



# Embracing the Consumerization of IT: A BYOD Case Study

By Shawn Genoway

Four years ago, going strictly by the numbers, it could be said that employees were happy with IT support services at Citrix. FCR, abandonment rates, and customer satisfaction were all meeting or exceeding stated SLAs. However, just below the surface, employees were voicing a general discontent with the corporate IT experience and the image of the anonymous IT professional, hiding behind a ticketing system, militant desktop standards, and an endless series of web-based support services.

Then, in 2008, Citrix launched a BYOD (“bring your own device”) program for its worldwide employee base. Already a leading provider of virtualization, networking,

collaboration, and cloud technologies, Citrix set the stage for their IT support teams to begin embracing the transformation taking place around the consumerization of IT at the support level. That support transformation was manifesting itself in different ways. Business leaders, for instance, were finding that the consumer shopping process offered a richer self-service experience around selection, choice, price, delivery, and setup (which did not always mirror the corporate IT experience).

Informally, BYOD was already prevalent across the organization. For one thing, hundreds of employees worldwide connected to the Citrix network everyday via Citrix Receiver from their personal home devices. In addition, during mergers and acquisitions (M&A), the IT teams delivered either Citrix Receiver or XenDesktop to every acquired desktop on the very first day.<sup>1</sup> Both of these activities highlighted the fact that corporate-issued devices were no longer as relevant to the support structure as they once had been.

The program launched in 2008 provided full-time employees with a choice of either receiving the standard corporate IT-managed laptop or using a personal device, either a PC or Mac. As a BYOD participant, the program pays a stipend of \$2,100 in the form of a bonus (minus any applicable taxes). The employee can either purchase a new personal laptop or use an existing personal laptop, with the stipulation that they have a vendor maintenance program for the duration of their three-year enrollment in the program. At the end of the three years, employees can re-enroll with management approval. If a participant leaves the program within one year of their enrollment date, he or she is required to reimburse the company for the remaining stipend, prorated over the months remaining in the agreement.

Across the IT support teams, reactions to BYOD were mixed. Some welcomed the approach. Others believed that users would not be able to manage on their own without some level of IT involvement; others feared that it meant an end to their jobs. This last point prompted a review of hardware-related incidents to understand the number of hardware tickets per employee per year, and what, if any, impact BYOD would have on our desktop engineering team. The ratio of hardware to total tickets proved to be quite low, which we attributed to the three-year vendor warranty standard for Citrix-managed devices and few if any client/server application installations on the device. All critical and noncritical business applications were delivered virtually, thereby reducing complexity at the device level.

## The Program

How did we embrace consumerization to ensure that the BYOD experience was easier, simpler, and more successful? From the outset, it meant abandoning existing support mechanisms and methods and taking a fresh look at the customer experience. To be an IT service offering choice to the employees, we made a number of critical decisions.

**The employee chooses the laptop:** The mix at Citrix is an even split between Macs and PCs. Since the program's introduction, there has been an explosion in the number of personal and Citrix-owned tablets and mobile devices. However, regardless of device, the virtual experience is the same.

<sup>1</sup> Citrix Receiver is a universal client technology that enables on-demand delivery of virtual desktops and Windows, web, and SaaS applications to any user or device—including PCs, Macs, tablets, and smartphones. If a Citrix employee is using a BYOD iPad, tablet, smartphone, corporate laptop/desktop, or a thin-client device, XenDesktop delivers their Windows desktop in high definition.

**Same experience as a managed device:** This translated to providing Internet connectivity and support for Citrix Receiver and a Citrix-provided antivirus program (or one of the participant's choosing). As mentioned, hardware was not included. And since the device belonged to the participant, no systems management software was installed.

**Reduce dependency on IT:** IT support was challenged with the task of rewriting support documentation from step one to completion. While the existing documentation was good, it fell short of providing employees with a thorough end-to-end walkthrough. Getting this right was instrumental to the program, as it made no sense to offer a BYOD program and then have to task staff with supporting it. Currently, ten percent of one FTE per month is required to maintain the BYOD website and make payroll submissions.

**Self-service via a BYOD website:** In addition to support documentation, the website provides comprehensive downloads, employee purchase programs, hardware discounts, a BYOD blog, and a discussion board.

**Control the service, not the hardware:** Earlier in this article, I brought up the topic of maintaining device standards to drive service consistency and support. Trying to control the proliferation of devices in the workplace is challenging at best. As a service provider, IT support decided that it was better to be in the “yes” business than the “no” business. Stellar customer service and comprehensive virtualization were the keys to allaying device-specific concerns.

**Simple to participate:** Participation by a full-time employee requires manager approval. The agreement stipulates that the employee must either already have a Citrix-managed laptop (which is returned when the employee joins the program) or be a new employee. In the early stages of the project, the team started down the path of defining participation based on job role (i.e., whether the employee was a knowledge worker, a task worker, or a road warrior, traveling perhaps ten percent or more). It became readily apparent that defining these roles would be a challenge, even more so to base participant approval on the amount of travel or a particular job function. This approach was subsequently abandoned.

## Five Key Milestones

With the BYOD experiences defined, the project had five key milestones:

1. Survey the employees.
2. Set the stipend.
3. Review corporate policies.
4. Review security.
5. Draft the program's rules.

## ***Survey the Employees***

A prepilot survey gauged employee reactions to a BYOD program. Twenty-three percent of employees responded, and the results helped Citrix to understand whether the program would be of interest, identified elements that influenced participation, and drove recommendations for the program components (i.e., what people wanted from the program). Of those surveyed, the majority were enthused by the prospect of having a choice beyond the current slate of IT offerings. Twelve percent already used their own devices for some Citrix work. There were those that were happy with an IT-supported device, but willing to take on the responsibility of managing their own devices. Fifty-four percent of employees believed that their productivity would increase, though only 11 percent of managers agreed. Prior to the pilot, IT support spent a lot of time predicting the appeal to Gen X and Gen Y. This didn't factor into the final adoption, though the program is offered as one of many incentives when HR is recruiting talent. The program's 1,300+ participants span a broad age group and the real draw is a simpler and easier IT.

## ***Set the Stipend***

In the employee survey, we asked employees whether they preferred to receive the stipend as a lump sum or in installments. The response was overwhelmingly in favor of the lump sum, a preference that was also reflected in the survey comments.

To determine the stipend amount, existing device costs (including procurement, imaging, security, deployment, monitoring, and maintenance) were factored in. Over a three-year period, the cost of a standard laptop was \$2,500–2,600. The purpose of the stipend was to allow program participants to purchase a laptop that was comparable to a Citrix-managed device and for Citrix to realize savings of up to 18 percent. After taxes (assuming an average rate of 35%), and with a pretax stipend of \$2,100, participants could expect to be able to put approximately \$1,500 towards a new device. Taking \$1,500 as the base amount, the team then looked at consumer devices on the market to determine whether or not an employee could realistically and reasonably purchase the equivalent of a Citrix-standard laptop. If employees wanted more memory or a better processor, that would, of course, be an additional out-of-pocket expense.

Some additional considerations included global stipends, device depreciation, and device quality. In terms of a global stipend, a single worldwide stipend is certainly easier to manage, but for those countries (e.g., Germany) with higher tax rates, it meant that employees would receive a smaller stipend after taxes. A better approach is to offer regional stipends (Europe, Middle East, and Asia [EMEA], Pacific, Americas, etc.). Citrix considered country-specific stipends, but there was simply too much overhead.

Citrix also decided to time the employee's submission and management's approval with the lifecycle or depreciation of a

company-owned and -managed device. The three-year agreement ensures that the device is near the end of its life. While this slows the adoption rate, it's a more measured approach, it's in line with budgetary considerations, and it ensures the asset is no longer depreciating.

Early in the program, one of the key concerns centered on the quality of the device a participant would bring to the program. Whether the device was a new or existing device, did it warrant increasing our loaner pool of Citrix-managed laptops to accommodate participants if they needed to send their personal devices out to the vendors for service? Citrix assumed that the majority of participants would purchase new and opted not to increase its loaner pool. Over the past three years, we have received few loaner requests from BYOD participants. We've found that BYOD participants appear to taking better care of their personal devices now that they're used for work. Unlike our Citrix-managed devices, there have been no reports from our BYOD participants of vinaigrette dripping from the sides of a laptop or tire tracks across the screen (true stories).

## ***Review Corporate Policies***

The Citrix BYOD policy is less than two pages. We focused on keeping the rules the same for all, with the same policies in effect for both Citrix-managed and personal devices. Working with HR, legal, and finance, we agreed that all corporate policies—the code of business conduct, security, corporate governance, intellectual property, etc.—still applied. The only consideration was the device itself. As Citrix no longer owned the device, in the event of litigation employees would have to be subpoenaed to gain access to their devices.

## ***Review Security***

Existing corporate security policies applied whether the employee had a Citrix-managed device or a personal device. On the device side, there is antivirus and two-factor authentication. Leveraging vendor offerings, Citrix provides participants with free antivirus software. Employees connect to their applications via the Citrix SSL/VPN, using Citrix Access Gateway coupled with perimeter firewalls, intrusion detection and prevention (IDS/IPS), web filtering, and overall threat management.

## ***Draft the Program's Rules***

To keep the program efficient and easy to follow, there are ten rules:

1. Manager approval is required.
2. The employee receives a \$2,100 stipend (minus applicable taxes) for a laptop and a three-year maintenance plan.
3. If the employee leaves the company within the year, the stipend is prorated.
4. Participating employees must return their managed laptops to their manager(s).





5. All BYOD hardware issues are to be addressed by the vendor.
6. Antivirus software is required on all BYOD laptops.
7. All personal devices must connect remotely through Citrix Receiver/Citrix Access Gateway.
8. All applications must be delivered (online and offline) by the data center.
9. Applications are to be provisioned through Citrix Receiver.
10. All existing corporate policies apply.

## Lessons Learned

Three years after the program was launched, BYOD participation continues to grow steadily. At its core, BYOD enabled Citrix IT support to revisit and reinvent the user experience. It's by no means perfect, but by adopting a consumer-centric approach, it created opportunities to change how IT support did business. For example, in the case of the Windows 7 desktop refresh, it was offered as either a fully automated self-service option for employees to do

themselves or as an IT support request. They were confident that the lessons learned from the BYOD program—keeping it simple and easy—would hold true. Of the 4,800 desktops refreshed in the first three months, 675 were completed by IT support and the remainder by employees, with no reported data loss. The lack of complexity and a consumer-centric approach drove that success.<sup>2</sup>

Citrix IT support's shift to "consumerized" IT continues to evolve and take shape. Initiatives like the BYOD program have pushed IT support from the back streets onto Main Street, where we can listen to our employees, align with their day-to-day work schedules, anticipate the next consumer trends, and break out of our comfort zone to deliver a great customer experience.



## About the Author

Shawn Genoway has been active in the IT industry for nearly twenty years. He has experience in technical architecture, desktop standardization, service level management, business process re-engineering, IT automation, mergers and acquisitions, regional operations, and service and support. Shawn has been with Citrix for more than twelve years, and he is currently the senior director of worldwide

IT service delivery and the NOC, as well as the program manager for the BYOD program.

<sup>2</sup>Another initiative, driven by our success with the BYOD program, is the Citrix IT storefront. These are places where people can drop by to have their IT issues resolved or their questions answered. They're nothing fancy; IT support professionals just grab available space in high-traffic areas and set up shop. The worldwide IT support team began opening storefronts in 2010. Currently, there are storefronts in Bangalore, Santa Clara, and Fort Lauderdale, with two more scheduled to open in EMEA in 2012.