

# File Sync And Share Grows In The Enterprise: Capture The Benefits And Manage The Risks

## Introduction

Demand is surging for collaboration technologies appropriate for the enterprise. More organizations are adopting file sync and share (FSS) solutions to accommodate changes in workforce behaviors arising from collaboration and mobility trends such as bring-your-own-device (BYOD). While the benefits of file sync and share tools are significant, the security risks associated with them can leave organizations wondering how best to invest. This Code42-commissioned profile of IT decision-makers and information workers evaluates trends, challenges, and benefits surrounding file sync and share, based on a custom study and Forrester's own market data.

## Device Diversity Drives Need For File Sync And Share

Today's workforce has embraced the mobile mind shift: "the expectation that they can get what they want in their immediate context and moments of need."<sup>1</sup> This includes access to corporate information and tools to collaborate on any device from any location. Employees have become multidevice enthusiasts, often buying their own smartphones and tablets in order to work on the device they prefer. A recent survey of US information workers reveals that 38% use smartphones and 18% use tablets weekly for work, while even more use multiple computers every week (see Figure 1). Their motivation is clear: They seek to

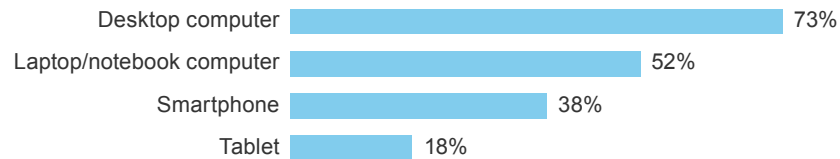
unshackle work from the desk and be productive wherever they are.

Enterprises are responding by prioritizing collaboration and mobility solutions. Data from Forrester's Forrsights Software Survey, Q4 2013, shows that 72% of software decision-makers consider the use and deployment of collaboration technologies to be a top priority (see Figure 2). Decision-makers also recognize the demand for mobile devices and applications; 68% view the investment in mobile applications for employees, customers, or partners as a top technology priority.

**FIGURE 1**  
Employees Use Multiple Devices For Work

**"Which of the following devices (work-provided or personal) do you use at least weekly for work?"**

(Select all that apply)

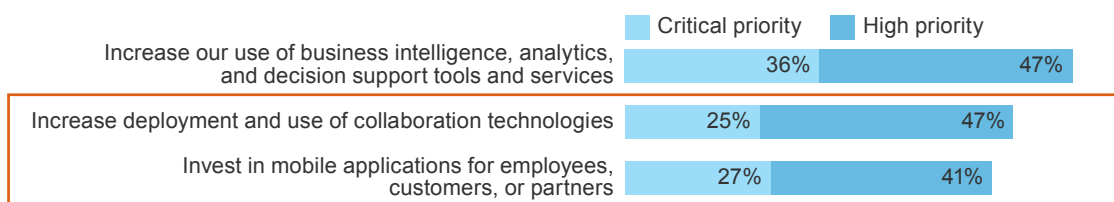


Base: 753 information workers at US enterprises

Source: Business Technographics Global Telecom And Mobility Workforce Survey, 2014, Forrester Research, Inc.

**FIGURE 2**  
Collaboration And Mobility Are Big Investment Priorities

**"Which of the following initiatives are likely to be your IT organization's top software technology priorities over the next 12 months?"**



Base: 516 software decision-makers at US enterprises

Source: Forrsights Software Survey, Q4 2013, Forrester Research, Inc.

## File Sync And Share Solutions Bring Business Benefits

As part of this Technology Adoption Profile, Forrester surveyed IT decision-makers in US-based enterprises to explore current collaboration and mobility trends. Results paint a clear picture of how the growing role of a new collaboration tool — file sync and share — gives employees access to files from any device and helps them collaborate with colleagues and people outside the firm.

According to results from the survey, 52% of organizations believe that FSS speeds access to files and content

regardless of file size, which is surprising given the continued reliance on email and other older and less secure solutions to share files (see Figure 3). Half of respondents feel that FSS makes employees more efficient in all aspects of daily work, and 50% think FSS helps employees work more effectively with customers, partners, and other external parties.

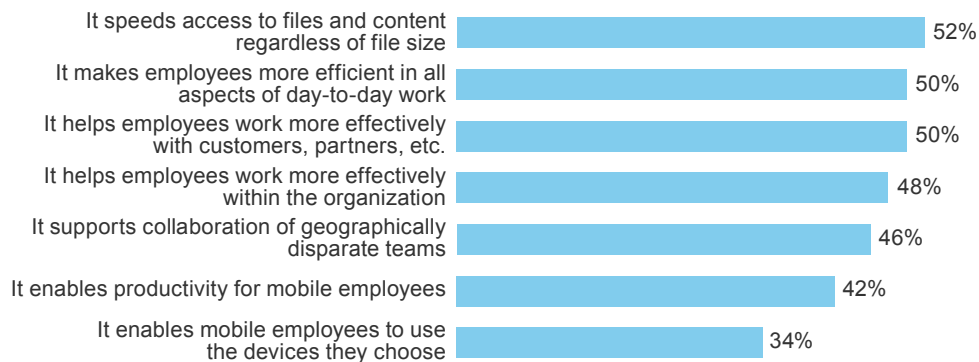
And while survey results indicate that FSS is primarily used to collaborate on documents and PDFs, employees are also syncing and sharing a notable mix of file types and content, making the FSS benefits of access, efficiency, and collaboration all the more enticing for the enterprise (see Figure 4).

**FIGURE 3**

### File Sync And Share Brings Big Benefits Like Access, Efficiency, And Collaborative Effectiveness

**“What benefits does or will your file sync and share solution bring to your organization?”**

(Select all that apply)



Base: 50 IT decision-makers at US enterprises

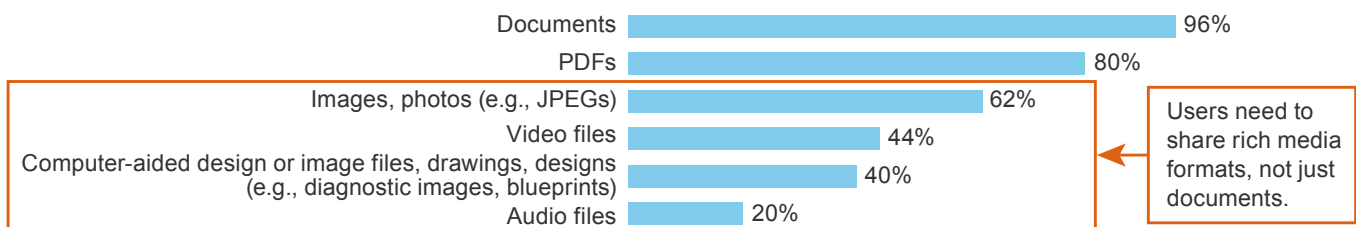
Source: A commissioned study conducted by Forrester Consulting on behalf of Code42, July 2014

**FIGURE 4**

### Employees Share More Than Just Documents

**“What types of files/content do or will employees sync and share with an IT-deployed file sync and share solution?”**

(Select all that apply)



Base: 50 IT decision-makers at US enterprises

Source: A commissioned study conducted by Forrester Consulting on behalf of Code42, July 2014

Sixty-two percent of IT decision-makers surveyed reported that employees at their organization share images and photos, 44% reported audio files, and 40% reported computer-aided design files. Using email to collaborate with both internal and external stakeholders on multiple file versions — especially when file sizes prohibit sending via email — is simply not suitable for enterprise-level collaboration.

Given the variety and size of files that employees are sharing, it is not surprising that organizations are starting to recognize FSS as a more efficient collaboration method than email or legacy media (CDs, flash drives, etc.).

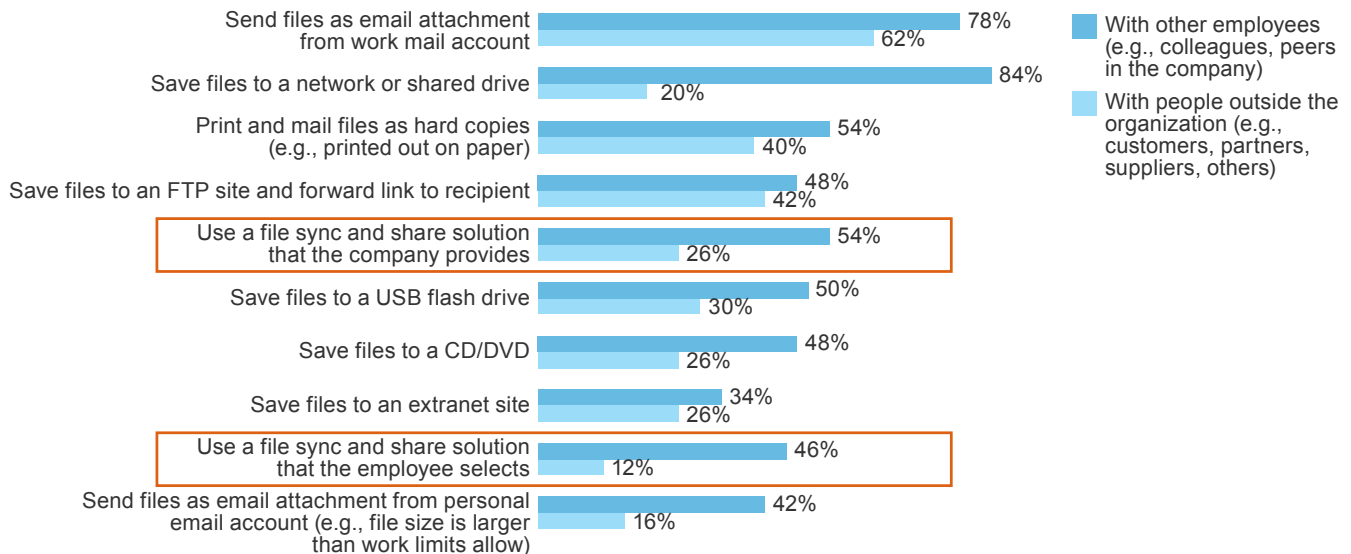
## But The Enterprise Faces Two Sources Of Risks

While the benefits of FSS are significant, the challenge for the enterprise is keeping corporate data secure while ensuring employee productivity. With the proliferation of devices and mobile apps, employees are increasingly going outside the organization to choose tools and solutions. Forty-six percent of respondents stated that members of their organization use an FSS solution that employees select on their own (the consumerization of IT) (see Figure 5). Use of these unsecure and unsanctioned consumer solutions creates potential risks to organizations when it comes to maintaining security and control of corporate data.

**FIGURE 5**  
File Sync And Share — Both Personal And Company-Provided — Empowers Mobile Employees To Collaborate

### “How do members of your organization currently share or collaborate on files for work with the following groups of people?”

(Select all that apply)



Base: 50 IT decision-makers at US enterprises

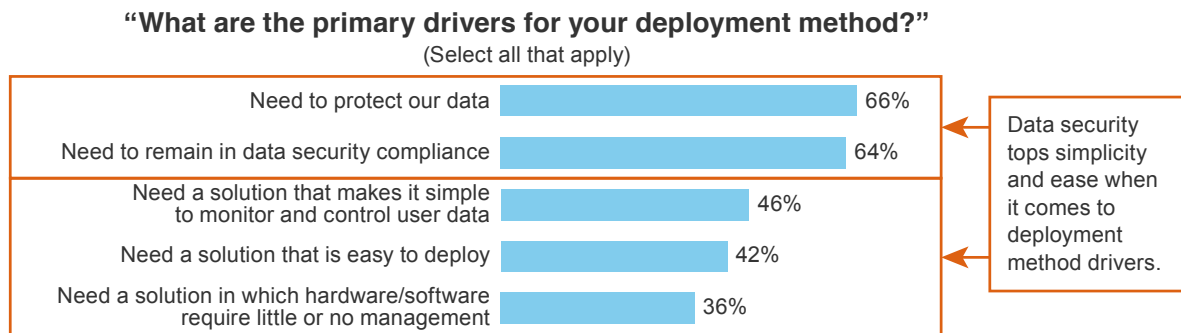
Source: A commissioned study conducted by Forrester Consulting on behalf of Code42, July 2014

Additionally, older and less secure file-sharing tools are still in heavy rotation; results show email file attachment as the top method for collaborating on files with other employees and with people outside the organization; other outdated technologies, such as USB drives, CDs, or DVDs, are still common sharing techniques as well.

The prevalence of employee-driven collaboration solutions reduces IT control and creates a host of security and compliance challenges for organizations. Problems begin with the myriad of unsecure tools employees use, including personal FSS solutions and USB drives. But problems continue with the deployment choices employees make on their own and sometimes from the lack of a robust, compliant cloud solution.

While employees select collaboration tools based on convenience, the primary concern of the enterprise is data security. Results from our survey indicate that 76% of enterprises use, or plan to use, a private cloud to deploy FSS, with 34% using a private cloud exclusively, 28% using a hybrid cloud, and 14% using a managed private cloud. Data protection and the need to remain in compliance with industry and government laws are the primary drivers for these deployment choices (see Figure 6). Using a private cloud to deploy enterprise file sync and share (EFSS) combines the benefits of access, efficiency, and collaboration with the ability to protect and control corporate data.

**FIGURE 6**  
Data Protection, Compliance, And Control Are Big Concerns For Firms Deploying File Sync And Share



Base: 50 IT decision-makers at US enterprises

Source: A commissioned study conducted by Forrester Consulting on behalf of Code42, July 2014

## Conclusion

File sync and share solutions enable employee collaboration and productivity from anywhere, on any device, and with anyone. But the risks of unfettered personal solutions — indeed, the risk of doing nothing at all and leaving the decision in employees' hands — are too great to ignore. Instead, firms must invest in the right file sync and share platform to both deliver the benefits and protect corporate data assets.

## Methodology

This Technology Adoption Profile was commissioned by Code42. To create this profile, Forrester leveraged its BT Technographics Software Survey and Networks and Telecommunications Survey. Forrester Consulting supplemented this data with custom survey questions asked of 50 IT decision-makers at enterprises in the US. Survey respondents included managers and above with responsibility for their organization's FSS solutions and strategy. The auxiliary custom survey was conducted in July 2014. For more information on Forrester's data panel and Tech Industry Consulting services, visit [www.forrester.com](http://www.forrester.com).

## Endnotes

<sup>1</sup> Source: Ted Shadler, Josh Bernoff, and Julie Ask, *The Mobile Mind Shift: Engineer Your Business to Win in the Mobile Moment*, Groundswell Press, 2014.

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