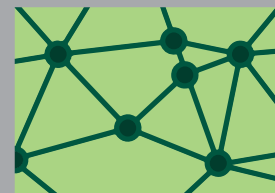
86% say they have already adopted or are planning to adopt cloud as part of their endpoint management strategies.

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Firms Aren't Sure Where To Start The Modernization Journey

While companies dream of the benefits of modern management, they must account for certain obstacles when crafting a modern management strategy. The very steps they are prioritizing for the next 12 months are also their most difficult challenges: speedier deployments, increased automation, improved enforcement of policies, improved overall day-to-day management, and a better understanding of end-user sentiment. Unfortunately, companies lack either the skilled personnel or budget to make these goals a reality. By justifying the investment in new technologies or third-party services, IT leaders can begin to take advantage of the benefits of modernizing. We found that:

› **Those interested in modernization face a myriad of challenges.** Companies whose leaders decide modernization is their way forward face several roadblocks; the most formidable of these include a lack of security, a lack of skills or knowledge, and an inability to justify investment in new technology. While they struggle less with garnering initial executive buy-in, nearly half of respondents feel they lack the security stack or the skilled personnel to effectively implement updates to their endpoint management strategies without putting their environments or data at risk (see Figure 2).

Figure 2

"What challenges do you experience with updating your current strategy for device management?"

46% Lack of security

43% Lack of skills or knowledge

40% Inability to justify investment in new technology

39% Lack of budget/resources

37% Change management for employees

33% Opposition from internal decision-makers

31% Lack of executive buy-in

Base: 779 IT decision-makers with responsibility over or insight into fleet and/or device management
Source: A commissioned study conducted by Forrester Consulting on behalf of HP, September 2020

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> › **End-to-end security is more important than ever.** General IT security remains the largest concern when approaching an update to endpoint management strategy, particularly when maintaining infrastructure or general data security. What's worse is that this trend is pervasive throughout every stage of the endpoint lifecycle, especially in maintaining identity management processes and struggling to meet IT compliance standards. Companies have been focused on quickly adapting to the growing number of remote workers, and security/compliance will become more important as the dust settles.

> › **It's tough to support the employee experience in all the ways that matter.** Business leaders are finding it difficult to provide a satisfactory EX. Myriad hiccups plague the current employee experience, from accessing applications to spending too much time on security updates rather than innovation. In enabling employees and increasing employee satisfaction, firms struggle with acquiring the right tools to measure sentiment accurately, harvesting actionable qualitative data, and tying the employee sentiment data they do gather to improvements. Even if companies can gather data, it isn't useful since they don't know how to act on it and lack industry benchmarks to guide their decision-making (see Figure 3).

Figure 3

"What challenges do you face when trying to enable your employees/increase employee satisfaction?"

46% Lack of tools to measure sentiment accurately

44% Qualitative data that is not actionable

44% Tying employee sentiment to improvements

44% Difficult to measure employee sentiment against industry standards

40% Unsure how to prioritize support investments to improve device performance

39% Data not collected based on employee sentiment

37% Executives who don't feel employee sentiment is important

Base: 779 IT decision-makers with responsibility over or insight into fleet and/or device management
Source: A commissioned study conducted by Forrester Consulting on behalf of HP, September 2020

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› **Modernized data and analytics lead the way to improved support.**
Most companies begin the journey of improving EX by smoothing the
process of deployments or finding help through comanagement. For
many companies, this looks like modernizing enforcement of policies,
rationalizing their employee-facing app portfolios, investing in automation
of deployments, and finding and deploying a modern management tool
(unified endpoint management). But the next level of modernization will
be guided by the richest source of information they already have at their
disposal: internal data on endpoints and employees.

› **Companies must learn to interpret the data once they have it.**
Business leaders are aware that the way forward will be paved with
data, but aggregating and using this data has proven to be challenging.
Forty-six percent of IT decision-makers indicate they lack the tools to
measure employee sentiment accurately, and 90% report that improving
their ability to collect qualitative feedback on tech experience will be a
high or critical priority over the next 12 months. And while lack of skills
and personnel to innovate for these changes is a challenge, companies
are gaining interest in hiring assistance in these areas. Companies
currently use third-party services for day-to-day endpoint management
and analytics. When considering what services they would expect
from hiring third-party services, decision-makers most commonly cite
predictive analytics. Companies are looking to be more proactive in
serving their employees by being able to predict and stop problems
before they start. An improvement in the aggregation and analysis of
qualitative data will help them focus their efforts to address the harshest
pain points of their EX.

Grow The Bottom Line Through Improved PC Lifecycle Management And Employee Enablement

IT leaders know that investing in modern endpoint management will lead to greater employee productivity, better support, and a better-enabled workforce. While they may not have assembled the right puzzle pieces for their strategies yet, many companies are on the right track. Making key changes in their endpoint management strategies and employing third-party services where they don't have the right skills or expertise are all great places to start.
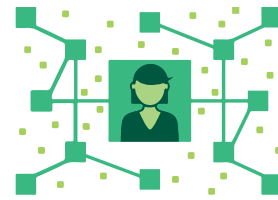
Decision-makers say their firms have experienced or expect their firms to experience the following benefits from modernization:

› **Empowering a more remote workforce.** While leadership struggles to justify the case for investing in new technologies or partnerships to modernize due to security, budget constraints, or skills concerns, employees bear the brunt of the remaining stone-age processes and tools. For example, employees struggle with a lack of easy access to useful tools and resources when remote, the hassle of battery failures/overheating, and no efficient way of using multiple endpoints with multiple operating systems. What IT leaders fail to realize is that the technology available to help them can address these security and operations challenges and pave the way for a smoother EX going forward. The most common benefits expected or experienced by companies that are prioritizing modernization are an increase in employee/end-user productivity, enhanced support for remote employees, improved EX, and improved PC lifecycle management overall (see Figure 4). This means less time spent on things that can be automated and more time innovating to drive the business forward.

Figure 4

"What benefits have you experienced/do you expect to experience from modernizing your device management strategy?"

47% Increased employee/end-user productivity

45% Better support for remote employees

45% Improved employee experience

43% Improved full PC lifecycle management (e.g., overall efficiency, faster deployment of devices, better patching, faster retirement)

42% Improved technology and employee metrics profiles

41% Increased time for innovation

39% Greater understanding of end-user satisfaction and productivity

38% Reduced cost of addressing security incidents

38% End-to-end platform security

37% Predictive analytics to decrease downtime

37% More time to allocate to strategic initiatives

36% Improved retention of talentsatisfaction

Base: 779 IT decision-makers with responsibility over or insight into fleet and/or device management
Source: A commissioned study conducted by Forrester Consulting on behalf of HP, September 2020

› **Improved data and analytics, including predictive analytics.** Data and analytics are top of mind in the race to modernize. Hiring and implementing a service provider can prove helpful for IT teams that lack the expertise internally; predictive analytics to increase employee productivity and reduce downtime are the top anticipated benefits from using endpoint management services (see Figure 5). As teams prioritize improving their qualitative understanding of EX, improved endpoint analytics will provide the knowledge they need to update the tools and processes that shape the employee experience.

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Companies are also interested in tracking endpoint security profiles, endpoint usage stats, endpoint performance stats, and individual productivity/utilization (see Figure 6). Predictive analytics will also enable IT leaders to solve problems before they arise. Services will be instrumental in this process, as analytics is one of the top capabilities IT leaders expect to receive from providers. Once companies can predict costly problems before they happen, they can shift to a more proactive strategy. Service providers can help companies comfortably make this shift from reactive to predictive to preventative.

› **Improved service and support.** Finding the right partner can be crucial in enabling employees and improving endpoint management. Many IT decision makers expect to benefit from faster break/fix after modernizing their endpoint management, and 54% expect such speedy and knowledgeable break/fix solutions to come from partnering with a service provider (see Figure 5). While it is typical for companies to lack the internal personnel to navigate their modernization journey, the right partner can light the way to a more productive future with more time spent on revenue-driving tasks, rather than administrative or maintenance-related tasks. With predictive analytics and faster break/fix, companies can focus on prevention of downtime and issues, rather than spending time and money on inefficient support.

Figure 5

"What benefits do you expect from device management services?"

58% Predictive analytics to increase employee productivity/reduce downtime

56% Endpoint security services interwoven in the full lifecycle/full platform

54% Speedy and knowledgeable break/fix solutions

54% Full, tailored lifecycle management

51% Greater understanding of industry employee data benchmarking

50% Expedient deployment service — gets requirements and tailors based on those

42% Diligent management — day-to-day

Base: 779 IT decision-makers with responsibility over or insight into fleet and/or device management
Source: A commissioned study conducted by Forrester Consulting on behalf of HP, September 2020
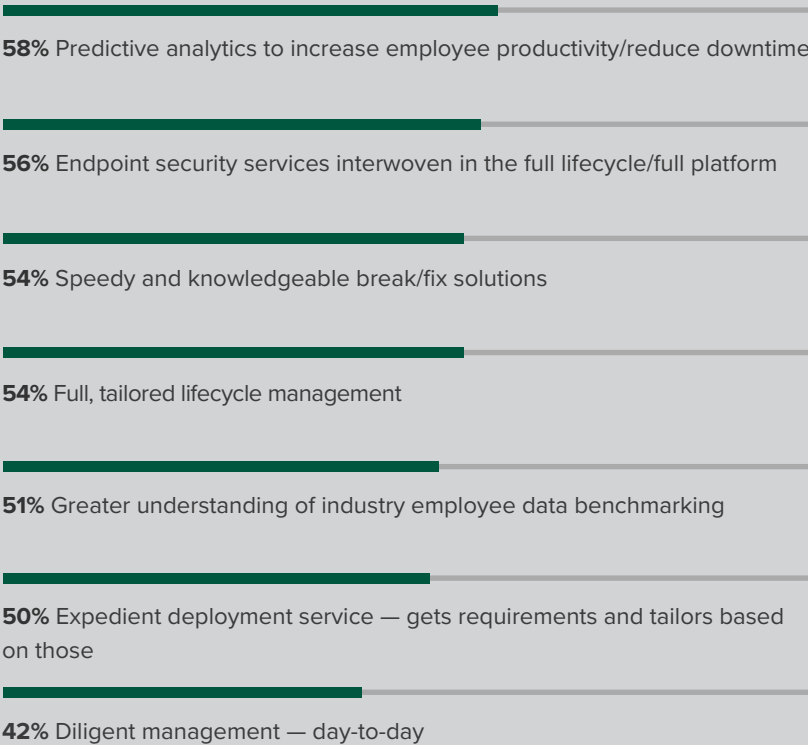
58% expect device management services to provide predictive analytics that increase employee productivity/reduce downtime.

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Figure 6

"What benefits do you expect your employees to experience from modernized device management?"
(Showing top four responses)

■ Most beneficial   ■ Second-most beneficial   ■ Third-most beneficial

	Most beneficial	Second-most beneficial	Third-most beneficial
Security will infringe less on productivity.	17%	14%	14%
They'll have easier access to a consolidated set of apps.	13%	13%	13%
They'll have faster break/fix.	12%	14%	13%
It will improve employee wellness.	13%	12%	9%

"What type of employee metrics/data would you track, given the option?"
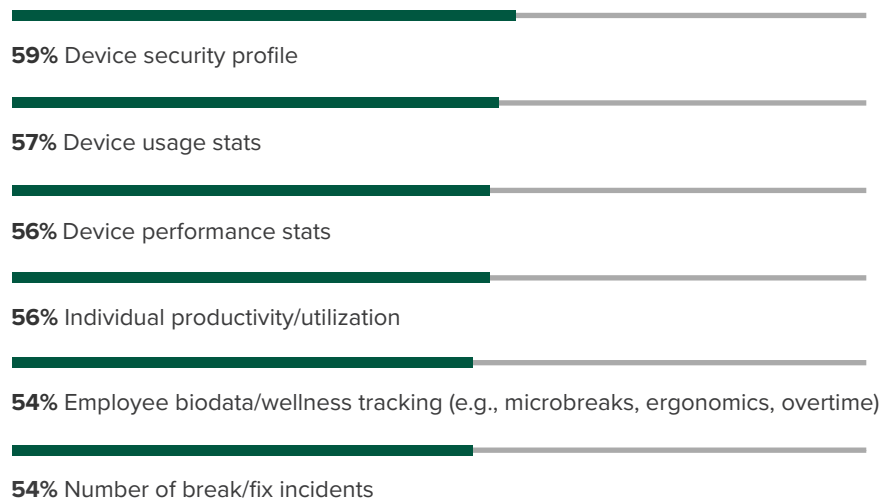
59% Device security profile

57% Device usage stats

56% Device performance stats

56% Individual productivity/utilization

54% Employee biodata/wellness tracking (e.g., microbreaks, ergonomics, overtime)

54% Number of break/fix incidents

Base: 779 IT decision-makers with responsibility over or insight into fleet and/or device management
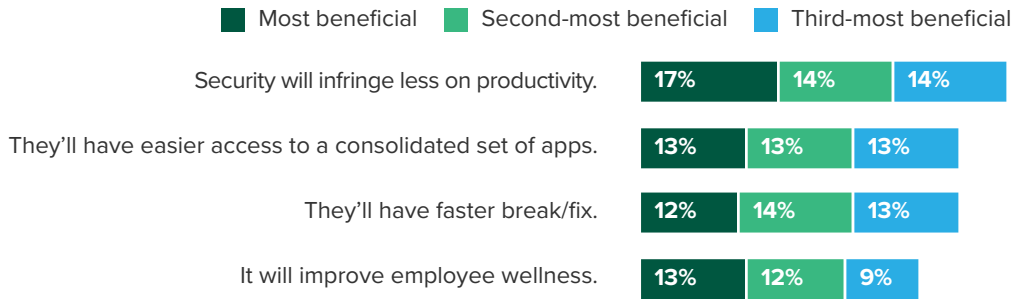Source: A commissioned study conducted by Forrester Consulting on behalf of HP, September 2020

67% expect security to infringe less on productivity after modernizing their device management.

Key Recommendations

Forrester's in-depth survey of IT decision-makers about updating and modernizing their endpoint management strategies yielded several important recommendations:

Understand the roadmap for modernization. The path to modern management has five key steps: 1) gaining visibility, 2) transforming policy, 3) modernizing update management, 4) rationalizing applications, and 5) implementing analytics capabilities. These five steps will differ in length and scope according to your organization's needs; however, you should be familiar with this roadmap prior to starting down the path.

Identify key groups that could benefit from modern management. You don't have to modernize endpoint management for every employee right away. If you're worried about transforming too quickly, start with a use case-centric approach. Good starter use cases include remote workers, heavy travelers, bring-your-own-PC (BYOPC) programs, call centers, and employees who primarily use software-as-a-service-based applications.

Make modern management palatable for security pros. Security pros can question modern management because of its emphasis on using the cloud to manage endpoints over the air. But in a world where data absolutely will travel outside of the data center, a traditional approach to endpoint management simply won't do. Focus on how modern management helps support Zero Trust, reduces the attack surface overall, uses contextual and continuous authentication to ensure proper access to data, and protects data both in transit and at rest.

Hire a partner to fill expertise gaps. Modern management will require new skill sets: mobile management for traditional PCs, data science for endpoint performance, people skills for employee research, etc. Your organization likely does not have all of these skills in-house. Utilize partners to fill your gaps, or contract partners to take on tasks that no longer differentiate your company. For example, using a partner to automate endpoint deployment in-factory can free up time to conduct more employee research.

Factor change management into your strategy. As you go down the path of modern management, consider how it will impact employee productivity, and build a change management strategy to overcome any change-related challenges. That means having dedicated staff to help employees overcome the change, marketing the benefits of the change appropriately, and providing adequate training. This is another area where an experienced partner can help.

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Appendix A: Methodology

In this study, Forrester conducted an online survey of 779 IT decision-makers across industries in APAC, EMEA, and the US to evaluate approaches to modernizing enterprise endpoint management. Survey participants included decision-makers in IT roles with responsibility over or insight into fleet and/or endpoint management. Questions provided to the participants asked about their IT and endpoint management priorities, as well as challenges and benefits to modernizing their endpoint management strategies. The study began and was completed in September 2020.

Appendix B: Demographics/Data

Country

China	13%
France	13%
Germany	13%
India	17%
Japan	13%
United Kingdom	13%
United States	19%

US 19%   APAC 43%   EMEA 39%

Company size

20,000 or more employees	9%
5,000 to 19,999 employees	20%
1,000 to 4,999 employees	43%
500 to 999 employees	28%

Respondent level

100% sit within IT

C-level executive	Vice president	Director	Manager
26%	18%	31%	26%

Industry

Technology and/or technology services	26%
Manufacturing and materials	11%
Retail	10%
Financial services and/or insurance	9%
Healthcare	7%
Telecommunications services	5%
Construction	5%
Energy and/or utilities	4%
Business or professional services	4%
CPG and/or manufacturing	3%
Transportation and logistics	2%
Electronics	2%
Education and/or nonprofits	2%
Consumer services	2%
Chemicals and/or metals	2%
Travel and hospitality	1%
Media and/or leisure	1%
Legal services	1%
Agriculture, food, and/or beverage	1%
Other	2%

Base: 779 IT decision-makers with responsibility over or insight into fleet and/or device management
Note: Percentages may not total 100 because of rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of HP, September 2020

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