

# The Computerworld Honors Program

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*Honoring those who use Information Technology to benefit society*

**LOCATION:**

*Oakbrook Terrace, IL, US*

**YEAR:**

*2007*

**STATUS:**

*Laureate*

**CATEGORY:**

*Business and Related Services*

**ORGANIZATION:**

**Grant Thornton**

**PROJECT NAME:**

**Securing and Managing the Highly Mobile Workforce**

**Short Summary**

Grant Thornton, through its strategic partners and careful integration of products has empowered its mobile workforce to execute and deliver high quality professional services anytime/anywhere, securely, remotely, and effectively.

Navigating the challenges facing today's mobile workforce required GT to solve highly complex technology challenges like mobile asset management, lease management, theft protection, data protection, remote backup, remote updates, email management, mobile communication, and much more.

We believe this model, developed over several years of testing and refining has become a best practice worthy of sharing with our industry. Succeeding against any of these challenges is worthy of mention, but together they form a comprehensive approach that surrounds the mobile worker and extends the value of the enterprise. This, we believe, is one of our competitive advantages.

**Introductory Overview**

Grant Thornton's IT environment is all about catering to the mobile user. In order to fully meet the needs of it's professionals, the IT department has worked hard to implement a highly standardized hardware and software management platform.

Grant Thornton procures their notebook computers from Dell along with integrated lease financing for hardware and much of its software. The Grant Thornton mobile workforce is currently equipped with Dell Latitude D620 notebook computers running Windows XP Professional. In order to ensure that all Grant Thornton professionals have the latest hardware to be as effective as possible, laptops are leased on a 24-month

cycle.

With a refresh cycle of 24 months, standardization has become a key component of Grant Thornton's IT effectiveness. Each laptop is deployed with a standard base image on top of which an automated process runs to install custom applications based on the individual professional's job function (Tax, Audit, Business Advisory Services, etc.) From start to finish, a secure, fully-configured laptop (including user data migration) can be deployed to a user within 1 hour. With 6000+ laptop computers being refreshed every 2 years, deployment time is key.

Grant Thornton has also implemented a comprehensive suite of applications for asset tracking and management. Asset management is a well-oiled machine within the firm and is key to cost savings and efficiency. Crucial to the firm's success and growth is hardware and data security. In case our laptops are lost or stolen Grant Thornton needs to have a way to recover these assets. Data encryption and backup is also mandatory in order to protect both the intellectual property of the firm and that of our clients.

In addition to physical asset management and data protection, effective software and patch management is also a must. This is a true challenge with such a highly mobile workforce. Grant Thornton employees need to be able to receive the latest patches, software updates, and management tools when they need them, from wherever they may be working, and via the wide range of connectivity options presented them (from dial-up to broadband, to LAN speeds).

The suite of management software used by Grant Thornton mobile employees includes:

- Computrace asset tracking software from Absolute Software to help locate and recover lost and/or stolen equipment.
- Connected Backup from Iron Mountain to back up user data in case of hardware failure.
- Mobile Guardian Shield from Credant Technologies to encrypt user data in the event a laptop is lost or stolen.
- Afaria from iAnywhere to keep comprehensive regulatory documentation up to date.
- Grant Thornton's Asset Management system (written in-house) to track all of our leased assets from receipt to return to Dell.

- Microsoft Systems Management Server infrastructure to link many of the systems above together into a management framework, to gather hardware and software inventory regarding all our assets, and to provide a full software distribution suite.

- Fiberlink Communications tools for 802.x, dial up and wireless connectivity.

## **Benefits**

**Has your project helped those it was designed to help?** Yes

### **What new advantage or opportunity does your project provide to people?**

The tools and systems deployed to successfully implement Grant Thornton's Mobile Workforce Project have had an impressive effect on IT. The firm has roughly 150 people in the IT department supporting 6,000+ devices spread across 50 US locations. Even though the number of company employees doubled over the few last years, IT has been able to keep the size of its support staff relatively constant through high efficiency.

In addition, the Grant Thornton IT group has established a 24-month refresh cycle for notebook and desktop computers, so consultants are always working with the best tools possible. The firm's investment in fast computers with the latest features pays back quickly in terms of employee productivity which also is passed on to customers by shortening the engagement cycle.

A huge advantage lies in the fact that users and customers can have peace-of-mind when it comes to data protection and our processes to combat laptop theft. That advantage in Grant Thornton's marketplace is "key" to obtaining additional business, as our customers are now asking, "How will GT protect our data?" while providing critical financial professional services.

**Has your project fundamentally changed how tasks are performed?**

Yes

### **How do you see your project's innovation benefiting other applications, organizations, or global communities?**

The mobile computing environment is challenging -- ask any company that has mobile workers. Grant Thornton's mobile workforce is over 85% of its total population; therefore, it has been our goal to succeed in mastering its challenges. The infrastructure the firm has in place today

can benefit anyone interested in: 1) reducing costs through leasing, asset management, and hardware security, 2) data protection through backup and encryption, and 3) software distribution techniques to maintain currency and standards as needed.

Leasing mobile devices is another skill that requires mastering several competencies in order to fully realize the financial benefits. Returning assets at end of lease is one of these. GT's asset management team has utilized features within Computrace from Absolute Software to: track assets on a monthly basis, integrate its reporting with our own internal asset management tool, develop auditing procedures and have worked with Dell and Dell Financial to ensure <1% loss rate on all leased assets. This is far below the industry norm of nearly 8%.

In the area of data and hardware security, stories are published daily about laptop theft and data compromise. By implementing the mobile environment security solution that Grant Thornton has currently in place with its partners (i.e. Absolute, Credant, Iron Mountain, and Microsoft), users can rest assured that their data is safe and that their systems are well managed.

Software distribution and management can be a challenge. Microsoft's Systems Management Server (SMS) has provided a highly successful backbone for this service. Grant Thornton's IT Department has taken this infrastructure and linked it with the other key systems (Computrace, Credant, Asset Management and others) to create a comprehensive Systems Management portal that helps local office support and other IT staff become more proactive in their daily tasks.

## **The Importance of Technology**

### **How did the technology you used contribute to this project and why was it important?**

This solution is all about using technology to enable our business. Anything IT can do to protect its property (both physical and intellectual), manage its assets, and provide timely updates in a highly mobile environment is a win-win for all involved. The technology in place enables Grant Thornton users, enhances our relationships with our customers, establishes a precedent for security, and saves Grant Thornton valuable resources in the form of both time and money.

Using our in-house-developed Asset Management System, coupled with imported leasing and physical asset reports from Dell and Dell Financial has enabled us to track and manage our leased assets with a high degree of precision. While the industry is averaging an 8% loss rate for leased assets, Grant Thornton has been able to consistently produce <1% loss

rate (i.e., laptops not being able to be returned to Dell Financial after the 24-month lease cycle).

Absolute Software's Computrace product has helped us to recover a high percentage of stolen laptops. This bios-enabled agent (thanks to Dell's collaboration with Absolute Software) "calls out" periodically whenever the computer is connected to a network. Lost and stolen assets can then be tracked down. This technology has enabled us to attain a hardware management rate far higher than most leasing customers. This high degree of recovery has even resulted in Dell Financial management visiting GT to discuss our processes in order to help other DFS customers who struggle with this issue.

Credant Technologies' Mobile Guardian Shield allows for the encryption of all client data without the encryption of applications to slow down performance. Encrypting client (as well as Grant Thornton) data gives potential clients comfort knowing that their data is safe no matter where it may roam in the mobile environment. This security technology alone is helping the firm generate additional revenues.

Grant Thornton's Microsoft's Systems Management Server (SMS) infrastructure, coupled with a custom, in-house-written portal application has helped tie Credant, Asset Management, Computrace, and other related systems together to produce a comprehensive set of management reports, software distribution methodologies, and a framework to better support our mobile workforce.

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## **Originality**

### **What are the exceptional aspects of your project?**

One exceptional aspect of the project is that the solution didn't just lie in the "best of breed" technologies acquired by the firm, but in how these were integrated and implemented. For example, with every notebook computer Grant Thornton leases, hardware theft protection (Computrace) and data encryption (Credant) is built right into the monthly lease cost. In addition, advance service tag lists from Dell Manufacturing are sent to Grant Thornton IT with every order placed. This ensures that when the hardware arrives, it is exactly what was ordered and Asset Management

accuracy increases. All of this is a testament to the value of close vendor relationships in putting all the "puzzle pieces" together to help the firm see and manage the big picture.

"What gets measured gets managed," is a common theme with GT IT. The ultimate goal of infrastructure management is to provide the best services at the best price that contribute to achieving the stated business objectives. Our ability to know where and how products are used helps us control costs and improve overall staff performance. Lowering costs alone is not necessarily positive if it reduces business effectiveness. The practices we've included in this application form the basis for the financial and operational benefits we enjoy.

By linking all the mobile workforce management systems together under a portal umbrella, vast amounts of useful data become available to available IT support staff. This enables them to do their jobs more effectively and to communicate better with the end-users they support.

### **How is it original?**

Grant Thornton has created this comprehensive solution. The pieces are not original (i.e. Computrace, Credant, SMS), but the "glue" to bring all of the different solutions together is. This glue consists of a perfect mix people, process, and technology. The high level of knowledge, experience, and technology the firm has around asset management, it's close-knit relationship with Dell, the custom development in creating a portal to bring solutions together, and the processes by which we can effectively manage the mobile user workforce have given us a definite competitive advantage.

Grant Thornton had a vision, and now, with our partners, have synergized in creating a highly effective solution. There are pieces and parts being developed by many different companies, but in our search, we did not find the comprehensive solution that Grant Thornton has developed anywhere else.

**Is it the first, the only, the best or the most effective application of its kind?** First

### **Success**

**Has your project achieved or exceeded its goals?** Exceeded

**Is it fully operational?** Yes

**How many people benefit from it?** 6000+

**If possible, include an example of how the project has benefited a specific individual, enterprise or organization. Please include personal quotes from individuals who have directly benefited from your work.**

As designed, the greatest benefits of this strategy have been realized by Grant Thornton and its partnership. How the firm has benefited is diverse. Overall asset management has directly reduced under-utilized assets by \$500K annually; end of lease management has reduced costs by an estimated \$270K annually. Effective email management, asset recovery, data encryption, and software management can only be measured in risk avoidance and litigation responsiveness which could be a far higher number than the already stated hard dollar savings. Improved processes, higher degrees of control, and enterprise wide efficiencies also provide a high degree of value (but are hard to put a dollar value on).

Software and content distribution enhancements, including Internet-based updating, now ensure the timely distribution of critical knowledge to its workers -- thus benefiting our clients. With client service forming the life-blood of our business, successful and efficient engagements are critical to our ongoing success. Overall these solutions form a win-win for all involved.

**How quickly has your targeted audience of users embraced your innovation? Or, how rapidly do you predict they will?**

From Grant Thornton's perspective, the wonderful thing about this project is that for most of the pieces, end users don't even need to know about the implementation. The firm is able to run all the agents (i.e. Computrace, Credant, SMS, and Afaria) on end users' machines and start managing them without them even needing to click a single button. In this case, Grant Thornton measures quickness of adoption on the lack of negative feedback the IT department hears!

In the security area of mobile workforce management, nothing helps a user embrace a concept more than having a laptop stolen and being able to: 1) recover the hardware due to Computrace calling in on its location, and 2) know that no client data was compromised when asked point-blank by the client if they should be worried.

Users also love the fact that the latest software updates are either right at their fingertips to install as needed, or that updates are pushed silently to their computers with no action required on their part. Having a master catalog of all software available in every office through SMS drastically cuts down on the time required to fulfill software license requests and installations.

## **Difficulty**

**What were the most important obstacles that had to be overcome in order for your work to be successful? Technical problems?**

**Resources? Expertise? Organizational problems?**

Three of the biggest challenges faced by Grant Thornton in addressing the issue of managing and securing the mobile workforce were in the areas of vendor relationships, IT personnel readiness, and cost of implementation.

**Vendor relationships:** To make this project work, the firm not only had to build close relationships with its key vendors, but those vendors also had to build relationships with each other. For example, Credant and Computrace are bundled right into our Dell leasing program. This took some hard work on the part of all three parties to pull together.

**IT Readiness:** Every successful project requires synergy of people, process, and technology. It was critical to make sure that the people supporting our mobile workforce on a day-to-day basis were on-board, adequately trained, and had "bought into" the process whole-heartedly. Many training sessions were (and still continue to be) given and resources are made available to help local IT support staff through issues.

**Cost of Implementation:** As with all major implementations, cost (initial layout, return on investment, depreciation, etc.) is always a factor. Many discussions were had around "lease vs. buy" regarding our Dell laptops and related-financing. Comprehensive cost and ROI analyses were presented and debated. In addition, buy-in was critical from the firm's Senior Leadership Team around the large costs associated with protecting our assets (hardware and data encryption). All of these costs contribute to the eventual bottom-line and Grant Thornton IT had to prove to the firm that these expenditures were invaluable.

**Often the most innovative projects encounter the greatest resistance when they are originally proposed. If you had to fight for approval or funding, please provide a summary of the objections you faced and how you overcame them.**

One objection to the proposal for data encryption was the real need. To overcome this, Grant Thornton's IT Department simply presented the cold, hard facts: The average theft of a laptop costs a company around \$89,000 (Source: 2005 FBI Computer Crime Survey). Every day, one sees news articles of stolen laptops containing unprotected client data. In fact (also according to the 2005 FBI Computer Crime Survey), laptop theft has been the cause of the second highest amount of financial loss to



companies, second only to damage caused by virus attacks. Upon hearing many of the horror stories of companies (many in our area of accounting and business advisory services), any concerns about moving ahead were dispelled.

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***The information below is for your review only. This information will not be available to judges.***

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### **Nomination Information**

**Nominated By:** Dell

**Organization:** Grant Thornton

**Project Name:** Securing and Managing the Highly Mobile Workforce

**Category:** Business and Related Services

**Project Description:**

As the 5th largest accounting and tax business advisory organization in the U.S., Grant Thornton LLP employs more than 6,000 highly mobile employees who offer personalized services to businesses throughout the country.

Because of the mobility of the workforce, Grant Thornton was faced with a challenge of how to procure, deploy, manage, and secure user laptops with consistent hardware, software, updates, and support.

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### **Demographics**

What is the estimated annual revenue of your entire company? \$500 Million - \$999 Million

What is your company's annual IT/IS budget for all IT/IS products? \$10 to \$49.9 million

What best describes your involvement in the IT purchase process? All of the above

Your Business/Industry: Non-Tech: Finance/Banking/Accounting

Your Job Title/Function: IT Management: Manager

Number of employees in your entire company: 5,000 - 9,999

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### **Additional Questions**

#### **How do you think Information Technology will be different in 2010?**

Voice, data and video communications will no longer be store and forward but Real Time. Faster network speeds, broad wireless access and more virtualization will drive organization harder and farther down the path of more highly powered mobile workers. Companies who are not prepared to support this environment will suffer competitively. Less control over mobile devices will drive up costs, impacting organizational

revenues.

Increased legal requirements and punishments for client data loss will drive more litigation awards for those who don't proactively manage mobile systems and the data they contain.

Increased need to distribute larger upgrades to combat viruses, apply patches, update research and work tools during engagements will force companies to face these challenges.

Companies looking to control brick and mortar costs will embrace more home based workers, further increasing the need for improved remote management and administration.

Control over enterprise content both in process and historical will be driven by increasing litigation discovery requests, forcing enterprises to begin to establish virtual collaborative environment for mobile workers as well.

**What does being a part of the 2007 Computerworld Honors Program mean to you?**

We are very excited to be nominated as part of this program. Although not related, in the past three years, we have participated in the Computerworld Top 100 Places to Work in IT and have placed 26th, 18th, and 5th, respectively.

# Appendix 1

