

# Mobility for the People-Ready Business

## A Microsoft Whitepaper

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#### **Abstract:**

This white paper describes the benefits of Microsoft-supported mobile solutions, which provide workers with access to data and vital information when they are away from the office. These solutions help improve the productivity of all types of professionals—from consultants, sales representatives, and field technicians to physicians, store managers, and all employees who need to access business information when they are working on the go.

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## Executive Summary

A growing number of companies are supporting a workforce filled with people who perform their jobs outside of the office. By giving their people access to the real-time data and vital information they need to do their work while on the go, these companies are seeing many benefits. These benefits include greater worker productivity by decreasing time lost while on the road or telecommuting, greater efficiency by replacing paper-based processes, and increased customer satisfaction because workers can respond to customers quickly, even when they are away from the office. In addition, organizations can take advantage of scalable and flexible solutions that adapt to their business needs as they grow. Companies now realize that mobile solutions can be used to drive a competitive advantage and are making "mobile workforce enablement" a technology priority.

However, while mobile solutions offer many benefits, some enterprises may also encounter management and IT challenges such as managing the costs, increased complexity, and concerns over the security of data accessed from and stored on remote devices and mobile PCs. To combat these challenges, organizations can use their existing technology investments to help reduce costs, while investing in innovative technologies that can help enhance security.

This paper describes the benefits of Microsoft-supported mobile solutions. These solutions are scalable, extensible, and use existing and familiar infrastructures. The right mobile solution can be a real competitive advantage, helping companies extend the advantages of being in an office—quick communication, easy collaboration, high productivity, and connection to business resources—to employees who are on the road or working from home.

## Business Adoption of Mobile Technology

Mobility is a growing trend among global organizations. Some of these trends include:

- **Time spent away from the office desk, resulting in higher mobile e-mail needs:** Enterprise wireless in the United States continues to expand. There are 50 million mobile workers—virtually all of them with cell phones—representing 41% of the US workforce according to a Yankee Group study.<sup>1</sup>
- **Adoption of mobile devices in organizations:** Wireless continues to pervade the enterprise market: when looking at usage, an IDC research conducted in the US shows that 84.2% of workers use notebook PCs with WiFi capabilities, while

mobile phone, smartphone and PDA usage ranged anywhere from nearly 60% to 67%.<sup>2</sup>

- **Technology prioritization of mobility:** IT "Mobile workforce enablement" scored in the top three technology priorities for the 2006 calendar year among 1,400 global CIOs surveyed by Gartner.<sup>3</sup> In 2007 survey, CIOs are more generally looking for improvements in the effectiveness of enterprise workforce.<sup>4</sup>
- **Organizations are satisfied when they deploy mobile solutions:** Three-fourths of respondents said the mobile deployment met their expectations.<sup>5</sup> In comparison, 15.7% said their mobile deployment exceeded their expectations; only 8.0% were not satisfied at all.<sup>6</sup>
- **The future is also very promising:** IDC surveyed members of the Mobile Advisory Council (MAC). In total, 70.4% of the respondents said they have deployed a pilot, a single application, or multiple mobile applications. When looking at the applications that have been "mobilized", almost 94% said productivity applications, followed by customer service for almost 50% respondents.<sup>7</sup>

*"The growing mobile workforce is forcing many companies to change the way they build and support their information technology. Additionally, companies must transform the way they deliver enterprise applications, services, and productivity tools to the mobile workforce."*

*Jason Corsello, "The Mobile Workforce: How Enterprises Must Adapt to Survive", August 4, 2006, Yankee Group.*

<sup>2</sup> Diana Hwang, "Mobilizing The Enterprise: Results from a Survey of IDC's Mobile Advisory Council", October 2006, IDC

<sup>3</sup> Nick Jones, "CIO Survey Shows the Continuing Importance of Mobile Applications", October 30, 2006, Gartner

<sup>4</sup> Mark P. McDonald and Tina Nunno, "Creating Enterprise Leverage: The 2007 CIO Agenda", February 2007, Gartner

<sup>5</sup> Diana Hwang, "Mobilizing the Enterprise 2006: The Long and Winding Road...", December 2006, IDC

<sup>6</sup> Diana Hwang, "Mobilizing the Enterprise 2006: The Long and Winding Road...", December 2006, IDC

<sup>7</sup> Diana Hwang, "Mobilizing the Enterprise 2006: The Long and Winding Road...", December 2006, IDC

<sup>1</sup> Keith Mallinson, "Enterprises Strive to Better Connect the Mobile Workforce", December 8, 2006, Yankee Group

“Gartner expects corporate mobile/wireless application spending to grow 10% to 20% per year through 2009. By the end of 2010, the total number of wireless e-mail users will exceed 350 million worldwide.”

*Daley Monica Basso and Ken Dulaney, “Magic Quadrant for Enterprise Wireless E-Mail Software, 4Q06”, January 3, 2007, Gartner.*

## Business Benefits of Mobile Solutions

Mobile solutions are helping to create real business value for organizations by increasing efficiencies and helping employees better respond to customers. Companies are evaluating the mobile needs of all their information workers, beyond those in the field. And mobile solutions have grown far beyond accessing e-mail.

Today, doctors send prescriptions electronically to the pharmacy from their mobile PCs or handheld devices, insurance companies manage claims through electronic forms instead of paper processing, and field service is conducted using devices that upload customer information. Mobility is helping to improve business productivity and processes, and companies are learning how to create a competitive advantage by helping to give their mobile workforce the ability to:

- Save time and increase productivity by quickly and easily accessing information when they’re away from the office.
- Better respond to customer requests with access to e-mail and vital business information when workers are away from the office.
- Improve sales cycles and forge closer relationships with customers and partners by giving sales professionals and teams access to information that can help them provide information, improve responsiveness, complete a sale, or simplify a process for partners.
- Improve collaboration by staying engaged with team projects while out of the office through innovations such as the ability to edit documents simultaneously, use of Web-based collaboration spaces, and access of files when remote.
- Reduce field service data errors by replacing paper-based processes with electronic forms for remote workers.
- Gain a competitive advantage by adapting to market demands more quickly through scalable

solutions that are customizable and simple to deploy and manage.

- Reduce costs and complexities by implementing a secure, adaptable, and integrated mobile solution that uses existing technology investments.

Microsoft delivers familiar, easy-to-use programs and tools with new enhancements so your people can work more efficiently—where their business takes them.

## Business Scenarios

Business success today comes from giving your people the technology they need to amplify their capabilities and do valuable work even when they are out of the office. There are 50 million mobile workers—virtually all of them with cell phones—representing 41% of the US workforce.<sup>8</sup> When workers are in the office, they use information work software such as the Microsoft® Office system; take advantage of communication and collaboration tools like e-mail, instant messaging, and team workspaces; and have access to business data. Microsoft® products can extend these resources to people working away from the office.

The following business scenarios illustrate some of the ways that mobile workers are using technology today to improve their productivity, increase responsiveness, and access data.

### Sales

Company leaders and managers of sales teams are concerned with growth goals, customer retention, and the productivity of their sales forces. Mobility solutions that help sales people respond quickly can speed key activities such as sales transactions and responding to customer inquiries.

For example, Microsoft Dynamics™ CRM Mobile on Windows Mobile® powered devices helps sales people access customer information on the go. With Windows Mobile powered devices and Windows Vista™-enabled mobile PCs, supported by Microsoft Office Live Communication Server and Microsoft® Exchange Server 2007, sales people can communicate with others while on the road and between sales calls. When sales people are presenting to customers, Windows Vista-enabled mobile PCs help them deliver better presentations and offer new ways of sharing documents with customers.

Location no longer has to prevent a mobile worker from responding to customer e-mails, updating customer reports, or preparing for customer meetings.

<sup>8</sup> Keith Mallinson, “Enterprises Strive to Better Connect the Mobile Workforce”, December 8, 2006, Yankee Group

# Customer Success: Mobile Access to Customer Data Supports New Product Rollout for Medical Products Company

**Background:** In late 2002, Conceptus, a California-based medical products company, received approval to market its Essure product in the United States. Anticipating rapid growth, the company needed to improve its efficiency and streamline the tracking of physician training on the product.

**Solution:** In 2003, Conceptus began deploying Microsoft CRM (now part of Microsoft Dynamics), third-party software from the ISS Group and Axonom, and Microsoft CRM Mobile to create a customer relationship management system that integrated with its QAD business management software.

**Results:** By 2005, office and mobile employees had access to a wealth of customer data, increasing efficiency and productivity. The company has reduced time spent gathering and reporting data from days to hours, while dramatically increasing the number of doctors certified to use its product..

**For more information:**

[http://download.microsoft.com/documents/customerevidence/25024\\_Conceptus\\_FINAL.doc](http://download.microsoft.com/documents/customerevidence/25024_Conceptus_FINAL.doc)

This productivity can lead to a higher level of customer service, customer satisfaction, and sales—and eventually increased revenue and profitability.

## A day in the life of a sales person enabled by mobility:

Trevor is an account representative for an advertising agency. He's always on the road meeting with clients. Trevor needs to respond to customer requests immediately and stay up-to-date on client reporting, even when he's away from his desk.

Trevor will be giving a presentation to a new account. He is working from his home office to prepare for the meeting, so he synced his Tablet PC running Windows Vista to his corporate network through a virtual private network (VPN) and pulled down his Microsoft® Office PowerPoint® presentation, which he has saved to the company server. He also accessed his company's Microsoft CRM system and selected historical information on the customer. All critical documents are now available on his Tablet PC in offline folders.

As Trevor leaves home, he gets an e-mail with updated information from one of his contacts on his Windows Mobile powered device or his Tablet PC. He makes the change on his device, knowing that it will be updated whether he needs to access his contacts from his Windows Mobile powered Smartphone or his Tablet PC. He also opens a Microsoft® Office Excel® spreadsheet that is in an attachment from one of his co-workers, viewing his team's budget.

As Trevor greets his client, he quickly adjusts his Windows Vista Presentation Settings on his Tablet PC to ensure that system notifications are turned off as he delivers his presentation. As the client discusses the proposal, Trevor takes notes using pen support

and digital ink input on his Tablet PC, and he uses the Snipping Tool to capture a snip of a screenshot referenced by his client.

The client has requested an updated proposal for tomorrow. After leaving the client's office, Trevor uses his Windows Mobile powered device to access CRM Mobile to update the client's file about the meeting. Later, back at home, Trevor keeps his data consistent by using Windows® Sync Center to manage data synchronization between his Tablet PC and company server. He develops a formal proposal to deliver to the client the next morning.

## Customer Service and Support

Customer service and support teams regularly work offsite and greatly benefit from technology that helps increase their efficiency when servicing customers. Field service people equipped with Windows Vista-enabled mobile PCs or Windows Mobile powered devices can access key customer information before they reach their customers.

Using electronic forms on mobile hardware helps organizations to eliminate errors and costly manual processing required for paper-based forms. In addition, support professionals are better able to assist customers by connecting to applications remotely. These mobile solutions built on Microsoft technology can help ensure compatibility with line-of-business applications and integration with existing systems.

## Day in the life of a customer service person enabled by mobility:

Toby works for a medical device company whose customers are hospitals and extended care facilities. Toby installs and services a range of medical equipment. When a hospital in Toby's sales territory is having a technical issue that requires a service specialist, Toby is sent out to help the customer.

In Toby's work week, no two days are exactly alike. Each morning, Toby reviews his appointments on his Microsoft® Office Outlook® Mobile calendar using his Windows Mobile powered Smartphone. Today, the roads to his first destination are blocked with traffic. Toby stays on schedule by looking at up-to-the-minute data on traffic conditions on his Windows Mobile powered Smartphone using a third-party application. The GPS device on his phone lets the operations manager know that Toby is the closest service person to an urgent hospital request. Toby

## Customer Success: Service Company Eliminates the Need for 70 Paper Manuals by Providing Field Technicians with Handheld Devices

**Situation:** Technicians at ware-washing manufacturer Winterhalter spend most of their day in the field repairing and servicing equipment. They used handheld devices running Windows Mobile software for Pocket PCs to record parts codes. However, they had to carry numerous paper manuals to identify parts, and keying in complex codes was error-prone.

**Solution:** The organization turned to Microsoft partner Infomill. Its solution, PartsArena, running on the devices, makes detailed information from manuals accessible to users. Using a Bluetooth connection to their mobile phones, it links to the company's service management system so that technicians can place orders by simply tapping the part onscreen.

**Results:** Improved accuracy of parts information has almost eliminated ordering errors and has significantly boosted customer-service levels.

**For more information:** [http://members.microsoft.com/CustomerEvidence/Common/FileOpen.aspx?FileName=2091\\_4\\_Winterhalter\\_final.doc](http://members.microsoft.com/CustomerEvidence/Common/FileOpen.aspx?FileName=2091_4_Winterhalter_final.doc)

uses Microsoft® Office Communicator Mobile to initiate a quick instant messaging session with his operations manager to confirm the location of the hospital.

When he arrives, Toby pulls out his Windows Mobile powered device. In the past, Toby used paper forms that he had to fill out by hand. A data clerk back at the office couldn't always read his writing. With the Windows Mobile solution, his handwriting isn't an issue. Also, the automated forms are pre-populated with information, which saves Toby time and allows him to service more customers in a day.

During his lunch break, Toby catches up on e-mail on his Windows Mobile powered Smartphone and checks his Outlook Mobile calendar for his busy afternoon schedule. When getting back into his van, he drives off, forgetting his Windows Mobile powered Smartphone. He has to turn around to retrieve it, but he isn't worried that confidential information will be at

risk because he knows that his device is password protected. Additionally, his IT manager could remotely wipe the device of all information.

### Sourcing

Microsoft-supported mobile solutions can help improve supplier relationships. On-the-go access to supply chain information helps lead to greater visibility into upstream and downstream activities. And partner relationships may improve with new ways of communicating and sharing information.

For example, providing your mobile employees with Microsoft solutions, such as Microsoft® Office Groove® 2007 on a Windows Vista-enabled mobile PC, can help facilitate information and data exchange with suppliers. A Windows Mobile powered device with access to business data like inventory usage can help an employee make prompt decisions. These technologies are part of a mobile solution intended to drive better responsiveness and more efficient process management.

### Day in the life of a purchasing agent enabled by mobility:

Shiaw-Ling is a purchasing agent for a chemical materials manufacturer. She is responsible for maintaining relationships with global suppliers. Shiaw-Ling travels frequently to mining facilities around the world to negotiate agreements and ensure that materials provided by suppliers meet her company's quality standards.

At her field office, Shiaw-Ling lost connection with her corporate network while meeting with a fellow purchasing agent on a contract for a new supplier. To quickly share and jointly edit the Microsoft® Office Word document, she uses her Tablet PC running Windows Vista to initiate a session in Windows Meeting Space to set up an ad hoc network. Using Windows Tablet and Touch Technology, they are able to edit documents, open and move files, and take notes by touching the screen with a pen or a finger. Once finished, she leaves the office to catch a train to the supplier's offices to review the contract.

When at the site, the supplier asks Shiaw-Ling about her spend level. She accesses her team's Office Groove 2007 workspace to easily retrieve and make changes to the team's budget forecast, even though it is a large Microsoft Office Excel 2007 spreadsheet. Using Groove 2007, she instantly creates a workspace for herself and her partner to use the retrieved data and put together a budget proposal. While working, she receives an automatic Groove alert that her manager has made a few changes to the team spreadsheet. She incorporates these new numbers into her budget proposal.

The supplier agrees with the contract and Shiaw-Ling uses the pen and digital ink input to capture the supplier's notes electronically and document the

transaction, saving everything on her Tablet PC. Shiao-Ling returns to the office by train. She gets off at her usual stop, and as the train leaves, Shiao-Ling realizes that she's forgotten her Tablet PC on the train. Fortunately, Shiao-Ling's Tablet PC has new hard-drive encryption technology in Windows Vista, BitLocker Drive Encryption, helping to make private information unreadable to unauthorized users. And luckily, the train's conductor found her mobile PC, and she was able to retrieve it the next morning.

## Customer Success: Centrica Deploys Mobility Solution to Executives and Boosts Productivity by 90 Minutes per User per Day

**Situation:** Senior employees at international energy supply group Centrica travel extensively throughout the world. The company needed a new technology infrastructure so that these staff members could work more efficiently.

**Solution:** Centrica decided to upgrade its IT systems to support the rollout of Windows Mobile technology. It also equipped executives and senior staff with Windows Mobile powered devices and Windows® XP Tablet PC Edition devices.

**Results:** Executives are now able to access e-mail, calendar, contacts, tasks, and the Internet while on the road, and on average they can find up to 90 minutes of additional productive time each day. They are no longer restricted to fixed terminals in each office to respond to queries or authorize documents, ensuring that business decisions can be made quickly and efficiently.

**For more information:** [http://download.microsoft.com/documents/customerevidence/843\\_0\\_Final\\_Centrica.doc](http://download.microsoft.com/documents/customerevidence/843_0_Final_Centrica.doc)

## Microsoft-supported Mobile Solutions

While some mobile solution providers focus only on devices, specialized software, or proprietary networks,

“In our view, the new upgrade of Microsoft will offer mobile professionals using Windows Mobile powered devices a very well rounded mobile experience including rich media capabilities (for example, Windows Media® Player 10) and familiarity with the Windows desktop look and feel.”

*Mathiaud, Antoine. "The Battle for Supremacy in Wireless Email: Market Update." Strategy Analytics. November 30, 2005.*

- **Microsoft Windows Mobile® 6:** Windows Mobile 6 delivers advanced mobile communications, increased mobile productivity and integrated mobile business performance, with a consistent and familiar Microsoft software experience. This includes real-time access to a genuine Outlook® mobile experience that includes enhanced control and visibility of calendar information such as calendar bars, contacts with context, and the ability to view e-mails with pictures, tables, lines, and formatting. Windows Mobile 6 also offers the most advanced Office Mobile suite to date, helping users manage and review documents on any Windows Mobile 6-powered device. In addition, users get live links to Web and SharePoint® sites and a rich set of services in Windows Live for Windows Mobile.
- **Microsoft Windows Vista™-based Mobile PCs:** Helps sales reps use their mobile PCs (laptops, Tablet PCs, ultra-thin laptops, etc) as a mobile office, connect more securely to business networks, and obtain and share more information when in the field.
- **Microsoft® Exchange Server 2007 with Microsoft Outlook, Outlook Web Access, or Outlook Mobile:** Provides security-enhanced mobile access to e-mail, voice mail, calendars, and contacts on a variety of mobile PCs and devices.
- **Microsoft® Office Enterprise 2007, Office Sharepoint Server and Office Groove® 2007:** Extends rich communication, collaboration, and coordination capabilities to mobile employees.
- **Microsoft Dynamics™ CRM Mobile:** Provides sales teams with access to critical customer information and tools that enhance their ability to sell and manage their time effectively.
- **Microsoft® Office Communication Server with Microsoft® Office Communicator:** Offers consistent, familiar instant messaging and Voice over Internet Protocol (VOIP) capabilities to Windows Mobile-powered devices and Windows Vista-enabled mobile PCs.
- **Windows Longhorn Server:** Microsoft Windows Server code name "Longhorn" is the next generation of the Windows Server operating system that helps information technology (IT) professionals maximize control over their infrastructure while providing unprecedented availability and management capabilities, leading to a significantly more secure, reliable, and robust server environment than ever before. Windows Server "Longhorn" delivers new value to organizations by ensuring all users regardless of location are able to get the full complement of services from the network. Windows Server "Longhorn" also provides deep insight into the operating system and diagnostic capabilities to allow administrators to spend more time adding business value.

Microsoft offers a comprehensive and end-to-end approach to support business applications and mobile information workers. The Microsoft solution addresses both the business needs, such as increased productivity and improved customer service, as well as IT requirements for improved security, product integration, platform compatibility, and simplified deployment and hardware management.

These mobile technologies are based on the Microsoft enterprise infrastructure: the same servers and software that many businesses already use for their data center, such as Microsoft® Windows Server®, Microsoft Exchange Server and Microsoft® SQL Server™, with capabilities that provide the same level of support for mobile employees as for those employees in the office. And as a company sees the need to upgrade, the latest versions of Microsoft enterprise and information worker servers are designed to optimize mobility. These products include Microsoft Exchange Server 2007 (unified messaging, calendar, and contact information), and Microsoft Office Live Communication Server (real-time communication and presence).

In addition, Microsoft client-side applications such as Office Enterprise 2007, Office Outlook 2007, Office Groove 2007, and Office Communicator 2007, as well as the new Windows Vista operating system that supports mobile PCs, provide the same level of functionality to mobile employees as to individuals working at desktop PCs.

The goal of Microsoft is to make communication, collaboration, and coordination seamless and consistent, regardless of whether workers are in the office or on the road.

The following illustration shows the relationship between Microsoft mobility solutions, the strategic capabilities that the products enable, and the overall business value across different scenarios.

### Microsoft Mobility Portfolio Drives Business Value



Microsoft also supports the development of custom mobile applications by using familiar, widely used developer tools to create applications for the Windows environment. This enables an ecosystem of partners to create solutions designed for a mobile worker, at a lower cost for business customers. Plus, it

offers mobile employees the same familiar Windows interface they already know. Microsoft mobile technology also supports a broad choice of mobile hardware to fit the role, work-style, and functionality requirements of people and organizations, giving IT greater flexibility to tailor mobile solutions that meet a variety of needs for their business users.

### Summary

#### Advantages for Business

The Microsoft integrated and comprehensive approach to mobility can help organizations:

“Windows Mobile...is a vastly improved user experience and can potentially reshape enterprise mobility with the promise of painlessly enhancing the integration of mobile phones into corporate IT strategies”. *Antoine Mathiaud, “AS Windows Mobile 5.0 Steps Out of the Shadows—OEMs Struggle to Differentiate”, May 4, 2006, Strategy Analytics.*

- **Improve workforce productivity:** Extend the same information worker tools and business applications that employees use in the office to the mobile devices they use while they are on the road.
- **Increase customer retention and loyalty:** Increase customer satisfaction by giving customer-facing departments better solutions to resolve issues and find answers.
- **Foster communication and collaboration:** Connect people to the information, systems, and expertise they need when they are out of the office to effectively communicate with customers, partners, and colleagues.
- **Improve data security:** Help mobile workers protect vital business information on their mobile PCs with new hardware encryption and stronger security settings and security policies on their devices.
- **Maintain competitive parity:** Increase operational efficiencies, improve collaboration of mobile and remote workers, and improve overall responsiveness by keeping people connected to the business when away from the office.
- **Increase return on investment:** Get more value out of existing systems and reduce the risks of locking into mobile solutions that may lack broader enterprise functionality by taking advantage of existing technology investments.

#### Advantages for IT

The Microsoft approach to mobility helps the IT department optimize the use of IT assets and minimize the cost of technical resources in several ways:

- **Uses existing IT skills and vast partner ecosystem:** Microsoft products are built upon an existing body of development experience to reduce the cost and increase the choice and availability of mobile solutions without increasing burdens on IT resources.
- **Integrates with other Windows and third-party applications to provide mobile capabilities:** With improved interoperability with Windows and other third-party software, Microsoft makes it easier to manage, configure, and maintain the systems that support a mobile workforce.
- **Enhances security and reliability:** Microsoft helps address the risks associated with lost hardware and vital data with new capabilities built into the Windows platform such as devices running Windows Mobile software and Tablet PCs running Windows Vista that protect user data, confidential intellectual property, and transaction information.
- **Is scalable:** Familiar and extensible technology can simplify the process of extending business applications and data to mobile users. Companies can then scale their infrastructure and applications quickly to address an increasing user base or meet new business growth requirements.
- **Offers a simplified deployment:** New Windows Vista-enabled mobile PC management tools simplify the process of deploying Microsoft products to help ensure that workers can be up and running quickly and cost effectively.

Microsoft mobile solutions help organizations support

“Microsoft OS powered devices, whether for smartphones or w-PDAs are set to quadruple in the next four years from approximately 8.2 million units in 2005 to more than 32 million units in 2009.”

*Antoine Mathiaud, “As Windows Mobile 5.0 steps out of the shadows – OEMs struggle to differentiate”, May 4, 2006, Strategy Analytics.*

an increasingly mobile workforce by helping them communicate, collaborate, and work effectively whether in or away from the office. Microsoft can help enterprise organizations develop smart strategies for adopting and deploying mobile technologies, and with the Microsoft platform, tools, and technologies, companies can give their mobile workforce solutions that address their needs—both today and tomorrow.

For more information, go to [www.microsoft.com/windowsmobile](http://www.microsoft.com/windowsmobile) or contact a local Microsoft representative.

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