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Identifying And Prioritizing Growth Opportunities For Windows Autopilot

Customer Business Cases

November 13, 2020

Overview: The Autopilot business case for Microsoft customers

Autopilot will address challenges organizations face in provisioning devices and getting them to employees

Benefit Area	Benefit Description	Why It's Important
Time savings for device provisioning	• For pre-provisioned deployments, Autopilot streamlines device provisioning workflows, enabling IT to ready devices more quickly. • Zero Touch deployments shift application provisioning workflows to end users	• On average, imaging a device for a new or existing user can take up to 4 hours for IT department personnel. • IT organizations are already over-burdened – they report that a lack of staffing and time to manage device imaging and deployments holds.
Time savings for adjacent workflows	• Autopilot eliminates adjacent workflows such as image maintenance, which distract IT resources from higher-value activities.	• More than half of organizations with 25 or more employees maintain multiple Windows images to support their workforces.
Streamlined logistics and device delivery	• Devices ship directly to end users, eliminating unboxing, repacking, and shipping for IT teams. • Direct shipping is also "greener", positively impacting sustainability initiatives.	• Approximatley 70% of enterprise-scale organizations report spending a lot of time packaging and shipping devices to workers who are remote. • 60% of businesses with 500-1,000 employees report the same
Improved employee experience	• Making it easy to provision devices ensures that employees always have the newest devices in hand. • Organizations frequently delay device upgrades and refreshes, owing to the investment of time and inherent complexity that comes with these projects.	• Modern management is a strategy for not only application and security management but for employee experience management, leveraging cloud-based APIs, self-service, automation, and analytics.*

Source: 1,344 global manager-level and higher technology decision makers (ITDMs and BDMs) with significant influence or authority around device and software selection

*Source: Embrace Modern Management To Improve Employee Experience, Forrester Research, Inc., September 2019

Device provisioning is a challenging process for many businesses. IT departments lack the wherewithal to streamline device provisioning today.

- **6 in 10 technology decision-makers maintain multiple Windows 10 images and procure devices requiring removal of factory applications. This consumes a great deal of IT time and bandwidth.**

- **IT departments report that they are challenged by a lack the time, expertise and resources needed to streamline device provisioning today.**

Issues with current device imaging processes

61%	61%	57%	54%	53%	50%
We maintain multiple Windows 10 images	We spend a lot of time updating and maintaining images	Devices come from the factory with applications that must be removed	Device deployments take a lot of time	Windows devices are more challenging than mobile devices to deploy	We spend a lot of time packaging and shipping devices for remote workers

Challenges in streamlining device provisioning workflows

30%	29%	28%	24%	21%	6%
Lack of time	Lack of expertise	Staffing challenges	Budget constraints	Lack of tooling	Lack of perceived benefits

Base: 1,344 global manager-level and higher technology decision makers (ITDMs and BDMs) with significant influence or authority around device and software selection
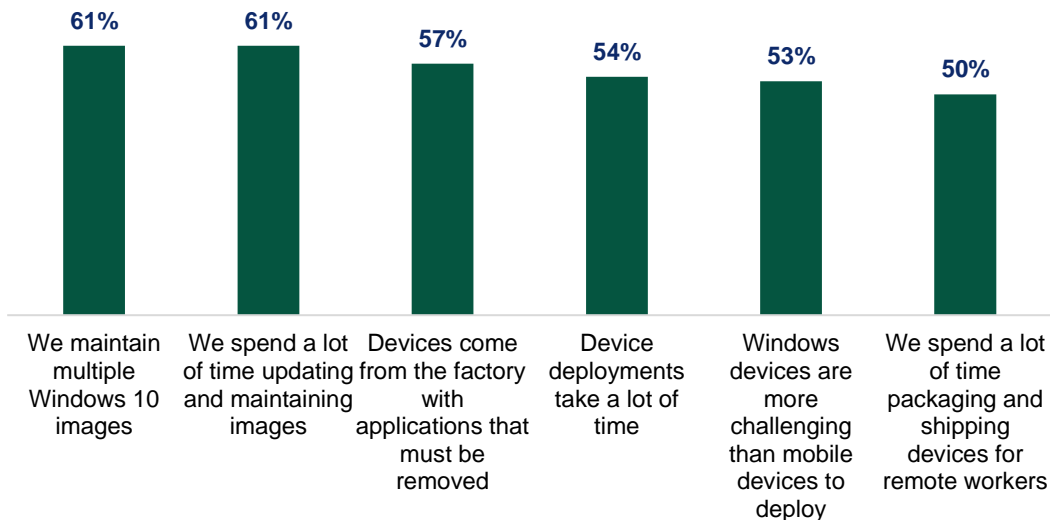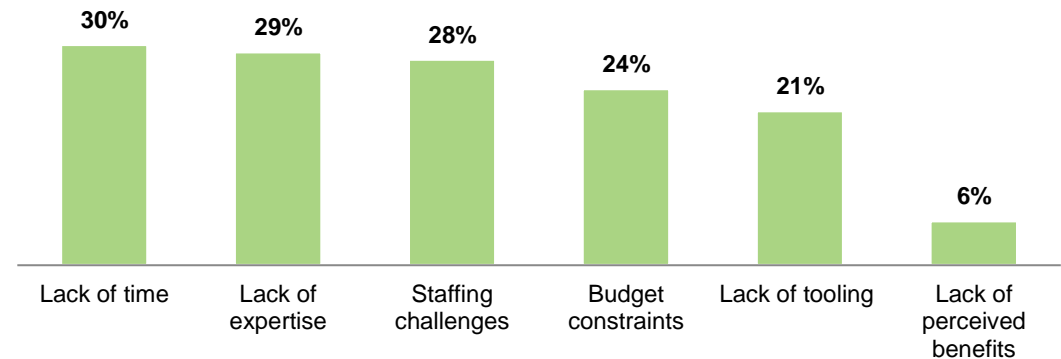
Source: 2020 Autopilot Customer Study fielded by Forrester Research

Base: 1,072 global manager-level and higher technology decision makers (ITDMs and BDMs) with significant influence or authority around device and software selection

Source: 2020 Autopilot Customer Study fielded by Forrester Research

Inefficient device provisioning workflows add significantly to initial and ongoing costs of device ownership

4.2 hours

to update an existing Windows device

4.5 hours

to image a new Windows device for a new user

4.2 hours

to image a new Windows device for an existing user

4.2 hours

to re-image an existing device for a new user

Device imaging workflows require a significant investment from already time-constrained IT organizations, distracting them from higher-value activities

Device imaging workflows require a significant investment from IT organizations.

- For example, a small business with 500 employees that refreshes approximately one-third of its Windows PCs each year will devote **20% of a FTE's time** solely to imaging devices.

- **The IT department will spend $15,000 to $20,000 annually on this task.**

- **On a per device cost, this amounts to approximately $108.**

*Assumes that 90% of the organization's employees use Windows-based devices and that each device takes approximately 2 hours to ready for employees.

Businesses may realize cost savings through outsourcing imaging and deployment services to a third-party partner.

- Partner support can help businesses reduce imaging-related costs by up to 83%.

- Time invested in additional workflows will bolster the business case for partner-supported imaging:
  - Application testing
  - Image development and maintenance
  - Data migration
  - Device logistics

$108	**$17.50**
cost of effort for imaging a device in-house	cost of pre-provisioning a device via a partner using Autopilot*

More distributed workforces face greater issues with device provisioning

Businesses with a majority of remote employees spend more time packaging and shipping devices

Please rate the extent to which you agree with the following statement: "We spend a lot of time packaging and shipping devices to workers who are remote or away f

- 61% — Firms with a majority of remote employees (51% or more remote)
- 40% — Firms with a majority of office-based employees (less than 51% remote)

Workforce distribution varies by geography and industry Percentage of organizations where 51% or more of the workforce is working remotely

- IT and Professional Services: 64%
- Advertising and Communications: 52%
- Manufacturing and Natural Resource Production: 42%
- Healthcare: 34%
- Financial Services: 71%
- Retail and Hospitality: 36%
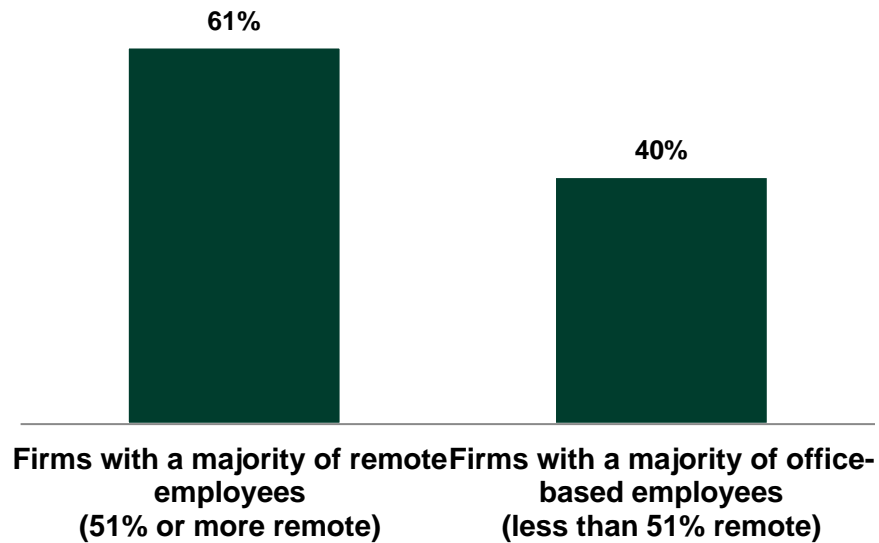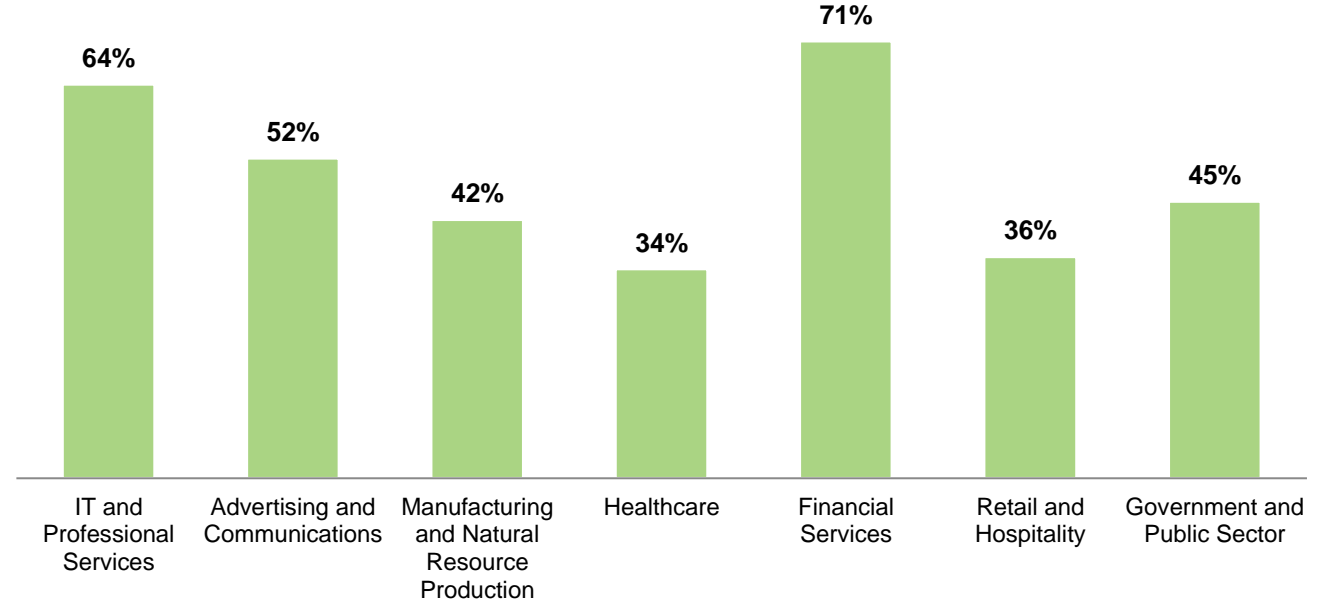- Government and Public Sector: 45%

Base: 1,397 global manager-level and higher technology decision makers (ITDMs and BDMs) with significant influence or authority around device and software selection; Source: 2020 Autopilot Customer Study fielded by Forrester Research

The shift to remote work will not be transient! Up to two-thirds of employees in industries comprising a high percentage of knowledge workers will work remotely, at least part of the time

		Overall Average	IT & Professional Services	Advertising & Comm.	Manufacturing & Resource Production	Healthcare	Financial Services	Retail & Hospitality	Government & Public Sector
Today	% of workforce working remotely	49%	60%	51%	43%	41%	63%	40%	50%
Post Covid-19	Full-time remote workers	34%	43%	38%	29%	29%	40%	30%	31%
	Occasional remote workers	23%	24%	29%	20%	24%	27%	19%	25%
	Location-based employees	44%	33%	34%	50%	48%	33%	52%	44%
Remote Workers (Post Covid-19)	Occasional and full-time remote workers	57%	67%	67%	49%	53%	57%	49%	56%

Base: 1,345
Questions: What percentage of your workforce is currently working at home during COVID-19?; Please estimate what percentage of your workforce you expect will permanently work in the following ways following COVID-19.

Thank You.

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