



Zoho ManageEngine IT research

May 2017

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Approach and methodology

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IT decision makers

- All research participants IT decision makers
- All companies 26 or more staff
- Sample size of 152
- Confidence level of $\pm 7.9\%$ @ 95% confidence level
- 33 questions asked

Sample from...

- Online permission based panel

Roles included in the research

Job title	%	n
IT Manager	25	38
CIO	20	31
IT Director	12	18
Line of Business Owner (Marketing, Finance, Operations, Sales)	12	18
IT Security Manager	7	10
Network administrator	7	10
Software engineer	6	9
Database Manager	6	9
ICT business and systems analyst	3	5
ICT support technician	3	4
NET	100	152

Consistent results when analysed by part-completed data showing robust findings

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IT security risks

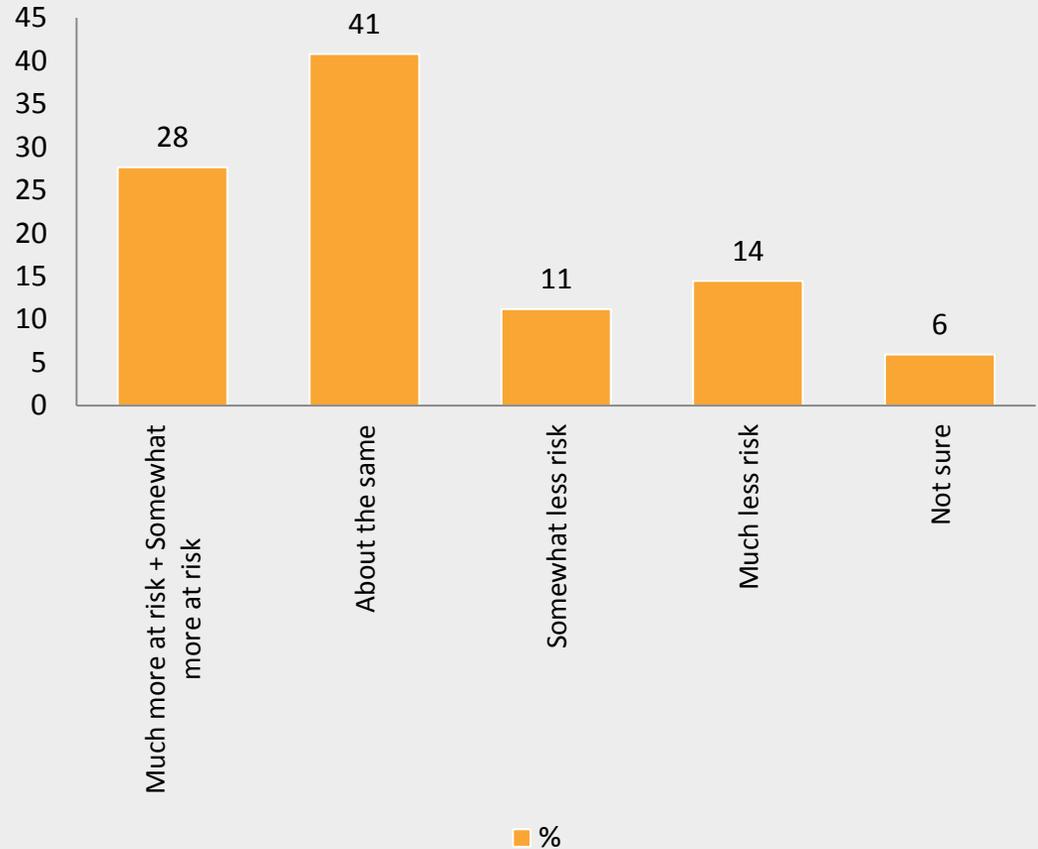


IT security risks now compared to 1 year ago

Over one-quarter more at risk

- More than one-quarter (28%) feel they are much more/somewhat more at risk than 12 months ago
- 41% feel about the same as 12 months ago
 - 26% less at risk

IT security attacks compared to 1 year ago

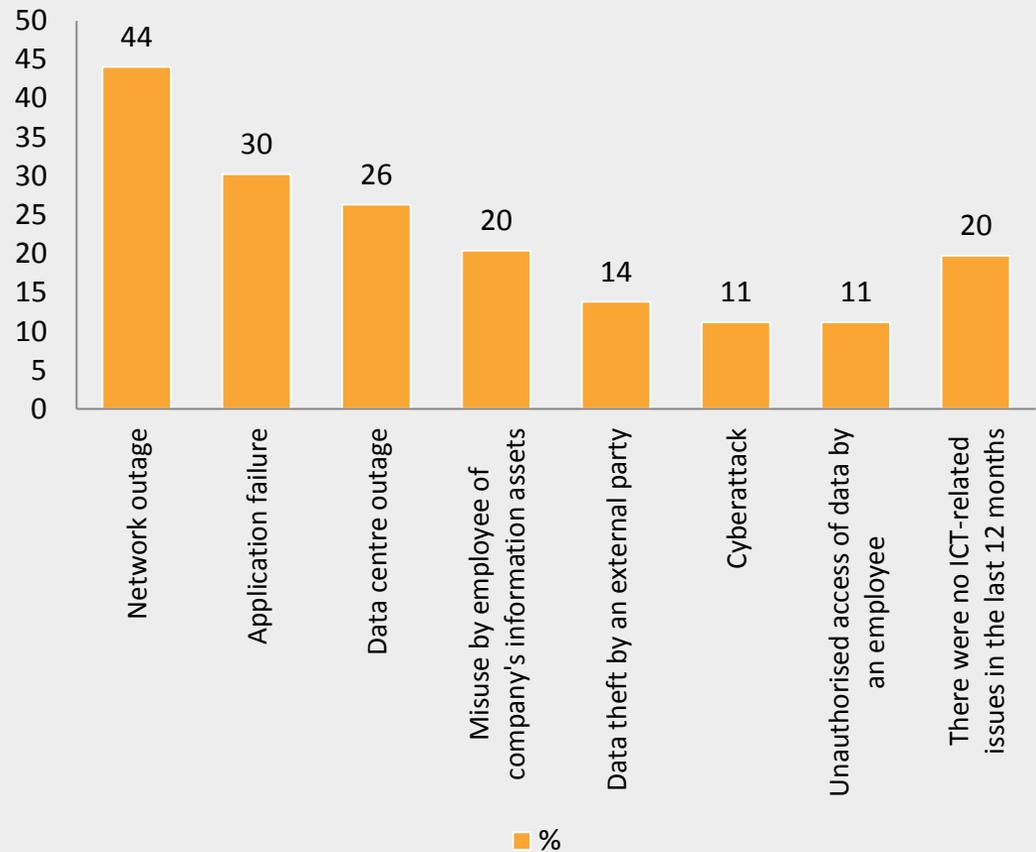


ICT events in last 12 months

Only 20% have no issues

- Biggest issues are network related
 - Almost half (44%) network outage
 - 30% application failure
 - 26% data centre outage
- Security events
 - One-in-five (20%) misuse of data by staff
 - 14% external data theft
 - 11% cyberattack
 - 11% unauthorised access of data by staff

IT security attacks compared to 1 year ago

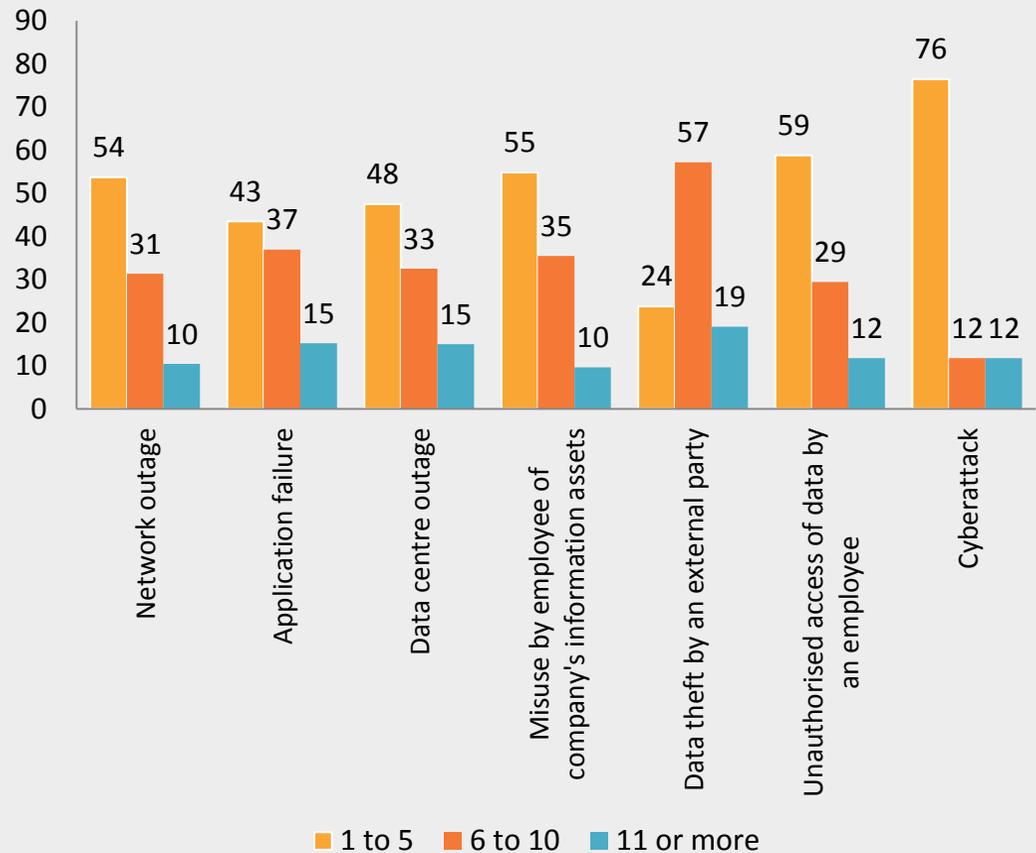


Frequency of ICT events in last 12 months

If companies have issues they reoccur

- Misuse of data by staff
 - 55% 1 to 5 times
 - 35% 6 to 10 times
- Data theft by external party
 - 25% 1 to 5 times
 - 57% 6 to 10 times
 - 19% 11 or more times
- Unauthorised access of data by staff
 - 59% 1 to 5 times
 - 29% 6 to 10 times
- Many companies have security issues that reoccur
- Note: 1 to 5 may be one instance

IT security attacks compared to 1 year ago

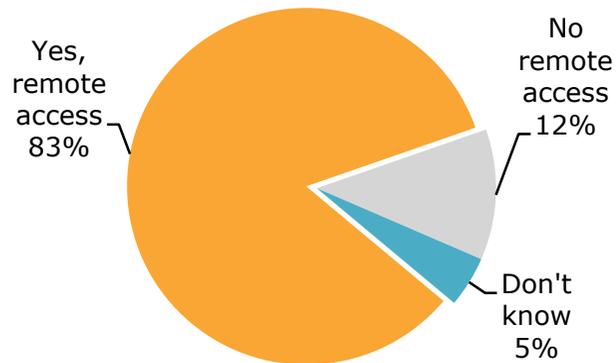


Mobile devices and remote access

Most business has remote access

- Most businesses (83%) have remote access to company data
- 86% of companies provide a mobile device
- 12% allow staff to use their own mobile device

Remote access to data



Mobile device status

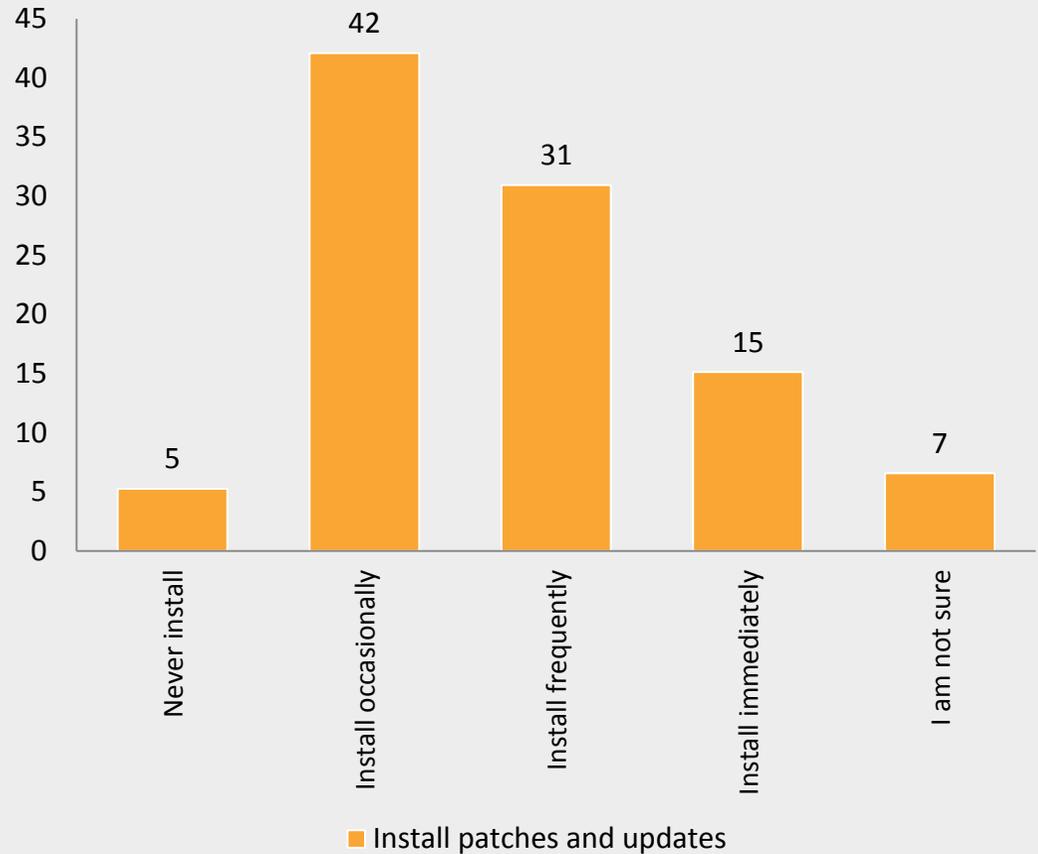
	%
My company provides staff with a device that they can use for work, without any restriction	42
My company provides staff with a device that they can use for work, but there are certain policies that I need to adhere to	43
Staff can use their own device for work, without any restriction	5
Staff can use their own device for work but there are certain policies that they need to adhere to	7
Staff cannot use mobile devices for work	3

Mobile devices and remote access

Updates are not always frequent

- Only 46% install patches and upgrades immediately
- 47% either 'never' or only 'occasionally' install patches and upgrades
 - 7% 'don't' know'

Frequency of installing patches and upgrades



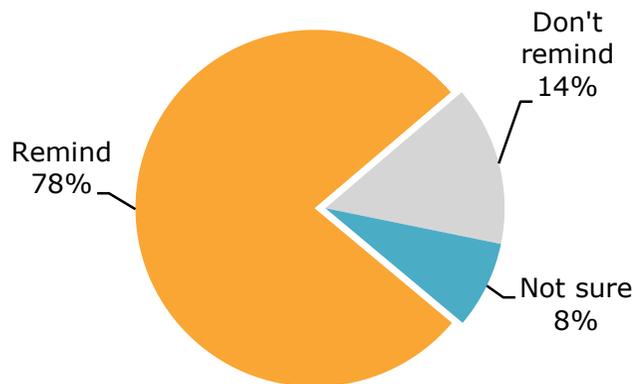
Passwords and authorised software

The majority of businesses have unauthorised software in use

- 53% of businesses have staff using unauthorised applications

Remind to change password

- 22% either are not reminded to change passwords or 'don't know



Unauthorised applications

	%
Yes, staff DO use applications not provided by the company for work	53
No, staff DO NOT USE applications not provided by the company for work	41
Don't know	5

Only 13% of businesses have mechanisms in place to prevent unauthorised use of software

- 30% of those who do not use apps not provided by the company have a process to block unauthorised use
 - = 13% of all companies

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Cloud use

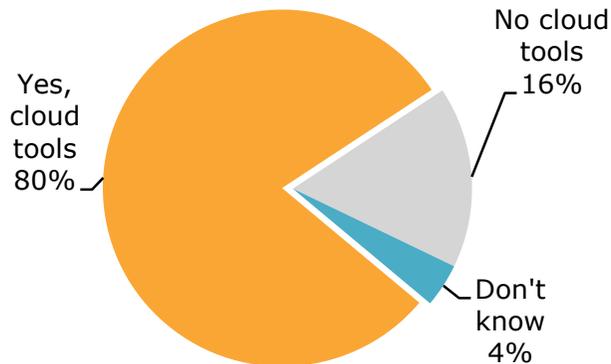


Passwords and authorised software

Cloud use grows

- Only 13% of businesses do not use a cloud environment
 - 3% don't know
- Most (80%) use cloud based collaboration tools
 - Cloud-based Word documents, spreadsheets, and other applications

Use cloud based collaboration tools



Cloud strategy

	%
We have a "public cloud only" environment	34
We have a hybrid cloud	32
We have a "private cloud only" environment	18
We do not use the cloud	13
Don't know	3

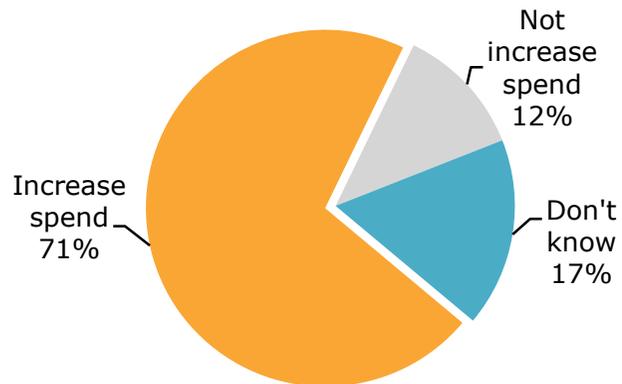
Cloud platforms used and spend in next year

Google leads the way

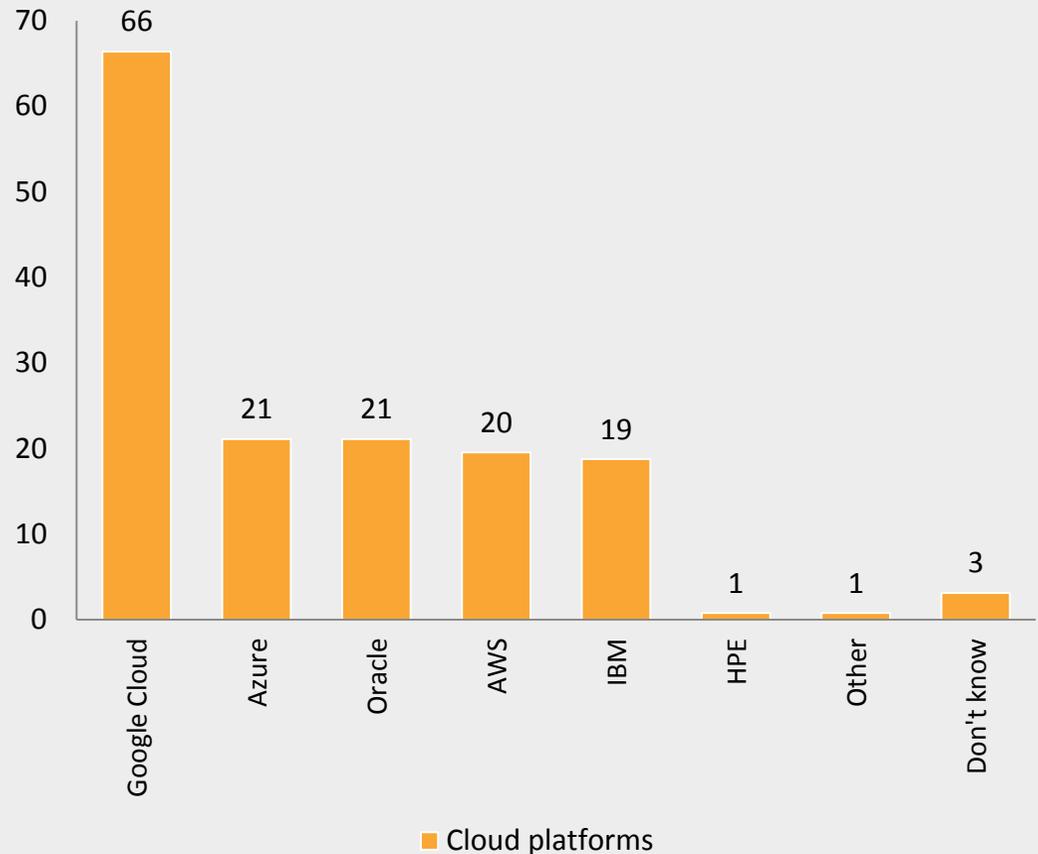
- Two-thirds (66%) are using Google Cloud

Cloud spend in next 12 months

- Almost three-quarters (71%) of businesses plan to increase cloud spend in the next 12 months
 - 12% will not increase spend
 - 17% don't know

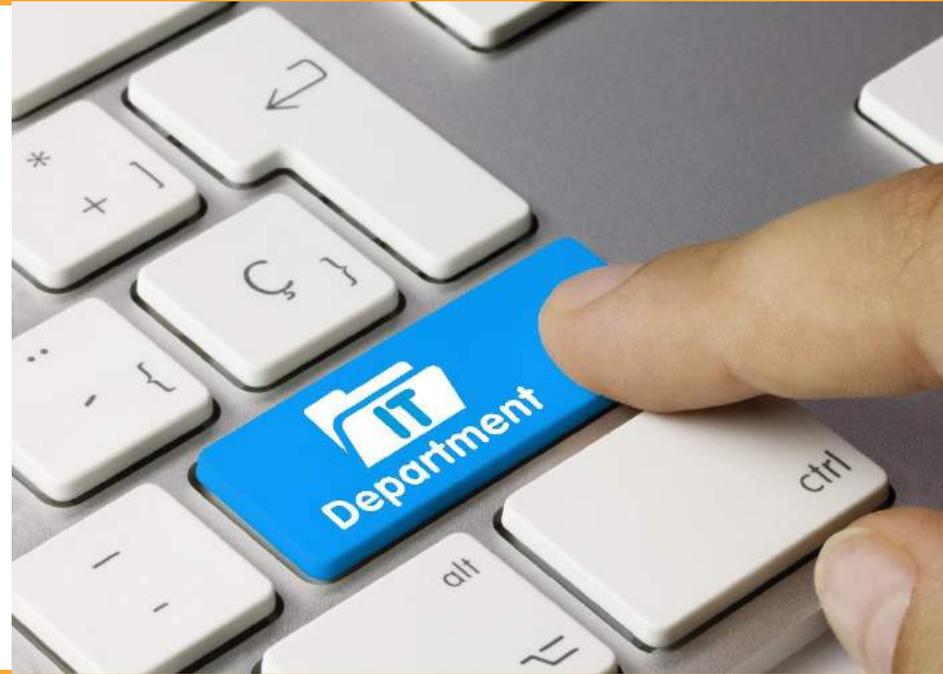


Cloud platforms



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Role of IT



Business understanding of IT

Both IT Managers and Business Managers understand IT, but IT Managers a bit better

- The importance of IT to a business is shown by the level of understanding that Business Managers have of IT
 - IT is much more than cables and backups

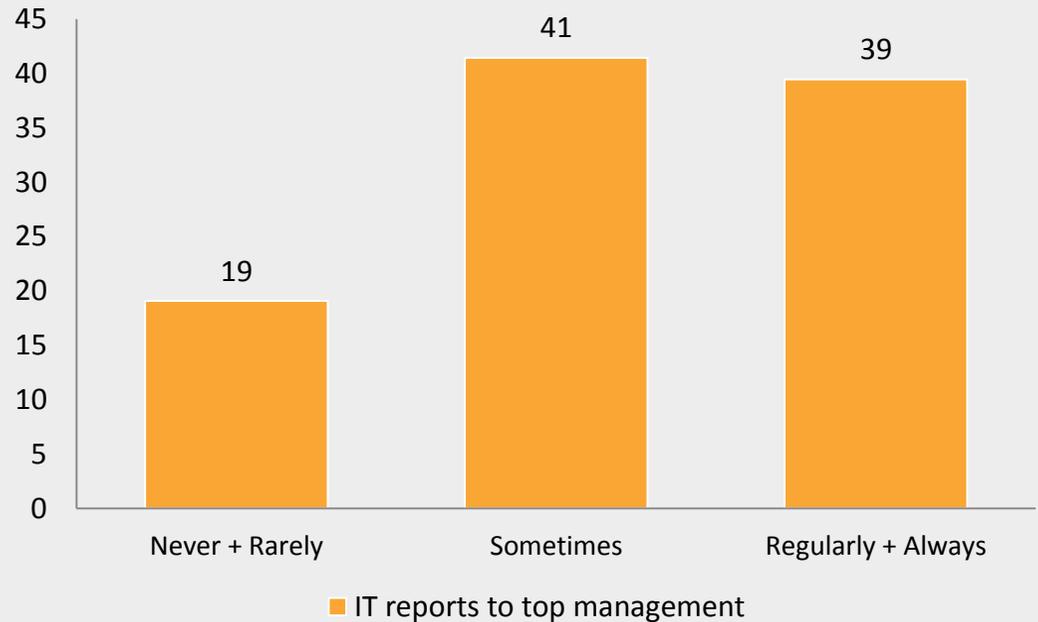


IT is part of the business and the business is IT

IT has a seat at the table

- 39% of ICT professionals report 'regularly/always' to senior management
 - 41% 'sometimes'
 - 19% 'never/rarely'
- In most businesses IT have a seat at the table

IT reports to senior management frequently



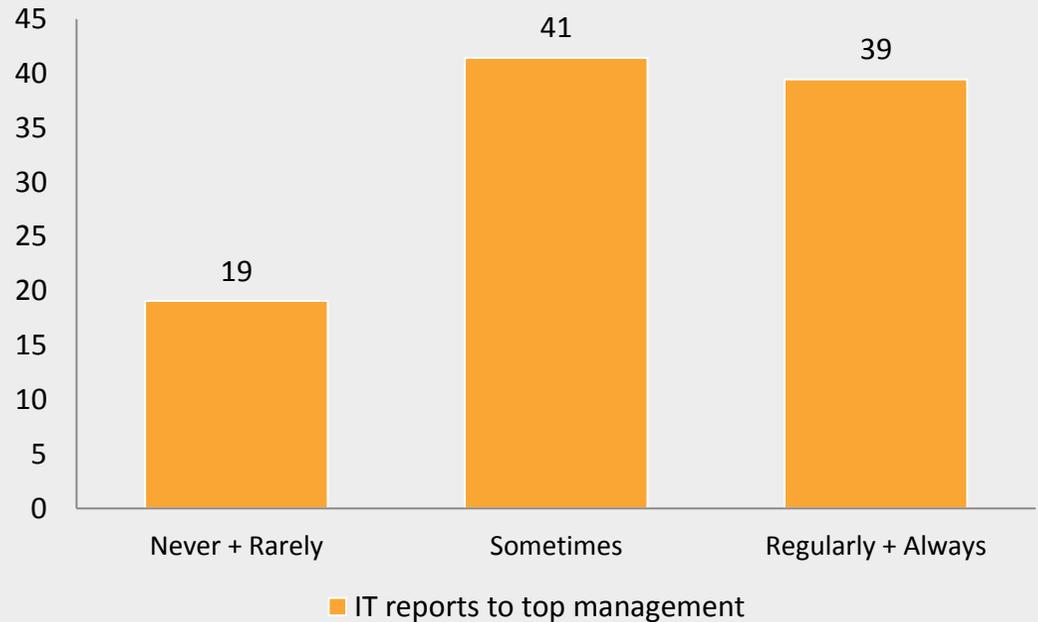
How often does a top ICT professional (CIO, ICT director, IT manager or similar) attend Board or line of management meetings at your organisation

IT is part of the business and the business is IT

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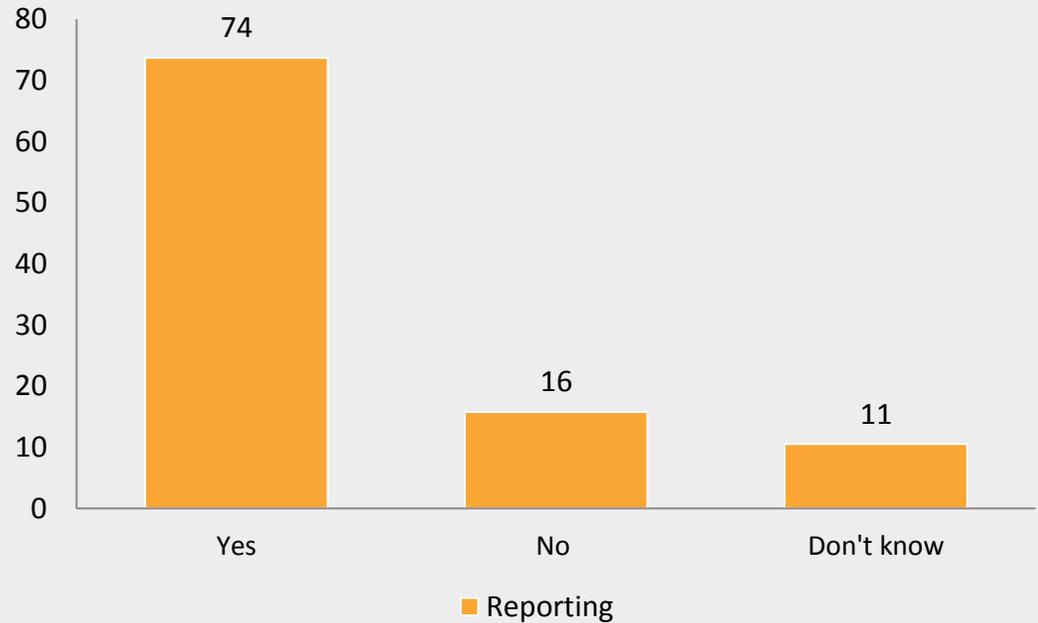
How often does a top ICT professional (CIO, ICT director, IT manager or similar) attend Board or line of management meetings at your organisation

IT is part of the business and the business is IT

IT has a seat at the table

- 74% of IT departments report to the Board or business owner

IT reports to the Board/business owner frequently



Does your IT department report to the Board of Directors/business owner with regular updates

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The future



Top IT challenges in next 12 months

Challenges

- Three top IT challenges are
 - Developing IT strategies 30%
 - Keeping up with new technologies 28%
 - Maintaining customer satisfaction 28%

Top IT challenges

	%
Developing IT strategies	30
Keeping up with new technologies	29
Maintaining customer satisfaction	28
Internet and IT security	26
Process Improvement	26
IT Infrastructure Management	22
Skills shortage	18
Project Management	14
Other	1
Don't know	9

Technologies of the future

No clear picture of one technology

- 'What technologies of the future will have an impact on your business?'
- Of the suggested technologies for the future only Internet of Everything (39%) stands out
 - Slightly ahead
- There is no clear 'winning' technology of the future
 - Autonomous vehicles (17%) are thought to have the least impact at this time

The future....

	%
Internet of Everything	39
3D printing	26
Artificial intelligence	26
Digital currency	21
Wearable technologies	20
Virtual and augmented reality	20
Robotics	19
Drones	18
Autonomous vehicles	17
Not sure	13



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ADVANCED STATE OF BUSINESS-IT ALIGNMENT

A ManageEngine survey conducted by StollzNow Research.

Security at the gates!



Recent ICT issues.



say that they've faced one or more ICT related security issues in the past 12 months.

The future looks challenging.



believe that the cyber world is not getting any safer.

Does your organization take care of your devices?



say that their organization installs security updates and patches on their devices automatically.



Getting cloud savvy!



It is everywhere.



say that they have already moved to the cloud platform.

Impacting businesses for good.



believe that cloud has made a positive impact on the business processes.

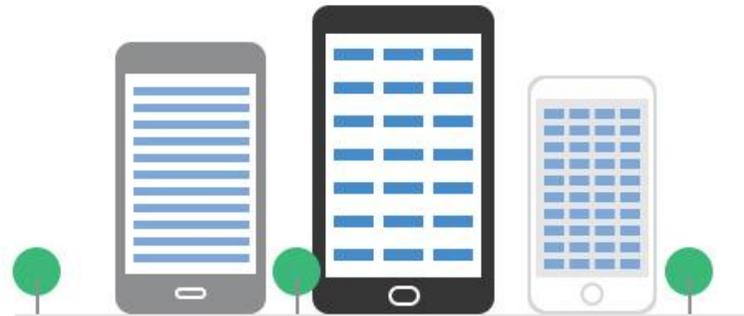
Yet, there's more to it.



are planning for further investment in cloud platforms in the next 12 months.



Enterprises go mobile!



BYOD hasn't truly arrived yet.



say their organizations let employees bring their devices to work.

On a positive note.



believe mobile devices have affected all business areas positively.

Reign of the apps.



believe that employees use applications not provided by the company for work.



Service at it's best!



All in a day's work.



say that they can resolve an issue or incident within 24 hrs.

Nothing beats old school.



still believe that email is the best way to raise a support request.

Because networks are the key.



say that network related metrics are best to measure operational excellence.



It's all about business!

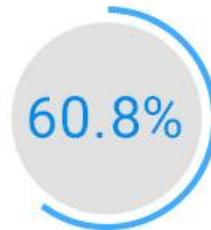


Shaping the business.



believe that the IT department is involved in at least some business decisions.

Positivity in the air.



believe that the IT department leaves a positive impact on the business bottom line.

Technologies of tomorrow.



believe that Internet of Everything is the major future technology that will affect their businesses.