The Total Economic Impact Of Windows Tablets For Assisted Sales In Retail

Cost Savings And Business Benefits Enabled By Windows Tablet Devices

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Executive Summary

In September 2013, Microsoft commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) retail organizations or divisions may realize by deploying and using Windows tablet devices in an assisted sales role. The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of the Windows tablet devices for their retail sales employees.

To better understand the benefits, costs, and risks associated with a Windows tablet implementation, Forrester collected data and information from a number of retail organizations currently using Windows tablets, from 17 anonymous survey respondents and two interviews. All operate in retail sales and have sales associates selling directly to consumers. Organizations found that arming their sales associates with a Windows tablet device running Windows 8 helps:

› Lower management and security costs by providing a device that already integrates with their Windows-based desktop and laptop endpoint management and security systems.

› Consolidate device provisioning, leading to lower total purchase costs (versus providing tablet and laptop devices).

› Improve sales associate effectiveness with faster access to data, eliminating time and mistakes rekeying information, and quickly processing transactions.

› Increase customer satisfaction when questions are answered more quickly, and transactions are handled efficiently.

Prior to Windows tablet devices, retailers had implemented typical sales processes, which are successful but led to occasional issues, customer frustrations, and exposed many areas for improvement. Retailers that provided non-Windows tablets to sales associates and managers were able to leverage the devices for many tasks, but were faced with management or security issues that required extra time and investment to manage, and/or restricted features (such as network access to back-end systems) that limited benefits.

For others, sales associates have to run around the store checking stock, finding a manager, and walking the customer to other products to consider; customers would get frustrated waiting for all this running around to be completed, especially when it was a question that required the manager to go back to their desk. When sales associates and managers are armed with Windows tablet devices, customers are serviced more quickly, can be shown more options with less running around, and sales associates and managers can look up information without leaving the customer's side.

WINDOWS TABLETS ENABLE NEW VALUE VERSUS NON-WINDOWS TABLETS

Forrester collected data from current users of Windows tablet devices, from 19 total organizations, interviewing two and surveying 17. The financial analysis found that a representative organization based on these participants experienced the risk-adjusted ROI, benefits, and costs shown in Figure 1.[1] See Appendix A for details about the representative organization.

The representative organization's three-year analysis points to risk-adjusted benefits of around $2.4 to $3.5 million per year, versus implementation costs of $1.2 million and risk-adjusted costs of around $500,000 to $550,000 per year, adding up to a risk-adjusted net present value (NPV) of over $4.5 million.

FIGURE 1
Financial Summary Showing Three-Year Risk-Adjusted Results

| ROI: 182% | NPV: $4,547,845 | Payback: 4.7 months | Sales: ▲ 50% |

Source: Forrester Research, Inc.

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Benefits. The composite organization experienced the following risk-adjusted benefits that are based on information provided by the interviewed and surveyed companies:

- **Device consolidation and reduced device purchase costs.** The composite organization selected Windows tablets that provide laptop capability, plus the ability to detach or transform into a tablet slate. They run all the Windows software the organization has already licensed, such as Office and their POS system. They estimate more than $1.2 million in risk-adjusted cost savings by avoiding the planned purchase of a laptop plus companion tablet device for sales managers and some sales associates.

- **Reduction in annual device licensing, management, and support costs.** The composite organization chose Windows tablets that can be managed in the same manner as any other Windows laptop or desktop, without the need for additional third-party software such as mobile device management (MDM) or any special IT processes or exceptions. This choice results in an estimated risk-adjusted cost avoidance of more than $620,000 per year.

- **Reduction in annual costs related to device security.** The composite organization selected Windows tablets because it can implement the same security policies and software as the laptops and desktops it already manages, including device antivirus, group policy settings, and device encryption. It estimates a 75% reduction in security issues, and faster issue resolution by 50%, versus its past solution with non-Windows tablets, adding up to a risk-adjusted savings of almost $60,000 per year.

- **Improved sales manager productivity from faster access to information.** Sales managers can handle team and customer-related issues right from the store floor. The composite organization estimated that sales managers saved an average of 5 hours per month of time they used to spend looking for information, or nearly $450,000 per year.

- **Improved sales by sales associates assisted by Windows tablet devices.** The composite organization estimates a 50% increase in sales, or nearly $1.2 million, in new sales profit per year from sales associates with Windows tablets. Customers are happier and spend more when they can complete transactions, get answers, and resolve issues quickly. Windows tablets can run all of the software to meet customers' needs as well as meeting the enterprise-class management and security requirements of the organization.

› **Costs.** The composite organization experienced the following risk-adjusted costs related to Windows tablets:

- **Device purchase costs,** including operating system, of $550 per device or $1.1 million total upfront investment.

- **Deployment costs.** Planning, imaging, and distributing to sales teams, which add up to $105,000.

- **Management costs.** Estimated device management, support and security costs are $440,000 to $485,000 per year.

Disclosures

The reader should be aware of the following:

› The study is commissioned by Microsoft and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

› Forrester makes no assumptions as to the potential return on investment that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the report to determine the appropriateness of an investment in Microsoft Windows tablet devices.

› Microsoft reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

› The customer names for the interviews were provided by Microsoft. Microsoft did not participate in customer interviews. Survey respondent names were not provided by Microsoft.

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Market Overview

The tablet market has seen explosive growth over the past several years. Forrester forecasts[2] that the overall tablet market (including all competitors) will grow from 327 million installed users in 2013 to 905 million in 2017. While the consumer market is large, the enterprise-purchased, company-owned market continues to grow — from 12% of the tablet market in 2013 to 18% of the market in 2017.

Windows 8 represents a growing proportion of the enterprise tablet market: As of Q3 2013, 28% of IT decision-makers in North America and Europe reported supporting at least some Windows tablets in their organizations, while an additional 51% had interest in doing so.[3] Since the release of Windows 8 in October 2012, Microsoft and its OEM partners have produced a wide array of devices. For the first time, Windows-based devices enjoyed a touch-first experience, enabling the release of tablets, hybrids, and convertibles that empower workers with mobile computing scenarios. The release of Windows 8.1 in October 2013 further refined this experience, expanding the range of devices — for example, eight inch form factor devices.

The range of devices powered by Windows 8 offers users access to new usage cases in the retail sector, including:

› **Mobile usage scenarios.** IT professionals cite portability as the number one driver for tablet adoption at their organizations. Windows tablets empower new, mobile-first business processes, equipping retail sales associates with devices and building new sales routines around the devices.

› **Two-in-one usage scenarios.** Windows tablets can be used behind the scenes as a PC replacement when paired with a dock, keyboard, and other accessories. Sales managers and associates can use the same device for customer-facing scenarios and for administrative and communication tasks.

› **Mobile point of sale.** Sales associates can also use Windows tablets to check out customers in a mobile point-of-sale scenario. This scenario creates a more intimate interaction between associate and customer, and helps eliminate the situation in which customers change their mind and abandon their cart during their walk from a sales associate's department to a cash register.

› **Product demonstrations and configurators.** Sales associates can use Windows tablets to create new sales experiences for customers. In a retail clothing store, an associate can instantly accessorize a dress with shoes and jewelry — virtually, on the tablet. In other cases, the tablet can offer a product configurator, used by a sales associate to help a customer design a customized solution, as with automobiles.

The benefits of using Windows tablets are laid out later in this TEI study. But as a general proposition, retailers aim to deploy the devices in order to:

› **Improve the customer experience.** Sales associates armed with mobile tablets can offer better service to customers. Windows tablets can drive improved customer experience metrics. Customer experience improvements can derive from streamlined checkout processes, prioritized services for loyal customers, rich media demonstrations, and mobile point of sale, among other in-store experiences.

› **Increase cross-sell of goods.** Using configurators, sales associates can pair items from across the store together with the current item under consideration — driving up cross-sell.

› **Drive higher productivity rates.** Sales managers and associates can get more accomplished more quickly when armed with tablets, which can allow them to spend more time on the floor in front of customers.

› **Improve brand image.** The retailer benefits by providing mobile devices to its sales associates — the brand benefits intangibly by projecting a tech-forward, customer-friendly sensibility. Tablets also allow sales associates to provide customers with the best possible information, giving them better access to product and inventory data in real time.

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TEI Framework And Methodology

INTRODUCTION

From the information provided in the interviews, Forrester has constructed a Total Economic Impact™ (TEI) framework for those organizations considering implementing Microsoft Windows tablet devices. The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision.

APPROACH AND METHODOLOGY

Forrester took a multistep approach to evaluate the impact that Microsoft Windows tablet devices can have on an organization (see Figure 2). Specifically, we:

› Interviewed Microsoft marketing, sales, and/or consulting personnel, along with Forrester analysts, to gather data relative to Windows tablet devices and the marketplace for Windows tablet devices.

› Interviewed two companies and received 17 completed surveys from organizations currently using Microsoft Windows tablet devices to obtain data with respect to costs, benefits, and risks.

› Designed a composite organization based on characteristics of the interviewed organizations (see Appendix A).

› Constructed a financial model representative of the interviews using the TEI methodology. The financial model is populated with the cost and benefit data obtained from the interviews as applied to the composite organization.

› Risk adjustment is a key part of the TEI methodology. While interviewed organizations provided cost and benefit estimates, some categories included a broad range of responses or had a number of outside forces that might have impacted it higher or lower. For that reason, some cost and benefit totals have been risk-adjusted, and is detailed in each relevant section.

Forrester employed four fundamental elements of TEI in modeling Microsoft Windows tablet device solutions: Benefits, Costs, Flexibility and Risks.

Given the increasing sophistication that enterprises have regarding ROI analyses related to IT investments, Forrester's TEI methodology serves to provide a complete picture of the total economic impact of purchase decisions. Please see Appendix B for additional information on the TEI methodology.

FIGURE 2
TEI Approach

Perform due diligence › Conduct customer interviews › Design composite organization › Construct financial model using TEI framework › Write case study

Source: Forrester Research, Inc.

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Analysis

COMPOSITE ORGANIZATION

For this study, we conducted two interviews with and collected 17 survey responses from representatives from the following companies, which are Microsoft customers operating in the retail sales vertical:

› One interview was with a retailer focused on telecommunications products and services in Australia.

› The other interview was with a large department store retailer in the United States.

› The 17 anonymous survey responses are from organizations primarily in the United States, are a variety of sizes from smaller midmarket to enterprise, are current Windows tablet users, previously used non-Windows tablet devices, and were either from representatives currently in a sales associate or management role, or were in an IT team supporting those roles.

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an associated ROI analysis that illustrates the areas financially affected. The composite organization that Forrester synthesized from these results represents an organization with the following characteristics:

› A primarily United States-based retailer with brick-and-mortar stores.

› 10,000 employees in retail sales and management roles.

› Have previously used or piloted another tablet platform, or evaluated another platform before choosing Windows tablets.

The composite organization chose Windows tablets from a leading manufacturer with a "hybrid" or "slate" form factor (see Figure 3):

› Hybrid: in which the screen can detach and operate like a standard touchscreen slate tablet, but can dock to become a full-fledged laptop with keyboard, mouse, and other peripherals. Typically provided to sales managers.

› Slate: a more traditional tablet form factor with a flat touchscreen and (usually) no included dock or peripherals, though these can be added. Typically provided to sales associates.

The composite organization then began deployment.

› Rollout to retail employees began in June 2013.

› Have deployed 2,000 Windows tablets to retail sales associates and/or managers.

FIGURE 3
**Examples Of Windows Tablet Devices: Tablet With Keyboard, Hybrid Tablet With Detachable Screen, 10"
Slate Tablet, 8" Slate Tablet**

Source: Microsoft, Corporation

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INTERVIEW AND SURVEY HIGHLIGHTS

The composite organization is based on interviews and survey respondents who shared a variety of experiences covering why they investigating providing tablet devices to retail sales associates and managers, what they hoped to achieve, what Windows tablet they ultimately selected, and what business and IT benefits and cost savings they have experienced.

Situation

Organizations for the most part found Windows tablets helped resolve business issues and save IT costs — but even more so created new business opportunities. Organizations identified the following opportunities and areas of improvement they hoped to change with Windows tablets:

› Improve customer satisfaction and increase sales.

› Increase manager time on retail floor.

› Reduce number of devices provisioned to employees, particularly sales managers, who previously had a laptop and a companion tablet device, such as store managers.

› Manage all devices, including tablets, using the same security and management tools.

Solution

Organizations on the whole selected Windows tablets running standard Windows 8, which they chose for its ability to be managed and secured with the same software and agents as on other laptops and desktops, and that all desktop software that ran on Windows 7 will be available. Devices were selected from a variety of hardware manufacturers, and while some could be considered consumer devices, all are from the "hybrid" or "convertible" classes of form factors. These devices function (and look like) a traditional laptop, but through some form of flipping, spinning, or detaching, the device could transform into a traditional touchscreen slate device.

These devices were provisioned to retail sales associates and managers. Little or no training was required since, for the most part, it was the same as the back-office laptops and desktops or the POS terminals. While some developed or deployed Windows 8 "Modern App" versions of desktop applications, they were still familiar enough to be picked up quickly.

Results

The interviews and survey results revealed that:

› **Device purchase costs were reduced.** The composite organization was able to reduce the number of devices provisioned since Windows tablets can provide full laptop capabilities as well as function as a light, slate tablet. Several organizations saw significant cost savings buying one Windows tablet for each sales associate and manager rather than a tablet plus a laptop or desktop.

"Using Windows tablets has improved many things – most of all our client service for quick and easy transactions."

-Sales Manager from retail organization survey respondent

"Preparing a new device takes just a few hours – and only minutes of work."

-IT Manager, telecom retailer

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› **Desktop management costs were reduced — or at least stayed the same.** For organizations that previously provided a tablet solution, management costs were reduced for two reasons:

- First, non-Windows tablets do not often replace the need for a laptop or desktop device, so providing and managing two devices instead of one is more time-consuming and costly.

- Second, non-Windows tablets typically require additional software to manage and secure, such as an MDM solution, which cost extra not only to license, but also to manage separate security and device policies.

"Customers feel like our management team is more engaged."

-IT Manager, department store retailer

Organizations that did not provide a tablet solution before Windows tablets did not see any increase in management costs — since the same device management software that would have been installed on a traditional laptop or desktop works the same on a Windows tablet.

› **Security management and issue resolution costs were reduced.** The same security software installed on Windows laptops and desktops can be installed and the same encryption policies can be set on Windows tablets. Organizations that previously provided other tablets avoided costs related to purchasing and managing special endpoint security software just for those tablet devices. Also, Windows tablets are enterprise-ready, such as the same device encryption, domain-joining and full asset management as with other laptops and desktops in the organization. This means any breaches can be handled using the same security processes and tools. With an encrypted, managed device the risk of data loss is much lower, even if the device is lost, stolen, connected to a public wireless network, or placed in other situations that could lead to security risks.

› **Sales manager productivity benefits from faster access to data.** Sales managers are more effective when they and/or their sales associates have Windows tablets with Office, communication and email applications, and access to line-of-business applications and data such as their POS, product information, stock and supply chain information, customer account, and other back-end systems. In the past, managers would often have to run back to their desk to look up line-of-business data such as details about a new internal policy or look up a customer's account. Now they can handle team and customer-related issues right from the store floor, adding a Bluetooth keyboard if necessary. This means they spend more time on the floor and are more available to customers and sales associates when needed.

› **Sales associate sales improvements leading to greater profits.** Sales associates armed with Windows tablets have the potential to generate more and larger sales by using their tablet. Value-generating processes include: as a product catalog to look up features and answer a customer's detailed questions; check stock or set up shipping options for a product; connect with a technical subject-matter expert or a manager when necessary; and complete sales transaction. Customers that can get their questions resolved quickly and thoroughly are less likely to walk away from a sale. Note that while many of these processes could be enabled by non-Windows tablets, many large retail organizations never implemented non-Windows tablets because of the high cost of managing and securing a new set of devices, operating systems, and software.

"Windows tablets have helped raise customer satisfaction in stores where we have moved our management team from the back office to the retail floor."

-IT Manager, department store retailer

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BENEFITS

The composite organization experienced a number of quantified benefits in this case study after deploying Windows tablets, compared to their previous non-Windows tablet solution, particularly:

› Reduced device purchase costs.

› Reduction in annual device licensing, management, and support costs.

› Reduction in annual device security costs.

› Sales manager productivity improvements.

› Improved sales by sales associates.

Another important benefit mentioned by interviewed and surveyed organizations was an increase in customer satisfaction. While customer satisfaction depends on a number of factors, some organizations nevertheless identified more positive customer interactions and increased customer positive feedback since deploying a Window 8 tablet assisted sales solution that allows sales associates to provide services more quickly, and sales managers are on the floor more to handle escalations.

⊕ Reduced Device Purchase Costs

Previously, if the composite organization provided non-Windows tablets to any users, including sales associates and managers, they also often had to include a Windows laptop or desktop. Managers wanted (and often needed) access to Microsoft Office applications, and while not every sales associate would be allocated a laptop or desktop, shared back-room workstations would need to be provided to provide access to corporate systems such as HR and time reporting.

TABLE 1

Reduced Device Purchase Costs

Ref.	Metric	Calculation	Year 1	Year 2	Year 3
A1	Estimated number of avoided non-Windows tablet purchases		1,050	53	55
A2	Estimated number of avoided laptop/desktop purchases		1,250	63	65
A3	Average cost of non-Windows tablet device		$350		
A4	Average cost of laptop or desktop		$800		
At	Cost savings from device consolidation (not risk-adjusted)	(A1 * A3) + (A2 * A4)	$1,367,500	$68,950	$71,250
	Risk adjustment	↓10%			
Atr	**Cost savings from device consolidation (risk-adjusted)**		**$1,230,750**	**$62,055**	**$64,125**

Source: Forrester Research, Inc.

The composite organization (and virtually every interviewed and surveyed organization) selected Windows tablets with a "hybrid" form factor that performs both as a light, slate tablet but also has similar capabilities to a laptop. They run all the Windows software they've already licensed, such as Office and their POS system. The composite organization selected Lenovo ThinkPad Helix devices for sales managers and the slate-only Dell XPS 10 for sales associates. Other Windows tablet devices selected include: Lenovo ThinkPad tablets, HP Envy, and Microsoft Surface Pro.

> *"We feel that the level of security we need can only be provided with Windows."*
>
> -IT Manager, telecom retailer

The composite organization was able to provide a device that served both tablet and laptop needs. That meant that, particularly for sales managers, they no longer had to purchase two devices (a non-Windows tablet plus a laptop or desktop) and saw significant cost savings, considering the average cost of a non-Windows tablet of $350 (which is the average of a broad range of devices — some non-Windows tablets, especially those with 10" screens, may be much more expensive) plus the cost of a laptop or desktop of $800 (again the middle of a broad range). Note that while newer, smaller, and often much less expensive Windows tablets may not be the device some choose to replace both a laptop and a tablet, they are considered here as devices for sales associates, who did not previously have a personal laptop or desktop.

The organization provided 2,000 Windows tablet or hybrid devices to its sales associates and managers, replacing an alternative tablet device for everyone and a laptop or desktop for some (i.e., managers, plus some shared back-office workstations that sales associates can share). Table 1 shows the estimated costs and replacement device assumptions, leading to savings of more than $1.3 million in the first year, plus about an additional $70,000 per year in later years. Note that the full avoided device purchase cost reduction is shown here. The cost of new Windows tablet devices is covered in the cost section, Table 7, and net device purchase cost savings is part of the full financial summary.

The composite organization has standard a three-year device refresh cycle. Organizations that have a device refresh rate less than three years may expect additional avoided costs in Years 2 or 3.

The composite organization recognizes that if it deployed more Windows tablets to sales associates (who previously only had a tablet plus a shared laptop or desktop) this benefit could have been much lower, because it would not accrue device consolidation savings. For that reason, a 10% risk adjustment has been applied, as shown in Table 1. The risk-adjusted savings from reduced purchase costs is $225,000 up front, and about $12,000 per year afterward. See the section on Risk for more detail.

✪ Licensing, Management, And Support Cost Savings

Windows tablets lead to reduced management and support costs for two reasons:

› There are fewer devices to manage, as described in the previous section.

› Windows tablets can be managed the same as other Windows desktops and laptops — Windows 8 is managed with the same system management software, the same group policies, the same encryption settings, and the same desktop management.

By not having to continue to license an MDM solution, plus the added time savings managing one device instead of two (or one non-Windows tablet), Table 2 shows that the composite organization estimates a savings of $690,000 per year in IT costs. Note that the full avoided management cost reduction is shown here. The cost of managing Windows tablet devices is covered in the cost section, Table 8, and net management savings are part of the full financial summary.

Because the number of devices may have been overestimated above, the same 10% risk adjustment is applied to this category, so the risk-adjusted IT cost savings is nearly $621,000 per year, as shown in Table 2. See the section on Risk for more detail.

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TABLE 2

Reduction In Annual Device Licensing, Management, And Support Costs

| Ref.	Metric	Calculation	Year1	Year2	Year3
B1	Previous number of devices for sales managers and associates		2,300	2,416	2,536
B2	Average cost to manage previous device (non-Windows tablet plus laptop) per year		$300	$300	$300
Bt	Cost savings from annual device licensing, management, and support (non-risk-adjusted)	B1 * B2	$690,000	$724,800	$760,800
	Risk adjustment	↓10%			
Btr	**Cost savings from annual device licensing, management, and support (risk-adjusted)**		**$621,000**	**$652,320**	**$684,720**

Source: Forrester Research, Inc.

♻ Security Cost Savings

Similar to management cost savings, the composite organization has also seen a reduction in security management costs, based on fewer security issues as well as faster resolution of issues that do happen. For the composite organization's 1,000 retail sales associates and managers, it estimated a total of 24 security issues per month before Windows tablets — a virus attack, a lost or stolen device, or other issues requiring a security technicians involvement to quarantine, clean, reimage, or replace a tablet, laptop or desktop device, or manage server and database security for a data breach. With Windows tablets, the number of security issues is estimated to be reduced 75%, to just 6 per month, and that each issue can be resolved in half the time, illustrated in Figure 4.

FIGURE 4

Illustration Of Security Issue Reduction And Faster Resolution Time With Windows Tablets

0   3   6   9   12

Time to resolve each issue (in hours)

Security issue frequency and resolution time before Windows tablets

24 issues per month before Windows tablets (on average)

6 issues per month with Windows tablets (avg.)   Security issue frequency and resolution time with Windows tablets
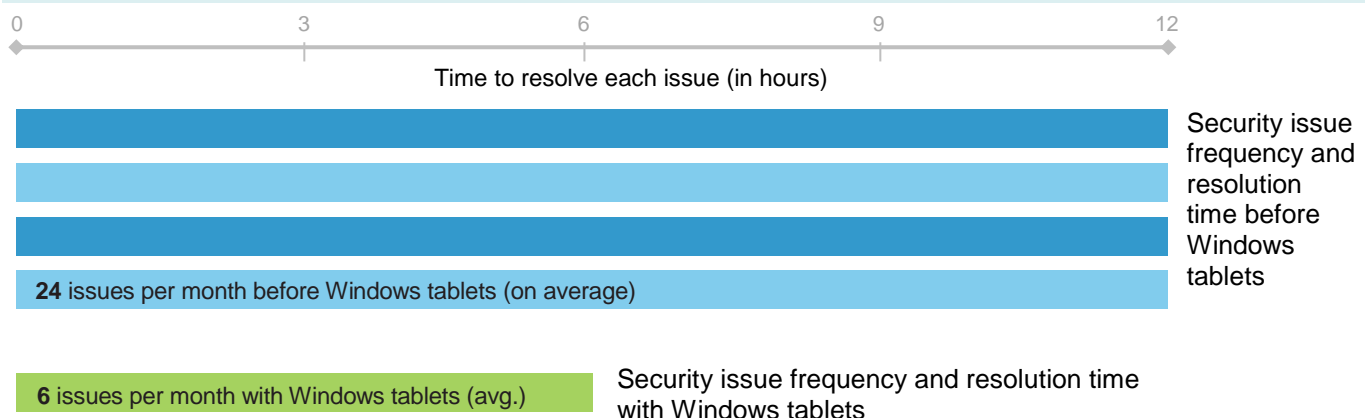
Source: Forrester Research, Inc.

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The devices are managed using the same security tools as laptops and desktops, providing efficiencies. For example, they can be domain-joined and have the same group policy settings that lock down outside network access as needed, Windows tablets can be encrypted like any other laptop or desktop using BitLocker or another solution, and network access can be managed granularly (again like a laptop or desktop) so that if an issue did arise the Windows tablet could be quarantined and blocked from network access until the issue was resolved.

"We don't have to page managers anymore, they are already close by."

-IT Manager, department store retailer

The composite organization estimates that it reduced issues from 24 to 6, and that each issue could be resolved in just 6 hours (down from 12). That adds up to an estimated annual security cost savings of more than $62,000 per year, as detailed in Table 3.

However, the composite organization recognizes it could have experienced more issues without already-well-defined security policies and processes. This benefit was reduced by 5%, for an updated risk-adjusted security cost savings of a little less than $60,000 per year. See the section on Risk for more detail.

TABLE 3
Reduction In Security Issues, Resolution Time, And Total Security Costs

Ref.	Metric	Calculation	Year 1	Year 2	Year 3
C1	Number of current issues related to tablet devices per month		24		
C2	Reduction in issues with W8 tablets		75%		
C3	Number of issues with W8 tablets per month		6		
C4	Time to resolve each current issue in hours		12		
C5	Reduction in resolution time with W8 tablets		50%		
C6	Time to resolve each issue with W8 tablets in hours		6		
C7	IT employee hourly rate		$48		
Ct	Cost savings from improved security (non-risk-adjusted)	(C1-C3) * (C4-C6) * C7 * 12	$62,208	$62,208	$62,208
	Risk adjustment	↓5%			
Ctr	**Cost savings from improved security (risk adjusted)**		**$59,098**	**$59,098**	**$59,098**

Source: Forrester Research, Inc.

♻ Improved Sales Manager Productivity

With Windows tablets, sales managers were able to handle employee and customer escalations more effectively. Any issue that would have required walking back to their desk to look up information could be handled right from the store floor, saving valuable time and allowing managers to be more available and visible to customers. Windows tablets enable this benefit by meeting security and device management requirements, making it possible for some or all back-office application data to be available on the Windows tablet.

FIGURE 5
Information Workers Prefer Keyboards With Their Mobile Computing Device

62% of information workers who use or would like to use a tablet, would prefer to use it with a keyboard

A large tablet used with a wireless keyboard   **27%**

A large tablet with a keyboard dock   **35%**

A regular tablet without a keyboard   **34%**

Don't know/no preference   **4%**
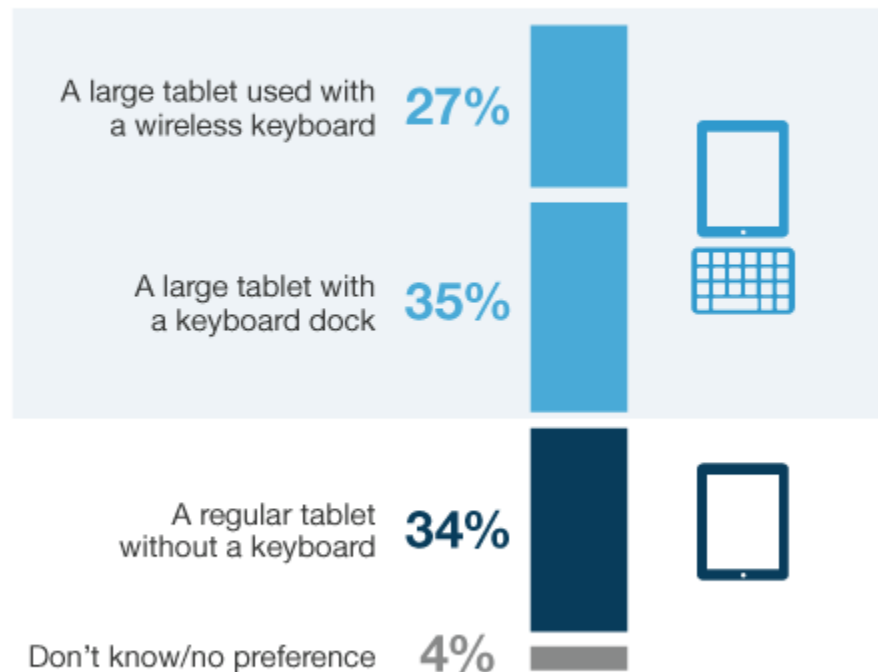
Base: 1070 Information workers in the US and EU who use or would like to use a tablet for work
Source: Forrsights Devices And Security Workforce Survey, Q2 2013

Source: Forrester Research, Inc.

Sales managers can use in-store fixtures to set the tablet down in laptop mode or on a stand with a wireless keyboard so they and the customer can review information together and quickly input any new or updated data. As highlighted in a recent Forrsights survey, most information workers — 62% — would prefer a wireless or attached keyboard, as shown in Figure 5.[4] The composite organization recognized this need for store managers and made sure that docking stations include a full keyboard, monitor, mouse, and other necessary peripherals, as well as light, portable keyboards that can attach to the Windows tablet in slate mode or are convenient enough to carry.

The composite organization estimates that each of the 500 store managers armed with Windows tablets spend an average of 12 hours per month, and with Windows tablets at least 50% could be recovered for other tasks. The recovered time can be used (or most of it can be used) to perform other, value-generating tasks like helping additional customers. As shown in Table 4, the value of time saved that is available for other tasks adds up to nearly $500,000 per year.

Since individual stores and each store manager plans and performs tasks a little differently, the estimated 50% benefit though based on store manager input was an average value with a high variance. Furthermore, there may be other process changes not considered that could have impacted this benefit. For this reason, sales manager productivity benefits have

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been risk-adjusted by 10% to be more conservative. The risk-adjusted annual benefit is nearly $450,000 per year, as shown in Table 4. See the section on Risk for more detail.

TABLE 4

Sales Manager Productivity Benefits With Windows Tablets

Ref.	Metric	Calculation	Year1	Year2	Year3
D1	Time (hours per month) each sales manager spends on data-intensive questions		5		
D2	Improvement in data access time with W8 tablets		50%		
D3	Average sales manager salary per hour		$22		
D4	Percent of time recovered for work-related tasks		75%		
Dt	Sales manager productivity benefit from faster access to data (non-risk-adjusted)	D1 * D2 * D3 * D4 * 12 * mgrs.	$495,000	$495,000	$495,000
	Risk adjustment	↓10%			
Dtr	**Sales manager productivity benefit from faster access to data (risk-adjusted)**		**$445,500**	**$445,500**	**$445,500**

Source: Forrester Research, Inc.

✪ Improved Sales Associate Sales Performance

With Windows tablets, sales associates were able to provide additional services to customers, answer their questions more quickly, and (when necessary) able to escalate to a manager efficiently. One key enabler was using the Windows tablet to access product, account, and stock information without leaving the customer's side. One interviewed organization measured more than 20 average stopping points needed to complete a single transaction — from initiating the conversation, walking around to look at other items, running back to the stockroom to look for an item (that may or may not be there), running back to find a manager, locating the item the customer wants, and then finally ending up a the POS station to transact the sale. With Windows tablets, that organization has seen the number of points drop from many to just 2 or 3, as shown in Figure 6.
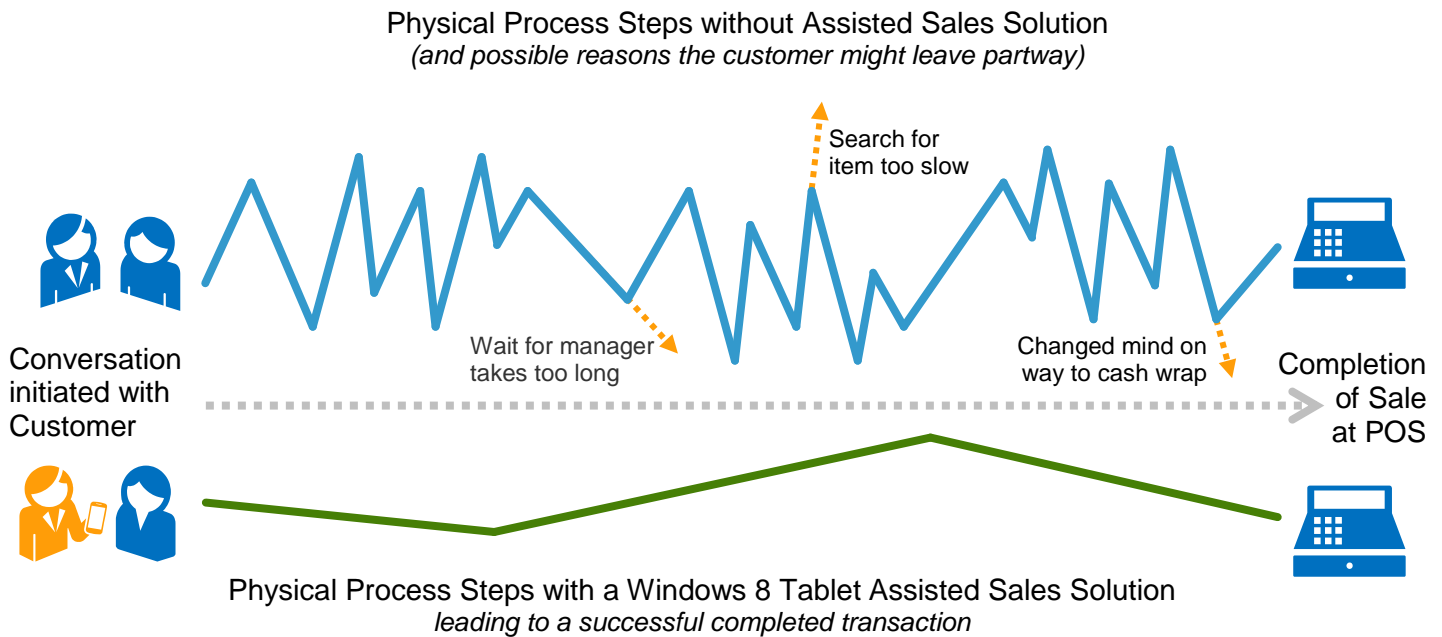
The composite organization identified a 50% sales increase from sales associates with Windows tablets, adding up to nearly $3 million in sales profit per year, as shown in Table 5.

"With Windows tablets, we reduced the touch points – all the stops you have to make in the store to complete a transaction – from more than 20 to just a few."

-IT Manager, telecom retailer

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FIGURE 6

Illustration Of Reduced Sales Touchpoints With Windows Tablets

Physical Process Steps without Assisted Sales Solution
(and possible reasons the customer might leave partway)

Search for
item too slow

Wait for manager
takes too long

Changed mind on
way to cash wrap

Conversation
initiated with
Customer

Completion
of Sale
at POS

Physical Process Steps with a Windows 8 Tablet Assisted Sales Solution
leading to a successful completed transaction

Source: Forrester Research, Inc.

TABLE 5

Sales Associate Improved Sales Performance With Windows Tablets

Ref.	Metric	Calculation	Year 1	Year 2	Year 3
E1	Total sales per day per FTE sales associate, without assisted sales devices (or non-Windows tablets)		$750		
E2	Improvement in sales with W8 tablets		50%		
E3	Additional sales per day per associate with Windows tablets	E1*E2	$375		
E4	Average work days per month		22		
E5	Number of sales associates		2,000		
E6	Estimated profit margin		1.5%		
Et	Sales associate increased profit from improved sales (non risk-adjusted)	E3 * E4 * E5 * E6 * 12	$2,970,000	$2,970,000	$2,970,000
	Risk adjustment	↓60%			
Etr	**Sales associate increased profit from improved sales (risk adjusted)**		**$1,188,000**	**$1,188,000**	**$1,188,000**

Source: Forrester Research, Inc.

However, since not every store had deployed the previous tablet solution, there is likely a significant portion of this benefit that could be enabled by non-Windows tablets. Additionally, since Windows tablets can be managed and secured like other laptops and desktops, the composite organization did not want to continue with another tablet solution. Windows tablets were the only solution that could be integrated with existing Windows Server and desktop management solutions like Active Directory, System Center, BitLocker, and other management and security solutions; a portion of this benefit has been included in the model. A 60% risk-adjustment has been applied, with a revised, risk-adjusted annual benefit of nearly $1.2 million per year. See the section on Risk for more detail.

Total Benefits

Table 6 shows the total of all benefits across the areas listed above, as well as present values (PVs) discounted at 10%. Over three years, the composite organization expects risk-adjusted total benefits to be a PV of more than 5 million.

TABLE 6 Total Benefits (Risk-Adjusted)						
Benefit	**Initial**	**Year 1**	**Year 2**	**Year 3**	**Total**	**Present value**
Cost savings from device consolidation	$0	$1,230,750	$62,055	$64,125	$1,356,930	$1,218,327
Cost savings from annual device licensing, management & support	$0	$621,000	$652,320	$684,720	$1,958,040	$1,618,093
Cost savings from improved security	$0	$59,098	$59,098	$59,098	$177,293	$146,967
Sales manager productivity benefit from faster access to data	$0	$445,500	$445,500	$445,500	$1,336,500	$1,107,893
Sales rep increased profit from improved sales	$0	$1,188,000	$1,188,000	$1,188,000	$3,564,000	$2,954,380
Total benefits (risk-adjusted)	**$225,000**	**$3,544,348**	**$2,406,973**	**$2,441,443**	**$8,392,763**	**$7,045,660**

Source: Forrester Research, Inc.

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COSTS

The composite organization experienced the following costs associated with purchasing, managing, and supporting Windows tablet devices:

› Windows tablet device purchase costs.

› Provisioning and deployment costs.

› Annual management, maintenance and support costs.

Ⓢ Windows Tablet Device Purchase Costs

The composite organization estimates an average of $700 for each new Windows tablet hybrid device, and $400 for Windows tablet slate devices, with a 5% growth year over year. They have a three-year refresh rate, which means they can expect additional costs (as well as avoided non-Windows tablet and Windows laptop/desktop benefits) in Year 4. The total purchase cost is estimated to be $1.1 million at implementation time, plus about $55,000 to $60,000 per year for new device purchases to accommodate growth, as shown in Table 7.

TABLE 7

Device Purchase Costs

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
F1	Estimated annual growth rate		5%			
F2	Annual tablet device refresh rate (in years)		3.0			
F3	Number of new sales associates using Windows tablets each year		1,000	50	53	55
F4	Number of new sales managers using Windows 8 hybrids each year		1,000	50	53	55
F5	Average cost of Windows 8 hybrid device		$700	$700	$700	$700
F6	Average cost of Windows tablet/slate device		$400	$400	$400	$400
Ftr	**Windows tablet device purchase costs (risk-adjusted)**	F3 * F5 + F4 * F6	**($1,100,000)**	**($55,000)**	**($58,300)**	**($60,500)**

Source: Forrester Research, Inc.

Keep in mind that Windows tablet devices come in a variety of sizes and styles with a variety of technology options. The modeled costs per device has been used as a conservative estimate — there are many hybrid devices that can be found at lower and higher prices, and many new slate tablet devices (including new, smaller versions) are often less expensive.

Ⓢ Provisioning And Deployment Costs

Table 8 shows that the composite organization estimates deployment and provisioning costs, including desktop imaging, to be $50 per device, or $100,000 total.

The composite organization estimated no additional costs for support or training during deployment, but recognized that some costs could have been required if it had a sales force not as experienced with tablets and laptops. To compensate, this

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cost was risk-adjusted up by 5%. The risk-adjusted cost of deployment was $105,000, as shown in Table 8. See the section on Risk for more detail.

TABLE 8
Provisioning And Deployment Costs

Ref.	Metric	Calculation	Year 1	Year 2	Year 3
G1	Deployment and provisioning costs		$100,000		
G2	Training costs		$0		
G3	Other deployment costs		$0		
Gt	Windows tablet device deployment costs (not risk-adjusted)	G2 + G1 + G3	($100,000)	$0	$0
	Risk adjustment	↑5%			
Gtr	**Windows tablet device deployment costs (risk-adjusted)**		**($105,000)**	**$0**	**$0**

Source: Forrester Research, Inc.

Ⓢ Annual Management, Maintenance, And Support Costs

The composite organization estimates an annual cost of $200 per Windows tablet device covering management, support, and annual maintenance costs, for a total of $400,000. Again, the composite organization assumes very little required for support even after deployment, but this category has been risk-adjusted to compensate by 5%. The risk-adjusted cost of annual maintenance over the three years was $420,000, as shown in Table 9. See the section on Risk for more detail.

TABLE 9
Annual Management, Maintenance, And Support Costs

Ref.	Metric	Calculation	Year 1	Year 2	Year 3
H1	Number of tablet devices		2,100	2,206	2,316
H2	Desktop/tablet management costs per device		$200	$200	$200
H3	Additional support costs per device		$0	$0	$0
Hto	Windows tablet device annual management and support costs (not risk-adjusted)	(H2+H3)*H1	$420,000	$441,200	$463,200
	Risk adjustment	↑5%			
Htr	**Windows tablet device annual management and support costs (risk-adjusted)**		**($441,000)**	**($463,260)**	**($486,360)**

Source: Forrester Research, Inc.

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Total Costs

Table 10 shows the total of all costs as well as associated present values, discounted at 10%. Over three years, the composite organization expects total costs to total a net present value of a little less than $2.4 million.

TABLE 10

Total Costs (Risk-Adjusted)

Benefit	Initial	Year 1	Year 2	Year 3	Total	Present value
Windows tablet device purchase costs	($1,100,000)	($55,000)	($58,300)	($60,500)	($1,273,800)	($1,243,636)
Windows tablet device deployment costs	($105,000)	$0	$0	$0	($105,000)	($105,000)
Windows tablet device annual management and support costs	$0	($441,000)	($463,260)	($486,360)	($1,390,620)	($1,149,178)
Total costs (risk-adjusted)	**($1,205,000)**	**($496,000)**	**($521,560)**	**($546,860)**	**($2,769,420)**	**($2,497,814)**

Source: Forrester Research, Inc.

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FLEXIBILITY

Flexibility, as defined by TEI, represents an investment in additional capacity or capability that could be turned into business benefit for some future additional investment. This provides an organization with the "right" or the ability to engage in future initiatives but not the obligation to do so. There are multiple scenarios in which a customer might choose to implement Windows tablet devices and later realize additional uses and business opportunities. Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in Appendix B).

What might have been thought of as a flexibility benefit in the past has been included in the core model above. While organizations have looked for device consolidation, Windows tablets provide one of the first examples of truly two-in-one devices that can function both as a high-powered laptop or desktop, as well as a light, slate tablet with long battery life.

The composite organization has refreshed previous laptops and non-Windows tablets across much of its retail sales and management teams. As its planned three-year refresh cycle comes due for other departments, it plans to refresh those devices with new Windows tablets. While it may not be replacing two devices for one, it will be able to enable tablet features and benefits for many other groups in its organization, leading to immediate benefits in terms of meeting productivity and general voice or chat communication, as well as additional investments that unlock benefits such as HR providing touch-enabled forms that speed up and reduce errors in time sheet and expense reporting processes, other new Windows applications purchased or developed for other LOB systems, and business process re-engineering where tablet devices can provide value.

These areas have not been thought through in any detail, but are expected to be areas of future opportunity once Windows tablets are deployed across the organization.

RISKS

Forrester defines two types of risk associated with this analysis: "implementation risk" and "impact risk." "Implementation risk" is the risk that a proposed investment in Windows tablet devices may deviate from the original or expected requirements, resulting in higher costs than anticipated. "Impact risk" refers to the risk that the business or technology needs of the organization may not be met by the investment in Windows tablet devices, resulting in lower overall total benefits. The greater the uncertainty, the wider the potential range of outcomes for cost and benefit estimates.

Quantitatively capturing investment risk and impact risk by directly adjusting the financial estimates results provides more meaningful and accurate estimates and a more accurate projection of the ROI. In general, risks affect costs by raising the original estimates, and they affect benefits by reducing the original estimates. The risk-adjusted numbers should be taken as "realistic" expectations since they represent the expected values considering risk.

The following impact risks that affect benefits identified as part of the analysis are:

› Device consolidation and reduced purchase cost savings could have been much lower per device if Windows tablets were deployed to more sales associates (where just a non-Windows tablet would have been replaced, not a tablet and a laptop).

› Device licensing, management, and support cost savings have been adjusted the same amount as device purchase cost savings for roughly the same reasons — the average per-device management savings enabled by device consolidation could have been lower.

› Security management cost savings were risk-adjusted as interviewed and surveyed organizations realize that they benefited from knowledgeable and conscientious employees.

› Sales manager productivity benefits were reduced as there was a high variance in responses. However, those responses are relatively evenly distributed, so the risk adjustment was not higher.

› Sales associate sales benefits were reduced considerably as a way to limit benefits modeled and included in this analysis that could have been enabled by a non-Windows tablet. However, several interviewed and surveyed organizations

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stressed they would not have selected any tablet solution other than Windows tablets, because they provide the greatest assurance of compliance and security combined with management cost-effectiveness given the ability to use the same desktop and security solutions as for other Windows laptops and desktops. So the benefit was included, though with a very high risk adjustment.

The following implementation risks that affect costs identified in the analysis are:

› Deployment costs could have been higher had the composite organization selected more higher-end hybrid tablets.

› Annual management and support costs were also risk-adjusted, as the composite organization experienced no additional support or training costs (based on interview and survey results). However, the new Windows does provide a new interface, and many organizations could expect to provide some training and/or plan on a bump in help desk support calls.

Table 11 shows the values used to adjust for risk and uncertainty in the cost and benefit estimates. Readers are urged to apply their own risk ranges based on their own degree of confidence in the cost and benefit estimates.

TABLE 11
Benefit And Cost Risk Adjustments

Benefits	Adjustment
Device consolidation and reduced purchase cost savings	↓10%
Device licensing, management, and support cost savings	↓10%
Security management cost savings	↓5%
Sales manager productivity benefits	↓10%
Sales associate sales benefits	↓60%

| Costs	Adjustment
Deployment costs	↑5%
Annual management and support costs	↑5%

Source: Forrester Research, Inc.

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Financial Summary

The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the organization's investment in Windows tablet devices.

Figure 7 and Table 12 below show the risk-adjusted ROI, NPV, and payback period values. These values are determined by applying the risk-adjustment values from Table 11 in the Risk section to the unadjusted results in each relevant Cost and Benefit section.

FIGURE 7

Cash Flow Chart (Risk-Adjusted)
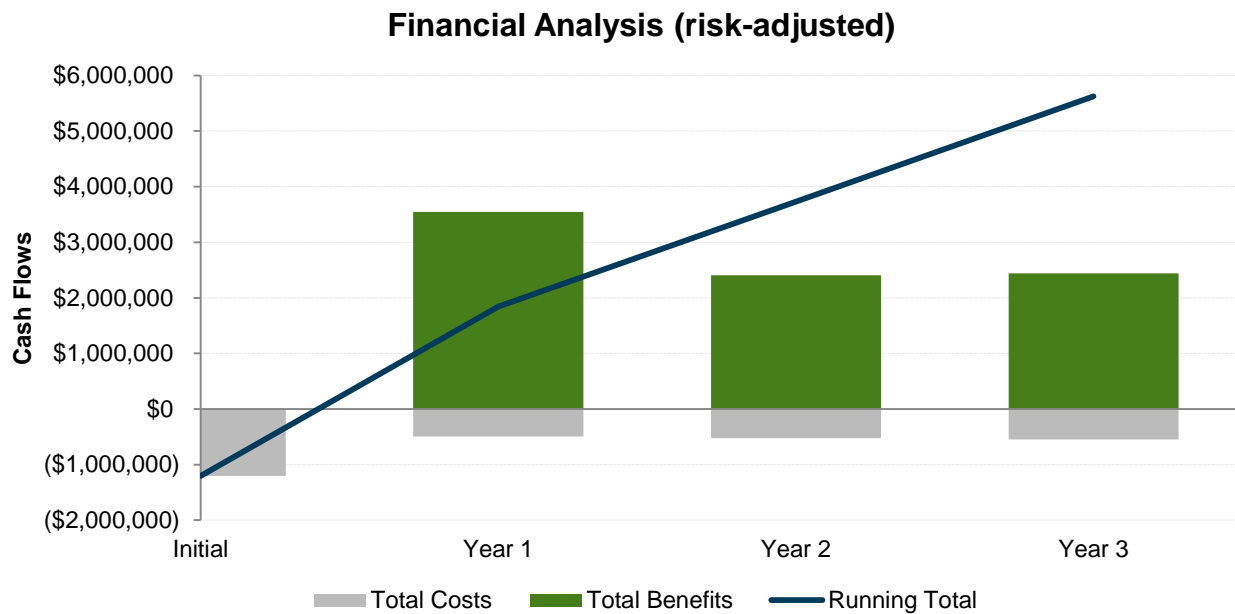
Source: Forrester Research, Inc.

TABLE 12

Cash Flow: Risk-Adjusted

	Initial	Year 1	Year 2	Year 3	Total	Present value
Costs	($1,205,000)	($496,000)	($521,560)	($546,860)	($2,769,420)	($2,497,814)
Benefits	$0	$3,544,348	$2,406,973	$2,441,443	$8,392,763	$7,045,660
Net benefits	**($1,205,000)**	**$3,048,348**	**$1,885,413**	**$1,894,583**	**$5,623,343**	**$4,547,845**
ROI	182%					
Payback period	4.7 months					

Source: Forrester Research, Inc.

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Microsoft Windows Tablet Devices: Overview

The following information is provided by Microsoft. Forrester has not validated any claims and does not endorse Microsoft or its offerings.

Until the arrival of Windows tablets, businesses feel they have had to choose between convenience and productivity when selecting devices for the enterprise. Laptops and desktop PCs offer enterprise grade-security, full processing power and productivity software, but are inconvenient for mobile computing. Consumer-grade tablets, while convenient for mobile computing, for the most part don't integrate easily into existing enterprise IT architecture, and aren't ideal for complex computing or productivity tasks.

Windows tablets offer touch and stylus interaction along with full support for mouse and keyboard, allowing users to choose the interaction method that suits their task. Users have connected experiences with apps from the Windows Store, while they also can use all their desktop LOB and productivity apps they use today on Windows 7. New Windows tablets offer users the convenience of touch and mobility as well as the reliability of enterprise grade processing power. IT departments benefit from the simple integration of Windows devices into their existing IT infrastructure. Windows tablets are as secure as Windows laptops and desktop PCs, and are managed using the tools that the IT department already uses.

Hardware innovation is on the rise with new Windows devices. Now that Windows 8.1 and Windows RT 8.1 are generally available, a wide range of new tablets, convertibles and other innovative devices from a variety of manufacturers are available, with more on the way. While some people may still be best served by traditional laptop or desktop PCs, many customers will benefit from new Windows tablets or touch-enabled devices like convertibles. In some cases, these tablets will be used as companion devices alongside existing PCs, while in other cases Windows tablets will become the primary computing device. With the broad range of form factors now available, there's no "one size fits all" device, nor should there be.

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Appendix A: Composite Organization Description

For this TEI study, Forrester has created a composite organization to illustrate the quantifiable benefits and costs of implementing Windows tablet devices. The composite company is intended to represent a retail firm with 15,000 employees and is based on characteristics of the interviewed customers.

The composite company has the following characteristics:

› A primarily United States-based retailer with around 900 brick-and-mortar stores.

› 4,000 total full-time employees. Part-time sales associates have not been included in this program at this time.

› 3,000 full-time sales associates and managers who have been provided Windows tablets — with about half of these devices going to managers.

› Given that not every sales associate needs his or her own device, the organization deployed 2,000 Windows tablets. Half have been provided to sales associates (to be shared) and the rest to managers (who each get his or her own device).

› Estimate an average 1.5% sales profit margin.

› Expect a 5% annual growth rate in staffing.

› Have previously used or piloted another tablet platform, or evaluated another platform before choosing Windows tablets.

› Chose Windows tablets from a leading manufacturer with a "hybrid" form factor — in which the screen can detach and operate like a standard touchscreen slate tablet, but can dock to become a full-fledged laptop with keyboard, mouse and other peripherals.

› Rollout to retail employees began in June 2013

In purchasing Windows tablet devices, the composite company has the following objectives:

› Improve customer satisfaction.

› Increase sales.

› Increase manager time on retail floor.

› Reduce number of devices provisioned to employees.

› Manage all devices, including tablets, using the same security and management tools.

For the purpose of the analysis, Forrester assumes that there are no additional operating system costs, though many organizations may include Windows in their enterprise agreement with Microsoft for upgrade rights, as well as additional support and benefits. The business case for volume licensing was not considered in this study.

FRAMEWORK ASSUMPTIONS

Table 13 provides the model assumptions that Forrester used in this analysis.

The discount rate used in the PV and NPV calculations is 10% and time horizon used for the financial modeling is 3 years. Organizations typically use discount rates between 8% and 16% based on their current environment. Readers are urged to consult with their respective company's finance department to determine the most appropriate discount rate to use within their own organizations.

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TABLE 13
Model Assumptions

Ref.	Metric	Calculation	Value
C1	Hours per week		40
C2	Weeks per year		52
C3	Hours per year (M-F, 9-5)	52*5*8	2,080
C4	Work days per month		22
C5	Average hourly IT salary		$48
C6	Average hourly sales manager salary		$22

Source: Forrester Research, Inc.

Appendix B: Total Economic Impact™ Overview

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

The TEI methodology consists of four components to evaluate investment value: benefits, costs, flexibility, and risks.

BENEFITS

Benefits represent the value delivered to the user organization — IT and/or business units — by the proposed product or project. Often, product or project justification exercises focus just on IT cost and cost reduction, leaving little room to analyze the effect of the technology on the entire organization. The TEI methodology and the resulting financial model place equal weight on the measure of benefits and the measure of costs, allowing for a full examination of the effect of the technology on the entire organization. Calculation of benefit estimates involves a clear dialogue with the user organization to understand the specific value that is created. In addition, Forrester also requires that there be a clear line of accountability established between the measurement and justification of benefit estimates after the project has been completed. This ensures that benefit estimates tie back directly to the bottom line.

COSTS

Costs represent the investment necessary to capture the value, or benefits, of the proposed project. IT or the business units may incur costs in the form of fully burdened labor, subcontractors, or materials. Costs consider all the investments and expenses necessary to deliver the proposed value. In addition, the cost category within TEI captures any incremental costs over the existing environment for ongoing costs associated with the solution. All costs must be tied to the benefits that are created.

FLEXIBILITY

Within the TEI methodology, direct benefits represent one part of the investment value. While direct benefits can typically be the primary way to justify a project, Forrester believes that organizations should be able to measure the strategic value of an investment. Flexibility represents the value that can be obtained for some future additional investment building on top of the initial investment already made. For instance, an investment in an enterprisewide upgrade of an office productivity suite can potentially increase standardization (to increase efficiency) and reduce licensing costs. However, an embedded collaboration feature may translate to greater worker productivity if activated. The collaboration can only be used with additional investment in training at some future point. However, having the ability to capture that benefit has a PV that can be estimated. The flexibility component of TEI captures that value.

RISKS

Risks measure the uncertainty of benefit and cost estimates contained within the investment. Uncertainty is measured in two ways: 1) the likelihood that the cost and benefit estimates will meet the original projections, and 2) the likelihood that the estimates will be measured and tracked over time. TEI applies a probability density function known as "triangular distribution" to the values entered. At a minimum, three values are calculated to estimate the underlying range around each cost and benefit.

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Appendix C: Glossary

Discount rate: The interest rate used in cash flow analysis to take into account the time value of money. Although the Federal Reserve Bank sets a discount rate, companies often set a discount rate based on their business and investment environment. Forrester assumes a yearly discount rate of 10% for this analysis. Organizations typically use discount rates between 8% and 16% based on their current environment. Readers are urged to consult their respective organizations to determine the most appropriate discount rate to use in their own environment.

Net present value (NPV): The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made, unless other projects have higher NPVs.

Present value (PV): The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.

Payback period: The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

Return on investment (ROI): A measure of a project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits minus costs) by costs.

A NOTE ON CASH FLOW TABLES

The following is a note on the cash flow tables used in this study (see the example table below). The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1. Those costs are not discounted. All other cash flows in years 1 through 3 are discounted using the discount rate (shown in Framework Assumptions section) at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations are not calculated until the summary tables are the sum of the initial investment and the discounted cash flows in each year.

TABLE [EXAMPLE]
Example Table

Ref.	Metric	Calculation	Year 1	Year 2	Year 3

Source: Forrester Research, Inc.

Appendix D: Endnotes

[1] Forrester risk-adjusts the summary financial metrics to take into account the potential uncertainty of the cost and benefit estimates. For more information see the section on Risk.

[2] Source: "Global Business And Consumer Tablet Forecast Update, 2013 To 2017," Forrester Research, Inc., August 5, 2013.

[3] Forrester's Forrsights Hardware Survey, Q3 2013, was fielded to 2,306 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from June 2013 to August 2013. 20% of respondents say they "currently support" or are "expanding support" for Windows tablets, while 51% say that they plan to support or are interested but have no current plan in place. Source: Forrsights Hardware Survey, Q3 2013, Forrester Research, Inc.

[4] Source: Forrsights Devices And Security Workforce Survey, Q2 2013, Forrester Research, Inc.

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