

A Forrester Total Economic Impact™
Study Commissioned By Microsoft
July 2020

Maximizing Your ROI From Microsoft 365 Enterprise With Microsoft Surface

Cost Savings And Business Benefits
Enabled By Using Microsoft 365-Powered
Surface Devices

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ABOUT FORRESTER CONSULTING

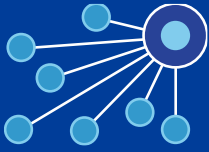
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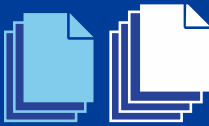
Executive Summary

Benefits And Costs



Total three-year employee productivity benefits:

\$25,441,859



Total three-year benefits to IT:

\$3,314,316



Total three-year costs:

\$10,619,929

To improve employee experience across their entire organizations, firms are looking to replace legacy device technologies with more flexible hardware solutions and cloud technologies that lend themselves to modern work environments, where employees can remain productive, communicative, and secure from any location. Microsoft commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study to examine the potential return on investment (ROI) enterprises may realize by implementing Microsoft 365 Enterprise on Microsoft Surface devices, looking closely at how Microsoft Surface augments and compounds the business benefits of Microsoft 365. The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Microsoft 365-powered Surface devices on their organizations.

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed six customers and surveyed hundreds more across seven countries, all with experience using Microsoft 365® Enterprise running on both Microsoft Surface devices as well as non-Surface devices. Prior to Microsoft Surface, customers used a variety of end user devices, with many organizations issuing multiple devices to a single end user, including desktops, laptops, and tablets. Additionally, organizations relied on a number of overlapping and complementary security solutions to protect their firms from security breaches and regulatory consequences. This created an environment of technology sprawl, stretching IT resources thin and hampering consolidation of end users on the same platforms and software. One interviewed customer explained: “It was important for our IT team to begin to standardize our devices. The goal is to have one common piece of hardware to support rather than multiple models of desktops, laptops, and tablets.”

By switching to Surface devices, customers reported benefits to end user productivity from simplified collaboration and device interfaces, benefits to IT efficiency from simplified device deployment and management, and cost savings to the business overall from enhanced security and device consolidation. Another customer said: “Versatility was the key factor in driving our choice of Surface devices. We no longer need to issue multiple devices, the extended battery life means more productivity on the go, and our IT costs shrink as we move toward standardizing on a single system.”

Key Findings

Quantified benefits. The following risk-adjusted present value (PV) quantified benefits are representative of those experienced by the organizations interviewed and surveyed:

- › **Increased efficiency and productivity from improved collaboration worth \$16.2 million.** End users equipped with Surface devices saw significant time savings when pairing them with Microsoft 365 Enterprise collaboration and cloud storage technologies. According to our survey, this pairing saved each user on average 2 hours daily in terms of efficiency and productivity.
- › **Increased end user productivity from device and interface valued at \$9.3 million.** Similarly, end users equipped with Surface saved time daily from the device interface, flexibility, and peripherals. Survey respondents shared that Surface users experienced productivity savings from such features averaging 1.6 hours daily.



ROI
171%



Benefits PV
\$28.8 million



NPV
\$18.1 million



Payback
14 months

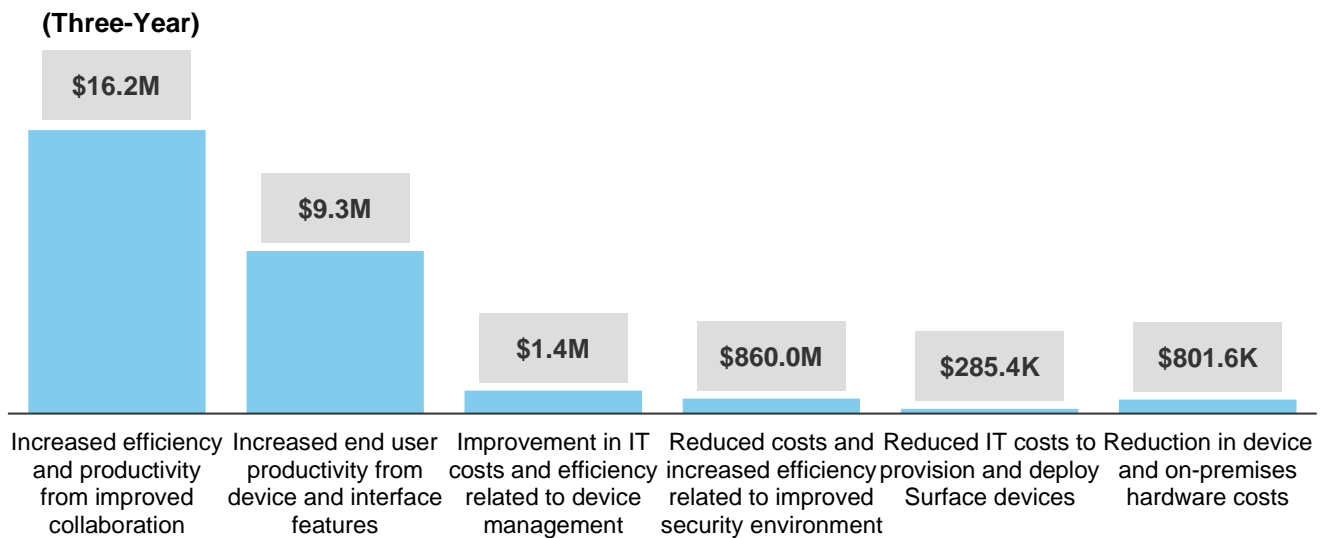
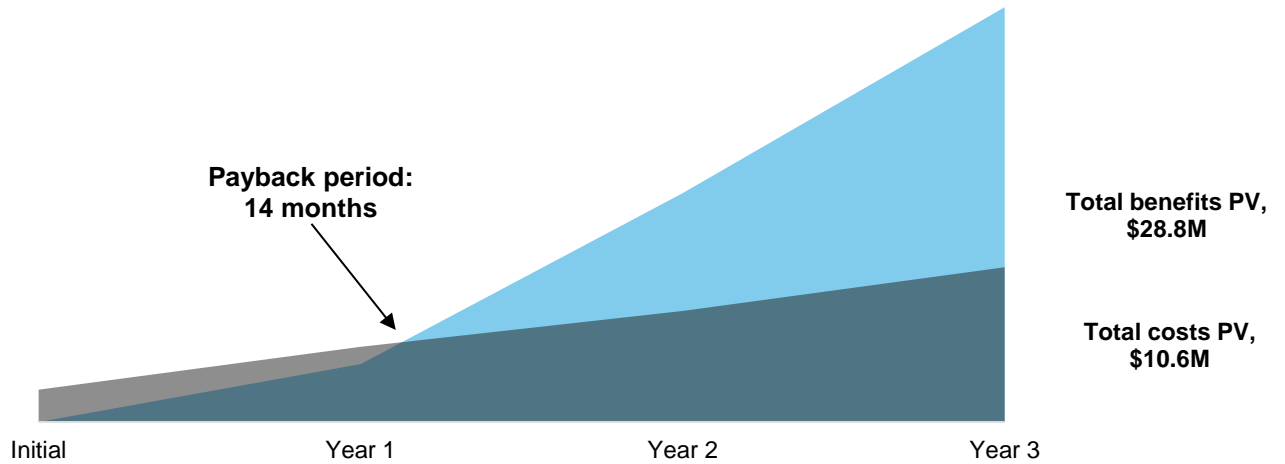
- › **Improvement in IT costs related to device management worth \$1.4 million.** IT departments also saw significant cost and time savings related to Microsoft 365-powered Surface device deployments. For example, application updates required approximately 3.25 hours less time to complete per device, while help desk call times decreased on average by 75%.
- › **Reduced costs and increased efficiency related to improved security environment valued at \$859,998.** Firms also received benefits related to their security environments. Not only could they reduce their use of third-party security solutions, saving on expenses, but firms could also reduce the number of security breaches they experienced annually by about 20% for Surface device users.
- › **Reduced IT costs to provision and deploy Surface devices worth \$285,376.** IT professionals saw cost and time savings to both Surface device management and Surface device deployment. Thanks to Microsoft Autopilot and Microsoft Endpoint Manager, which includes Intune, IT departments saved an average of 4 hours for each Surface device deployed.
- › **Reduction in device and on-premises hardware costs valued at \$801,551.** Because of the flexible form factor of Microsoft Surface devices, IT departments were able to replace more than one device with each Surface deployment, saving on device costs.

Costs. The organizations experienced the following risk-adjusted PV costs:

- › **Surface device and Microsoft 365 licensing costs worth \$4.1 million.** Organizations reported experiencing one-time costs related with Microsoft Surface device purchases, including Surface Pro, Surface Laptop, Surface Book, Surface Go, Surface Studio, and Surface Hub. They also incurred ongoing licensing fees from investing in Microsoft 365 Enterprise E5.
- › **Cost of deployment and implementation valued at \$4.2 million.** Customers incurred internal time costs associated with deploying Microsoft 365 Enterprise E5 and Microsoft Surface devices, including an average 10-month pilot period, as well as costs associated with professional and managed services.
- › **Training costs worth \$576,368.** Customers incurred costs associated with training relevant members of their IT teams, as well as setting up training programs for end users.
- › **Ongoing system administration costs of \$1.7 million.** Customers also incurred ongoing system administration costs, including on average two FTEs dedicated to managing Microsoft 365 and Microsoft Surface devices.

Forrester's interviews with six existing customers, survey of 315 customers, and subsequent financial analysis found that an organization based on these customers experiences benefits of \$28,756,175 over three years versus costs of \$10,619,929, adding up to a net present value (NPV) of \$18,136,246 and an ROI 171%.

Financial Summary



The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

TEI Framework And Methodology

From the information provided in the interviews and survey, Forrester has constructed a Total Economic Impact™ (TEI) framework for those organizations considering implementing Microsoft 365 Enterprise for their workforce on Surface devices.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that Microsoft 365 Enterprise on Surface devices can have on an organization:



DUE DILIGENCE

Interviewed Microsoft stakeholders and Forrester analysts to gather data relative to Microsoft 365 and Microsoft Surface.



CUSTOMER INTERVIEWS AND SURVEY

Interviewed six organization using Microsoft 365-powered Surface devices and surveyed 407 Microsoft 365 Enterprise customers, 315 of which used Microsoft Surface devices to obtain data with respect to costs, benefits, and risks.



COMPOSITE ORGANIZATION

Designed a composite organization based on characteristics of the interviewed and surveyed organizations.



FINANCIAL MODEL FRAMEWORK

Constructed a financial model representative of the interviews and survey using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewed organizations.



CASE STUDY

Employed four fundamental elements of TEI: benefits, costs, flexibility, and risks. Given the increasing sophistication that enterprises have regarding ROI analyses related to IT investments, Forrester's TEI methodology serves to provide a complete picture of the total economic impact of purchase decisions. Please see Appendix A for additional information on the TEI methodology.

DISCLOSURES

Readers should be aware of the following:

This study is commissioned by Microsoft and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the report to determine the appropriateness of an investment in Microsoft 365-powered Surface devices.

Microsoft reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Microsoft did not participate in the interviews.

The Microsoft 365-Powered Surface Device Customer Journey

BEFORE AND AFTER THE INVESTMENT IN MICROSOFT 365 AND SURFACE

Interviewed Organizations

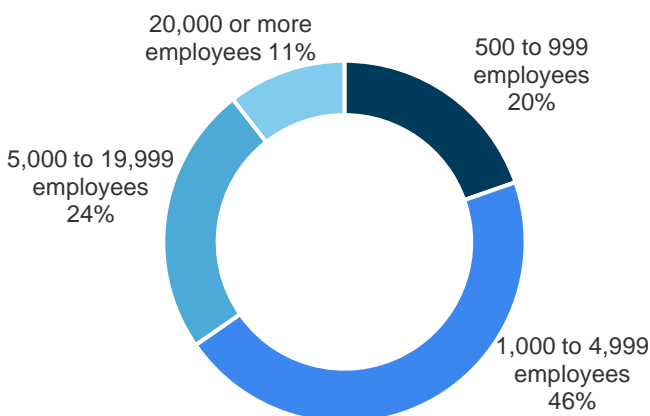
For this study, Forrester conducted six interviews with organizations that provided both Microsoft 365 Enterprise and Microsoft Surface devices to a subset of their workforces. Interviewed customers include the following:

INDUSTRY	REGION	INTERVIEWEE	TOTAL EMPLOYEES AND SURFACE USERS
Financial services	US	VP and information security officer	500 employees and 125 Surface users
Manufacturing	EMEA	Head of product group	10,000 employees and 2,000 Surface users
HR services	US	VP and CISO	17,000 employees and 5,000 Surface users
Enterprise IT	US	Director of corporate development, strategy, and GTM	75,000 employees and 10,000 Surface users
Professional services	EMEA	CTO	100,000 employees and 5,000 Surface users
Manufacturing	US	Global corporate account director	114,000 employees and 55,000 Surface users

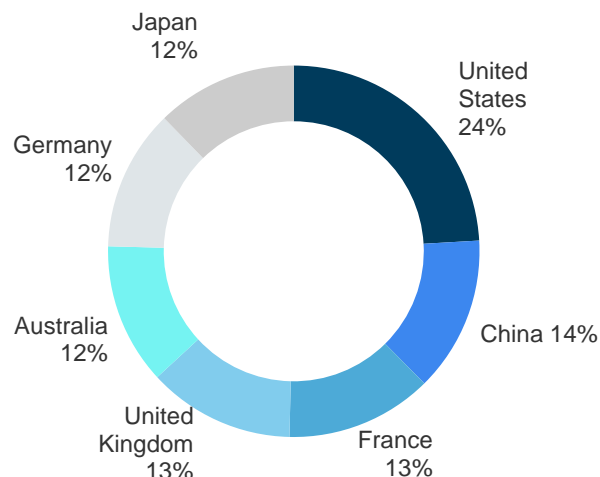
Surveyed Organizations

For this study, Forrester surveyed 407 IT and business decision makers using Microsoft 365 Enterprise, 315 of whom had also deployed Microsoft Surface devices, including Surface Book, Surface Go, Surface Laptop, Surface Pro, Surface Studio, and Surface Hub in their businesses. Survey respondents came from a variety of organization sizes across seven countries, including Australia, China, France, Germany, Japan, the United Kingdom, and the United States.

“How many employees work for your organization worldwide?”



“In what geographic region are you located?”



Base: 407 Global Microsoft 365 powered device users; 315 of whom a Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020

Key Challenges And Business Objectives

Interviewed and surveyed companies experienced a number of common challenges and shared a number of key business objectives that led them to seek productivity-enhancing modern devices and a secure cloud productivity and collaboration solution. Some of these challenges included the following:

- › **Improving employee experience (EX).** Survey respondents indicated that the top reason that their organizations deployed Microsoft Surface devices along with Microsoft 365 Enterprise was to improve employee experience, including remote work support. Interviewed organizations described non-Surface employees spending too much time troubleshooting with IT support, even with newly deployed devices. Their employees also felt limited in terms of where they could work when equipped with nonportable devices, heavy portable devices, or low-battery life devices. The CTO from the professional services company noted: “Microsoft 365 and Surface devices are helping our workforce be effective regardless of location or time zone. Being able to enable that experience for them while using premium hardware has been huge.”
- › **Boosting employee productivity.** Interviewees and survey respondents also sought to boost employee productivity by investing in Surface devices. Surface devices come with a variety of features that enhance employees’ productivity, including biometric login with Windows Hello, the ability to run multiple apps side-by-side, extended battery life, portability, the ability to work in traditional laptop mode, as a tablet, and in studio mode on 2-in-1 Surface devices, and the ability to conduct IT maintenance without disrupting employees’ workflows. The director of corporate development, product, and GTM (go-to-market) from the enterprise IT company explained, “Our productivity benefits have come from the seamlessness of having our IT and business users all running on Microsoft ecosystem hardware, software, and cloud services.”
- › **Improving IT workflows.** Customers complained that their IT environments were increasingly complex due to the variety of devices needing to be provisioned and managed, intensive infrastructure requirements, and the numerous security measures needed to protect increasingly remote workforces. Organizations looked to Surface devices to improve IT efficiency, reduce their overall IT and support costs, and eliminate device, application, and infrastructure sprawl. The VP and CISO from HR services explained: “Our investment was driven by a desire to standardize on one common piece of hardware, lowering IT costs by limiting the number of different devices they support while also simplifying the experience for end users.”

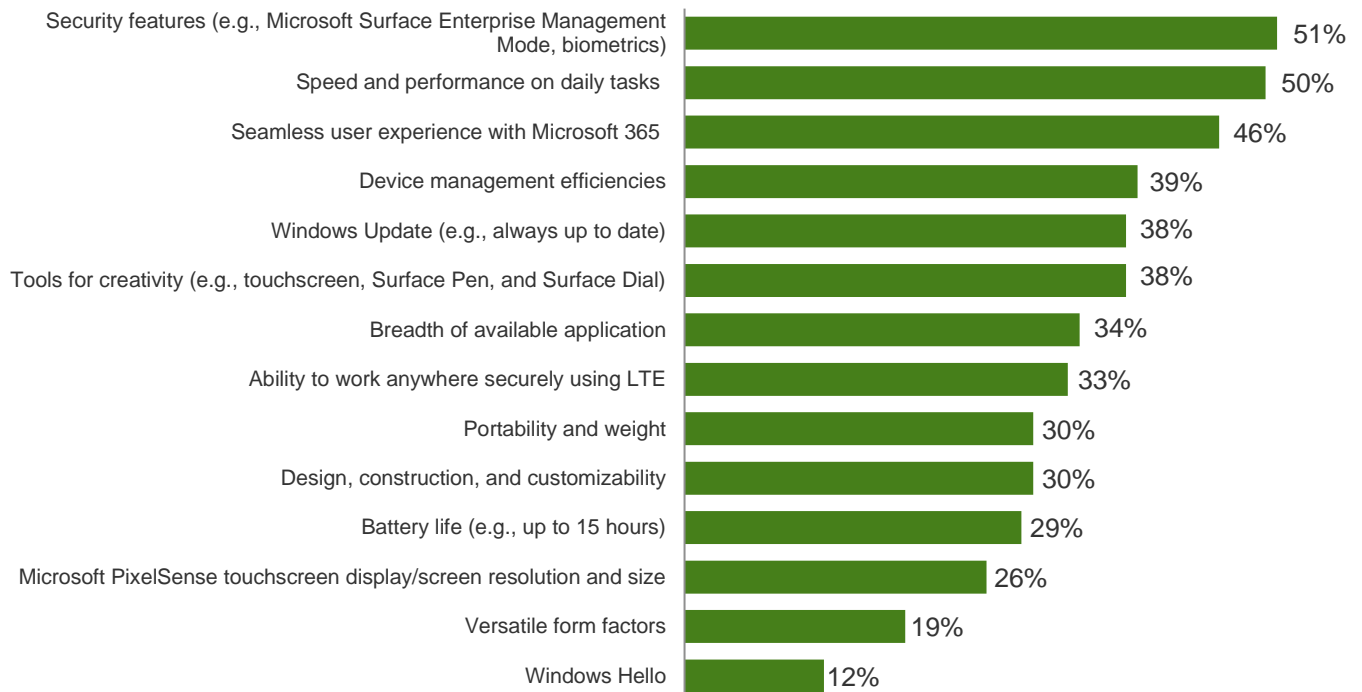
“What are the key drivers or business objectives that led your organization to deploy Microsoft 365/M365-powered Surface devices?”



Base: 315 Global Microsoft 365 powered device users.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020.

Top Features of Microsoft Surface



Base: 315 Global Microsoft 365 powered device users.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020.

Key Results

The interviews and survey data revealed that key results from customers' investments in Microsoft 365-powered Surface devices include:

- › **Enhanced employee productivity.** By providing employees with a standardized experience across hardware, software, and cloud solutions, organizations were able to boost productivity across the pool of users provisioned with Microsoft 365-powered Surface devices. The global corporate account director from the manufacturing company told Forrester, "We have a whole bunch of Microsoft tools that we use, and when everyone is standardized on the same software and hardware platform, it allows employees to be on a level playing field and makes being productive that much easier."
- › **Improved workforce collaboration and teamwork.** Workforce collaboration, innovation, and creativity for organizations across a myriad of industries are becoming increasingly important strategically. Given this, 88% of survey respondents indicated that Microsoft 365-powered Surface devices had helped their employees become more collaborative, compared to 79% of respondents without Surface devices. Furthermore, 82% said that Microsoft 365-powered Surface devices made their

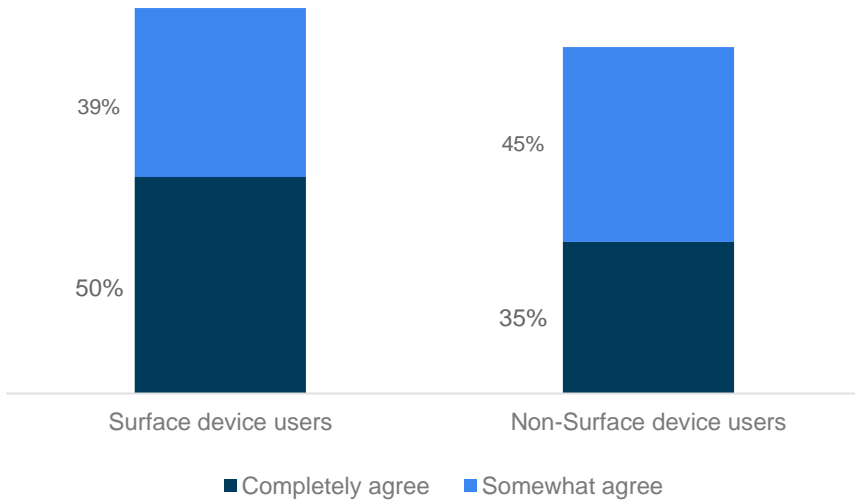
"Our internal studies have shown anywhere from a 10% to 15% overall increase in productivity and reduction in time on task. We've also seen a 25% drop in support incidents and support time on task. So these devices are productive for employees, but also IT."

CTO, professional services



employees more creative, compared to 70% of respondents without Surface devices.

“My organization is a modern, productive workplace.”



“Our Surface users are more responsive to emails, they’re better prepared for meetings, they’re more on time for meetings, they don’t complain about their IT tools as much. I just think overall the experience is better.”

Global corporate account director, manufacturing

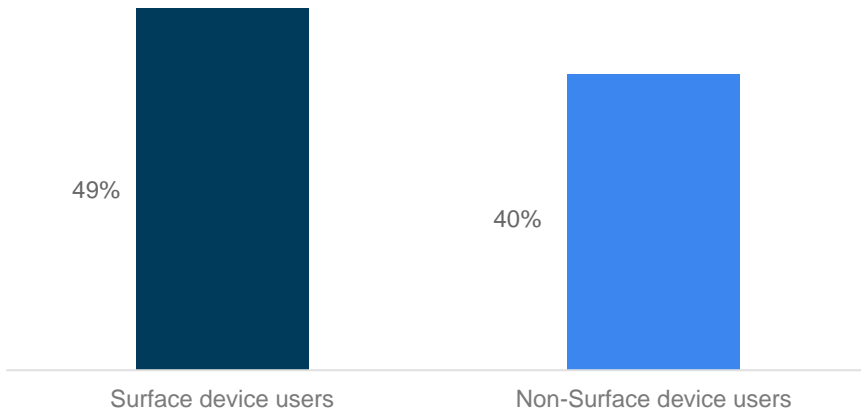


Base: 315 Global Microsoft 365 powered device users.
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020

- › **Increased security with reduced costs.** Interviewees and survey respondents were able to improve enterprise security, reducing both the number of security breaches and their breach remediation costs, without impacting workforce productivity or employee experience.

“Which of the following benefits has your organization’s IT department realized as a result of Microsoft 365 usage?”

Responses to option 3: “Reduced number of data security incidents experienced annually.”



“Surface devices are high-quality. They just look and feel nicer.”

VP and CISO, HR services



“Our salespeople are perceived better when pulling out a Surface device rather than a traditional laptop.”

CTO, professional services



Base: 407 global Microsoft 365-powered device users.
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020.

- › **More efficient device-related IT operations.** Organizations were able to save money by reducing or eliminating redundant third-party technologies, infrastructure, and IT support requirements. In addition, device and application configuration,

provisioning, and management efficiencies of Microsoft Surface and Microsoft 365 Enterprise saved IT time and ensured that employees could remain productive with as little downtime as possible.

- › **Better employee experiences.** Eighty-six percent of survey respondents with Microsoft 365-powered Surface devices agreed that their organizations successfully improved employee experience, compared to 76% of respondents using non-Surface devices. Additionally, 86% of survey respondents with Microsoft 365-powered Surface devices deployed agreed that their organization is better able to support a remote workforce, compared to 71% of respondents using non-Surface devices. Interviewees shared that Surface devices drove EX by requiring substantially less involvement with IT from deployment to end of life. Surface devices were also more flexible to the changing nature of the “workplace,” allowing employees to remain productive whether working from their office, a communal space,

“Millennials particularly enjoy that we issue Surface devices. They want to work at the cafeteria or from their home, and we can support that.”

VP and information security officer, financial services



Microsoft 365 + Surface: Impact on employee experience (EX)



82%

Agree that M365-powered Surface devices have helped improve employee retention



86%

Agree that M365-powered Surface devices improved employee satisfaction



80%

Agree that M365-powered Surface devices have helped position their organization as a top employer

Base: 315 Global Microsoft 365 powered device users.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020.

a coffeeshop, or their couch. The head of product group from the manufacturing industry described: “I’m happy we switched because it’s now a lot easier for us to carry this device around and hop from meeting to meeting. It is smaller than the old computer I have. I can take it anywhere, and it is perfect for my home office. Also, the battery life is longer, and the charger is also smaller and better to carry around, so overall it’s a lot more practical.”

Composite Organization

Based on the interviews and survey, Forrester constructed a TEI framework, a composite company, and an associated ROI analysis that illustrates the areas financially affected. The composite organization is representative of the companies that Forrester interviewed and surveyed and is used to present the aggregate financial analysis in the next section. The composite organization that Forrester synthesized from the customer data has the following characteristics:

- › **Description of composite.** The organization is a global financial services company with a highly distributed workforce and a strong presence throughout the US, Western Europe, China, Japan, and

Australia. The company has 5,000 employees worldwide, with 1,000 employees using Microsoft Surface and Microsoft 365 Enterprise E5 in Year 1. Over the course of this three-year analysis, it adds an additional 250 Microsoft 365-powered Surface device users in both Years 2 and 3 for a total of 1,500 Surface device users.

Prior to adopting Microsoft Surface, the organization offered employees a variety of PC, desktop, and tablet devices, with a significant portion of employees using more than one device for work. Before using Microsoft 365 Enterprise E5, the composite organization had a mix of mainly on-premises Microsoft and non-Microsoft technologies for enterprise collaboration, communication, productivity, and security.

- › **Deployment characteristics.** The organization has a choice of a mix of Microsoft Surface device models, including Surface Pro, Surface Laptop, Surface Book, Surface Go, and Surface Studio but decides to deploy mostly Surface Book 3 devices and Surface Pro 7 devices based on its current needs. These devices are set up and configured using Windows Autopilot. In addition, the composite organization invests in two Surface Hubs for each of its seven offices to be used in team conference rooms.

In its journey to Microsoft 365 Enterprise E5, the organization begins by configuring and deploying Office 365 to users, providing the majority of features to users within a 10-month period. In parallel, the organization rolls out EMS and Windows 10 to all Microsoft 365-powered Surface device users, and, where required, does some application remediation around Windows 10. In addition, the organization spends several months post-deployment activating collaboration and communication workloads, migrating workflows to SharePoint, and deploying Microsoft Defender ATP.

Analysis Of Benefits

QUANTIFIED BENEFIT DATA AS APPLIED TO THE COMPOSITE

Total Benefits

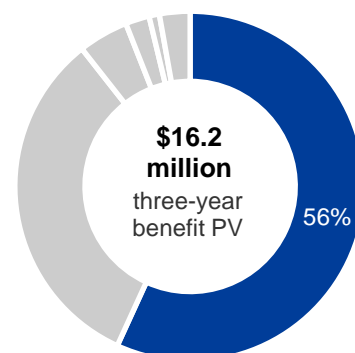
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Increased efficiency and productivity from improved collaboration	\$2,165,625	\$8,219,531	\$9,863,438	\$20,248,594	\$16,172,298
Btr	Increased end user productivity from device and interface	\$1,254,094	\$4,704,492	\$5,645,391	\$11,603,977	\$9,269,561
Ctr	Improvement in IT costs related to device management	\$466,875	\$555,469	\$644,063	\$1,666,406	\$1,367,391
Dtr	Reduced costs and increased efficiency related to improved security environment	\$280,210	\$350,262	\$420,315	\$1,050,787	\$859,998
Etr	Reduced IT costs to provision and deploy Surface devices	\$218,925	\$54,731	\$54,731	\$328,388	\$285,376
Ftr	Reduction in device and on-premises hardware costs	\$97,750	\$405,011	\$503,076	\$1,005,836	\$801,551
	Total benefits (risk-adjusted)	\$4,483,479	\$14,289,496	\$17,131,013	\$35,903,988	\$28,756,175

Increased Efficiency And Productivity From Improved Collaboration

The largest financial benefit customer organizations received from an investment in Microsoft 365-powered Surface devices was improved productivity from the collaborative nature of Microsoft 365-powered Surface devices. Using Microsoft 365 Enterprise solutions like SharePoint, Office 365, and Microsoft Teams coupled with Surface devices enabled users to access the most up-to-date files from anywhere, collaborate on generating documents in real time, and also hold meetings and make presentations without regard to geographic limitations.

- › **Knowledge sharing and document collaboration.** Microsoft 365-powered Surface devices make it easier to collaborate as a team, empowering users to work together both in real time and asynchronously. The global corporate account director from the manufacturing industry noted: "We've seen increased SharePoint use from Surface device users. This has added to their productivity. They do not have to worry about version control. You can just do everything online together in real time or on your own time." He continued: "We do a lot of file collaboration as a team online now. Everyone knows who is updating what. We're seeing 30% to 40% less time spent per file and eight less revisions per document."

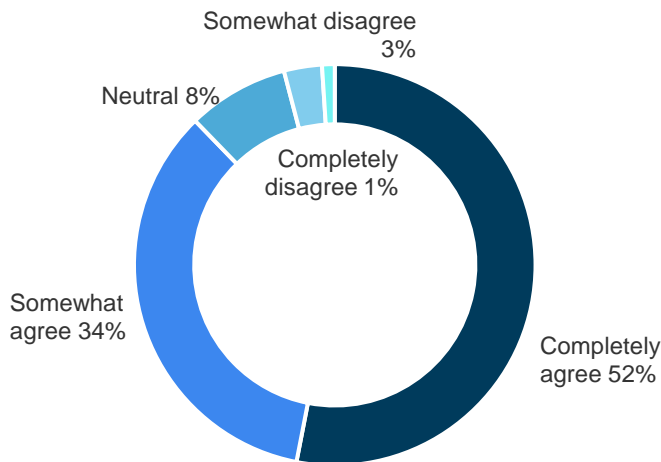
The table above shows the total of all benefits across the areas listed below, as well as present values (PVs) discounted at 10%. Over three years, the composite organization expects risk-adjusted total benefits to be a PV of \$28.8 million.



Increased efficiency and productivity from improved collaboration: 56% of total benefits

- › **Meetings.** Surface devices do not only inspire increased digital collaboration but also positively impact offline collaboration. The head of product group for the manufacturing company explained: “We have been measuring that, and it has been higher among our Surface users that they tend to have more meetings. They have more interactive meetings in which they share screens or use Microsoft Whiteboard as part of the meeting.”
- › **Standardization.** Standardizing users on Surface devices, optimized for use with Microsoft 365 solutions, also helped collaboration. According to the global account director from manufacturing: “The main productivity benefit is that the whole organization is on Microsoft 365 and Surface devices. All the devices are the same spec, so you do not have to worry about cameras not working or this guy not being able to get on because it is slow. It really streamlines the workflow, and it makes things easier.”

“Employees at my organization are more collaborative”



Base: 315 Global Microsoft 365 powered device users.
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020

Based on the customer interviews, Forrester assumes:

- › The composite organization deploys 1,000 Surface devices in Year 1 and an additional 250 devices in both Years 2 and 3.
- › An average FTE fully burdened hourly rate of \$35.
- › A productivity recapture rate of 50%.

The actual increase in improved efficiency and productivity from collaboration may vary based on:

- › The rate of Surface deployment.
- › The average fully burdened hourly rates for FTEs.
- › The amount of productivity recaptures.

“We’ve seen a 50% uptick in collaboration measured by Teams meetings, screen sharing, and whiteboarding among Surface device users compared to non-Surface device users.”

VP and CISO, HR services



“Surface Pen has facilitated a new way of meeting. With it, we’re able to work in a larger group and all participate using Windows Ink. It’s become part of our culture, and it’s a boon to the exchange of ideas.”

CTO, professional services



“With Surface devices, we have seen better cross-departmental collaboration, faster decisions, more efficient work processes. We have been able to work from home and connect on various projects across the country.”

Survey respondent: IT director, manufacturing and materials



Impact risk is the risk that the business or technology needs of the organization may not be met by the investment, resulting in lower overall total benefits. The greater the uncertainty, the wider the potential range of outcomes for benefit estimates.

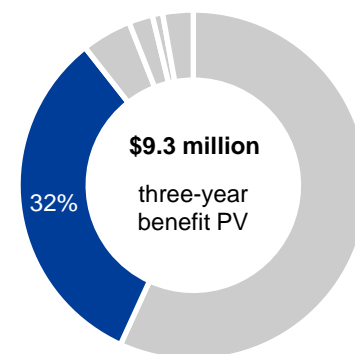
Improvements to employee efficiency and productivity due to collaboration will also vary significantly based on how collaborative their organizations were and which collaboration and communication technologies they originally had in place. To account for these risks, Forrester adjusted this benefit downward by 25%, yielding a three-year risk-adjusted total PV of \$16.2 million.

Increased Efficiency And Productivity From Improved Collaboration: Calculation Table					
Ref.	Metric	Calculation	Year 1	Year 2	Year 3
A1	Total number of Surface devices deployed		1,000	1,250	1,500
A2	Improved collaboration and knowledge-sharing efficiency gains (hours)	0.64 hours*250 (33% of benefit in Year 1)	53	160	160
A3	Decreased time spent on decision making due to the ability to quickly connect with relevant content and people (hours)	0.55 hours*250 (33% of benefit in Year 1)	45	138	138
A4	Decreased time spent joining and participating in in-person and virtual meetings	0.81 hours*250 (33% of benefit in Year 1)	67	203	203
A5	Average FTE fully burdened hourly rate		\$35	\$35	\$35
A6	Productivity recapture		50%	50%	50%
At	Increased efficiency and productivity from improved collaboration	$A1*(A2+A3+A4)*A5*A6$	\$2,887,500	\$10,959,375	\$13,151,250
	Risk adjustment	↓25%			
Atr	Increased efficiency and productivity from improved collaboration (risk-adjusted)		\$2,165,625	\$8,219,531	\$9,863,438

Increased End User Productivity From Device And Interface

Interviewed and surveyed customer organizations also experienced an increase in end user productivity from device and interface features of Microsoft 365-powered Surface devices. This productivity stemmed from three key features of Surface devices:

- Interface.** According to both interviewees and survey respondents, the combination of a variety of Surface device interface features greatly impacted end user productivity. These features include a touchscreen, faster secure log-in with Windows Hello, and the ability to run multiple applications side-by-side. The director of corporate development, strategy, and GTM at the enterprise IT company noted: “We saw productivity improvements of 12% to 15% average from Surface device users. Some teams experienced upwards of 20% improvement. It was amazing to see that amount of time saved each week because of Surface devices’ slick interface.”
- Flexibility.** The light weight and high battery life married to a full-powered computing device allows users the flexibility to be productive from anywhere. The head of product from the manufacturing industry shared: “Surface makes our employees a lot more productive when on the go, switching offices, or heading from meeting to meeting. Surface and Microsoft 365 combined are more adapted to different environments. It makes work more convenient and a lot more flexible.”

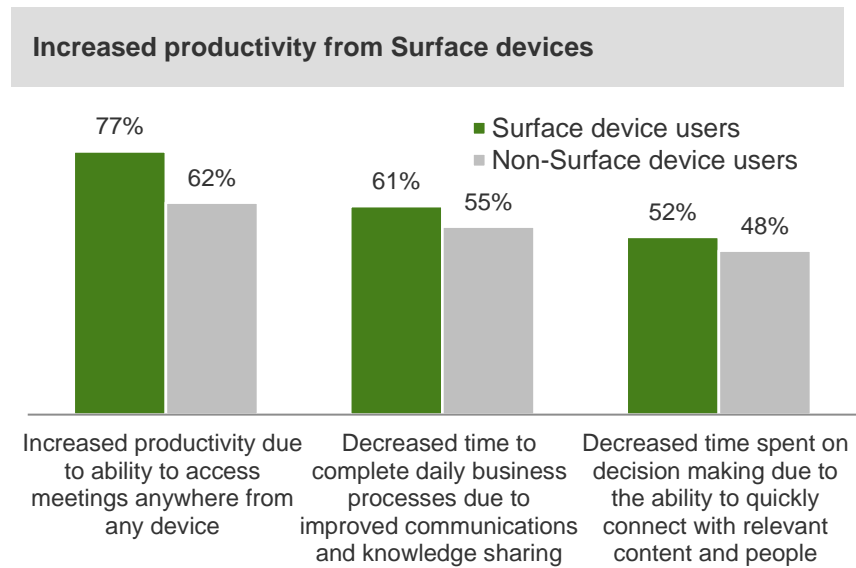


Increased end user productivity from device and interface: 32% of total benefits

› **Peripherals.** The use of Surface Pen and Surface Dial peripherals also assisted end users to be more productive. Survey respondents shared that their creative workers in particular were saving over 35 minutes per day on their tasks thanks to the use of such peripherals. The global corporate account director from a manufacturing firm shared their sales team’s experience: “You can just take out a Surface and a Pen and just start writing on it, and it recognizes your handwriting. That makes it more intuitive and easier to use when our sales team is on the road and meeting with customers. That really adds a lot of value for us.”

However, not all end user productivity from Surface devices was attributable to the direct end user interaction with the devices. Some end user productivity stemmed from the increased efficiency in the IT group from the ability to seamlessly deploy Surface devices. The VP and information security officer from the financial services organization shared: “Deployment with non-Surface devices created inefficiencies. We would have users sometime sit around for two to three days before they got access to their device. Now they start working right away.”

According to survey respondents, organizations deploying Microsoft 365-powered Surface devices saw additional productivity compared to organizations deploying Microsoft 365 with non-Surface devices:



Base: 315 Global Microsoft 365 powered device users.
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020

For the composite organization, Forrester assumes that:

- › Twenty-five percent of employees receiving Surface devices participate in creative work.

“Everything Surface users are doing is faster. The machines perform better and are more consistent. If they were spending an hour in an Office file on another device, they’re probably now spending anywhere from 45 to 50 minutes doing the same thing on Surface.”

CTO, professional services



“We’ve definitely seen an increase in productivity. Surface users are logged into their devices more, answering more emails, and answering messages faster.”

VP and information security officer, financial services



1 hr 35 min saved daily
 Survey respondent total daily savings from device features.

The improvement in employee efficiency and productivity due to better collaboration will vary with:

- › The rate of Surface device deployment.
- › The percentage of employees delivering creative work.
- › The percentage of employees working remotely.
- › The average fully burdened hourly rate of affected FTEs.

The magnitude of these process efficiency gains will vary significantly depending on the number of users, the unique skills sets of your employees, and the specific devices and productivity tools that were in place prior adopting Microsoft 365-powered Surface devices. Furthermore, adoption and change management challenges can impact the realization of the productivity gains above. To account for these risks, Forrester adjusted this benefit downward by 25%, yielding a three-year risk-adjusted total PV of \$9.3 million.

“Account reps can now pull up our CRM 5 to 10 minutes before they walk into the client’s office and know all about that client on the Surface Pro. They’re more informed and more engaged with clients. It has really empowered our business.”

VP and Information security officer, financial services



Increased End User Productivity From Device And Interface: Calculation Table

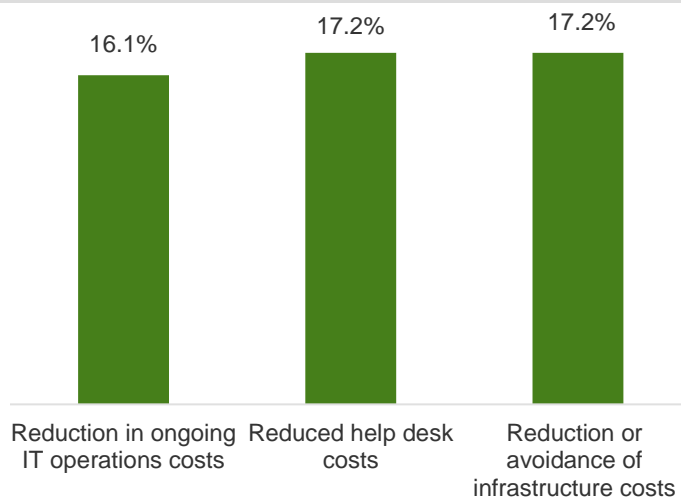
Ref.	Metric	Calculation	Year 1	Year 2	Year 3
B1	Total number of Surface devices deployed	A1	1,000	1,250	1,500
B2	Increased user productivity on common daily tasks with Surface’s touchscreen, Surface Pen, and/or Dial features	0.25 hours*250 (33% of benefit in Year 1)	21	63	63
B3	Faster secure logon with Windows Hello	0.18 hours*250 (33% of benefit in Year 1)	15	45	45
B4	Increased creativity with Surface Pen, Dial, and/ or collaboration via Teams or Skype	0.25 hours*250 (33% of benefit in Year 1)	21	63	63
B5	Percent of employees doing creative work	Assumption	25%	25%	25%
B6	Improved support of remote workers with Surface’s battery life and portability	0.28 hours*250 (33% of benefit in Year 1)	23	70	70
B7	Percent of employees working remotely	Assumption	10%	10%	10%
B8	Increased productivity with Surface’s ability to run applications concurrently side-by-side	0.31 hours*250 (33% of benefit in Year 1)	26	78	78
B9	Improved productivity due to ability to maintain PCs without disrupting workflows	0.31 hours*250 (33% of benefit in Year 1)	26	78	78
B10	Average FTE fully burdened hourly rate	A5	\$35	\$35	\$35
B11	Productivity recapture rate		50%	50%	50%
Bt	Increased end user productivity from device and interface	B1* (B2+B3+B4*B5+B6*B7+B8+B9) *B10*B11	\$1,672,125	\$6,272,656	\$7,527,188
	Risk adjustment	↓25%			
Btr	Increased end user productivity from device and interface (risk-adjusted)		\$1,254,094	\$4,704,492	\$5,645,391

Improvement In IT Costs Related To Device Management

End users are not the only direct benefactors of Microsoft 365-powered Surface devices. In fact, customers reported that Surface devices also made the lives of their IT employees easier due to improved device management. Device management is simplified with Microsoft 365-powered Surface devices in two key ways:

- › **Updates and patching.** Interviewed customers reported substantially reduced challenges for IT administrators when pushing patches and updates to Surface devices. The VP and information security officer from the financial services company explained: “The best accuracy rate for applying patches we ever achieved on non-Surface devices was 80%. Using Microsoft Endpoint Manager, including Intune, with Surface devices, this is 95%. Every device where a patch misses costs us between five and ten business days of time and work to get the patch working properly.”
- › **Troubleshooting.** Troubleshooting time and effort are also substantially reduced with Microsoft 365-powered Surface devices. IT is often empowered to know what is wrong with the device even before a support request is made. The VP and information security officer from the financial services industry elaborated: “When we get a support call, we already know what’s going on. This has led troubleshooting for Surface devices to take an average of 15 minutes, when it still takes an hour for other devices.” Additional time saved troubleshooting comes from Windows Hello, according to the VP and CISO of HR services: “We have seen a big drop-off in the password reset calls from Surface device users because they are using Windows Hello, which is biometric. They no longer need to remember anything.”

Reduction In Costs Associated With Device Management



Base: 147 Global Microsoft 365 powered device users.
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020

“To update any given non-Surface device, it could take anywhere from one day to one week. Using Microsoft Endpoint Manager, including Configuration Manager, with Surface devices, it takes 45 minutes.”

VP and information security officer, financial services



“Updating our field sales team presented a lot of challenges before Surface devices, as they wouldn’t connect to the VPN to get updates for long periods of time. Thanks to Surface, we’ve been able to reallocate one FTE whose sole role before was campaigning our sales team to perform system updates.”

VP and CISO, HR services



Based on the customer interviews, Forrester estimates for the composite organization:

- › The time to roll out updates to devices decreases from 4 hours of effort to 45 minutes.
- › Six help desk calls per user annually, reducing on average from 45 minutes to 15 minutes.
- › An average fully burdened hourly rate for IT professionals of \$63.

The actual improvement in IT costs related to device management may vary based on:

- › The current time spent rolling out updates to devices.
- › The number and length of help desk calls.
- › The average fully burdened hourly rate for IT professionals.

To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year risk-adjusted total PV of \$1.4 million.

Improvement In IT Costs Related To Device Management: Calculation Table

Ref.	Metric	Calculation	Year 1	Year 2	Year 3
C1	Total number of Surface devices deployed	A1	1,000	1,250	1,500
C2	Hours spent rolling out application updates to non-Surface devices	Customer interview	4	4	4
C3	Hours spent rolling out application updates to Surface devices	Customer interview	0.75	0.75	0.75
C4	Total reduced time to roll out application updates	C1*(C2-C3)	3,250	4,063	4,875
C5	Help desk calls per user annually	Assumption	6	6	6
C6	Average help desk call time for non-Surface devices in hours	Customer interview; 45 minutes	0.75	0.75	0.75
C7	Average help desk call time for Surface devices in hours	Customer interview; 15 minutes	0.25	0.25	0.25
C8	Total reduced time spent on help desk calls	C1*C5*(C6-C7)	3,000	3,750	4,500
C9	Average IT FTE fully burdened hourly rate		\$63	\$63	\$63
C10	Total reduced time spent on patching due to MEM	Interview; 1 FTE	\$125,000	\$125,000	\$125,000
Ct	Improvement in IT costs related to device management	$((C4+C8)*C9)+C10$	\$518,750	\$617,188	\$715,625
	Risk adjustment	↓10%			
Ctr	Improvement in IT costs related to device management (risk-adjusted)		\$466,875	\$555,469	\$644,063

Reduced Costs And Increased Efficiency Related To Improved Security Environment

Interviewed and surveyed customers reported an improved security environment after investing in Microsoft 365-powered Surface devices. Microsoft 365 Enterprise combined with Surface devices provide a secure working environment from the cloud down to the chip layer.

- › Microsoft 365 Enterprise provides the following security features:
 - **Conditional access.** Microsoft 365 Enterprise will consider device context, such as location and the network being used, when determining access to cloud solutions. The VP and information security officer from the financial services industry noted, “It is now easier for us to control where our employees are accessing our systems from, be it an open Wi-Fi network at a café or any other location.”
 - **Microsoft Defender ATP.** Microsoft has billions of devices deployed, each providing telemetry data, so that security packages can be built and deployed to Surface devices considering the latest trends in attacks from around the globe.
 - **Windows Update for Business.** Surface devices can automatically be updated with the latest security patches with Windows Update for Business. This ensures that devices, especially those in the field, are consistently protected with the most up-to-date patch without direct IT involvement or the need to connect to VPN. The VP and CISCO of HR services stated: “Our new environment is all cloud based, so we can update devices as long as they’re connected to the internet. We’re no longer waiting days or even weeks for field devices to connect through the VPN.”
 - **Remote wipe.** Microsoft Endpoint Manager (MEM) comes with remote wipe capabilities, allowing the IT team to lock or delete data from devices lost in the field. The VP and information security officer from financial services mentioned: “Anytime you have a mobile device, you need to take extra security measures. If a device is lost or stolen, we can take immediate action to remotely wipe the data from the device.”
- › Microsoft Surface devices provide the following additional features:
 - **TPM 2.0 and BitLocker.** TPM 2.0 chips in Surface devices scan for any potential security breaches at the device level and isolate these, while Windows BitLocker offers full volume drive encryption. Combined, the two features ensure the device has not been tampered with while offline. The VP and CISO of HR Services shared, “TPM 2.0 plus BitLocker gives us the assurance that when a device is lost in the field, it is near impossible to decrypt its contents.”
 - **Surface Enterprise Management Mode (SEMM) – Enables IT teams to manage the device at the Unified Extensible Firmware Interface (UEFI) level.** UEFI provides a means for IT to control device firmware functionality and availability. For example, it would allow IT to control whether Surface devices can make use of their cameras, microphones, or USB drives based on security policies.

“We have seen a 30% to 40% reduction in security incidents needing a person dispatched thanks to using Surface devices with Microsoft 365 E5.”

CTO, professional services



“Conditional access also considers information from Microsoft Defender ATP. If a device is known to be infected or known to have a risk factor, it doesn’t have access to company resources.”

CTO, professional services



“We’re saving massive amounts of time across IT, risk management, and legal on the reporting process when devices are lost.”

VP and CISO, HR services



- **Windows Hello.** Windows Hello does not simply provide productivity benefits for end users who no longer have to remember a lengthy password; the biometric access technology also ensures that only the appropriate end users can access the device. The VP and CISO of HR Services noted: “We use Windows Hello as third-factor authentication. To access a device, you not only need a password but also to use Hello’s facial or fingerprint recognition technology. It is fabulous.”

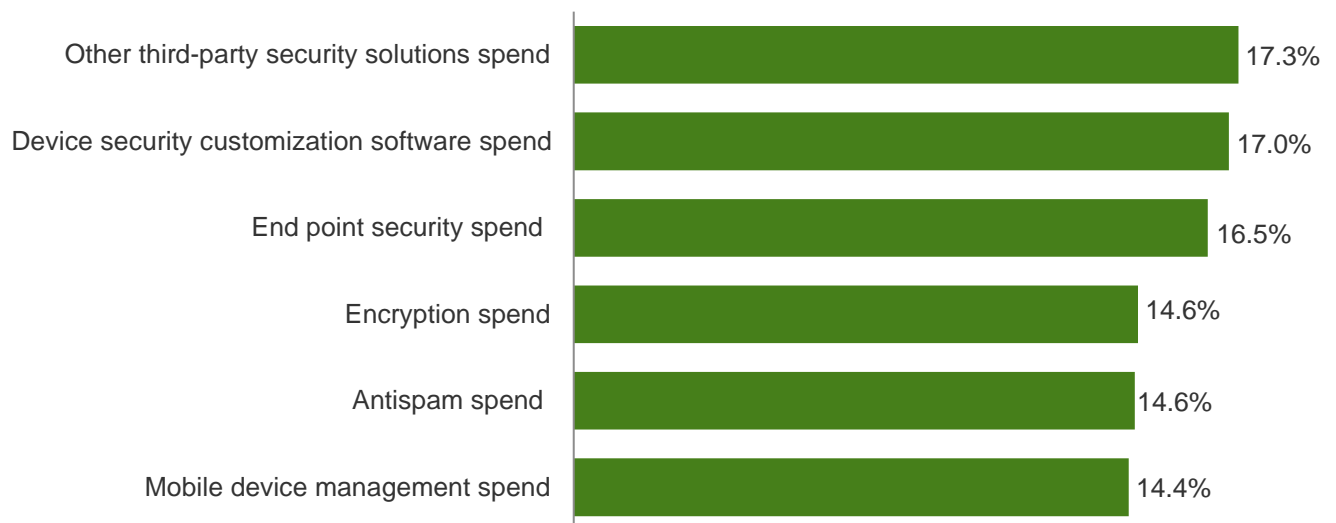
In fact, 51% of survey respondents ranked the security benefits of Microsoft 365-powered Surface devices as the top feature. Additionally, interviewed and surveyed customers noted that they could save costs by decommissioning or rolling back their use of third-party security solutions due to the combined security benefits of Microsoft 365 Enterprise and Surface devices. The VP and CISO from HR services remarked, “Thanks to BitLocker and Windows Hello, we’ve been able to decommission our previous endpoint encryption service as well as our multifactor authentication service.”

“We have seen a 20% increase in system performance with Microsoft Defender ATP versus our previous solution.”

CTO, professional services



Third-Party Security Spend Reduction



Base: 143 Global Microsoft 365 powered device users.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020

For the composite organization, Forrester assumes:

- › An average cost to recover from a security incident of \$3.9 million.
- › A probability of a data breach of 29.6%.
- › A third-party security solution spend of \$1,200.

The reduction in security-related expenses will vary with:

- › The average cost to recover from a security incident.
- › The probability of a data breach.
- › The third-party security solution spend per user.

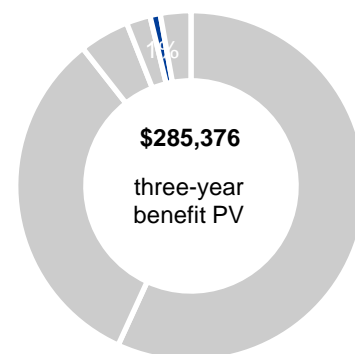
To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year risk-adjusted total PV of \$859,998.

Reduced Costs And Increased Efficiency Related To Improved Security Environment: Calculation Table					
Ref.	Metric	Calculation	Year 1	Year 2	Year 3
D1	Percent of organization with Surface Devices	A1/5,000	20%	25%	30%
D2	Reduction in data and security breaches experienced annually from M365	Survey finding	17.2%	17.2%	17.2%
D3	Additional reduction from Surface	Survey finding	17.6%	17.6%	17.6%
D4	Reduction in spending related to security incidents from M365	Survey finding	16.8%	16.8%	16.8%
D5	Additional reduction from Surface	Survey finding	18.0%	18.0%	18.0%
D6	Average cost to recover from a security incident	Ponemon Institute	\$3,920,000	\$3,920,000	\$3,920,000
D7	Probability of a data breach	Ponemon Institute	29.6%	29.6%	29.6%
D8	Subtotal savings from reduced data and security breaches	$((D1*D2+D1*D2*D3)+(D1*D4+D1*D4*D5))*D6*D7$	\$92,944	\$116,181	\$139,417
D9	Prior spend on third-party security solutions	\$1,200*A1	\$1,200,000	\$1,500,000	\$1,800,000
D10	Reduced third-party security solution spend	Survey finding	18.2%	18.2%	18.2%
D11	Subtotal savings from reduced security solution spend	D9*D10	\$218,400	\$273,000	\$327,600
Dt	Reduced costs and increased efficiency related to improved security environment	D8+D11	\$311,344	\$389,181	\$467,017
	Risk adjustment	↓10%			
Dtr	Reduced costs and increased efficiency related to improved security environment (risk-adjusted)		\$280,210	\$350,262	\$420,315

Reduced IT Costs To Provision And Deploy Surface Devices

Interviewed and surveyed firms also saw their IT costs related to provisioning and deploying devices decrease after investing in Microsoft 365-powered Surface devices. Most of these cost savings stemmed from time reduction in the imaging and deployment of devices to end users. For non-Surface devices, organizations followed a high-effort, time-consuming process whereby a new device is shipped to the organization, where the IT group images the device, applies the required team and user settings, ensures that all of the relevant security updates are made to the device, and deploys the device to the end user. Firms must follow a similar process when reprovisioning a used device to a new end user.

With Microsoft 365-powered Surface devices, customers reported a simpler process. Using Microsoft Autopilot, all Surface devices are provisioned from the cloud. They ship directly to end users, who follow a short 10- to 15-minute process where all relevant policies for that organization and that user are downloaded and configured through the cloud. The VP and CISO from HR services said: "For every Surface device we deploy, we save our IT team a half-day getting it on the network, imaging the device, setting up security requirements, and patching."

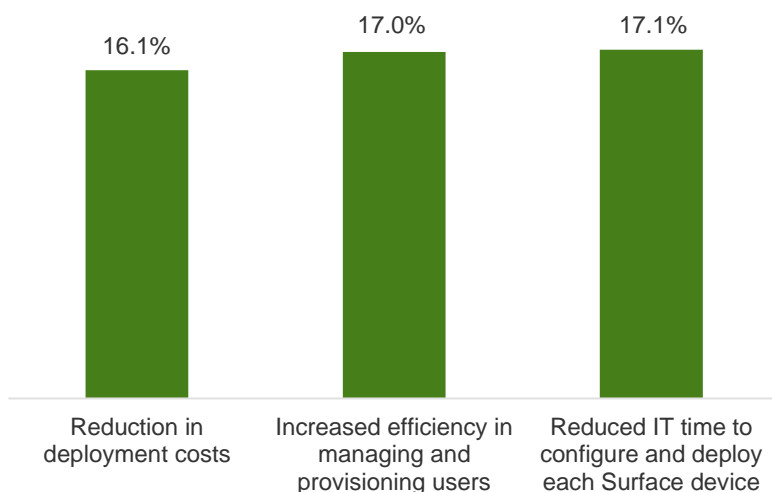


Reduced IT costs to provision and deploy surface devices: 1% of total benefits

Additionally, the new, touchless deployment process reduces post-deployment support calls to the IT help desk. Again, the VP and CISO of HR services noted: “We definitely get a lot fewer support calls immediately post-deployment with Surface devices. With non-Surface devices, two or three out of every five devices deployed would require immediate IT support.”

Survey respondents reported seeing the following reduction in costs associated with Microsoft-powered Surface device deployment:

Reduction In Costs Associated With Device Deployment



Base: 147 Global Microsoft 365 powered device users.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2020

Based on the customer interviews, Forrester estimates for the composite organization:

- › Four hours previously spent provisioning devices manually by IT professionals, reduced to no time as the process is automated via Autopilot.
- › Fifteen minutes per end user to set up their Surface device via Autopilot.

The actual reduction in costs associated with provisioning and deploying Microsoft 365-powered Surface devices may vary based on:

- › The time spent by IT provisioning devices.
- › The time it takes end users to set up the device via Autopilot.

To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year risk-adjusted total PV of \$285,376.

“We used to spend the better part of a workday getting new devices ready for our end users. With Surface, the end user gets the device immediately and sets it up in 10 to 15 minutes. Microsoft Endpoint Manager, including Intune, does all the work for us.”

VP and CISO, HR services



Reduced IT Costs To Provision And Deploy Surface Devices: Calculation Table

Ref.	Metric	Calculation	Year 1	Year 2	Year 3
E1	Total number of Surface devices deployed		1,000	1,250	1,500
E2	New Surface deployments per year		1,000	250	250
E3	Hours spent provisioning and deploying non-Surface devices	Interview	4	4	4
E4	Hours spent provisioning and deploying Surface devices	Interview	0	0	0
E5	Average IT fully burdened hourly salary	C9	\$63	\$63	\$63
E6	Hours required by end user to set up Surface device	15 minutes	0.25	0.25	0.25
E7	Average employee fully burdened hourly salary	A5	\$35	\$35	\$35
Et	Reduced IT costs to provision and deploy Surface devices	$(E2 * E3 * E5) - (E2 * E6 * E7)$	\$243,250	\$60,813	\$60,813
	Risk adjustment	↓10%			
Etr	Reduced IT costs to provision and deploy Surface devices (risk-adjusted)		\$218,925	\$54,731	\$54,731

Reduction In Device And On-Premises Hardware Costs

Prior to investing in Microsoft 365-powered Surface devices, customers relied on a variety of end user devices from multiple vendors. Interviewees and respondents revealed that the two-in-one form factor of Microsoft Surface devices like the Surface Book and Surface Pro enabled them to retire and eliminate a number of redundant devices following their investment in Microsoft 365-powered Surface devices. Additional savings such as time savings to IT from administering less devices and less varied devices have already been included in the benefits sections above.

The VP and information security officer from the financial services company shared: “Sixty percent of our end users who previously had multiple devices are now using a single Surface device. This has cut our procurement costs dramatically, as well as our maintenance and support costs.”

Some customers reported utilizing Microsoft 365-powered Surface device to replace screens for less traditional use cases, such as booking and managing conference rooms. The global corporate account director from the manufacturing industry explained: “We are also using Surface devices to replace screens outside conference rooms. Employees use them to log meetings, book new meetings, or look at the meeting schedule.”

Some specific device and support savings included in this benefit category include:

- › A 16.6% reduction in PC costs.
- › A 17.5% reduction in desktop device costs.
- › A 16.7% reduction in non-Windows tablet costs.
- › A 15.6% reduction in Windows tablet costs.
- › A 14.6% reduction in specialty device costs.

“Eighty percent or more of our executives have ditched their non-Windows tablets in addition to their laptops in favor of Surface devices. We’re down to a few hundred of those non-Surface, non-Windows tablets from thousands. So, consolidation has been huge.”

CTO, professional services



For the financial analysis, Forrester assumes:

- › Legacy device reductions begin in the year following deployment of Surface devices. The assumptions in calculating device savings are as follows:

Device Reduction: Percentage Eliminated And Cost Per Device		
Device category	Percentage of devices eliminated	Average cost per device
PC	16.6%	\$700
Desktop	17.5%	\$550
Non-Windows tablets	16.7%	\$599
Windows tablets	15.6%	\$300
Specialty device	14.6%	\$700

- › An on-premises hardware and maintenance fee cost of \$115,000 in Year 1 and an additional \$15,000 each subsequent year.

The actual reduction in device and on-premises hardware costs will vary with:

- › The device refresh lifecycle.
- › On-premises hardware and maintenance fees.

To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year risk adjusted total PV of \$801,551.

Reduction In Device And On-Premises Hardware Costs					
Ref.	Metric	Calculation	Year 1	Year 2	Year 3
F1	Reduction in PC costs	16.6% at \$700 per device	\$0	\$116,200	\$145,250
F2	Reduction in Desktop costs	17.5% at \$550 per device	\$0	\$96,250	\$120,313
F3	Reduction in non-Windows tablet costs	16.7% at \$599 per device	\$0	\$100,033	\$125,041
F4	Reduction in Windows tablet costs	15.6% at \$300 per device	\$0	\$46,800	\$58,500
F5	Reduction in specialty devices	14.6% at \$700 per device	\$0	\$102,200	\$127,750
F6	Reduction in on-premises hardware and maintenance fees		\$115,000	\$15,000	\$15,000
Ft	Reduction in device and on-premises hardware costs	Sum(F1:F6)	\$115,000	\$476,483	\$591,854
	Risk adjustment	↓15%			
Ftr	Reduction in device and on-premises hardware costs (risk-adjusted)		\$97,750	\$405,011	\$503,076

Unquantified Benefits

Organizations noted seeing several benefits from implementing Microsoft 365-powered Surface devices that were not quantifiable. These could potentially be quantified in a financial analysis if given the appropriate data and metrics and are as follows:

- › **Improved employer branding.** Interviewed customers have seen enough uptick in their EX from Microsoft 365-powered Surface devices that they have begun marketing the fact that they are a Surface device company to prospective hires. The VP and CISO from HR services mentioned: “We do talk about the fact we issue Surface devices in our recruiting process. This news is favorably received, especially among tech employees.”
- › **Improved customer reputation.** Interviewed customers also shared that their sales teams are often perceived by customers better when they are seen using Surface devices compared to non-Surface devices. The VP and CISO from HR services described: “We especially benefit using Surface devices in front of our clients. When our field teams are presenting to clients and flip the device from its laptop to its tablet mode, that’s impressive.”

Flexibility

The value of flexibility is clearly unique to each customer, and the measure of its value varies from organization to organization. There are multiple scenarios in which a customer might choose to implement Microsoft 365-powered Surface devices and later realize additional uses and business opportunities, including:

- › **Flexibility in times of crisis.** Interviewed customers expressed that a key benefit they received from investing in Microsoft 365-powered Surface devices was the flexibility it provided during the COVID-19 pandemic. The CTO from the professional services organization described the ease of issuing new devices in a decentralized manner: “We’ve been able to hire people and have them simply enroll their personal device with their work account and have secure apps that our application can service without having to fully manage and enroll those devices. It’s been a great boon our ability to be agile, even in unforeseen circumstances.”

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in Appendix A).

“We now put the fact that prospective hires can get Surface devices into our literature for the recruiters and for the hiring managers.”

CTO, professional services



Flexibility, as defined by TEI, represents an investment in additional capacity or capability that could be turned into business benefit for a future additional investment. This provides an organization with the "right" or the ability to engage in future initiatives but not the obligation to do so.

“For Surface users, even during COVID-19, they’ve been able to be efficient and effective even though they haven’t been able to go into the office.”

Global corporate account director, manufacturing



Analysis Of Costs

QUANTIFIED COST DATA AS APPLIED TO THE COMPOSITE

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Gtr	Surface device and Microsoft 365 licensing costs	\$0	\$2,215,065	\$1,257,795	\$1,423,170	\$4,896,030	\$4,122,444
Htr	Cost of deployment and implementation	\$1,980,000	\$837,833	\$852,500	\$1,017,500	\$4,687,833	\$4,210,674
Itr	Training costs	\$236,500	\$26,400	\$200,200	\$200,200	\$663,300	\$576,368
Jtr	Ongoing system administration costs	\$0	\$156,450	\$681,450	\$1,337,700	\$2,175,600	\$1,710,443
Total costs (risk-adjusted)		\$2,216,500	\$3,235,748	\$2,991,945	\$3,978,570	\$12,422,763	\$10,619,929

Surface Device And Microsoft 365 Licensing Costs

Interviewed and surveyed customers reported making one-time investments in Microsoft Surface devices, including Surface Book, Surface Laptop, Surface Pro, Surface Go, Surface Studio, and Surface Hub, and ongoing investments in Microsoft 365 Enterprise E5 license subscriptions. In addition, Forrester includes end-of-life device costs, including device wipe and recycling processes, in Years 2 and 3 of this analysis, as devices from the previous year are decommissioned.

The composite organization has 1,000 Microsoft 365-powered Surface device users in Year 1, with the total user count growing to 1,500 by Year 3. Consistent with interviews, Forrester assumes a deployment of 60% Surface Book 3 devices and 40% Surface Pro 7 devices each year. Forrester also assumes the purchase of two Surface Hub devices for each of the organization's seven offices for a total of fourteen devices.

Note: Microsoft Surface devices come at a variety of price points, and expenses may be significantly higher or lower depending on the unique mix of Surface devices purchased. Forrester used the list price of \$57 per month for Microsoft 365 Enterprise E5 licenses. Readers are encouraged to work with their Microsoft partners to understand what the cost would be for their own organizations.

Forrester risk-adjusted this cost category upward by 5% to account for variance in the specific models and specifications in Surface devices procured and to account for out-of-cycle refreshes of devices. The three-year risk-adjusted total PV for Microsoft Surface device and Microsoft 365 Enterprise licensing totaled just over \$4.1 million.

The table above shows the total of all costs across the areas listed below, as well as present values (PVs) discounted at 10%. Over three years, the composite organization expects risk-adjusted total costs to be a PV of more than \$10.6 million.

Implementation risk is the risk that a proposed investment may deviate from the original or expected requirements, resulting in higher costs than anticipated. The greater the uncertainty, the wider the potential range of outcomes for cost estimates.

Surface Device And Microsoft 365 Licensing Costs: Calculation Table

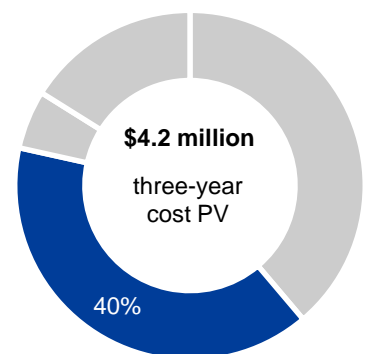
Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
G1	Number of Surface devices procured	A2		1,000	250	250
G2	Percentage Surface Book 3	Customer interview		60%	60%	60%
G3	Average cost per Surface Book 3			\$1,500	\$1,500	\$1,500
G4	Percentage Surface Pro 7	Customer interview		40%	40%	40%
G5	Cost per Surface Pro 7			\$999	\$999	\$999
G6	Surface Hub 2S devices	Assumes 2 per office; 14 total		\$125,986		
G7	End-of-life services cost (device wipe, recycle)	\$18*users deployed in prior Year			\$18,000	\$4,500
G8	Microsoft 365 Enterprise E5 license cost	\$57*12 months		\$684,000	\$855,000	\$1,026,000
Gt	Surface device and Microsoft 365 licensing costs	$((G1*G2*G3)+(G1*G4*G5))+\text{Sum}(G6:G8)$	\$0	\$2,109,586	\$1,197,900	\$1,355,400
	Risk adjustment	↑5%				
Gtr	Surface device and Microsoft 365 licensing costs (risk-adjusted)		\$0	\$2,215,065	\$1,257,795	\$1,423,170

Cost of Deployment And Implementation

The implementation process for customer includes a series of phases including:

- › Proof of concept (PoC).
- › Pilot.
- › Migration.
- › Deployment of Microsoft 365 Enterprise E5.
- › Deployment of Surface devices to users.

To complete these phases, the organization allocates resources from both IT and the lines of business (LOBs) for a period of 10 months. This project team consists of 10 employees from IT and the equivalent of four FTEs from the organization's various business units. The organization spends an additional two months post-deployment activating incremental collaboration and communication workloads, migrating workflows to SharePoint, and deploying Microsoft Defender ATP.



Cost of deployment and implementation: 40% of total costs

In addition to these internal resources, the composite organization leverages Microsoft partners for the following:

- › **Professional services.** The composite organization uses a Microsoft partner in the Initial phase of this analysis to analyze its existing infrastructure, productivity, collaboration, and security systems. The partner helps to build a long-term roadmap for the organization, build a pilot around Microsoft 365 Enterprise E5, support the migration and deployment effort, and assist with back-end integration challenges. In subsequent years, the composite organization uses its professional services partner for ongoing change management and adoption consulting to ensure effective utilization of Microsoft Surface and the Microsoft 365 Enterprise workloads.
- › **Managed services.** Customers leverage Microsoft partners for everything from technical and end user support to fully outsourced IT services that provide users with devices, modern desktop management, and Microsoft 365 update services that ensure all their Microsoft 365 Enterprise workloads are always up to date. The composite organization leverages both internal resources and outsourced managed services for ongoing administration and support of Microsoft 365 and Surface users. Outsourced managed services include premium technical and end user support, security monitoring, and modern desktop management services via Microsoft Endpoint Manager, including Intune, and come at a monthly cost of \$50 per user, per month.



Ten months
Total pilot and deployment time

Internal implementation costs will vary greatly depending on the size of the organization and its existing internal skill sets. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year risk-adjusted total PV of just over \$4.2 million.

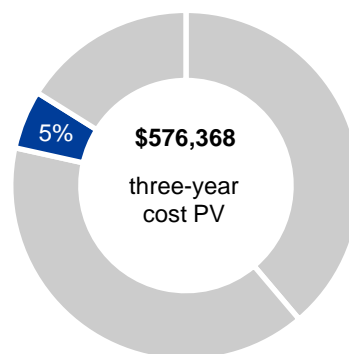
Cost Of Deployment And Implementation: Calculation Table

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
H1	Number of months	2-month pilot; 8-month deployment	10	2		
H2	Number of IT FTE resources		10	4		
H3	Number of LOB resources		4	2		
H4	IT fully burdened monthly resource cost	$(\$125,000/12) * H1 * H2$	\$1,041,667	\$83,333		
H5	LOB fully burdened monthly resource cost	$(\$85,000/12) * H1 * H3$	\$283,333	\$28,333		
H6	Microsoft 365 pilot and PoC	Benchmark	\$75,000			
H7	Microsoft 365 deployment professional services	Benchmark	\$400,000			
H8	Ongoing professional services			\$50,000	\$25,000	\$25,000
H9	Managed services			\$600,000	\$750,000	\$900,000
Ht	Cost of deployment and implementation	Sum(H4-H9)	\$1,800,000	\$761,666	\$775,000	\$925,000
	Risk adjustment	↑10%				
Htr	Cost of deployment and implementation (risk-adjusted)		\$1,980,000	\$837,833	\$852,500	\$1,017,500

Training Costs

Survey respondents needed to train their IT departments on provisioning and managing Microsoft Surface devices and Microsoft 365 Enterprise E5 solutions. Forrester assumes the use of an outside partner for training and that each training day costs \$300 per user per session. To facilitate training, the composite organization allocates two FTEs to create an end user training program. These FTEs build a learning portal on SharePoint and work with LOBs using both Microsoft Surface devices and Microsoft 365 Enterprise so that users know how to use the products. They roll out training around new workloads and features as they become available.

Training requirements will vary depending on both IT's and end users' technical proficiency and familiarity with Microsoft technologies. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year risk-adjusted total PV of just over \$576,000.



Training costs: 5% of total costs

Training Costs: Calculation Table

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
I1	Number of IT training session seats used		150	80	40	40
I2	Cost per training session seat		\$300	\$300	\$300	\$300
I3	End user training		\$170,000		\$170,000	\$170,000
It	Training costs	$(I1 \times I2) + I3$	\$215,000	\$24,000	\$182,000	\$182,000
	Risk adjustment	↑10%				
Itr	Training costs (risk-adjusted)		\$236,500	\$26,400	\$200,200	\$200,200

Ongoing System Administration Costs

The composite organization requires two FTEs to administer and support for Microsoft Surface users and Microsoft 365 Enterprise E5 workloads. These employees are responsible for: configuring and deploying new Surface devices; updating, supporting, and provisioning Microsoft 365 Enterprise E5 workloads; rolling out new solution components; and answering help desk tickets related to Microsoft technologies. Lastly, the composite organization requires incremental bandwidth to implement and run its Microsoft 365 Enterprise communication and collaboration solutions, cloud storage, and SharePoint sites.

The level of ongoing administration and support will vary depending on the number of users, the specific workloads, and technical skills and Microsoft technology familiarity within the IT organization. To account for these risks, Forrester adjusted this cost upward by 5%, yielding a three-year risk-adjusted total PV of \$1.7 million.



Two FTEs
spend 100% of their time on ongoing management of Microsoft Surface and Microsoft 365.

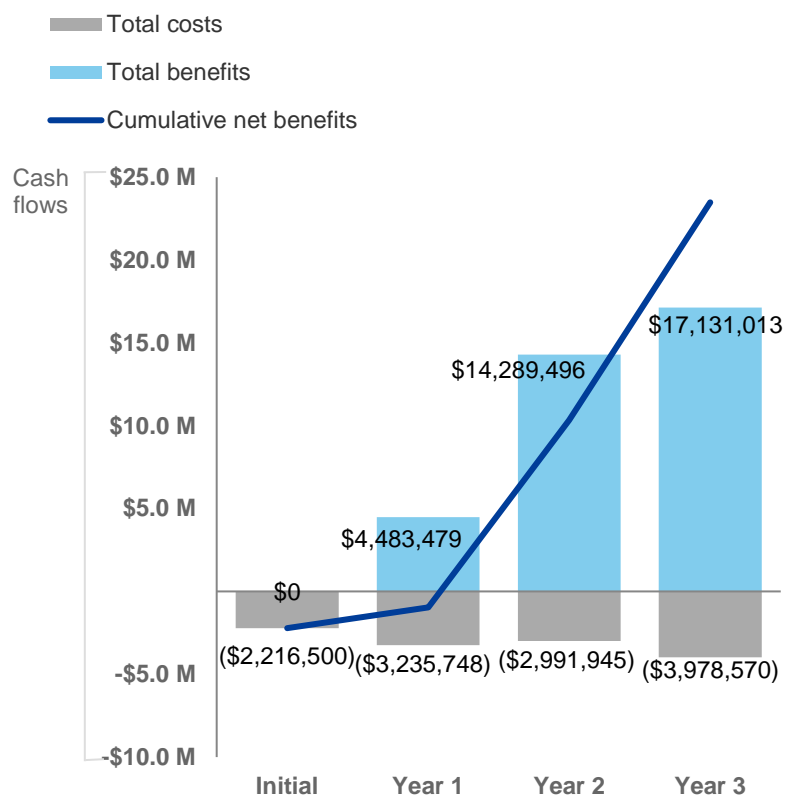
Ongoing System Administration Costs: Calculation Table

Ref.	Metric	Calculation	Initial	Year 1	Year 2	Year 3
J1	Number of FTEs			1	5	10
J2	Fully burdened cost			\$125,000	\$125,000	\$125,000
J3	Incremental bandwidth			\$24,000	\$24,000	\$24,000
Jt	Ongoing system administration costs	$(J1 \times J2) + J3$	\$0	\$149,000	\$649,000	\$1,274,000
	Risk adjustment	↑5%				
Jtr	Ongoing system administration costs (risk-adjusted)		\$0	\$156,450	\$681,450	\$1,337,700

Financial Summary

CONSOLIDATED THREE-YEAR RISK-ADJUSTED METRICS

Cash Flow Chart (Risk-Adjusted)



The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.



These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

Cash Flow Analysis (risk-adjusted estimates)

	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	(\$2,216,500)	(\$3,235,748)	(\$2,991,945)	(\$3,978,570)	(\$12,422,763)	(\$10,619,929)
Total benefits	\$0	\$4,483,479	\$14,289,496	\$17,131,013	\$35,903,988	\$28,756,175
Net benefits	(\$2,216,500)	\$1,247,731	\$11,297,551	\$13,152,443	\$23,481,225	\$18,136,246
ROI						171%
Payback period (months)						14.0

Microsoft 365-Powered Surface Devices: Overview

The following information is provided by Microsoft. Forrester has not validated any claims and does not endorse Microsoft or its offerings.

The Microsoft Surface device portfolio continues to evolve to deliver new experiences, including new device categories and accessories, for customers as part of a modern work solution for professional and education organizations. The portfolio is designed to support work from anywhere, getting things done however you work your best, and connecting and collaborating with your teams. You can find more information at Surface.com/Business.



Devices designed for work anywhere

We find ourselves adapting to a new way of working and adjusting our expectations for how we get our work done. We have become more flexible in where we work, whether it's in our home office or at our kitchen table. But where we don't want to make a change is in what we know we can achieve. Staying focused on our goals has become a goal itself.

Creativity, innovation, and collaboration are now more valuable than ever. Teamwork has become more important. Secure, reliable access to data and information is vital. Everyday activities we take for granted — like team meetings and one-on-one chats, using several apps at once, or even just typing — need to be seamless. Technology should help us stay focused and productive without introducing new obstacles to overcome.

Surface offers choice, value, and a premium experience across the portfolio of devices, from Microsoft's compact, lightweight Surface Go to the powerful, all-in-one desktop Surface Studio 2. No matter where or how they work, there is a perfect match for everyone on your team, whether they depend on essential apps vital to their everyday tasks or need pro-level storage and high performance to work in demanding, graphics-intensive software.

Get things done however you work your best

Wherever you work, stay focused to get it done quickly, comfortably, and in your own way. Call into virtual team meetings while prepping for dinner and be confident you can hear and that you are heard and seen. Work comfortably from your couch, quickly working your way through your inbox on the touchscreen and typing out responses with the Surface Type Cover* or Keyboards*. Check graphics-intensive tasks off your to-do list and get it all done with the performance, RAM, and storage your essential professional-grade software requires. Your home office is comfortable wherever you choose to work with support for Bluetooth-enabled ergonomic keyboards and mice.

Connect with your teams to collaborate anywhere

Make real connections with your teams, from virtual coffee chats to collaborating on complex projects, with hardware and software designed to bring people together. Bridge the distance between remote team members with built-in audio, mics, and cameras when you meet in secure Microsoft Teams* calls. Enable true team flow, collaborating across devices to brainstorm together with Surface Pen* in Microsoft Whiteboard* whether you're at home on your own Surface or gathered together around Surface Hub 2S on the manufacturing floor.

*sold separately

Appendix A: Total Economic Impact

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

Total Economic Impact Approach



Benefits represent the value delivered to the business by the product. The TEI methodology places equal weight on the measure of benefits and the measure of costs, allowing for a full examination of the effect of the technology on the entire organization.



Costs consider all expenses necessary to deliver the proposed value, or benefits, of the product. The cost category within TEI captures incremental costs over the existing environment for ongoing costs associated with the solution.



Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. Having the ability to capture that benefit has a PV that can be estimated.



Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.



Present value (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.



Net present value (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made, unless other projects have higher NPVs.



Return on investment (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.



Discount rate

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.



Payback period

The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

Appendix B: Consolidated Customer Quotes

Device Deployment

- › “For every Surface device we deploy, we save our IT team a half-day getting it on the network, imaging the device, setting up security requirements, and patching.” – VP and CISO, HR services
- › “We definitely get a lot fewer support calls immediately post-deployment with Surface devices. With non-Surface devices, two or three out of every five devices deployed would require immediate IT support.” – VP and CISO, HR services
- › “We used to spend the better part of a workday getting new devices ready for our end users. With Surface, the end user gets the device immediately and sets it up in 10 to 15 minutes. Microsoft Endpoint Manager, including Intune, does all the work for us.” – VP and CISO, HR services
- › “We’ve been able to hire people and have them simply enroll their personal device with their work account and have secure apps that our application can service without having to fully manage and enroll those devices. It’s been a great boon our ability to be agile, even in unforeseen circumstances.” – CTO, professional services

Device Management

- › “It was important for our IT team to begin to standardize our devices. The goal is to have one common piece of hardware to support rather than multiple models of desktops, laptops, and tablets.” – CTO, professional services
- › “Our investment was driven by a desire to standardize on one common piece of hardware, lowering IT costs by limiting the number of different devices they support while also simplifying the experience for end users.” – VP and CISO, HR services
- › “To update any given non-Surface device, it could take anywhere from one day to one week. Using Microsoft Endpoint Manager, including Configuration Manager, with Surface devices, it takes 45 minutes.” – VP and information security officer, financial services
- › “The best accuracy rate for applying patches we ever achieved on non-Surface devices was 80%. Using Microsoft Endpoint Manager, including Intune, with Surface devices, this is 95%. Every device where a patch misses costs us between five and ten business days of time and work to get the patch working properly.” – VP and information security officer, financial services
- › “When we get a support call, we already know what’s going on. This has led troubleshooting for Surface devices to take an average of 15 minutes, when it still takes an hour for other devices.” – VP and information security officer, financial services
- › “We have seen a big drop-off in the password reset calls from Surface device users because they are using Windows Hello, which is biometric. They no longer need to remember anything.” – VP and CISO, HR services
- › “Updating our field sales team presented a lot of challenges before Surface devices, as they wouldn’t connect to the VPN to get updates for long periods of time. Thanks to Surface, we’ve been able to reallocate one FTE whose sole role before was campaigning our sales team to perform system updates.” – VP and CISO, HR services

Security

- › “We have seen a 30% to 40% reduction in security incidents needing a person dispatched thanks to using Surface devices with Microsoft 365 E5.” – CTO, professional services
- › “It is now easier for us to control where our employees are accessing our systems from, be it an open Wi-Fi network at a café or any other location.” – VP and information security officer, financial services
- › “Conditional access also considers information from Microsoft Defender ATP. If a device is known to be infected or known to have a risk factor, it doesn’t have access to company resources.” – CTO, professional services

- › “Our new environment is all cloud based, so we can update devices as long as they’re connected to the internet. We’re no longer waiting days or even weeks for field devices to connect through the VPN.” – VP and CISO, HR services
- › “Anytime you have a mobile device, you need to take extra security measures. If a device is lost or stolen, we can take immediate action to remotely wipe the data from the device.” – VP and information security officer, financial services
- › “TPM 2.0 plus BitLocker gives us the assurance that when a device is lost in the field, it is near impossible to decrypt its contents.” – VP and CISO, HR services
- › “We’re saving massive amounts of time across IT, risk management, and legal on the reporting process when devices are lost.” – VP and CISO, HR services
- › “We use Windows Hello as third-factor authentication. To access a device, you not only need a password but also to use Hello’s facial or fingerprint recognition technology. It is fabulous.” – VP and CISO, HR services
- › “We have seen a 20% increase in system performance with Microsoft Defender ATP versus our previous solution.” – CTO, professional services
- › “Thanks to BitLocker and Windows Hello, we’ve been able to decommission our previous endpoint encryption service as well as our multifactor authentication service.” – VP and CISO, HR services

Collaboration

- › “We’ve seen increased SharePoint use from Surface device users. This has added to their productivity. They do not have to worry about version control. You can just do everything online together in real time or on your own time.” – Global corporate account director, manufacturing
- › “We do a lot of file collaboration as a team online now. Everyone knows who is updating what. We’re seeing 30% to 40% less time spent per file and eight less revisions per document.” – Global corporate account director, manufacturing
- › “We have been measuring that, and it has been higher among our Surface users that they tend to have more meetings. They have more interactive meetings in which they share screens or use Microsoft Whiteboard as part of the meeting.” – Head of product group, manufacturing
- › “The main productivity benefit is that the whole organization is on Microsoft 365 and Surface devices. All the devices are the same spec, so you do not have to worry about cameras not working or this guy not being able to get on because it is slow. It really streamlines the workflow, and it makes things easier.” – Global corporate account director, manufacturing
- › “We’ve seen a 50% uptick in collaboration measured by Teams meetings, screen sharing, and whiteboarding among Surface device users compared to non-Surface device users.” – VP and CISO, HR services
- › “Surface Pen has facilitated a new way of meeting. With it, we’re able to work in a larger group and all participate using Windows Ink. It’s become part of our culture, and it’s a boon to the exchange of ideas.” – CTO, professional services
- › “With Surface devices, we have seen better cross-departmental collaboration, faster decisions, more efficient work processes. We have been able to work from home and connect on various projects across the country.” – Survey respondent: IT director, manufacturing and materials

Productivity

- › “Versatility was the key factor in driving our choice of Surface devices. We no longer need to issue multiple devices, the extended battery life means more productivity on the go, and our IT costs shrink as we move toward standardizing on a single system.” – VP and CISO, HR services
- › CTO from the professional services company noted: “Microsoft 365 and Surface devices are helping our workforce be effective regardless of location or time zone. Being able to enable that experience for them while using premium hardware has been huge.” – CTO, professional services

- › “Our productivity benefits have come from the seamlessness of having our IT and business users all running on Microsoft ecosystem hardware, software, and cloud services.” – Director of corporate development, product, and GTM, enterprise IT
- › “We have a whole bunch of Microsoft tools that we use, and when everyone is standardized on the same software and hardware platform, it allows employees to be on a level playing field and makes being productive that much easier.” – Global corporate account director, manufacturing
- › “Our internal studies have shown anywhere from a 10% to 15% overall increase in productivity and reduction in time on task. We’ve also seen a 25% drop in support incidents and support time on task. So these devices are productive for employees, but also IT.” – CTO, professional services
- › “Our Surface users are more responsive to emails, they’re better prepared for meetings, they’re more on time for meetings, they don’t complain about their IT tools as much. I just think overall the experience is better.” – Global corporate account director, manufacturing
- › “I’m happy we switched because it’s now a lot easier for us to carry this device around and hop from meeting to meeting. It is smaller than the old computer I have. I can take it anywhere, and it is perfect for my home office. Also, the battery life is longer, and the charger is also smaller and better to carry around, so overall it’s a lot more practical” – Head of product group, manufacturing
- › “Millennials particularly enjoy that we issue Surface devices. They want to work at the cafeteria or from their home, and we can support that.” – VP and information security officer, financial services
- › “We saw productivity improvements of 12% to 15% average from Surface device users. Some teams experienced upwards of 20% improvement. It was amazing to see that amount of time saved each week because of Surface devices’ slick interface.” – Director of corporate development, product, and GTM, enterprise IT
- › “Surface makes our employees a lot more productive when on the go, switching offices, or heading from meeting to meeting. Surface and Microsoft 365 combined are more adapted to different environments. It makes work more convenient and a lot more flexible.” – Head of product group, manufacturing
- › “You can just take out a Surface and a Pen and just start writing on it, and it recognizes your handwriting. That makes it more intuitive and easier to use when our sales team is on the road and meeting with customers. That really adds a lot of value for us.” – Global corporate account director, manufacturing
- › “Deployment with non-Surface devices created inefficiencies. We would have users sometime sit around for two to three days before they got access to their device. Now they start working right away.” – VP and information security officer, financial services
- › “Everything Surface users are doing is faster. The machines perform better and are more consistent. If they were spending an hour in an Office file on another device, they’re probably now spending anywhere from 45 to 50 minutes doing the same thing on Surface.” – CTO, professional services
- › “We’ve definitely seen an increase in productivity. Surface users are logged into their devices more, answering more emails, and answering messages faster.” – VP and information security officer, financial services
- › “Account reps can now pull up our CRM 5 to 10 minutes before they walk into the client’s office and know all about that client on the Surface Pro. They’re more informed and more engaged with clients. It has really empowered our business.” – VP and Information security officer, financial services
- › “For Surface users, even during COVID-19, they’ve been able to be efficient and effective even though they haven’t been able to go into the office.” – Global corporate account director, manufacturing

Other

- › “Our salespeople are perceived better when pulling out a Surface device rather than a traditional laptop.” – CTO, professional services
- › “Eighty percent or more of our executives have ditched their non-Windows tablets in addition to their laptops in favor of Surface devices. We’re down to a few hundred of those non-Surface, non-Windows tablets from thousands. So, consolidation has been huge.” – CTO, professional services

- › “Sixty percent of our end users who previously had multiple devices are now using a single Surface device. This has cut our procurement costs dramatically, as well as our maintenance and support costs.” – VP and Information security officer, financial services
- › “We are also using Surface devices to replace screens outside conference rooms. Employees use them to log meetings, book new meetings, or look at the meeting schedule.” – Global corporate account director, manufacturing
- › “We do talk about the fact we issue Surface devices in our recruiting process. This news is favorably received, especially among tech employees.” – VP and CISO, HR services
- › “We especially benefit using Surface devices in front of our clients. When our field teams are presenting to clients and flip the device from its laptop to its tablet mode, that’s impressive.” – VP and CISO, HR services
- › “We now put the fact that prospective hires can get Surface devices into our literature for the recruiters and for the hiring managers.” – CTO, professional services