

# Governance Takes A Central Role As Enterprises Shift To Mobile

## Table Of Contents

|  |          |
|--|----------|
| <b>Executive Summary .....</b>                                 | <b>1</b> |
| <b>Mobility Adds Complexity To Information Governance.....</b> | <b>2</b> |
| <b>Data Decentralization Has An Impact On Governance .....</b> | <b>3</b> |
| <b>Prioritizing And Understanding eDiscovery .....</b>         | <b>4</b> |
| <b>Technology As A Governance And eDiscovery Tool.....</b>     | <b>5</b> |
| <b>Key Recommendations .....</b>                               | <b>7</b> |
| <b>Appendix A: Methodology .....</b>                           | <b>8</b> |
| <b>Appendix B: Demographics/Data.....</b>                      | <b>8</b> |
| <b>Appendix C: Endnotes.....</b>                               | <b>9</b> |

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## Executive Summary

Enterprises need to evolve and expand their information governance (IG), compliance, and discovery programs to address emerging forces such as the mobile-enabled workforce, device proliferation, and the rise of eDiscovery. To succeed, organizations need to overcome barriers of technology adoption and gaps in skills needed to manage information within these environments.

These findings are the result of an August 2014 Forrester Consulting survey commissioned by Druva to evaluate governance and eDiscovery amid enterprise companies adjusting to these new forces. By conducting in-depth surveys with 205 IT and legal professionals in enterprises in the US and UK, Forrester found that most enterprises are struggling with eDiscovery and governance as work becomes more mobile and devices proliferate. Governance programs are expected to become more centralized over the next two years, creating a counterweight to the fragmentation and decentralization of work in mobile-enabled enterprises. Consistent execution of policies, as well as streamlined approaches to data collection and discovery, will increasingly be underpinned by investing in technology. The cost of information governance programs in enterprises will rise, with technology becoming an essential part of this enhanced investment.

Email continues to be the dominant communication channel, but content types such as documents, instant messages, and cloud-hosted data must also be viewed as sources of business records and thus subject to regulatory compliance obligations or eDiscovery orders. Corporate bring-your-own-device (BYOD) programs have resulted in a proliferation of end user device types — from laptops to desktops to phones and tablets — as well as the content and data generated on these systems.

eDiscovery is also heating up as a priority among IT and legal decision-makers, showing the largest rise on the expected priority list over the next two years. As compliance obligations — the high priority today — are met by adopting technology and moving to centralized oversight models, eDiscovery requirements for end user devices and data will increase in importance.

### KEY FINDINGS

Forrester's study yielded four key findings:

- › **Information governance takes a central role as organizations address device and data proliferation challenges.** Forrester's commissioned survey of IT and legal professionals reveals that 53% expect to have a centralized model for IG within two years, up from 25% who have one today and just 18% who had one two years ago. Information workers use their mobile and other computing devices to access corporate data and content anywhere, anytime. This decentralization of work means risk for enterprises that require consistent approaches to collection, discovery, and management of enterprise content. New approaches to governance are needed to bring centralized approaches to governance in an effort to balance the move to mobile.
- › **Investment in information governance will grow.** An overwhelming 89% of survey respondents anticipate that the cost of their information governance program model will increase over the next two years, including 44% expecting this increase to be more than 10%. Technology adoption is expected to be part of this added cost, with 54% of respondents expecting to use technology to enforce or execute governance policies on end user devices, up from 22% who do this today.
- › **eDiscovery rises in importance for enterprises.** The immediate priority for enterprises is compliance with laws and regulations pertaining to end user devices and data, with 87% of survey respondents selecting this as a top priority. eDiscovery, however, is the area of largest expected growth for IT and legal teams over the next two years. Our survey shows a 12% rise in eDiscovery as a high priority over the next two years. Compliance is expected to fall on the IT and legal priority list. This data aligns to Forrester's research in eDiscovery, showing that since 2013, interest in eDiscovery among IT and security decision-makers has significantly increased.
- › **Gaps in IT and legal skills reveal opportunities for technology adoption.** Enterprise IT and legal professionals rely on outsourcing for the skills needed to address eDiscovery and governance activities. Fifty-four percent of IT and litigation professionals expect to use technology to enforce policies on end user devices, up from 22% who do this today. Similarly, 52% of respondents expect to use technology to collect and discover content on end user devices; 20% do this today. The pace of change in an always-connected mobile world has resulted in a skills gap, pressing organizations to enhance current capacity with technology.

## Mobility Adds Complexity To Information Governance

Today's employee expects to be able to get work done anywhere, on any device, and at any time. This has caused organizations to look for fast and effective ways to implement governance strategies as the mobile mind shift is becoming pervasive among the growing number of global information workers and the customers they serve. According to data from Forrester Research, the number of anytime, anywhere workers who use multiple devices and work outside the office has risen from 23% of the global workforce in 2011 to 29% in 2012.<sup>1</sup> For enterprises, this presents a complex set of risks, such as data loss, security breaches, cyberattacks, and visibility. Although enterprises are working to support mobility solutions for employees, they are not yet fully prepared to manage the risks and challenges of device proliferation. They face the following challenges:

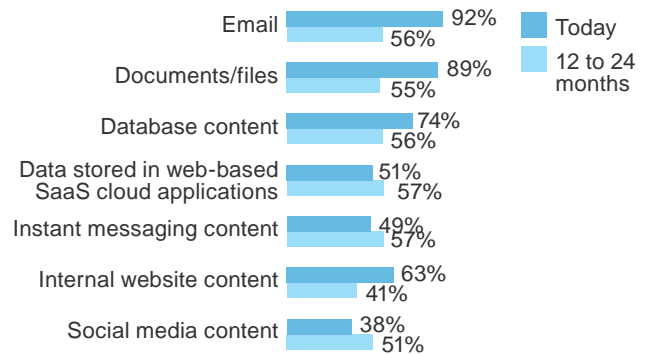
› **Abundance of devices.** As the rise of corporate BYOD programs continues, the lines between an employee's work and personal devices are beginning to blur, exacerbating content management challenges. Current governance targets revolve around established devices such as laptops, desktops, phones, and servers; however, tablets are also becoming an increasing priority (see Figure 1). Likewise, according to Forrester's Forrsights Global Workforce Benchmark Survey, Q4 2013, 58% of North American and European information

workers use tablets for content creation purposes, and 48% use tablets for making presentations to clients.

› **Evolution of data types.** Social media, SaaS file-sharing services, collaboration sites, and instant messaging are often ignored in corporate records management programs, leading to potential governance risks. Our research indicates that although emails, documents, files, and database content are the current targets of information governance by enterprises, there is a strong indication of growth in the importance of SaaS data, instant messaging content, and social media content as foci of governance in the next one to two years (see Figure 2).

**FIGURE 2**  
Shifting Focus In Data Targets

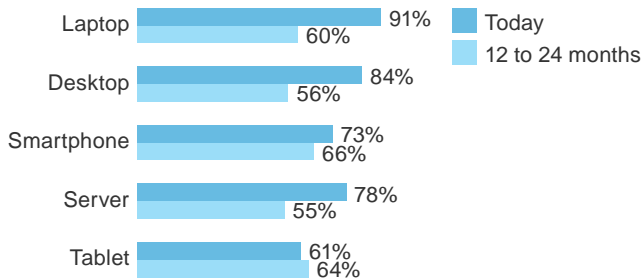
“Thinking about the devices you selected in the previous question, which of the following types of data on these devices are targets for governance at your organization?”



Base: 205 IT and litigation professionals at enterprises in the US and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

**FIGURE 1**  
Mobility Growing In The Workforce

“Which of the following end user devices are targets for governance at your organization?”  
(Select all that apply)

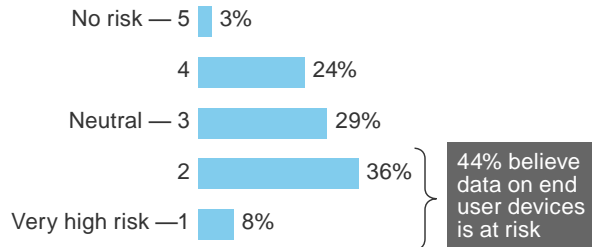


Base: 205 IT and litigation professionals at enterprises in the US and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

› **Securing data on end user devices.** Although savvy companies may institute security policies and train employees on the risk of data loss, the effectiveness of such initiatives is largely unknown. Forty-four percent of organizations believe that data on end user devices is still at risk (see Figure 3).

**FIGURE 3**  
Enterprises Concerned About End User Data

“To what extent to you believe data on end user devices is *at risk* at your organization?”



Base: 205 IT and litigation professionals at enterprises in the US and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

## Data Decentralization Has An Impact On Governance

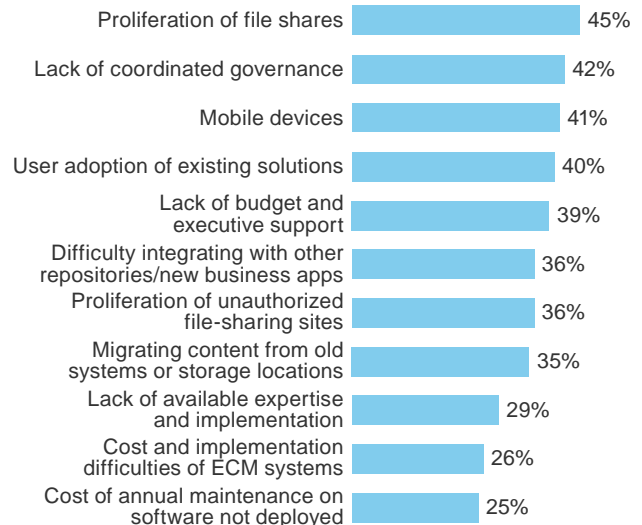
An increasingly mobile workforce using multiple devices to access data is forcing organizations to react and deliver content from all places and at all times. However, enterprises are not yet fully prepared for the impact of the “app” economy and the communication channels that it entails. This shifting work expectation, combined with heightened regulations and requirements surrounding data security, is making it increasingly complex for organizations to manage and secure corporate applications linked to databases locked away on servers in the corporate data center. Business applications have to run safely on anyone’s mobile device, and corporate data has to be transmitted over multiple channels. Firms can no longer expect to solely manage content on private corporate networks with controlled repositories. Corporate content applications must now include online, anywhere access to documents in the cloud or on-premises, which is forcing enterprises to adjust their information governance strategies. Enterprises are moving toward:

› **New imperatives.** Organizations are still in the relatively early stages of formulating information governance strategies and executing on programs to address internal and external compliance obligations. Figure 4 shows the main challenges facing governance on end user devices perceived by IT and legal professionals. Moreover, 89%

estimate that the cost of their information governance model will increase in the next two years (see Figure 5).

**FIGURE 4**  
Many Challenges Facing End User Device Governance

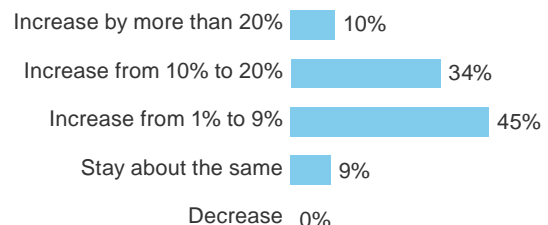
“What are the biggest *challenges* facing governance on end user devices in your organization today?”



Base: 205 IT and litigation professionals at enterprises in the US and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

**FIGURE 5**  
Information Governance Model Costs Increasing

“How much would you estimate that the cost of your organization’s information governance model will change in the next two years?”



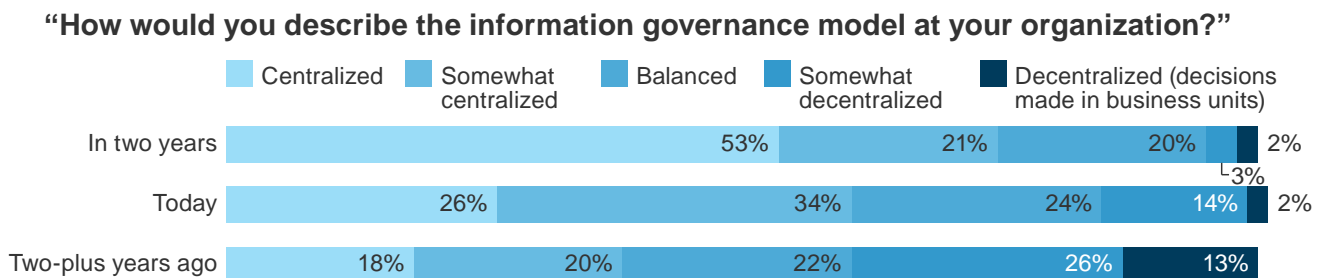
Base: 205 IT and litigation professionals at enterprises in the US and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

› **Centralized governance.** The ever-growing volume of mobile information is leading organizations to reevaluate their approaches to information governance. Identifying, collecting, preserving, and analyzing information are complex activities, and organizations are being compelled to develop centralized approaches to information governance in an effort to balance the decentralization of content creation. Specifically, 53% of enterprises surveyed expect to have a fully centralized information governance model within two years — up from 26% today and just 18% two years ago (see Figure 6).

still a lack of preparedness that may have serious legal, financial, and reputational ramifications.

› **Compliance is driving the immediate need for governance of end user devices and data.** The legal and regulatory landscape is complex, particularly for global businesses. IT and legal teams are facing this challenge head-on now, with 87% of our survey respondents naming compliance with external laws or regulations as a high priority today.

**FIGURE 6**  
Trend Toward Centralizing Information Governance Models



Base: 205 IT and litigation professionals at enterprises in North America and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

› **Investment in information governance.** The risk introduced by the proliferation of end user devices and the data that they generate is prompting organizations to accelerate investment in their information governance programs and technologies. An overwhelming 89% of surveyed IT and litigation professionals indicated that they expect the cost of IG to increase over the next two years, including 44% who expect their investment to increase by more than 10%. No respondents expect their IG costs to decrease, and only 9% expect costs to remain the same.

## Prioritizing And Understanding eDiscovery

In addition to having an impact on information governance, the growing and evolving amount of digital information that businesses receive, generate, and store is complicating the problems of eDiscovery and content management. Many organizations understand the importance of eDiscovery and are taking steps to address it, but keeping up with the proliferation of devices and data is challenging, and there is

› **But eDiscovery is becoming a growing priority . . .**

According to Forrester’s ForSights Security Survey, Q2 2013, 46% of organizations view eDiscovery as a “high” or “critical” priority over the next year — up sharply from 20% and 18% in 2012 and 2011, respectively. Additionally, the number of organizations that do not have eDiscovery on their agenda has fallen by more than half — from 34% in 2011 to only 15% in 2013. Data from our survey of 205 IT and litigation professionals at US and UK enterprises echoes these trends, with results indicating that eDiscovery is the only area of end user device governance climbing in priorities (see Figure 7).

› **. . . and organizations lack IT capacity and skills.**

Traditional approaches to the identification, preservation, and collection of electronically stored information (ESI) are becoming overly burdensome in the mobile workforce. The main reason for outsourcing eDiscovery and governance activities is the shortage of resources and lack of staff and skills (see Figure 8). Consequently, new approaches are required to get the legal and IT teams

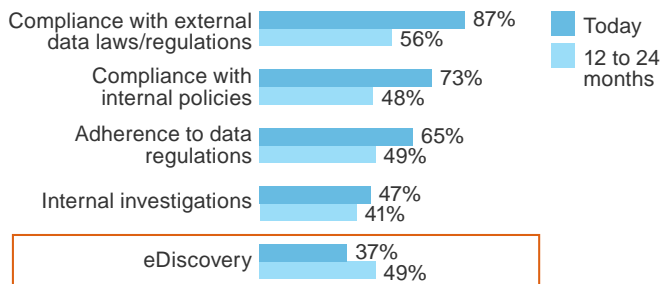


what they need in order to respond to lawsuits and regulatory orders without disrupting the flow of business.

**FIGURE 7**  
**eDiscovery Climbing In Priorities**

**“In handling data end user device governance in your organization, what areas do you feel are the highest priority?”**

(Select all that apply today and in the future)



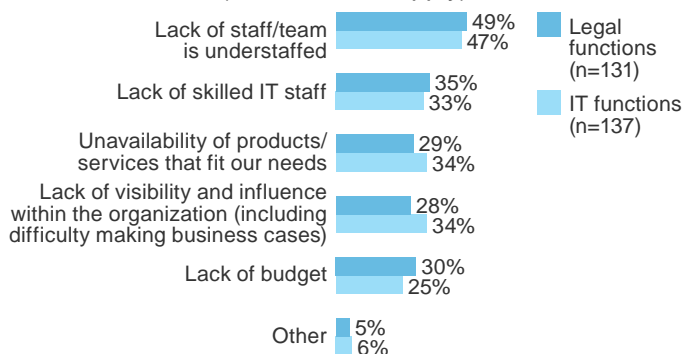
Base: 205 IT and litigation professionals at enterprises in the US and UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

**FIGURE 8**  
**Enterprises Outsource Due To Lack Of Staff And Resources**

**“Why does your organization outsource the activities you selected?”**

(Select all that apply)



Base: 205 IT and litigation professionals at enterprises in the US and UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

## Technology As A Governance And eDiscovery Tool

As content and data evolve, and enterprises continue to prioritize information governance and eDiscovery to meet the mobile mind shift, organizations are increasingly turning to technology to fill gaps in staffing and skill sets.

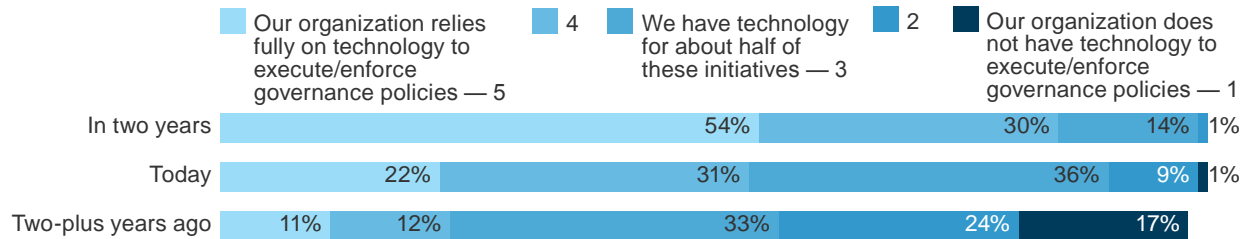
› **Technology for governance.** There is a growing interest in technology to enforce governance policies. Eighty-four percent of organizations see technology as a viable approach to enforcing and executing governance in the next one to two years. This finding demonstrates a significant increase of 61% from two years ago and 30% from today (see Figure 9).

› **Technology for eDiscovery.** There is also a growing reliance on technology to collect and discover content on end user devices, with 85% of organizations expecting to rely on technology in the next two years (see Figure 10). This is a 34% increase from today and a 61% increase from two years ago.

› **Investments in technology.** Organizations are prepared to invest in technology that enables information governance as they acknowledge the gaps in skills and staff when it comes to mobile workforce compliance (see Figure 11). Additionally, as technology management roles shift to the business technology agenda, investments in staff to perform such tasks will be replaced with investment in technology.

**FIGURE 9**  
Role Of Technology Growing For Enforcement And Execution Of Governance Policies

**“To what extent does your organization have technology to *enforce/execute* governance policies on end user devices?”**

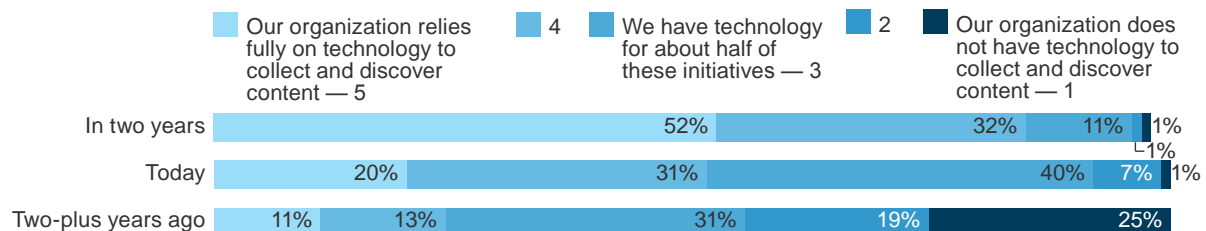


Base: 205 IT and litigation professionals at enterprises in North America and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August, 2014

**FIGURE 10**  
Role Of Technology Also Growing For Collection And Discovery Of End User Data

**“To what extent does your organization have technology to *collect and discover* content on end user devices**

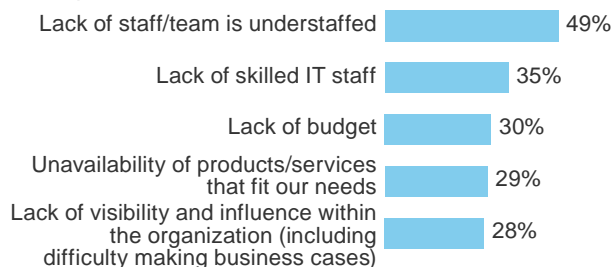


Base: 205 IT and litigation professionals at enterprises in North America and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August, 2014

**FIGURE 11**  
Legal And Compliance Activities Also Lack Staff And Resources

**“Why does your organization outsource the *legal/compliance* activities you selected?”**



Base: 131 IT and litigation professionals at enterprises in the US and UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014



## Key Recommendations

The new forces of mobility, increasing complexity of data visibility, and the rising role of technology require a new approach to information in the enterprise. Mobile-enabled enterprises will see a proliferation of business decisions and related data generated on an ever-evolving range of end user devices. Organizations will look at augmenting and evolving their current governance policies to address this decentralization of work. Investments in technology to more consistently enforce policies and a move to more centralized governance programs are the key themes uncovered in this research.

These four recommendations are based on the report findings and serve as a foundation for information governance and more effective eDiscovery in a rapidly changing world:

- › **Build a governance plan that addresses the habits of the mobile workforce.** Understand your current mobile device landscape and identify governance gaps by surveying your workforce and learning device usage patterns. Assess where technology can address these gaps and help embed and enforce information governance principles into mobile strategies, with an eye toward future trends. Define security, retention, and legal hold policies and map these into the mobile application creation or device provisioning programs. Assume that mobile content — beyond just email — may be subject to eDiscovery obligations.
- › **Survey the technology landscape and build an ecosystem of solutions.** Assess the technologies you're considering for managing endpoints and their applicability to the governance process. A complete solution will enable your organization to have centralized visibility into your data for governance and eDiscovery purposes. The mobile world is still evolving, so recognize that it may require multiple technologies to address all areas, and ensure that you work with vendors that have the proper relationships to deliver the entire ecosystem.
- › **Prioritize the need to retain and access data for eDiscovery.** Avoid serious legal, financial, and reputational consequences by planning ahead for the need to identify, preserve, and collect electronically stored information. Consider new approaches such as cloud-based services that offset time and skills needed to provide a complete solution.
- › **Leverage new technologies to get the job done.** Invest in technology to offset skill set deficits and to automate eDiscovery and other governance needs, such as policy enforcement. Technology can scale along with need, enabling teams to cost-effectively govern increasing amounts of data and data types across rapidly diversifying end user devices.

## Appendix A: Methodology

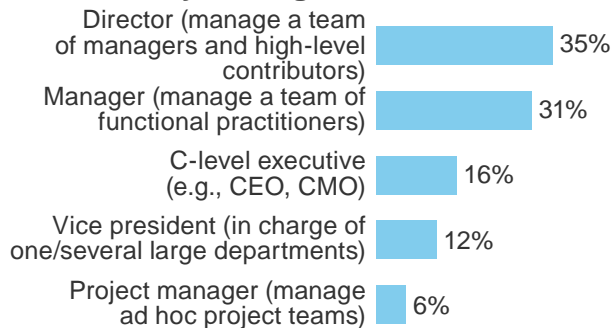
In this study, Forrester conducted an online survey of 205 IT and litigation professionals to evaluate trends and attitudes surrounding governance and eDiscovery in a mobile work environment. Survey participants included IT and legal decision-makers at enterprises in North America and the UK. Questions provided to the participants asked about technology usage, device types, outsourcing activities, and risk perceptions. The study was completed in August 2014.

## Appendix B: Demographics/Data

**FIGURE 12**

**Respondent Title**

**“Which title best describes your position at your organization?”**

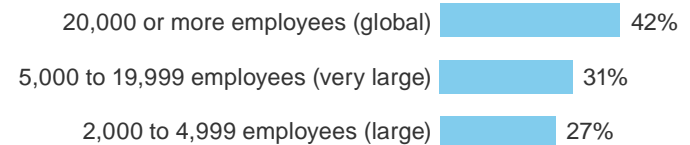


Base: 205 IT and litigation professionals at enterprises in the US and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

**FIGURE 13**

**Company Size**

**“Using your best estimate, how many employees work for your firm/organization worldwide?”**



Base: 205 IT and litigation professionals at enterprises in the US and UK  
Source: A commissioned study conducted by Forrester Consulting on behalf of Druva, August 2014

## Appendix C: Endnotes

<sup>1</sup> “Five Key Trends That Are Shaping How We Manage Enterprise Content,” Forrester Research, Inc., September 19, 2014.