

A Custom Technology

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Adoption Profile

Commissioned By Aerohive

Networks



Cloud Networking

Introduction

Business decision-makers are increasingly prioritizing company growth and new customer acquisition over cost-cutting. To do this, organizations have shifted business strategy away from differentiating on price to differentiating via customized products and services.

Forrester calls this new competitive dynamic the “age of the customer,” where expectations to “have it my way,” be always connected, and receive instant gratification are the new reality. In the age of the customer, the business environment has narrowed the period between change and response; data, users, and applications are in constant motion, and personal and business resources are longer separate. Not only do employees need to be untethered in order to be able to meet their customers’ demands, the supporting infrastructure also has to be just as scalable, simple, and secure. In November 2013, Aerohive commissioned Forrester Consulting to create a profile of IT decision-makers in order to evaluate the benefits of turning to software-as-a-service (SaaS) management for wireless in supporting this new environment.

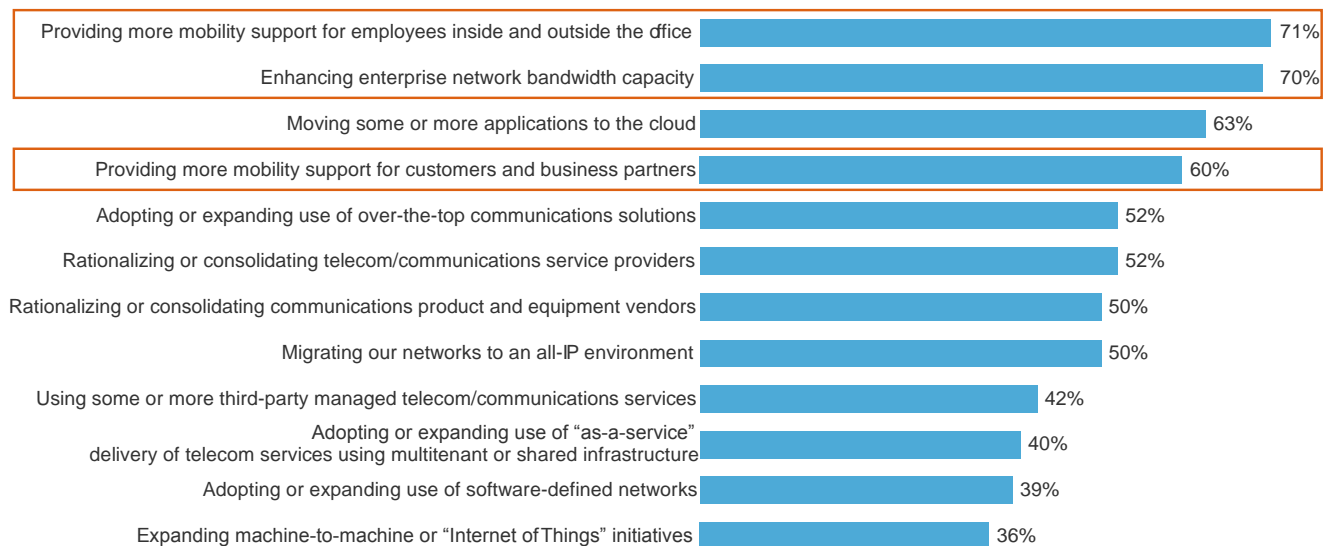
Business Strategy Is Built On Speed And Flexibility

Companies have placed increasing revenue, growing their customer base, and meeting their customers’ expectations at the top of the priority list. This means meeting the needs and wants of very mobile, dispersed, and empowered customers. Companies have begun to untether employees from their desks to help them get closer to customers. According to Forrester’s Forrsights Networks And Telecommunications Survey, Q1 2013, IT decision-makers put mobility at the top of their IT priority list (see Figure 1). 71% of respondents indicated that providing more mobility support for employees will be a high or critical priority during the next twelve months, while 60% rated providing mobility support for customers and business partners as a top strategic initiative.

To support this mobile environment, companies are turning to their infrastructure and operations (I&O) professionals to help the business be more flexible and cognizant of customer needs. While there are many mobile technologies, 82% of IT decision-makers have adopted wireless local area

FIGURE 1
Mobility Is A Top Priority

“Which of the following initiatives are likely to be your firm’s top strategic network and telecommunications priorities during the next 12 months?”
(percentage answering “high priority” or “critical priority”)



Base: 2,144 IT decision-makers

Source: Forrsights Networks And Telecommunications Survey, Q1 2013, Forrester Research, Inc.

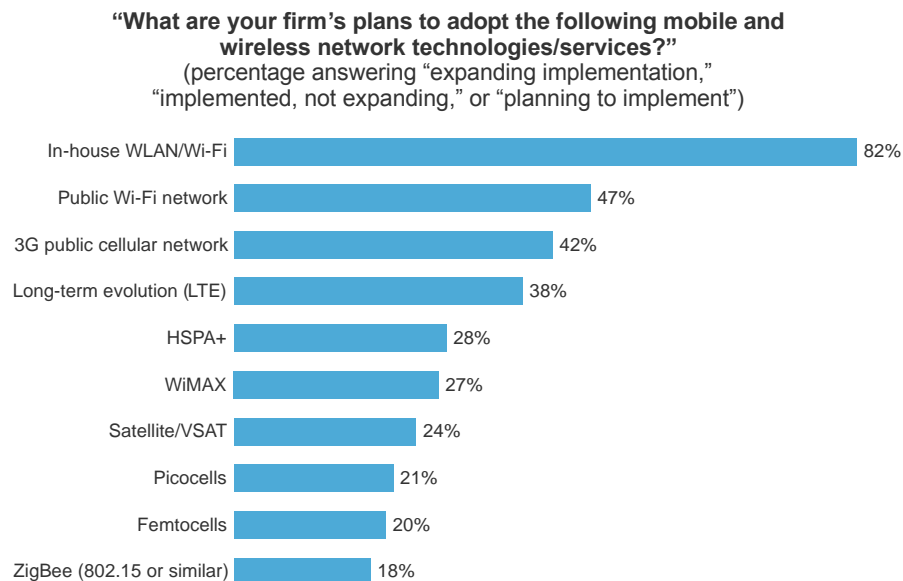
network (WLAN) or Wi-Fi technology or plan to do so — nearly double the number that said the same about cellular service (see Figure 2). Wi-Fi is clearly at the forefront of meeting the emerging demands of a high-density mobile environment filled with more devices, more users, and more business-critical applications.

SaaS Reinforces The Focus On Speed And Agility . . .

Cutting the wires off of employees' work devices isn't the only way to make companies agile. Companies see cloud

computing as a mechanism for business agility, reacting faster and engaging more richly with clients. They rarely know or care how this value is delivered; they just want it done now. For years, business leaders have driven the adoption of SaaS, and with the help of business-aligned developers and outside consultants, continue to approve the use of other cloud capabilities, such as infrastructure-as-a-service and platform-as-a-service. Respondents to Forrester's Q4 2012 Software Survey indicated that the top benefits of leveraging cloud services were speed and agility (see Figure 3).

FIGURE 2
In-House WLAN/Wi-Fi Is A Growing Priority

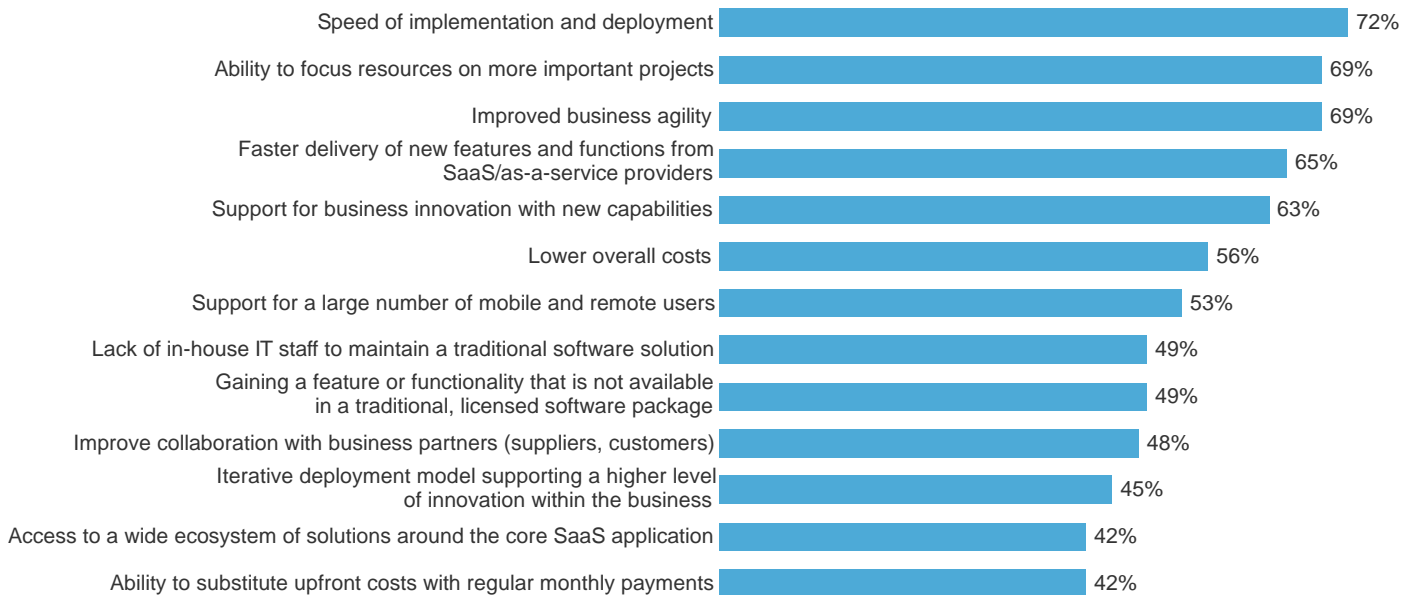


Base: mobile telecommunications decision makers in companies with more than 20 employees (multiple responses accepted)

Source: Forrsights Mobility Survey, Q2 2013, Forrester Research, Inc.

FIGURE 3
SaaS Improves Speed And Flexibility

“How important were the following benefits in your firm’s decision to use SaaS?”
 (percentage answering “important” or “very important”)



Base: 1,429 IT decision-makers

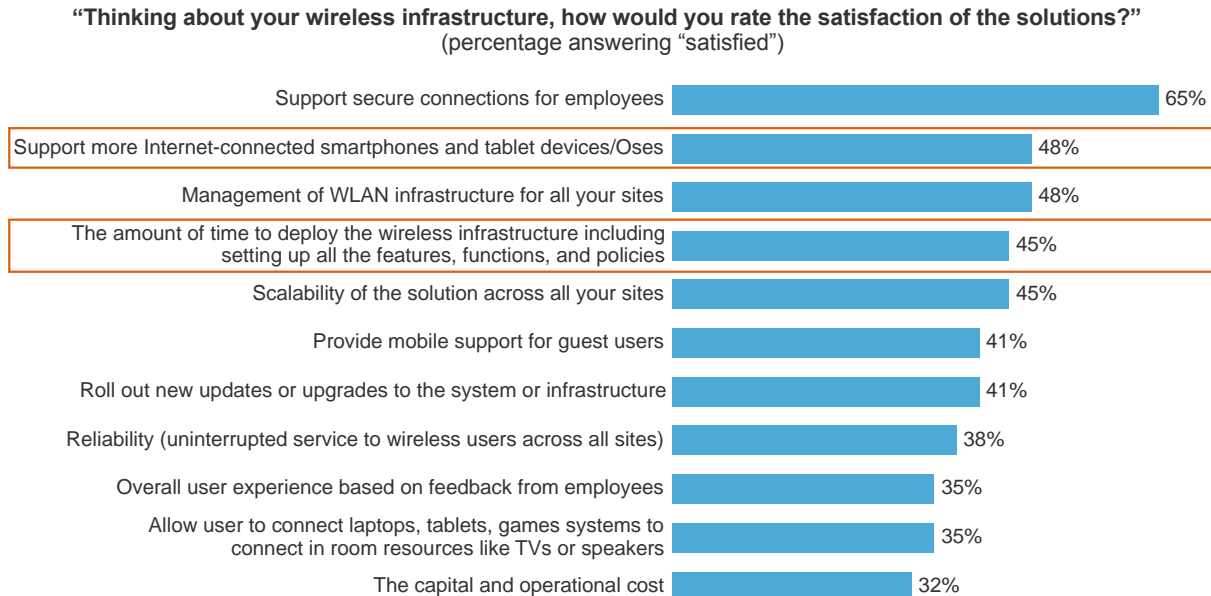
Source: Forrsights Software Survey, Q4 2012, Forrester Research, Inc.

... But Current Wireless Architectures Do Not Align With Business Strategy

Organizations are not satisfied with the speed or management of current WLAN solutions. Most of the wireless deployments have all of their equipment on site and route all traffic from access points back to the controller point — a setup often referred to as a thin AP architecture. As part of this profile, Forrester asked IT network and architecture decision-makers to rate their level of satisfaction with their current wireless infrastructure solutions (see Figure 4). We found that:

- › **Organizations are not satisfied with management solutions across sites . . .** Less than half of the respondents (48%) said that they are satisfied with the management of their WLAN infrastructure across all sites.
- › **. . . and are even less satisfied with deployment time.** Only 45% stated that they are satisfied with the amount of time it took to deploy the wireless infrastructure, including setting up all of the features, functions, and policies.

FIGURE 4
Organizations Are Not Satisfied With Current WLAN Solutions



Base: 95 IT decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of Aerohive, November 2013

Cloud Management Should Align To Business Strategy

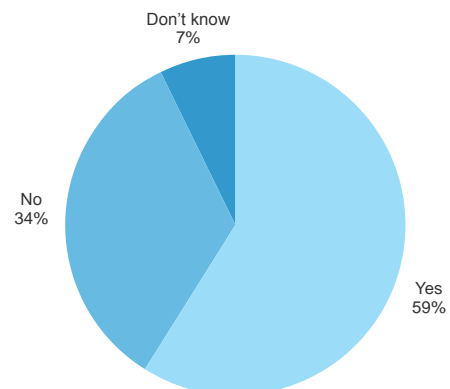
As cloud platforms emerged, the industry praised their basic economics and lower cost. As enterprises accelerated their adoption of cloud services — such as desktop, backup, software, and infrastructure — they have proven to offer far more value than just lower cost. Nearly two-thirds of respondents indicated that cloud wireless management (management-as-a-service) will be a better option than on-site solutions (see Figure 5). Cloud management overcomes a lot of I&O challenges that keep IT from creating a platform to best serve the business.

Organizations indicate that the platforms:

- › **Simplify operations.** As mobile employees empower themselves, the variety of devices and applications that the system must serve will grow exponentially, thereby consuming more resources. Thus, the amount of resources needed to deploy, manage, and upgrade wireless systems will need to decrease. 80% of companies surveyed recognize that cloud management

FIGURE 5
Cloud Is Better Than On-Site

“Do you feel that a wireless management system hosted in the cloud is a better option than a traditional solution hosted on site?”



Base: 95 IT decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of Aerohive, November 2013

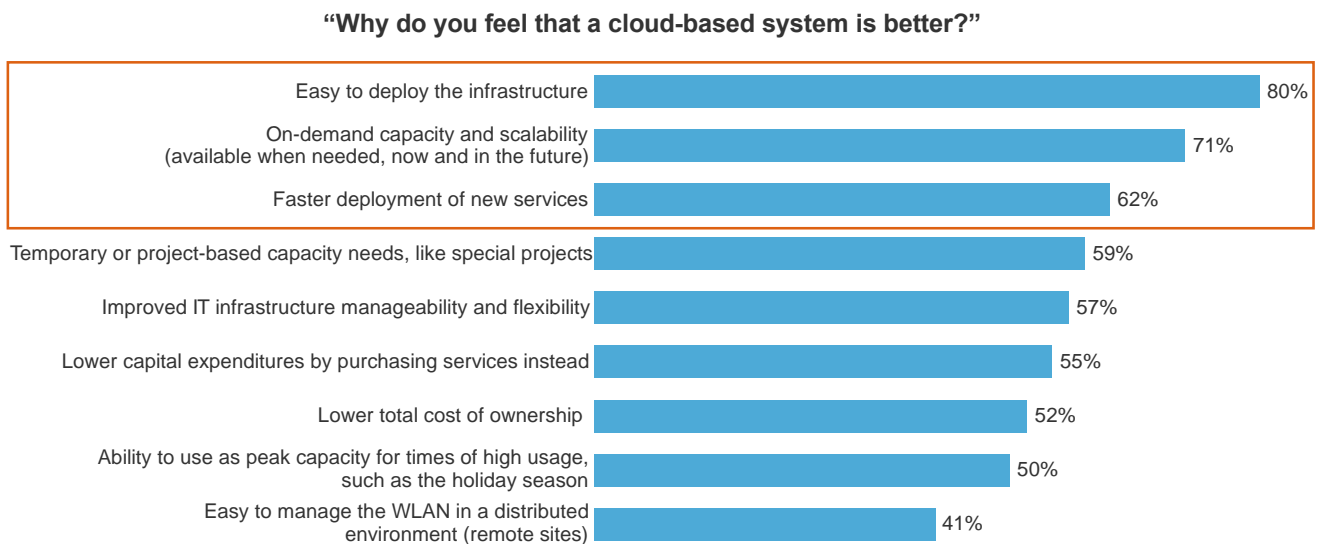
systems have fewer moving parts and a greater ease of deployment due to the intuitive interfaces commonly found on cloud resources (see Figure 6).

- › **Align to business cycles.** Unlike on-site solutions, cloud-based options can scale up or down depending on the business cycle, minimizing capital expenses, retraining, downtime, service disruptions, and operational errors as capacity is added or removed. This is why 71% of the IT professionals in the survey positioned on-demand capacity and scalability as the second most important benefit of cloud platforms.
- › **Standardize infrastructure and operations.** Whether the location is large or small, each location gets a rich and consistent set of features. Deployment times can be reduced and operational efficiencies will increase as Lean principles take hold within networking groups as redundancy and one-off operations are eliminated.
- › **Speed up wireless services.** Cloud management solutions consolidate all management systems in one area. Device management and user policies can be completed once they're in a single location. Consequently, 62% of I&O professionals indicated that they could deploy new services quicker on cloud platforms.

Conclusion

Leading-edge businesses serving the age of the customer will focus on two seemingly dichotomous strategies: consolidation and expansion. Taking a page out of Lean process thinking, companies are eliminating wasteful, redundant software, hardware, and operations from branch and remote locations. On the flip side, business decision-makers will strive to offer more customized products and services that require a dynamic and agile environment. The wireless architecture — cloud management services with on-site access points — is the only solution to support this strategy. Furthermore, cloud WLAN management solutions offer quick deployment of wireless services with almost instantaneous deployment to all sites to capitalize on the time-to-market, a critical element in a world driven by instant gratification.

FIGURE 6
Cloud Management Aligns To Business Strategy



Base: 56 IT decision-makers (multiple responses accepted)

Source: A commissioned study conducted by Forrester Consulting on behalf of Aerohive, November 2013

Methodology

This Technology Adoption Profile was commissioned by Aerohive. To create this profile, Forrester leveraged its Forrsights Networks And Telecommunications Survey, Q1 2013 and Forrsights Software Survey, Q4 2012. Forrester Consulting supplemented this data with custom survey questions asked of IT decision-makers in the UK and the US. Survey respondents included IT managers and above with responsibility for their organization's network and/or IT architecture. The auxiliary custom survey was conducted in November 2013. For more information on Forrester's data panel and Tech Industry Consulting services, visit www.forrester.com.

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