



2018 North American Mobile Workforce Management
Customer Choice: Brand Leadership Award



2018
BEST PRACTICES
AWARDS

Contents

Background and Company Performance	3
The Award.....	3
Award Criteria.....	3
Survey Results.....	3
Business Impact.....	5
Conclusion.....	6
Survey Methodology	7
Best Practices Recognition: Researching, Identifying, and Recognizing Best Practices	9
About Frost & Sullivan	9

Background and Company Performance

The Award

Frost & Sullivan presents its Customer Choice: Brand Leadership Awards to companies that are outstanding within their industries for their brand value as judged by today's North American businesses. In particular, Frost & Sullivan is identifying the AT&T brand in the mobile workforce management (MWM) solution category as "overall best," based directly upon evaluations given by North American decision-makers and influencers regarding mobile business applications across a range of industries.

Award Criteria

The Customer Choice: Brand Leadership Award is based upon Frost & Sullivan's analysis of feedback from purchase decision-makers. Frost & Sullivan surveys purchase decision-makers regularly to benchmark their preferences and opinions regarding key products, services and vendors across various industries of interest.

Specifically, this award is based on the share of "overall best" rankings given by decision-makers and influencers to the various brands of mobile sales force automation solutions (called the mean score or MS) and their loyalty to their current mobile SFA brand as indicated by their propensity to rank that brand as "overall best." Thus, the loyalty index (LI) is the share of users of a brand who rank that brand as number one.

For each brand, MS times LI is the Brand Leadership Index (BLI). BLI scores are normalized to cover a range of 0 to 10. The brand with the highest BLI score is recognized as the award recipient.

2018 Survey Results

As seen in the accompanying chart, AT&T tops all other mobile workforce management solution providers on the Frost & Sullivan BLI scoring.

AT&T earns the highest MS and has a strong LI score. Combined, the MS and LI easily give AT&T the top normalized BLI score of 10.0, which places it almost unchallenged in the leader quadrant of the BLI chart.

Only one other competitor appears in the Leader quadrant, yet follows at a distance.



Q36A. Which brand of mobile workforce management solutions do you consider the overall best?

Q36B. Please select your business' primary mobile workforce management brand.

Source: Frost & Sullivan analysis

AT&T has been a pioneer in introducing a more modularized, integrated portfolio of mobile workforce management capabilities and, in the process, has helped to move the field service management industry away from standalone siloed app solutions. Instead of a static list of features, the AT&T Workforce Manager suite offers a number of different task modules for customers to mix and match.

Those Workforce Manager offerings that fall within the mobile workforce management category are:

- AT&T Workforce Manager for Android and iOS Handsets/Tablets: Cloud based, fully integrated platform with Modules includes mobile workforce, vehicles, and Asset tracking features, timekeeping, dispatching, intelligent GPS tracking, wireless forms, messaging, etc. The monthly per-user fee is based on the number of modules activated: \$10 for 1-5 modules (Standard); \$15 for up to 10 modules (Enhanced); and \$20 for an unlimited number (Premium).
- AT&T Workforce Manager Voice Dispatch: An additional service that integrates the AT&T Enhanced Push-to-Talk with an intelligent tracking to Workforce Manager application for \$10 per-user per-month.
- AT&T also offers another standalone application called AT&T Mobile Forms, a wireless forms solution for \$20 per-user-per-month. This product works

on any Android or iOS devices and tablets. User can utilize pre-built digital forms or build unlimited customer forms and dispatch them to smartphone and tablet users in the field. Also receive data back, connect it to cloud service and generate powerful reports.

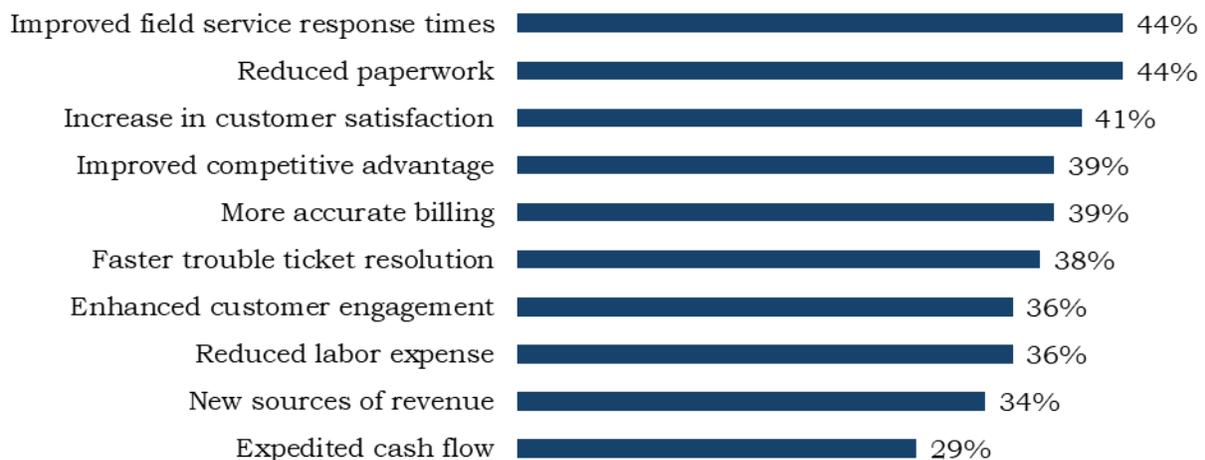
For more information on AT&T Workforce Manager solution, [click here](#).

For more information on AT&T Mobile Forms solution, [click here](#).

Business Impact

Faster field service response times and less paperwork combine to provide the top hard-dollar business benefits of mobile workforce management apps. Automating and optimizing the field service workflow positively impacts customer satisfaction levels and still functions as a differentiator against some fellow competitors.

Impact of a Mobile Workforce Management Solution - Percent of "Significant" Impact Ratings



Q24. Please rate the impact on your business while using a mobile workforce management solution.

Source: Frost & Sullivan analysis

Businesses that are currently using mobile workforce management solutions report multiple positive business impacts. Faster response times and less paperwork combine to provide the top hard-dollar business benefits of MWM apps. Automating and optimizing the field service workflow also positively impacts end-user satisfaction levels and still functions as a differentiator against some fellow competitors.

Conclusion

The North American mobile workforce management (MWM) market continues to demonstrate impressive growth, bringing the benefits of real-time communications and guidance to field workers and their management teams. This sector is leveraging new technologies, selective acquisitions and alliances, and heightened customer and employee expectations to expand annual revenues year over year. AT&T's strong brand showing in the 2018 Frost & Sullivan Mobile Enterprise Apps survey reflects the work AT&T has put into creating, nurturing, and expanding this market. Strong, positive brand awareness positions AT&T well as the mobile workforce management market continues to thrive.

For its strong overall performance, AT&T has earned Frost & Sullivan's 2018 Customer Choice: Brand Leadership Award.

Survey Methodology

Method Details

Frost & Sullivan surveyed U.S. and Canadian application software decision-makers and influencers regarding mobile app solutions for their companies' employees (Business-to-Employee or B2E). Only respondents qualified to evaluate mobile workforce management brands on the strength of their companies having implemented this particular technology were considered.

The survey was conducted February 2018.

The Frost & Sullivan survey methodology utilizes panels to source only qualified respondents. Respondents must meet requirements set by a screening process prior to full survey participation. For this survey, respondents were required to:

- Be located in Canada or the United States
- Be part of the decision-making process regarding mobile software applications for employees

Panels consist of individuals who volunteer to participate in surveys. They typically receive compensation directly from their panel membership for participating in qualified survey research. In general, survey respondents do not receive direct compensation from Frost & Sullivan for participating in research projects.

Survey Demographics

The following table presents selected demographic information regarding the survey participants.

Demographics	Primary brand of Mobile Workforce Management	
	AT&T	Other brand
Country		
Canada	12%	45%
United States	88%	55%
Role in providing mobile apps to employees		
A primary decision maker	91%	62%
One of multiple decision makers	9%	30%
A key influencer	-	8%
Responsibility within organization		
Chairman/president/CEO	35%	16%
Other C-level executive	21%	17%
Vice President or Director	23%	29%
Manager or supervisor	19%	38%
Industry		
Construction	12%	12%
Education	9%	6%
Energy and utilities	5%	4%
Financial services	9%	10%
Government	5%	3%
Healthcare and life science	5%	8%
High Tech	23%	8%
Hospitality and travel	-	3%
Insurance services	2%	7%
Manufacturing and distribution	7%	13%
Professional services	14%	12%
Real estate	-	5%
Retail and consumer goods	2%	7%
Transportation	7%	3%
Number of Employees		
1 to 24	7%	3%
25 to 499	28%	46%
500 to 999	40%	17%
1,000 to 9,999	14%	24%
10,000 or more	12%	9%

Best Practices Recognition: Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan Best Practices Awards recognize companies in a variety of regional and global markets for demonstrating outstanding achievement and superior performance in areas such as leadership, technological innovation, customer service, and strategic product development.

Customer Research analysts conduct the survey research to identify best practices in the industry.

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation, and implementation of powerful growth strategies. Frost & Sullivan leverages more than 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.