



Aberdeen *Group*

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The Enterprise Mobile Messaging Benchmark Report

December 2006



Executive Summary

Key Business Value Findings

- Enterprises are moving beyond e-mail for enterprise mobile messaging – 68% of organizations surveyed have two or more mobile messaging applications in place and 30% have three or more;
- Security is overall, the biggest challenge to the mass adoption of mobile messaging solutions;
- 67% of Best-in-Class organizations have an infrastructure in place that can support a platform that unifies all mobile messaging applications;
- Best-in-Class organizations are four times more likely than the industry average to understand the benefits of unified mobile messaging solutions.

Implications & Analysis

- 80% of Best-in-Class organizations are using enterprise mobile messaging solutions to interact with and develop closer ties with their customers;
- Best-in-Class organizations are using mobile messaging more in Customer Service and Sales departments than in the IT Department, while laggards still use messaging mostly in the IT department;
- 55% of organizations see security as the top challenge for deploying mobile messaging solutions, but only 30% are taking action to address that challenge.

Recommendations for Action

- Define business metrics such as time savings or increased customer responsiveness to determine the value of mobile messaging projects;
- Develop a centralized system for managing mobile messaging solutions;
- Improve communication across divisions about the needs for mobile messaging to ensure that the proper solutions are deployed in the appropriate departments;
- Integrate mobile messaging solutions with back-end hardware and software solutions to streamline the IT department's management of those solutions.

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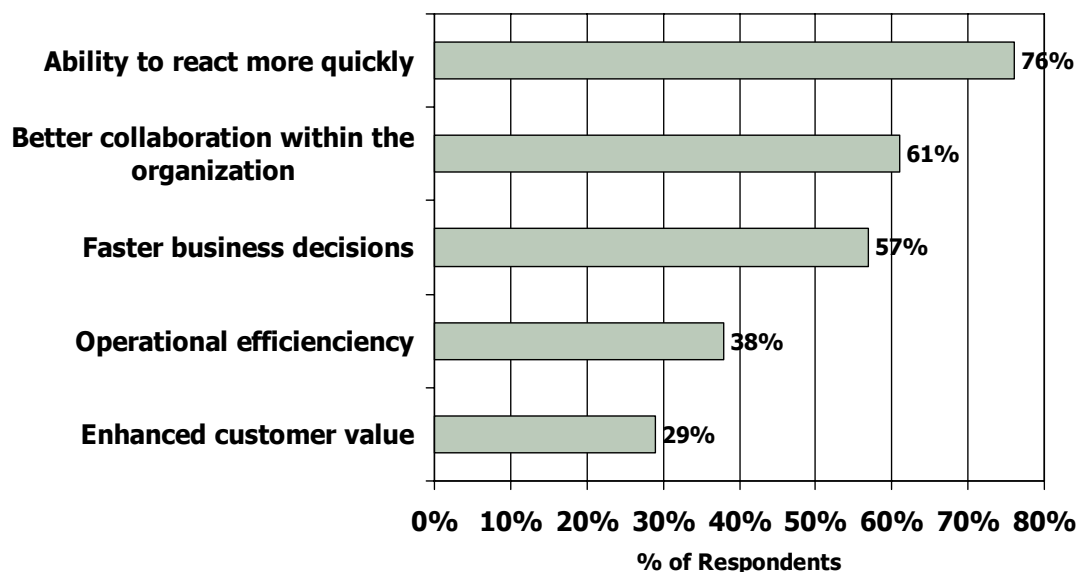
Chapter One: Issue at Hand

Key Takeaways

- 85% of organizations surveyed use at least one enterprise mobile messaging solutions while 68% use two or more solutions and 30% use three or more.
- The greatest obstacle to adopting mobile messaging solutions for those organizations that have not deployed a mobile messaging solution is the unproven business case;
- 64% of organizations do not have appropriate usage policies in place for mobile messaging;
- 71% of organizations described their awareness of the types of mobile messaging solutions available as medium or low;
- 74% of organization's strategies for adopting mobile messaging solutions are driven by the need to react more quickly.

Today's enterprises are starting to understand that doing faster, more efficient and more effective work requires faster, more efficient, and more effective communication systems. The ability to: 1) satisfy customer needs anytime, anywhere; 2) create flexible organizations that are able to react more quickly to environmental changes; and 3) enable employees to collaborate in the most effective way are

Figure 1: Top Factors Driving the Adoption of Enterprise Mobile Messaging



Source: AberdeenGroup, December 2006

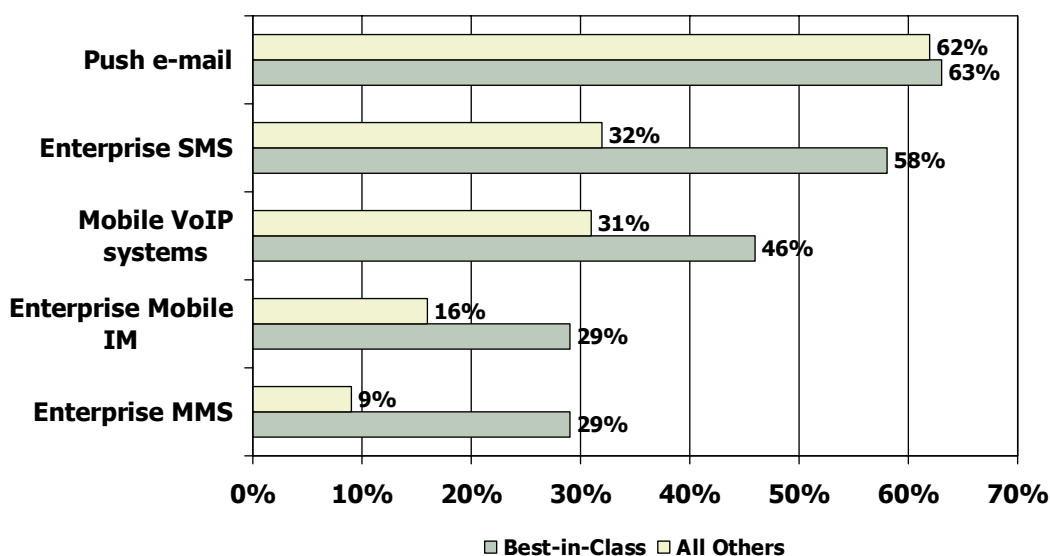


prerequisites for success in the modern business world. Organizations that are deploying mobile messaging solutions find it an invaluable tool to address these issues. (Figure 1).

The continuously falling cost, increasing availability and improved performance of mobile networks and devices is driving the proliferation of mobile messaging applications, including push-email, mobile instant messaging (IM), Short Message Services, Multimedia Services, and voice over IP (VoIP) solutions. Organizations are now assessing how these various mobile messaging solutions – beyond push email - can actually help improve workflows within their organizations, with the ultimate expectation of having all these communication options available to them on one device.

To that end, Aberdeen's research shows that 51% of the organizations had implemented at least one mobile messaging solution within the last 12 months. It's not surprising to see in Figure 2 that mobile email solutions were the most prevalent in organizations due to the popularity of those solutions.

Figure 2: Enterprise Mobile Messaging Applications Deployed



Source: AberdeenGroup, December 2006

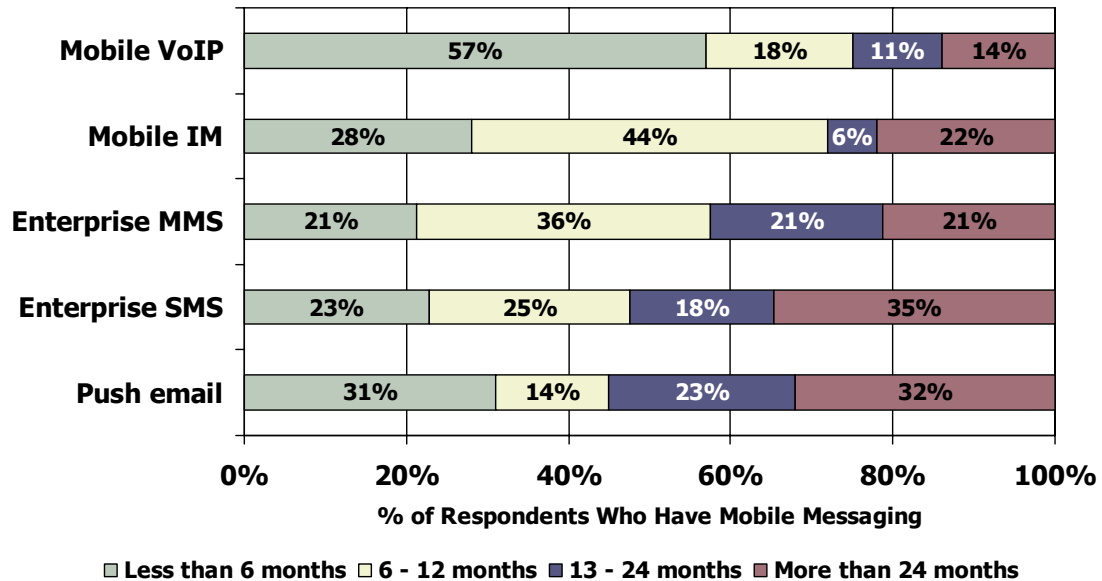
The Emergence of Mobile Messaging

Respondents to Aberdeen's survey have shown that mobile messaging is still a relatively new concept within their organizations. Forty-eight percent of the organizations surveyed stated that they have had mobile email in place for more than a year. This statistic suggests that enterprise mobile messaging is now coming out of the "early adopter" stage and is starting to see mass enterprise adoption.



Aberdeen's research also shows an increase in the number of organizations that are leveraging mobile messaging solutions other than mobile email. Sixty-eight percent of organizations surveyed are currently deploying two or more mobile messaging solutions and 30% are leveraging three or more mobile messaging solutions.

Figure 3: Average Age of Mobile Messaging Solutions



Source: AberdeenGroup, December 2006

Survey respondents also provided insight into what mobile messaging technologies they planned on investing in over the next 12 months. The fact that organizations stated most frequently that they planned on investing in Mobile VoIP speaks to the continued convergence of voice and data networks and the evolutionary transition from wired IP telephony to mobile IP telephony.

Table 1: Future Mobile Messaging Deployments

Messaging Technology	% Selected
Push email	14%
Enterprise SMS	11%
Enterprise MMS	7%
Mobile IM	14%
Mobile VoIP	26%

Source: AberdeenGroup, December 2006



Unifying Mobile Messaging

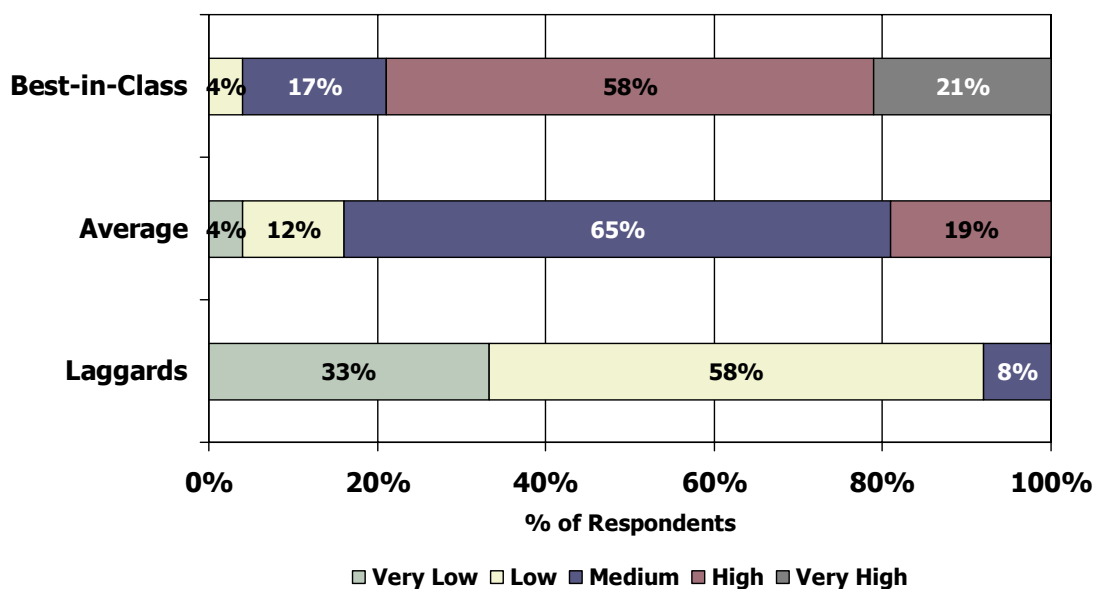
“The most significant challenges for organizations deploying enterprise mobile messaging include 1. standardization of mobile infrastructure, devices, and networks (particularly across broad geo’s), 2. crafting the user experience to reflect the task while on the road (not the same as behind a desk), 3. integrating beyond the point solution.”

Guy Waterman
Oracle

Forty-one percent of survey respondents indicated that interoperability and compatibility with existing solutions and devices is a major challenge in adopting new messaging solutions. Sixty-seven percent of Best-in-Class organizations are addressing this issue by implementing an infrastructure that can support unifying all mobile messaging applications. Best-in-Class organizations are unifying these applications into one integrated mobile messaging solution and see that as an effective way to address not only the above issues, but also the increasing cost of managing disparate mobile messaging platforms and applications within their organizations.

It is also important to highlight that while Best-in-Class organizations are moving toward unifying their mobile messaging applications in order to operate them on single platform, Industry Average and Laggard organizations are far behind in that process. Figure 4 shows significant discrepancies between these three market segments in regards to the level of awareness of benefits from unifying mobile messaging.

Figure 4: Awareness of Benefits of Unifying Mobile Messaging Solutions



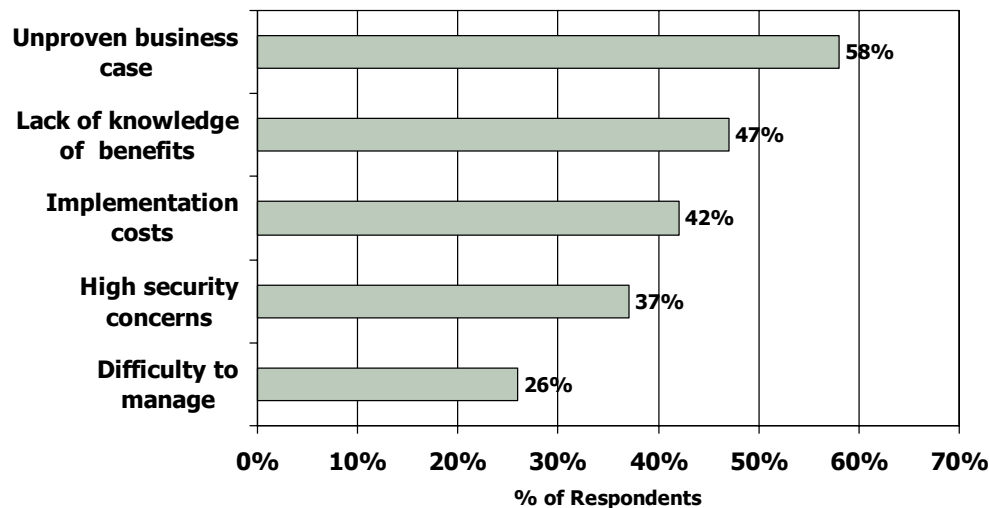
Source: AberdeenGroup, December 2006



Challenges in Adopting Mobile Messaging Solutions

Aberdeen's research showed that 15% of organizations surveyed do not currently have any mobile messaging solution in place and that 61% of those organizations do not have any plan to move towards adopting mobile messaging solutions. Figure 5 shows the major obstacles preventing the adoption is an unproven business case and a lack of knowledge about the benefits of mobile messaging.

Figure 5: Top Factors Preventing Adoption of Mobile Messaging Solutions



Source: Aberdeen Group, December 2006

"The most significant challenge has been the internal support required as the number of converged smartphones has multiplied -- we need to deal with procurement, implementation, billing and maintenance concerning the type of device and operating system, the carrier, the third-party messaging client and server applications."

IT Director

The data shows that organizations need to gain a better understanding of the value proposition of mobile messaging solutions. Furthermore, all of the major obstacles are rooted in a lack of knowledge regarding a technology or a lack of understanding of mobile messaging value proposition.

This is an opportunity for providers of mobile messaging solutions and services to demonstrate the value that these solutions can provide and show how these solutions can help companies achieve their goals.



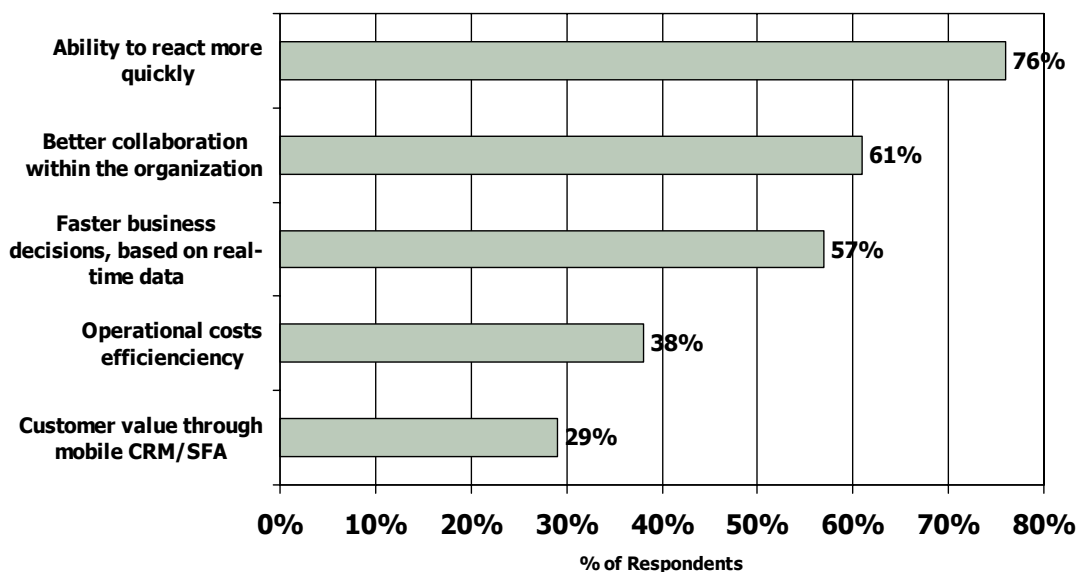
Chapter Two: Key Business Value Findings

Key Takeaways

- Security is the biggest challenge for leveraging mobile messaging solutions;
- 55% of Best-in-Class organizations are implementing a centralized system for managing mobile devices;
- 75% of organizations are implementing mobile messaging solutions to enable mobile workers to be more responsive to customer's needs.

While less than 15% of survey respondents stated they did not have any current mobile messaging solutions in place, the remaining 85% gave many reasons regarding what was driving their use of mobile messaging solutions. Not surprisingly, most reasons given revolved around driving continuous communications and collaboration, both with customers/prospects and colleagues.

Figure 6: Top Reasons Organizations Are Adopting Mobile Messaging Solutions



Source: [AberdeenGroup](#), December 2006

These organizations see mobile messaging as a tool for gaining a competitive advantage through satisfying customer needs, making better business decisions, and creating effective teams. Seventy-six percent of respondents stated that the ability to respond to customer needs more quickly was the most important factor driving the adoption of mobile messaging solutions.



Challenges and Responses

Table 2 shows that slightly more than half of the survey respondents see security as the key challenge to an effective mobile messaging deployment. However, even though 56% of respondents indicated security as the major challenge, only 33% of organizations are implementing a software solution to ensure the secure transfer of data to/from mobile devices. On the other hand, while 64% of Best-in-Class organizations indicated that security is a major challenge, 87% of those organizations are taking actions to address to this issue.

Additionally, 43% of respondents indicated that they find business justification of mobile messaging adoption as a serious challenge, but only 32% of organizations are defining and tracking metrics to determine the value of a specific project.

Table 2: Enterprise Mobile Messaging Challenges and Responses

Challenges	% Selected	Responses to Challenges	% Selected
1. Security	55%	1. Developing a centralized management system for mobile devices	38%
2. Interoperability/Compatibility	47%	2. Learning about mobile messaging prior to adopting a solution	37%
3. Business justification	43%	3. Developing an enterprise-wide usage policy for mobile messaging	35%
4. Cost of implementation	42%	4. Implementing a centrally managed software solution for secure data transfer	33%
5. Measuring ROI	31%	5. Using industry accepted messaging protocols and standards	32%

Source: [AberdeenGroup](#), December 2006

The data shows that organizations need to be better educated on how to take a more systematic approach to the adoption of mobile messaging solutions. The survey responses show that Best-in-Class organizations are effectively:

- Identifying the major challenges to mobile messaging;
- Understanding how these challenges affect the ROI of any implementation;
- Determining the best practices for addressing these challenges.

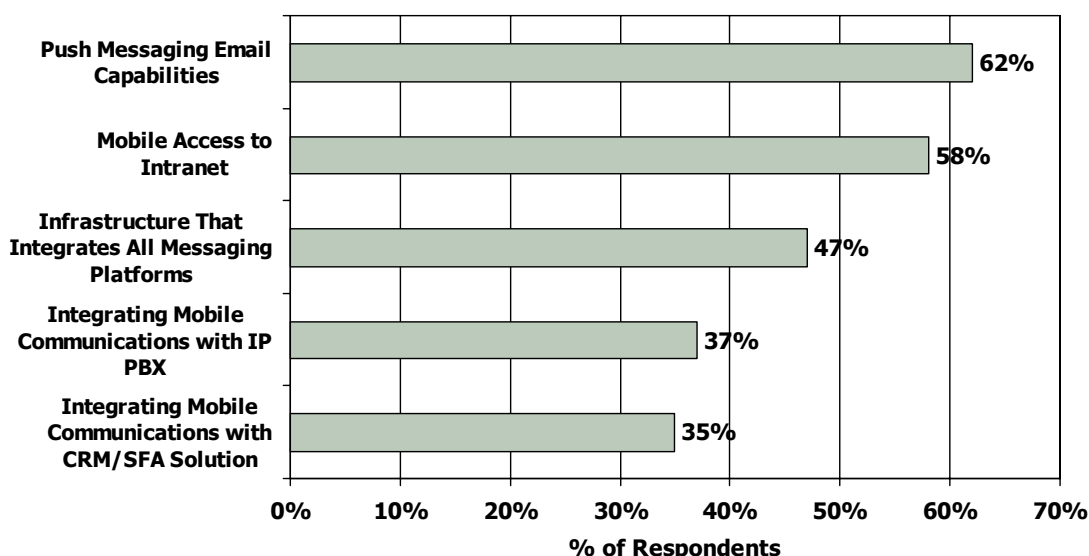
However, Industry Average and Laggard organizations are taking an “ad hoc” approach to leveraging mobile messaging. This approach makes it significantly more difficult for them to understand the value proposition of mobile messaging solutions. The end-result is that while 22% of Best-in-Class organizations find the business justification of mobile messaging a challenge, all other survey respondents struggled to understand the business value more than twice as frequently (48%).



Mobile Messaging Needs to Be Integrated With Other Back-End Solutions

Each of the top five capabilities that organizations selected includes somehow the integration of the mobile messaging solution with back-end hardware and software. Therefore, the effectiveness of adopting a mobile messaging solution also depends on the ability of mobile workers to access and retrieve data from applications such as CRM, SFA as well as corporate email and intranet.

Figure 7: Capabilities Needed for Effective Leveraging of Mobile Messaging



Source: [AberdeenGroup](#), December 2006

In order to get greater returns from mobile messaging, organizations need to implement enterprise-wide infrastructure, so that mobile messaging applications can be effectively integrated into their organization's workflow and business processes.

Table 3: Most Common Use of Mobile Messaging by Department

Best-in-Class	% Selected	Industry Average	% Selected	Laggards	% Selected
1. Customer Service	65%	1. Sales	67%	1. IT	75%
2. Sales	61%	2. Customer Service	54%	2. Sales	58%
3. IT	57%	3. Marketing	52%	3. Customer Service	38%

Source: [AberdeenGroup](#), December 2006

Best-in-Class organizations are providing mobile messaging solutions most frequently to their customer/field service organizations in order to maintain and build current client relationships, while industry average organizations are predominantly deploying mobile



messaging solutions to develop new relationships. On the other hand, laggard organizations are still deploying mobile messaging solutions for the most part within their IT departments.

Best-in-Class organizations have come to understand that mobile messaging solutions are an effective tool to deploy when the way in which a customer is contacted can become a competitive advantage and business growth driver.



Chapter Three: Implications & Analysis

Key Takeaways

- 74% of Best-in-Class organizations have high level of knowledge about mobile messaging solutions available, compared to 25% of the rest.
- 61% of Best-in-Class organizations have a infrastructure in place that can support platform that unifies all mobile messaging applications, only 8% of laggards
- 71% of Best-in-Class companies are using customer satisfaction as the key performance metric for mobile messaging solutions.
- 46% of organizations use number of mobile messages sent/received a key performance metric for mobile messaging solutions

As shown in Table 4, survey respondents fell into one of three categories – Laggard, Industry Average, or Best in Class — based on their characteristics in four key categories: (1) process (the way mobile messaging solutions are leveraged – for communications among colleagues only, or along the value chain); (2) organization (the level of understanding what the needs are for mobile messaging solutions across divisions); (3) knowledge (awareness of solutions available on the market as well as of perceived benefits from these solutions); and (4) technology (role that mobile devices, messaging applications, and software solutions play within an organization’s strategy).

Table 4: Enterprise Mobile Messaging Competitive Framework

	Laggards	Industry Average	Best in Class
Process	Mobile messaging solutions are primarily used for communication between colleagues.	Mobile messaging solutions are primarily used for communication between colleagues and customers.	Mobile messaging solutions are used for communication along the value chain (colleagues, customers, suppliers, and partners).
Organization	Lack of communication regarding needs for mobile messaging solutions across divisions.	Moderate communication regarding needs for mobile messaging solutions across divisions. Unified solution needs to be customized to division-specific communication needs.	Strong communication about needs for mobile messaging solutions across divisions. All divisions understand value of having a unified solution.



	Laggards	Industry Average	Best in Class
Knowledge	Low awareness of available solutions. Low knowledge of benefits of mobile messaging applications.	Medium awareness of solutions available. Moderate knowledge about benefits of unified mobile messaging solution	High level of knowledge about benefits of mobile messaging applications. High ability to measure the ROI of deploying mobile solution.
Technology	More focused on devices and software, less on solutions and applications.	Based upon using multiple solutions on multiple devices.	Already have in place, or planned, an infrastructure that can support a messaging platform that unifies all mobile messaging applications.

Source: AberdeenGroup, December 2006

Process, Organization, and Knowledge

- 80% of Best-in-Class organizations use mobile messaging applications to exchange messages with their customers. These organizations are moving from using enterprise mobile messaging predominantly for communication within the organization and increasingly leveraging these solutions to manage relationships with their major stakeholders (customers, suppliers, partners, etc.), as illustrated in the following table:

Table 5: Mobile Messaging Deployment Along The Value Chain

	Best-in-Class	Average	Laggards
Colleagues	91%	90%	92%
Customers	80%	63%	56%
Suppliers	56%	34%	48%
Partners	63%	43%	44%

Source: AberdeenGroup, December 2006

- Aberdeen's research showed that there are twice as many Best-in-Class companies that have a strong communication about needs for mobile messaging solutions between divisions compared to all other respondents. That kind of approach enables these organizations to adopt mobile messaging solutions that are

"The biggest challenge we face is to formulate a mobile messaging strategy which is aligned to and understood by the business and look at this as a service which is embedded like a matrix organisation."

Gerhard Marz
Roche



aligned with specific need of each division and also makes it easier for an enterprise as a whole to deal with issues such as interoperability, compatibility, usage and procurement policies. Therefore, Best-in-Class organizations are more capable to take a full advantage of these solutions that is mirrored in their ROI and customer satisfaction performance.

Table 6: Knowledge of Available Enterprise Mobile Messaging Solutions

	Best-in-Class	Average	Laggards
High	74%	21%	4%
Medium	22%	58%	24%
Low	4%	21%	72%

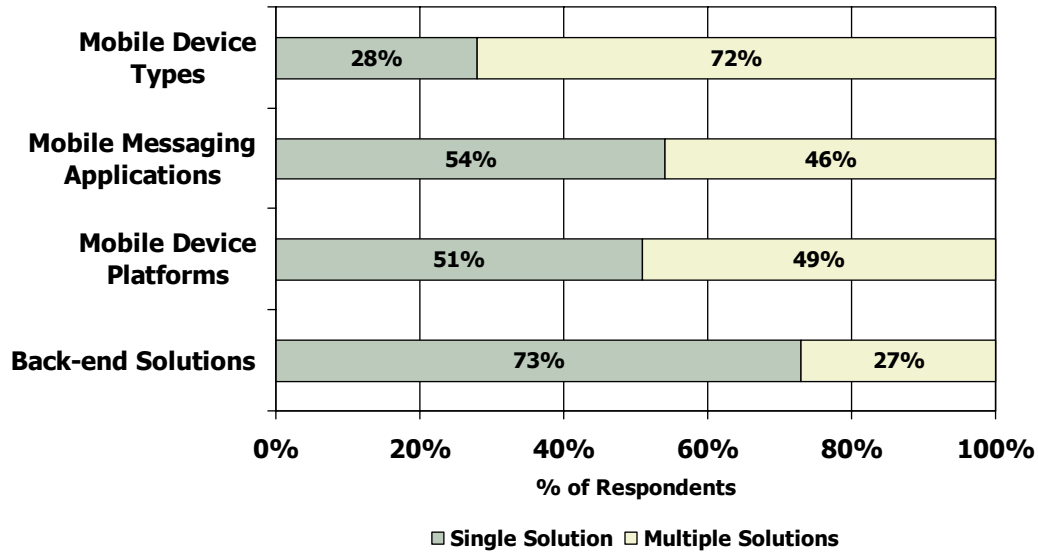
Source: [AberdeenGroup](#), December 2006

- Table 6 shows that Best-in-Class organizations have much better knowledge about enterprise mobile messaging solutions that are available than does the rest of the survey poll. Additionally, 48% of these organizations have a high level of knowledge of how to measure ROI from mobile messaging project compared to 8% of Industry Average and 4% of laggard organizations.
- Knowledge about the technology is the major issue among present and potential end-users of mobile messaging. Forty-seven percent of respondents that do not deploy these solutions indicated “lack of knowledge regarding solutions” and “benefits” as one of the major obstacles (Figure 5).

Technology Usage

Sixty-one percent of Best-in-Class organizations have the infrastructure in place that can support unifying all mobile messaging applications and integrate them with one back-end solution. Industry Average and Laggard organizations are currently more focused on mobile device and software selection.

There is a significant lack of standardization among these organizations as 51% of overall poll of respondents indicated that their organization uses multiple mobile device platforms across the enterprise as we can see from Figure 8. In addition to that, 72% of organizations are deploying mobile messaging solutions on multiple types of mobile devices. That makes it more difficult for these organizations to have an effective device and asset management processes and, also explains why interoperability and compatibility are major challenges.

**Figure 8: Mobile Messaging Solutions Deployed**

Source: AberdeenGroup, December 2006

Pressures, Actions, Capabilities, Enablers (PACE)

Table 7 shows the major pressures that drive adoption of mobile messaging solutions for enterprise. These pressures are matched up with specific strategic actions, organizational capabilities, and technology enablers that enterprises are using to address these pressures and improve their performance. Leading organizations are not evaluated by types of pressures they are facing, but by actions they are taking, capabilities they are developing, and technologies they are leveraging to respond to these pressures.

The table shows the pressures our survey respondents highlighted as most critical and the strategic actions, daily capabilities, and enabling technologies the best in class use to overcome those challenges. Readers are encouraged to evaluate their own organizational priorities as a benchmark and to help create plans for actions going forward.

Table 7: PACE (Pressures, Actions, Capabilities, Enablers)

Priorities	Prioritized Pressures	Prioritized Actions	Prioritized Capabilities	Prioritized Enablers
1	Ability to react more quickly	Increase accuracy and speed of information flow along the supply chain.	Providing push messaging e-mail capabilities.	Push Email solutions, PDAs, Mobile CRM



Priorities	Prioritized Pressures	Prioritized Actions	Prioritized Capabilities	Prioritized Enablers
2	The need for strengthening collaboration with the organization	Enable virtual teams within the company	Providing mobile access to my organization's intranet.	Intranet, Online Enterprise Collaboration Applications
3	Pressure to make better business decisions, faster, based on real-time data.	Enable mobile decision makers and knowledge workers to access, receive and send data in any format anytime, anywhere.	Mobile communications integrated with database management solution.	Enterprise SMS, enterprise management solutions, MMS and mobile IM, push E-mail solutions
4	Customers demanding shorter order cycle time	Improve flexibility of manufacturing and logistics operations	Measure and improve supplier and delivery responsiveness	An IT-enabled solution that can help provide suppliers and logistics service providers with forward visibility and track delivery compliance
5	Customers demanding reduced prices	Reduce inventory and assets required to produce and deliver product	Minimize kanban size and maximize pacemaker throughput	An IT-enabled solution that can help facilitate process redesign and load leveling of production that takes into account logistics operations

Source: [AberdeenGroup](#), December 2006



Chapter Four: Recommendations for Action

Key Takeaways

- Define business metrics such as time savings or increased customer responsiveness to determine the value of mobile messaging projects;
- Develop a centralized system for managing enterprise mobile messaging solutions;
- Improve communication across divisions about the needs for mobile messaging to ensure that the proper solutions are deployed in the appropriate departments;
- Integrate mobile messaging solutions with back-end hardware and software solutions to streamline the IT department's management of those solutions.

The adoption of enterprise mobile messaging solutions is driven by organizational needs to react more quickly, increase collaboration within the organization, make better business decision faster, and create value for customers. Enterprises are increasingly adopting many different mobile messaging applications and at the same time unifying them into a single platform that can effectively resolve issues of security concerns, interoperability, compatibility, and device management.

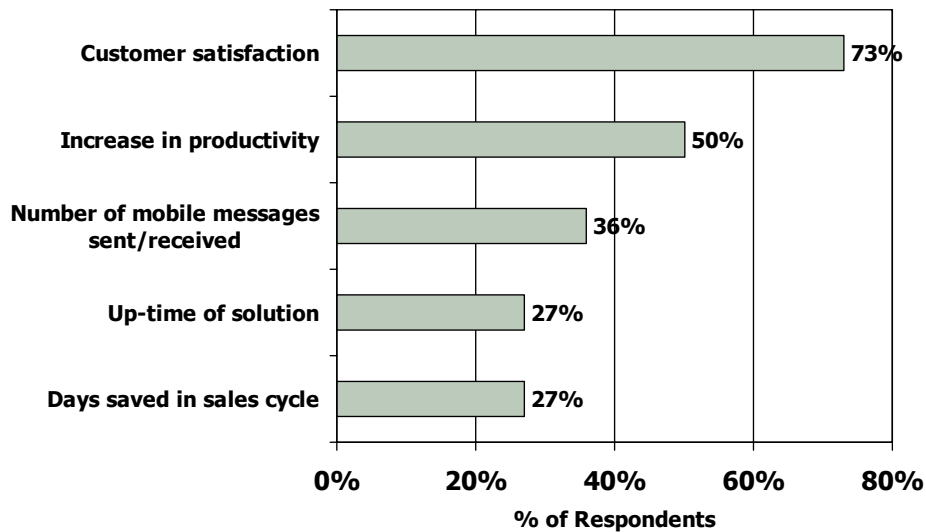
The effectiveness of a mobile messaging implementation depends on the approach that an organization is taking, as well as the key performance indicators that are developed in the planning process. Figure 9 shows key performance indicators that Best-in-Class organizations most frequently use when adopting mobile messaging solutions.

“Organizations contemplating mobile messaging should be conscious that they are initiating multimedia mobile communications, not just messaging. This will mean, voice, video and data exchanges and communications, conferencing in particular.”

Guy Bertrand
University of Québec



Figure 9: Key Performance Indicators for Measuring Mobile Messaging Value



Source: [AberdeenGroup](#), December 2006

Whether an organization is trying to gradually move its enterprise mobile messaging from “Laggard” to “Industry Average,” or “Industry Average” to “Best-in-Class,” the following actions will help spur the necessary performance improvements:

Laggard Steps to Success

1. *Develop a strategy to address the major challenges your trying to address through mobile messaging;*

Speak with the various departments outside of your IT department to better understand their needs and how they can leverage the ability to communicate wirelessly with colleagues and customers beyond traditional voice communication.

2. *Define the business metrics to determine the value of beginning a mobile messaging initiative;*

All IT projects need to have clearly defined objectives and ways to measure their success. Enterprise mobile messaging is no different from other mobile projects and deserves a rigorous measurement plan.

3. *Learn more about enterprise mobile messaging solutions available in the market and how their deployment can help you achieve performance excellence;*

Whether it’s by going online to do your own research or working with a third-party consultancy, learn more about the wide variety of mobile messaging solutions and how they can improve your organization’s workflow. This will help you better understand the value and ROI that organizations can achieve from leveraging mobile messaging technologies.

4. *Don’t leave mobile messaging solely in the IT department and leverage it across your organization.*



Best-in-Class and Industry Average organizations are leveraging the power of mobile messaging to interact more closely with customers and partners

Industry Norm Steps to Success

1. *Develop a centralized system for managing your mobile messaging solutions;*
Leverage tools that can allow your IT department to centrally update and manage your organization's mobile devices. This will allow for more streamlined device and content management and help enhance the security of the data on those devices.
2. *Learn more regarding how integrating a messaging solutions into your organization's business processes can help you develop a competitive advantage;*
Mobile professionals do not want to carry multiple devices for the various modes of communication they need. At the very least, leverage one mobile platform to allow for all the applications to reside on one device.
3. *Integrate your mobile messaging solutions with other back-end communication solutions;*
The ability to connect your messaging solutions to other internal systems, such as CRM or field service tools will significantly improve your customers' experience.

Best in Class Next Steps

1. *Continue moving toward deploying a single mobile messaging platform throughout your organization;*
A unified mobile messaging platform is a win-win, for both end-users and the IT department as users can experience a single and familiar user interface while making it easier for the IT department to address any challenges that users might face.
2. *Develop capabilities to measure the performance of your mobile messaging solutions in real-time.*
Whether it's tracking the use of a technology, or the number of messages that are being sent by any given mobile worker, develop a plan that provides you the tools to then develop a ROI model.
3. *Improve your organization's ability to measure the ROI from your mobile messaging projects;*
Work with the various groups within your organization to develop models that can help you quantify the value of your messaging investments. The more you show the tangible value of these projects, the more your organization will see the value in investing in other mobile communication platforms.

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Philippe Winthrop is a Research Director in Aberdeen Group's Wireless and Mobility Research Practice. In this capacity, Philippe brings his expertise for all things wireless and researches the impact of disruptive technologies, including WiFi, PDAs, mobile devices, and Mobile VoIP, on the business value chain.

Prior to joining Aberdeen Group, Philippe spent over 10 years in various research and strategic planning positions. At The George P. Johnson Company (GPJ), an integrated event marketing agency, Philippe provided market research and consulting services to organizations in the IT, logistics and automotive industries.

Before GPJ, Philippe was a principal at Axle Ventures, which provided business planning and consulting services based on objective market research. In that capacity, Philippe helped develop business strategies for both established and start-up organizations in IT, eCommerce, and healthcare. Philippe began his research career at IDC where he covered IT Services for Western Europe, providing analysis and insight to Fortune 500 companies as well as the top 50 Western EMEA IT service providers.

Philippe holds a Bachelor of Arts degree in Economics with a concentration in Romance Languages from Boston College, as well as a Master of Arts degree from Brandeis University, incorporating studies at Université de Paris IX – Dauphine.

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Bojan Simic performs fact-based research within the Communications Practice, with a specific focus on wireless and mobility. He brings to Aberdeen Group years of experience in the bio-tech, content management, and public administration. Through benchmarking studies and extended research, Simic provides insights on how companies can leverage wireless and mobile technologies to gain a competitive edge, achieve operational excellence, and realize efficient operations.

Simic holds a B.A. in Economics from Belgrade University in Belgrade, Serbia and a M.B.A. from McCallum Graduate School of Business at Bentley College.



Appendix A: Research Methodology

Between November and December 2006, Aberdeen Group and *Mobile Enterprise magazine* examined the enterprise mobile messaging procedures, experiences, and intentions of more than 150 enterprises in, automotive, high-tech, industrial products, and other industries.

Responding supply chain, logistics, and operations executives completed an online survey that included questions designed to determine the following:

- What factors are driving the adoption of enterprise mobile messaging solutions?
- What challenges are associated with the adoption of these solutions?
- How do organizations go about managing mobile messaging solutions?
- What purposes are mobile messaging solutions used for (collaboration within organization, creating value for customers, managing supply chain, etc.)

Aberdeen supplemented this online survey effort with telephone interviews with select survey respondents, gathering additional information on service parts management strategies, experiences, and results.

The study aimed to identify emerging best practices for service parts management and provide a framework by which readers could assess their own service parts management capabilities.

Responding enterprises included the following:

- **Job title/function:** The research sample included respondents with the following job titles: CIO or other C-level officer (27%), VP or Director (29%) Manager (27%); and staff members/consultants (11%).
- **Industry:** The research sample included respondents predominantly from manufacturing industries. Telecommunications organizations represented 29% of the sample, followed high-tech companies, which accounted for 25% of respondents. Other sectors responding included automotive, retail, medical equipment, construction/engineering, and distribution.
- **Geography:** Slightly more than half of respondents (64%) were from North America. An additional 23% were from Europe, Middle East and Africa and 12% from the Asia-Pacific region.
- **Company size:** About 22% of respondents were from large enterprises (annual revenues above US\$1 billion); 32% were from midsize enterprises (annual revenues between \$50 million and \$1 billion); and 46% of respondents were from small businesses (annual revenues of \$50 million or less).

Solution providers recognized as underwriters of this report were solicited after the fact and had no substantive influence on the direction of the *Enterprise Mobile Messaging*



Benchmark Report. Their sponsorship has made it possible for Aberdeen Group and *Mobile Enterprise Magazine* to make these findings available to readers at no charge.

Table 8: PACE Framework

PACE Key
Aberdeen applies a methodology to benchmark research that evaluates the business pressures, actions, capabilities, and enablers (PACE) that indicate corporate behavior in specific business processes. These terms are defined as follows: <i>Pressures</i> — external forces that impact an organization's market position, competitiveness, or business operations (e.g., economic, political and regulatory, technology, changing customer preferences, competitive) <i>Actions</i> — the strategic approaches that an organization takes in response to industry pressures (e.g., align the corporate business model to leverage industry opportunities, such as product/service strategy, target markets, financial strategy, go-to-market, and sales strategy) <i>Capabilities</i> — the business process competencies required to execute corporate strategy (e.g., skilled people, brand, market positioning, viable products/services, ecosystem partners, financing) <i>Enablers</i> — the key functionality of technology solutions required to support the organization's enabling business practices (e.g., development platform, applications, network connectivity, user interface, training and support, partner interfaces, data cleansing, and management)

Source: [AberdeenGroup](#), December 2006

Table 9: Relationship between PACE and Competitive Framework

PACE and Competitive Framework How They Interact
Aberdeen research indicates that companies that identify the most impactful pressures and take the most transformational and effective actions are most likely to achieve superior performance. The level of competitive performance that a company achieves is strongly determined by the PACE choices that they make and how well they execute.

Source: [AberdeenGroup](#), December 2006

Table 10: Competitive Framework

Competitive Framework Key
<p>The Aberdeen Competitive Framework defines enterprises as falling into one of the three following levels of MOBILE MESSAGING practices and performance:</p> <p><i>Laggards (30%)</i> — MOBILE MESSAGING practices that are significantly behind the average of the industry, and result in below average performance</p> <p><i>Industry norm (50%)</i> — MOBILE MESSAGING practices that represent the average or norm, and result in average industry performance.</p> <p><i>Best in class (20%)</i> — MOBILE MESSAGING practices that are the best currently being employed and significantly superior to the industry norm, and result in the top industry performance.</p>

Source: [AberdeenGroup](#), December 2006



Appendix B: **Related Aberdeen Research & Tools**

Related Aberdeen research that forms a companion or reference to this report include:

- Enterprise Mobile Adoption: a Corporate Conundrum (November 2006)
- Beyond Dial-tone: Unified Communications (December 2006)
- Mobile Customer Relationship Management (m-CRM) Solution Landscape (July 2006)
- Mobile Sales Solutions Benchmark Report (August 2006)

Information on these and any other Aberdeen publications can be found at www.aberdeen.com.

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