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For: CIOs

Re-Engineer Your Business For Mobile Moments

by Ted Schadler, Josh Bernoff, and Julie A. Ask, January 24, 2014

KEY TAKEAWAYS

We Are All Experiencing A Mobile Mind Shift

Smartphones are becoming an extension of our brains; we pull them out every time we need help. Every successful interaction reinforces the idea that whatever the problem, a mobile device provides the solution -- or should. The result of all this positive reinforcement is a Pavlovian response we call the mobile mind shift.

Embrace The Mobile Moments In Your Customer's Life

Mobile moments are the points in time and space when someone pulls out a mobile device to get what they want in their immediate context. These moments are a battleground for customers' attention. You can use the immediate context to engage someone in those moments of need in both a simple and relevant way.

Focus Your Business On Mobile Moments -- Or Be Disrupted

Mobile moments affect every part of your business, from marketing and sales to product development and employee productivity. If you serve the needs of a customer or an employee in a mobile moment, you can win their business and their loyalty. If you fail, an entrepreneurial company will step in and fill the need, disrupting your business.

The IDEA Cycle Is The Business Discipline Behind Mobile Moments

Use these four steps to embrace mobile moments: Identify the mobile moments that matter; design the mobile engagement; engineer your platforms and operations; and analyze the results to adapt and expand the service. These four steps are the IDEA cycle. Repeat it continuously to succeed.

Re-Engineer Your Business For Mobile Moments

Embrace The IDEA Cycle: Identify, Design, Engineer, Analyze

by Ted Schadler, Josh Bernoff, and Julie A. Ask
with Khalid Kark and Elizabeth Ryckewaert

WHY READ THIS REPORT

The mobile mind shift is the expectation that your customer can get what she wants in her immediate context and moments of need. This shift means the battle for your customer's attention will be waged in mobile moments — any time she pulls out a mobile device. Because mobile devices are pervasive in life and work, mobile moments have a pervasive impact on your company. Take heart. You can serve customers in their mobile moments if you undertake a new business discipline we call the IDEA cycle — identify mobile moments; design the mobile engagement; engineer your platforms, processes, and people for mobile; and analyze results to monitor performance and improve outcomes. Start with a mobile moment audit to find the mobile moments that matter.

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Forrester interviewed more than 100 companies, including Alex And Ani, American Airlines, AT&T, Bank of America, China Eastern Airlines, City of Westminster, Cleveland Clinic, Concur Technologies, Delta Air Lines, Dish Network, Dropbox, Flipboard, Harvard Engineering, HotSchedules, ING, Intuit, Lose It, Nest Labs, Nordstrom, Roambi, Starbucks, and Withings.

Related Research Documents

Mobile Moments Transform Customer Experience
January 24, 2014

Great Mobile Experiences Are Built On Systems Of Engagement
November 16, 2012

Wanted: Mobile Engagement Providers
August 6, 2013

The Future Of Mobile eBusiness Is Context
May 1, 2012

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WE ARE ALL EXPERIENCING A MOBILE MIND SHIFT

Smartphones are becoming an extension of our brains. When we don't immediately find what we want, we turn to our phone or tablet and look for a service that can help us directly: Twitter for sharing, Uber for car services, YouTube for entertainment, Google Maps for finding the best train to Florence, Instagram for photo bragging, Lose It for calorie counts before ordering lunch, Yelp for restaurant recommendations, OpenTable for booking a table at that restaurant, and so on, with the help of a million apps and 200 million websites.[1]

Every successful interaction reinforces the idea that whatever our problem, a mobile device gives us a solution — or it should if a company is doing its job properly. The result of all this positive reinforcement is a Pavlovian response: We feel a need, no matter how fleeting, so we tap an app to satisfy it. We call this change in attitude *the mobile mind shift* (see Figure 1):

> *The mobile mind shift is the expectation that I can get what I want in my immediate context and moments of need.*

What, exactly, has shifted? People's behavior, of course. There's no waiting: Someone can pull out a smartphone or tablet and immediately get the information and service she needs to act. There's no need for her to wait until she's sitting in front of a computer. But our research has revealed that people's psychology of expectations has shifted in two more fundamental ways:

- **People are undergoing a *shift in expectation for convenience in everyday things*.** I can get what I want on any device at any time. If it's not already in the app store, some entrepreneur will soon spot the opportunity and fill the gap with a new service or solution. The expectation shift is ongoing as more startups and companies, including yours, build more apps that fulfill specific needs. Already 64% of people with a smartphone and tablet expect a company to offer a mobile-friendly experience, and 25% feel the mobile app or site should be customized to their immediate location.[2]

- **People are also undergoing a *shift in desire for control over the things they care most about*.** With a mobile device, I can now control my travel services, my financial health, my restaurant reservation, my directions to the game, even my thermostat and glucose meter. I am drawn to apps that give me control over those things. Employees also experience a shift in control. If I'm meeting a customer, I can pull up the history and download the materials I need while in the entryway. If I repair wind turbines, I can climb the 350 steps to the top of the tower knowing that if I run into trouble, I can use the video camera to show an engineer what the problem is.

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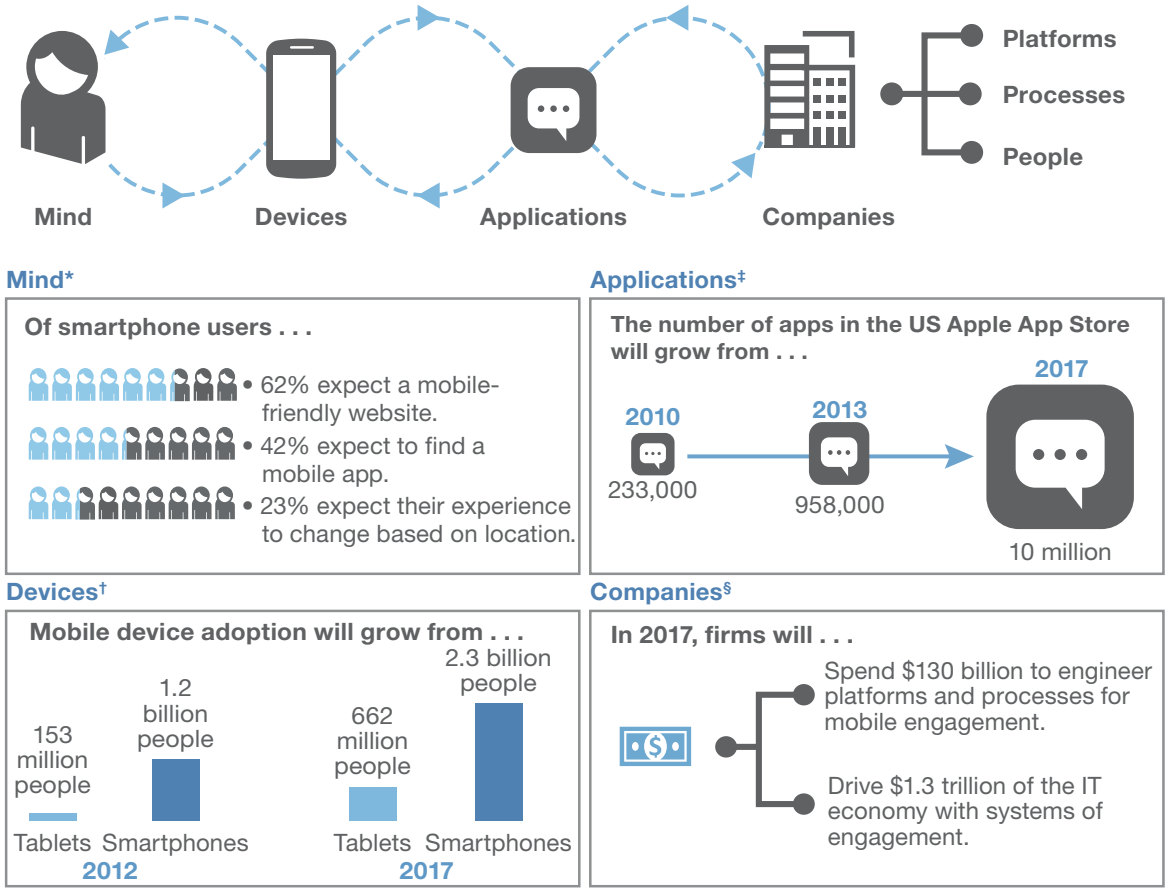
Figure 1 Understanding The Scale And Scope Of The Mobile Mind Shift



*Base: 4,404 US online adults (18+) who use a smartphone

*Source: US Mobile Mind Shift Online Survey, Q3 2013
†Source: Forrester Research World Smartphone Adoption Forecast, 2012 To 2017 (Global) and Forrester Research World Tablet Adoption Forecast, 2012 To 2017 (Global)
‡Source: 148Apps.biz, Forrester estimate
§Source: August 6, 2013, "Wanted: Mobile Engagement Providers" Forrester report and February 13, 2012, "Mobile Is The New Face Of Engagement" Forrester report

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Embrace Mobile Moments — Or Be Disrupted

How does the mobile mind shift affect your business? By creating a cascade of *mobile moments*:

> *A mobile moment is a point in time and space when someone pulls out a mobile device to get what they want in their immediate context.*

Context is important here.[3] Mobile moments happen because a specific person has a specific need or want based on who they are, where they are, their past history with a company, maybe even whether it's raining, and so on. Opportunity arises because you can use the immediate context to connect with someone in that moment of need.

Mobile moments are becoming a battleground for customers' attention. If you serve the needs of a customer or an employee in that moment, you can win their business and their loyalty. If you fail, an entrepreneurial company will step in and fill the need for you, disrupting your business in the process.

Think we're exaggerating? From speaking with disruptive entrepreneurs who've succeeded with mobile applications, we know how they work — when they spot a place *in the physical world* where a mobile app can solve a problem or deliver something valuable, they attack. As Cody Rose, who cofounded the startup NoshList, put it, "We look for annoying things in everyday life that can be fixed with a mobile app. Then we jump on it."

Tens of thousands of entrepreneurs at companies like Anjuke, Dropbox, Evernote, Flipboard, Hailo, Instagram, King, Line, Lose It, Roambi, SnappCab, Square, Tencent, Tootpay, Twitter, and Uber are building substantial new businesses and disrupting existing markets with new services delivered in the mobile moments. These apps exploit the gap between what people want to do in their daily life and work and what's now possible with a mobile device. When people see that they can do a new thing — or do an old thing more conveniently and immediately — they incorporate it into the way they live and work (see Figure 2). It's inevitable. Every industry and every market and every economy will shift under this onslaught of entrepreneurial energy and escalating expectations.

Unless you want to sit quietly and let these disruptors attack your business, *you* must engage your customers in their mobile moments. Here's how. First, give people the information and services they need whenever and wherever they need them. And second, identify the new services you can deliver to someone on a mobile device in their moments of need. This is your opportunity to serve your customers and employees in new ways — to make them happier, more loyal, more productive, and more connected.

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Figure 2 Mobile Moments Change Every Part Of Life And Work

How do expectations change in the mobile moment?

As a shopper . . .	You can walk into a Home Depot store confident that you will have as much or maybe more information at your fingertips than the store associate. When buying a grill, the ratings of other buyers and the pricing at Wal-Mart are available to you right from the aisle.
As a parent . . .	The phone is a blessing because you can get things done from anywhere or hand it to a whiny child to play a game. It's a curse because your teenager keeps sneaking a look at Instagram at the dinner table.
As a patient . . .	You can track your calories and general well-being with Lose It. You can connect with your diabetes or cardiac support team by automatically tracking and securely sharing your blood sugar or blood pressure.
As an employee . . .	You bring a smartphone to work to get things done. And if your company issues you a smartphone but locks it down to just company email, you carry two phones. A smartphone is much too valuable a business tool to leave in technology management's control.
As an executive . . .	You are always ready to access critical data on apps like Roambi. As a result, you can move forward with a decision in a meeting rather than waiting until later when someone can run the right report for you.
As a sports fan . . .	You have a new first screen — the only screen you really need to stay in direct and immediate touch with the game, the players, the fans, the stats, and the rumors. Whether you're watching the game live or in your living room, your phone is your go-to resource for the entire experience.
As a traveler . . .	You are no longer in an information vacuum, wondering if you'll get to your meeting on time. The TripIt app on your phone has what you need to check status, make connections, order cars, check into your hotel, and even help you rebook a flight.
As a driver . . .	You use a mapping app to find the fastest way to anywhere. A State Farm customer can snap a photo of an accident and file an insurance claim right from the scene. Record the insurance details of the other driver and exchange information in an instant.

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RE-ENGINEER YOUR BUSINESS FOR MOBILE MOMENTS

Because mobile moments are pervasive in life and work, they also have a pervasive impact on your company. You can't serve mobile customers effectively until you undergo your *own* mobile mind shift. You'll have to make shifts in every facet of your organization to serve people in their mobile moments.

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- **Marketing shift: Create value in your brand through the utility you provide.** Traditional marketing is far less relevant in the world of the mobile mind shift. Customers judge brands based on how useful they are. You must shorten the distance between what people want and what they get.[4] In the process, you get to build a relationship with your customers and increase the quality and frequency of your customer experiences as Clorox does with its myStain app.

- **Sales shift: Embrace mobile moments to serve empowered customers.** The sales shift is not about mobile selling; it's about influencing purchases in mobile moments. Your pricing must become more transparent because pricing information is instantaneously available. You can sell in new places because mobile enables connections everywhere. And mobile extends your shelf, enabling you to offer and promote the selection available online. A key asset in mobile sales is the sales staff, which can use phones and tablets to help customers make better buying decisions as Nordstrom does in retail and Banner Engineering does in manufacturing sales.

- **Product shift: Service-enable your products through mobile moments.** Products are not just products any more — they are service-enabled relationships. Nest Labs redefines the value of home thermostats by putting control over energy and comfort into a homeowner's mobile moments. The City of Westminster enables workers to control streetlights for safety and maintenance from a tablet. You will rethink every product as mobile moments create new ways to connect with customers, deliver service, and benefit from an ecosystem of partners.

- **Process shift: Use mobile moments to turn processes into tasks.** Mobile moments transform processes that have remained stubbornly manual or paper-based, such as field service, direct sales, store shelf restocking, inspections, guest services, and in-store service. AT&T U-verse, for example, empowers its field technicians with tablets that eliminate manual tasks and help them complete an installation in the promised 2-hour service window — and wins awards for doing so.[5] With mobile devices, you can inject intelligence into a mobile moment. The result is that employees are able to act with confidence to complete a task efficiently.

- **People shift: Empower employees with information in mobile moments.** Employees have also experienced a mobile mind shift. It's why 48% of global information workers use a smartphone for work, and 21% have bought the device themselves: They will spend their own money to work efficiently on the go.[6] Salespeople can improve their customer engagement by tapping into the transaction history or a product catalog right in a sales meeting. Restaurant workers can learn on a tablet and manage their shifts with HotSchedules. China Eastern Airlines has used mobile devices and overhauled its maintenance dispatch process to assign maintenance staff based on their immediate availability and the real-time demand for services at the gate.

- **Platform shift: Power mobile moments with systems of engagement.** In the mobile mind shift, you can't survive with your old approach to technology systems of record.[7] Instead, you will need systems of engagement to translate a mobile opportunity into an operational reality.

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Your technology platforms allow you to project your services directly into your customers' and employees' mobile moments. United Airlines spent nearly two years building a technology platform to offer all stakeholders — gate agents, attendants, and passengers — a single source of truth on any mobile device or computer.

THE IDEA CYCLE: THE BUSINESS DISCIPLINE BEHIND MOBILE MOMENTS

In our work with dozens of entrepreneurs and more than 100 companies, we have seen that success comes from using a new *disciplined* way to tackle mobile moments. Mobile moments in sales or marketing are different from mobile moments with products or services; customer mobile scenarios are completely different from employee mobile scenarios. Even so, you can use the same, universal business discipline to benefit from those mobile moments. We call this four-step business discipline the *IDEA cycle* (see Figure 3):

1. **Identify the mobile moments and context.** In this step, you focus on your customer's journey to find his defining moment, as well as important moments that come before or after it (see Figure 4). For Krispy Kreme customers, getting a push notification that the "Hot Now" sign is on is the defining moment. What matters most in a mobile moment is giving someone exactly what they want in the simplest way possible, sometimes before they even know they need it. Start by analyzing who is reaching for a mobile device and why. What is their physical and historical context? How would they like to engage with you in that moment? Develop that understanding by walking in their shoes, observing their actions, and describing what you have observed. Research, including ethnographic research, focus groups, journey mapping, and analyzing site traffic, can help here.

2. **Design the mobile engagement.** In this step, you bring businesspeople, designers, and developers together to decide exactly how to match your business goals to your customer's motivation in each moment. The resulting engagement is constrained by a tiny screen and the huge expectations set by five-star consumer apps. You must use Agile development and a continuous delivery process to rapidly launch, learn, and pivot to deliver value in the moment.

3. **Engineer your platforms, processes, and people for mobile.** To make a mobile moment successful, you must re-engineer your business. You must re-examine your technology platforms, processes, and people to enable them to deliver the experience. Engineering these systems is where you will face the true cost of mobile. It's what turns a $250,000 mobile marketing app into a $2 million mobile transaction app.

4. **Analyze results to monitor performance and optimize outcomes.** The mobile engagement is not complete if you're flying blind. Capture, track, analyze, and act on the data to improve your mobile experience. Unless you instrument the app and the back-end systems of engagement, you cannot possibly improve your service or develop insight into what your customer wants from you. Build data collection and analytics into each app release.

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Figure 3 Master The IDEA Cycle

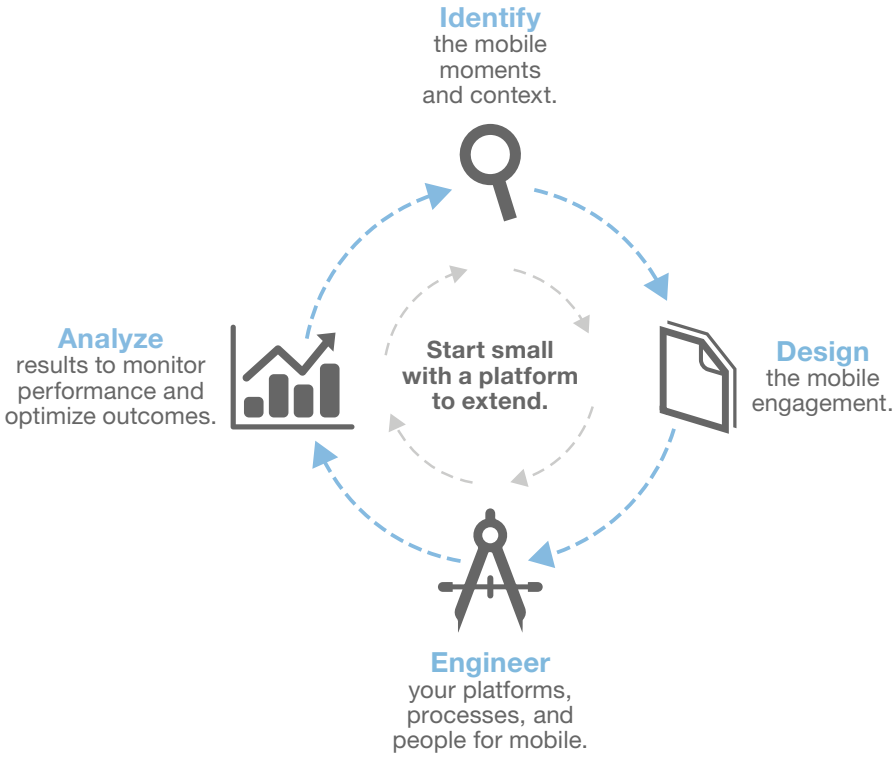

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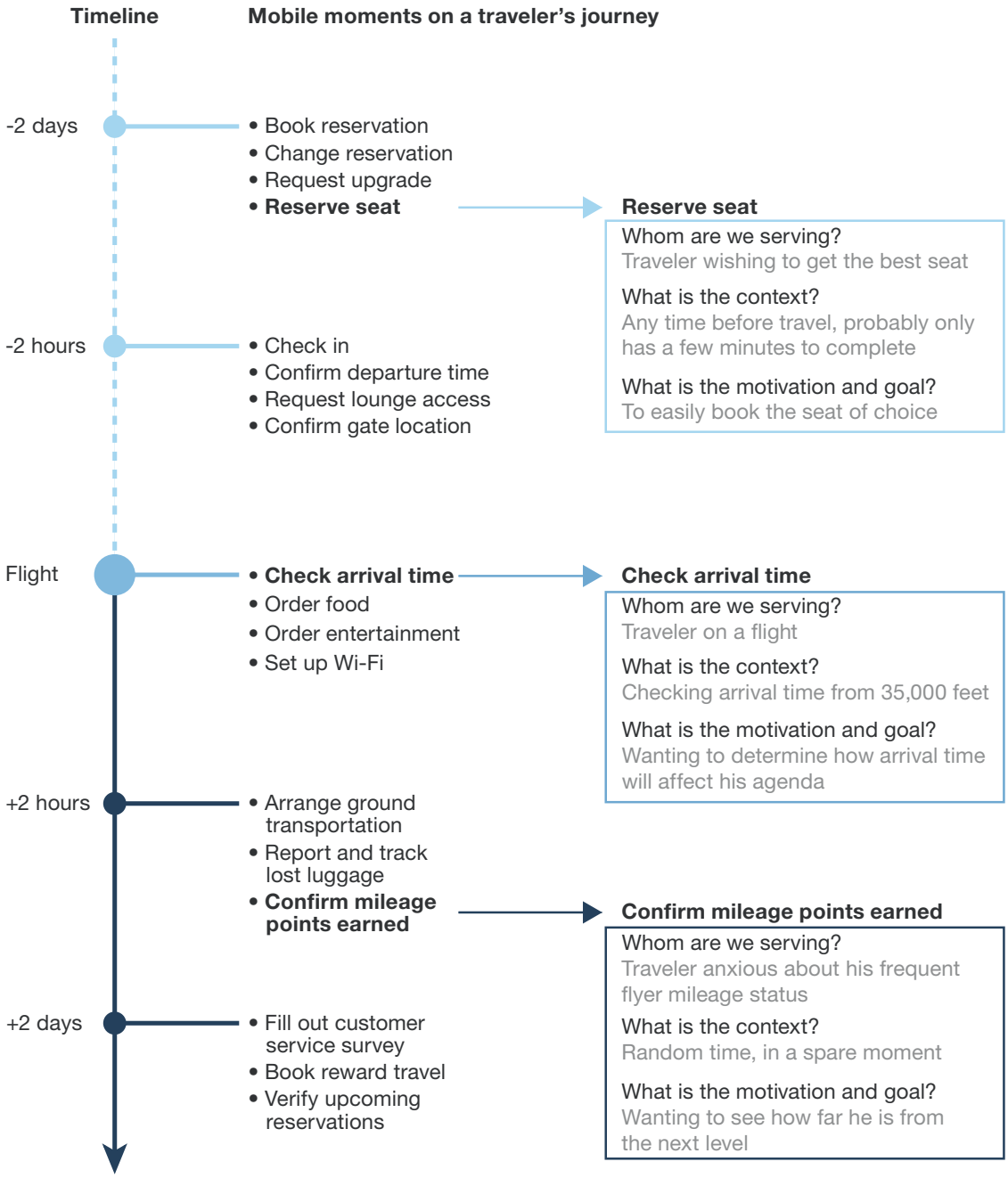
Figure 4 Identify The Mobile Moments And Context On Your Customer's Journey



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CONDUCT A MOBILE MOMENT AUDIT TO FIND THE MOMENTS THAT MATTER

Based on the successes and failures of the companies we have worked with over the past seven years, we have assembled a planning guide we call a *mobile moment audit* to help you consider the universe of possible mobile moments and then sketch out what it will take to move through the IDEA cycle. Then use a mobile moment worksheet to capture the essential elements for each step of the IDEA cycle, including the impact on your core operations (see Figure 5).

Identify The Mobile Moments And Context

How many potential mobile moments can you find in your customers' and employees' lives? Four? 10? 20? Once you start thinking about where your company intersects your customer's or employee's daily life in the real world, you will discover a multitude of ways to engage people in a mobile moment. To catalog your own customers' mobile moments, ask three questions:

1. **Where can we immediately solve a customer's problem?** For example, if a Bank of America customer wants to buy something with a debit card, but she isn't sure of her balance, can we give her the balance and the cost of an overdraft loan, then offer to increase her overdraft limit right there in the moment? If a traveler who wants to upgrade his seat can see his points balance or an executive about to call on a customer can pull up the customer history right then, that's an opportunity for a mobile moment. This is the no-waiting side of mobile, the side that accelerates business processes or improves a customer's task flow by giving him the information and tools to act in the moment.

2. **Where can we eliminate friction or annoyance in our customers' lives?** You already have a relationship with your customers in online and offline channels. How can you improve something they're already doing using a smartphone to interact with you? Can they take a picture of their credit card to capture payment information? eBay Now users do. Can they find a product in the store? Lowe's customers do. Can they file a claim complete with photos right from the scene of the accident? Crawford & Company claims adjusters do. This question should unleash a torrent of potential moments in which you can find and fix annoying things in your customers' lives.

3. **Where can we deliver a new business service?** This is the blue-sky path for new mobile moments — and multiplying mobile moments is a great path to profit. This is how entrepreneurs like Mike McCue at Flipboard, Quinton Alsbury at Roambi, and Travis Kalanick at Uber think about mobile. They imagine where mobile devices create opportunities to radically improve someone's life. Your new business service may solve a problem that your customers didn't know they had. For example, American Express lets people know through a mobile alert when the company detects a potentially fraudulent transaction.

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Figure 5 A Mobile Moment Worksheet Spurs Focus, Collaboration, And Impact

Identify the mobile moments and context.

Assess audience
- Whom are we serving?
- What devices do they use?
- What is their motivation and goal?

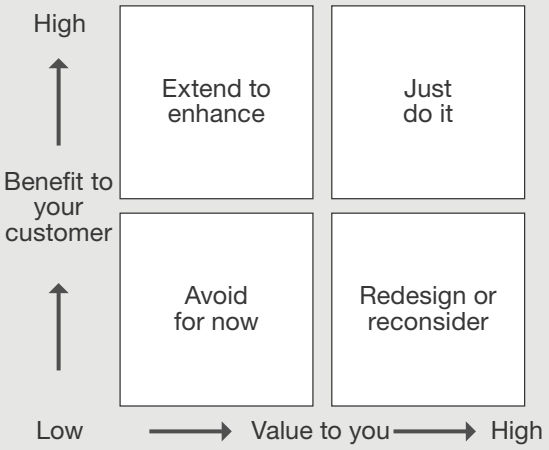
Determine context
- What is their situation and location?
- What is their emotional state or attitude?
- What are their preferences and history?

Design the mobile engagement.

Engage your customer
- What service will you provide?
- What will it accomplish?
- How will they find it?

Calculate customer benefit
- Does it accomplish a customer goal?
- Does it accomplish a goal in seconds?
- Is it convenient and enjoyable to use?

Determine the value to you
- Does it accomplish your goal?
- Is it cost-effective? Does it drive revenue?
- Are you committed to it for the long haul?



Engineer your platforms, processes, and people for mobile.

Build platforms
- What systems will the engagement use?
- Do you have access to those systems?
- Are they ready for mobile?

Transform processes
- What processes will the engagement touch?
- Where will your current processes break down?
- What changes will you have to make?

Align people
- What skills will you need?
- Will your organization support the engagement?
- Do you have resources to make these changes?

Analyze results to monitor performance and optimize outcomes.

Identify the data you need
- What are the business metrics?
- What are the engagement metrics?
- What are the technical metrics?

Determine if you're ready to use it
- Can you collect the data?
- Do you have the analysis tools?
- Do you have analytics expertise?

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Design The Mobile Engagement

Once you have identified the mobile moments and context, the next step in the IDEA cycle is to design how you will engage customers in those mobile moments. This is where you match your customer's motivations in her mobile moment to your business goals. If a customer doesn't use your app or site in the mobile moment, then the moment will pass and the opportunity will be lost. Ask yourself three questions: one to help you design your engagement and two more to help you prioritize the mobile moments to tackle first:

1. **What service will you provide?** To get the mobile engagement right, you have to deliver what a customer or employee expects in the simplest way possible. For American Airlines, the app streamlines a traveler's journey, from flight status to check-in to finding the right gate and so on. For a mobile point-of-sale system like the one jewelry retailer Alex And Ani has built, the app needs to be simple enough that an employee will use it with a customer to check inventory, take payment, and help the customer with any last-minute questions or substitutions.

2. **What benefit does it bring a customer?** What will motivate someone to pull out his phone or tablet and turn to you for help? That analysis starts with a simple investigation of how the app or site helps a customer meet his goal. Extend that with higher-order benefits: Does it accomplish that goal in seconds? Is it convenient to use? Is it enjoyable to use? Mike McCue, CEO of Flipboard, aims to replicate the visual beauty of a magazine on a mobile device, while improving the experience through sharing and convenience. That's his way to elevate "bringing joy" to the level of corporate strategy.

3. **What value does it bring to your company?** If a customer benefits but you don't, then you'll find resources quickly drying up. You might start out with a bang, but with no ongoing value or road map for improvement, the app will soon grow stale. Overcome this flaw by committing only to mobile moments that increase customer revenue or loyalty or improve an employee's productivity. Apps that enable people to serve customers faster create openings for new sales, as Dish Network's mobile apps for its field service reps do.

Engineer Your Platforms, Processes, And People For Mobile

CIOs and corporate strategists who treat mobile as just an app will face major complications down the road. You'll find that you must involve technology management and operations staff and systems to deliver an outcome that is meaningful to customers. You will spend 80% of your money and effort engineering your platforms, processes, and people for mobile. For each core system, make a list of the things you need to worry about and then assess whether that resource is *available* to you and if it is *ready* for mobile moments.

- **Are your technology *platforms* ready to support the mobile moments?** Bring technical experts into the mobile moment audit to identify the back-end systems and the new systems of

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engagement you need. You will need to know if that technology is ready to support your mobile moment. For example, at American Airlines, technology teams had to change the way they handled data after a tenfold increase in mobile app data consumption in some situations.

- **Are your customer-facing *processes* aligned for engagement?** In the mobile moment audit, prepare and assess a list of processes like field service, retail sales, marketing operations, or customer onboarding that the mobile moment will touch. At AT&T U-verse, for example, field reps carry tablets to help them quickly complete tasks like configuring a router or collecting a customer's signature. Ask: What tasks are improved by a mobile moment? Where will a process break down? What changes will you have to make?

- **How will mobile moments affect your *people*?** In the mobile moment audit, capture all of the departments that you need to involve. What new skills will their staff need? Will they support the mobile experience? At Alex And Ani, for example, store operations leaders needed to think about how retail staff interacts with customers in the store. At wine, beer, and spirits company Constellation Brands, a data dashboard from Roambi changed the way its sales teams worked with distributors and retailers by placing sales history and benchmark data into their hands.

Analyze Results To Monitor Performance And Optimize Outcomes

The last step in the mobile moment audit deals with measurement: What will you measure, and how will you use the data? Then use the results to monitor performance and figure out how to optimize outcomes to get you ready for another turn around the IDEA cycle. To prepare for these continuous iterations, build data and analytics into the process at the start, rather than attempting to add it on later. You'll want to:

- **Identify the data you need.** Consider what data you will need in three areas: business metrics, engagement metrics, and technical metrics.[8] Business metrics such as IHG's "room night revenue" are more important because they help prioritize the needed investment. Engagement metrics such as frequency of use, actions taken, and unique visitors give important feedback for marketing activities. Technical metrics such as device profiles, app performance, and crashes give your development team immediate feedback on success or failure. For each category of data and metric, ask: Can you collect and store this data?

- **Determine if you're ready to use the data.** Identifying the data available determines what questions you could answer. But are you ready to answer them? What will you do with the results? Mine them for customer insight? Improve your development process? Optimize your marketing strategy? These questions often reveal subtle organizational barriers to collecting and using data. Make sure it's practical to collect and analyze the data. And determine if your organization has the right expertise in place and the right technology to analyze the data.

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RECOMMENDATIONS

PROMISES FOR THE MOBILE MIND SHIFT

To keep your company focused on expectations created by the mobile mind shift, we have created a set of principles in the form of customer and employee promises. Ask yourself: "Can our organization deliver on these promises?"

- **Wherever I am, your company is available.** That means on a smartphone first and foremost, but it might also mean on a tablet, computer, television, or new-age device or gadget. If a new device is in a fifth of your customers' or employees' hands, you'd better be there. Because you can be sure that the first fifth is also the most influential and often the most valuable fifth.

- **Whenever I choose, your business service is at my fingertips.** We pay our monthly wireless data bill so we can immediately get what we want where and when we want it. If your service is poky or offline, you will disappoint your customer or employee. You must also tailor your service to the situation: Smartphones need action buttons to be useful, for example. People in the physical world accomplish tasks. They have little patience for fumbling around or waiting for a response.

- **Whatever my next step, you have anticipated my needs.** You know someone's immediate context — where they are, what they did last, how they present themselves, and maybe even their emotional state. All of this information gives you the opportunity to serve someone before they even ask for it. If you really don't know what your customer needs next, go find out. Walk around your retail store; ride around with your sales reps; instrument your apps and touchpoints to collect the behavioral data that will help you. This is now a basic business competency. It's also an operating principle of every mobile startup out there.

- **Whatever my action, you are ready to respond.** The mobile app hands someone a tremendously powerful lever to move forward, share an experience, capture a moment, or ask for help. If your mobile app doesn't help someone complete an action, you have failed. If the result of a click is a dead end on a customer journey or a roadblock on an internal process, then customers will complain and maybe defect.

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SUPPLEMENTAL MATERIAL

Methodology

Forrester's US Mobile Mind Shift Online Survey, Q3 2013 was fielded in September 2013 to 8,249 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size (N = 8,249), there is 95% confidence that the results have a statistical precision of plus or minus 1.08% of what they would be if the entire population of US online individuals ages 18 and older had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population (defined as those who go online weekly or more often). The survey sample size, when weighted, was 8,224. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) The sample was drawn from members of an online panel managed by MarketTools, and respondents were motivated by receiving points that could be redeemed for a reward. The sample provided by MarketTools is not a random sample. While individuals have been randomly sampled from MarketTools' panel for this particular survey, they have previously chosen to take part in the MarketTools online panel.

Please note that respondents who participate in online surveys generally have more experience with the Internet and feel more comfortable transacting online.

In addition to sampling error, one should bear in mind that the practical difficulties in conducting surveys can introduce error or bias into the finding of opinion polls. Other possible sources of error in polls are probably more serious than theoretical calculations of sampling error. These other potential sources of error include question wording, question ordering, and nonresponse. As with all survey research, it is impossible to quantify the errors that may result from these factors without an experimental control group, so we strongly caution against using the words "margin of error" in reporting any survey data.

These statements conform to the principles of disclosure of the National Council on Public Polls. You can find more information about the data on the Consumer Data page online. From this page, you will be able to download the Survey Instrument.

Companies Interviewed For This Report

Alex And Ani

American Airlines

AT&T

Bank of America

China Eastern Airlines

City of Westminster

Cleveland Clinic

Concur Technologies

Delta Air Lines

Dish Network

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Dropbox
Flipboard
Harvard Engineering
HotSchedules
ING
Intuit
Lose It
Nest Labs
Nordstrom
Roambi
Starbucks
Withings

ENDNOTES

1 148apps.com tracks apps in the app stores. Source: Steel Media Ventures (http://www.148apps.com/feeds-services/).

Netcraft reports 188 million active websites in November 2013. Source: "November 2013 Web Server Survey," Netcraft (http://news.netcraft.com/archives/2013/11/01/november-2013-web-server-survey.html).

2 Source: US Mobile Mind Shift Online Survey, Q3 2013.

3 A customer's context is the "sum total of what your customer is experiencing at his moment of engagement." Continental Airlines, for example, knows how close a passenger is to a departure time and delivers relevant content. Use a person's location, preferences, and transaction history to deliver something relevant even before your customer knows he needs it. See the May 1, 2012, "The Future Of Mobile eBusiness Is Context" report.

4 Customers are in the midst of a total mind shift. As a result of their perpetual mobile connections, their expectations have changed. They're not interested in your messaging and logos. They want utility, and they want it now. This report provides specific strategic recommendations for brands dealing with demanding mobile customers. See the April 19, 2013, "Marketing Strategy For The Mobile Mind Shift" report.

5 Source: "TV Viewers Give Highest Marks Once Again To AT&T U-verse TV In J.D. Power And Associates Study," AT&T press release, October 13, 2011 (http://www.att.com/gen/press-room?pid=21703).

6 This benchmark report is based on three surveys: 1) Forrester's North American Technographics® Online Benchmark Survey (Part 1), Q2 2012 (US, Canada); 2) Forrsights Workforce Employee Survey, Q4 2012; and 3) Forrsights Networks And Telecommunications Survey, Q1 2012. The surveys in aggregate reveal the gap between consumer and employee needs and IT's readiness to support them. CIOs need to take steps to bridge this gap now, as new devices, new platforms, and new usage will only widen the divide further in the coming years. See the May 9, 2013, "Benchmarking Mobile Engagement: Consumers And Employees Outpace CIOs' Readiness" report.

7 Mobile is not simply another device for IT to support with a shrunken website or a screen-scraped application. Rather, mobile is the visible manifestation of a much broader shift to systems of engagement that marry physical context and digital intelligence to deliver service directly into a person's hands. This shift will add value and take cost out of every business service, workflow process, and business application.

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But mobile engagement will also require wholesale changes to your app design, service delivery, IT skills, technology assets, and even your business model. See the November 16, 2012, "Great Mobile Experiences Are Built On Systems Of Engagement" report.

8 With mobile apps, your development teams need to deliver new versions and updates much faster: eight to 12 times a year or more. Mobile performance management provides an essential feedback loop to guide the content of your updates. By collecting historical, operational, and real-time data across technical, engagement, and business-aligned metrics, you can gather the information you need to analyze your app's performance, gain insight into what's working and what needs to be fixed, prioritize new features, and repair defects. This report details a number of valuable, commonly collected metrics and describes the tools and frameworks that can help you collect them. See the November 18, 2013, "Measuring Mobile Apps" report.

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