Corporate Mobile Policy Template

Updated July 2011

Three major changes have occurred over the past 18 months that require updates to your organization's mobile policy. These changes include widespread adoption of tablet devices, changes in wireless carriers and their approach to wireless data charges, and demands from employees to allow them to "bring their own device to work," also known as BYOD.

In this whitepaper, you will find:

> » A Corporate Mobile Policy Template including sections on General Policy Information, Eligibility, Acceptable Use, Financial Responsibility, Program Management, and Equipment
> » Key areas of consideration as you establish or update your mobile policy

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Introduction

Mobile expenses are one of the fastest growing business expenditures, but most mobile environments are characterized by little to no standardization of wireless devices and applications. This results in overspending, inefficiencies, and lack of visibility and control.

Establishing a mobile policy – or updating a policy that is 12 months old – is the first step to curtailing inefficiencies and overspending. Mobility managers must gain executive support for the program before they attempt to implement a policy. When an effective policy is combined with technology that provides controls over provisioning, organizations can provide better support for employees, exercise control over expenses, mitigate liability for inappropriate use of devices, and improve security.

What Has Changed Since the Last Policy Template (November 2009)

The previous trend of reducing the number of employees that were eligible for mobile devices has recently begun to reverse. Companies are now beginning to identify productivity gains from having employees use standard devices and applications. However, overly restrictive policies led managers to undercut the eligibility restrictions by approving mobile charges under corporate expenses. A new policy should reinforce the benefits of using group plans, and allow managers to submit requests for employees that need to be equipped with mobile devices.

Another issue that is affecting the enterprise is carrier subsidies that have accelerated widespread adoption of personal smartphones and tablets by employees, and led many of them to bypass the issue of eligibility for corporate paid devices. Often, these employees simply want to connect their devices to the network to access e-mail.

These tablets and smartphones may not have reliable features to secure access to the corporate network, or protect data. They are becoming endpoints for cloud computing that can add additional costs and security challenges for enterprises. In addition, organizations may face the worst of all worlds if employees expense the charges for these devices, and there are no controls or gains from economies of scale realized when deploying the devices to a large number of employees.

There are a number of sections in the policy that should be tailored for the specific circumstances of your enterprise. Other considerations include:

» Analysis of your corporate culture to determine how stringent the controls should be for mobile devices, software applications, web access, downloads and monthly spending

» A survey of job roles to determine mobile needs and standards for eligibility

» Creation of standard packages of devices including internal storage, applications, video capabilities, GPS, battery life, camera, resolution and other factors.

» Creation of standard packages of services for voice, data, and text messaging GSM for international travel.

This template was developed by Telesoft, a leading Telecom Expense Management provider, in conjunction with Network Trends Now and other telecom industry experts. It is based on industry best practices from hundreds of engagements and customer input on what works in different telecom environments. Key areas include General Policy Information, Eligibility, Acceptable Use, Financial Responsibility, Program Management, and Equipment.

General Policy Information

Policy Statement

COMPANY Inc. will, at its discretion and in accordance with this policy, provide employees with mobile devices ("Mobile Devices") and telecom carrier services, at COMPANY's expense, for the primary purpose of conducting COMPANY business. All Mobile Devices that are paid for by COMPANY are the property of COMPANY and the employee is responsible for ensuring the appropriate use of the Mobile Device, as well as the security and safe keeping of the Mobile Device as outlined in this policy.

Goals

This policy shall:

>   » Support employees' job duties with mobile communications
>   » Promote employee safety when using mobile communications
>   » Limit corporate liability
>   » Improve management of mobility costs
>   » Enhance corporate data security and network security

The policy establishes eligibility for company-owned Mobile Devices based on job roles and responsibilities, and it sets procedures for monitoring and controlling costs related to use of Mobile Devices in connection with company business. This Mobile Device and Carrier Policy ("the Policy") outlines the Mobile Device options supported by COMPANY, guidelines for acceptable use, and other administrative issues relating to Mobile Device acquisitions and reimbursements.

Scope

This Policy applies to all employees, contractors, consultants, temporary and other workers at COMPANY in the United States, including all personnel affiliated with third parties that maintain a Mobile Device on behalf of COMPANY. This includes all North American Business Units and Corporate employees whose primary office is located within the United States. (Employees in other regions shall follow policies set for their region.)

This Policy also applies to all Mobile Devices that connect to a COMPANY network or reside on COMPANY sites that provide wireless connectivity including, but not limited to cellular phones, smartphones, tablets, and laptops. This includes any form of wireless communication device capable of transmitting packet data.

Policy Owner

The EXECUTIVE TITLE is the owner of this Policy. The Mobile Policy Board will convene quarterly to prioritize issues for the EXECUTIVE TITLE approval. The Mobile Device and Carrier Policy will be updated by the Board as required. The EXECUTIVE TITLE must approve any and all exceptions to the Policy.

Definitions

"Board" shall mean the Mobile Policy Board

"Company" shall mean COMPANY Inc.

"Employee" shall mean all personnel working in the North American Business Unit and COMPANY Corporate whose primary office is located in the United States.

"Mobile Device" shall mean any and all smartphones (Blackberry® devices), Bluetooth® devices, Windows® mobile devices, aircards, and cellular phones, pagers or similar communication devices. Any device that can be used to make or receive calls, push to talk, used to enable communication among cellular phones, wireless handsets, smartphones tablets, and laptops connect to a network, or a device that enables users to send or receive messages. This includes any device capable of transmitting packet data.

"Mobility Portal" shall mean the COMPANY Mobility Portal facilitated by Telesoft.

Compliance with the Policy

Compliance to this Policy will be measured by comparing an eligible employee's monthly invoice total (including all special charges) to the Monthly Consumption Targets set forth in Table One.

Failure to comply with this Policy will result in one warning. A second violation will lead to notification of the employee's immediate Manager and appropriate remedial action, which may include but is not limited to revocation of privileges or disciplinary action, including suspension or termination of employment. COMPANY reserves the right to deduct from the employee's pay any monthly charges that are in excess of the Monthly Consumption Targets, if such monthly charges are proven to not be business related.

COMPANY intends to make a concerted effort to notify employees of changes made to this Policy. However, COMPANY reserves the right to change, revise, withdraw or add to its policies, process, procedures or guidance at any time without notice if necessary.

Eligibility

Device Eligibility

Table One below defines who is eligible for a Mobile Device and the Monthly Consumption Target in US dollars (including special charges). When employees first log into the mobile device order portal, they will be assigned a package based on their job role. Example job role groups defined in Table One are derived from COMPANY's Human Resource system under the JOB CODE heading; this list will change from time-to-time. The COMPANY mobile expense management committee is responsible for maintaining and updating the full listing of Job Codes and their corresponding group and Eligible Packages.

Mobile Device spend will be monitored on a monthly basis, including reviewing consumption & trend analysis reports at the individual level. Access to the telephone numbers which have been dialed by the employee will only be requested when non-compliant activity has been has been detected in compliance with the privacy laws.

Mobile Device usage reports will be communicated to the individual employee on a monthly basis to create cost awareness.

Table One Monthly Consumption Targets and Eligibility *(*monthly targets vary based on your rates.)*		
Group (Examples)	Mobile Device Package	Monthly Consumption Target*
Title A	Basic	$22.00
Title B	Customer Facing Level I	$32.00
Title C	Customer Facing Level II	$57.00
Title E	Smartphone Level I	$46.00
Title F	Smartphone Level II (Manager/Exec)	$127.00
Title G	Tablet Level I	$35.00
Title H	Tablet Level II (Manager/Exec)	$85.00
Title I	Not Eligible	$0.00

Employees are responsible for knowing their package costs as outlined above. The Mobile Policy Board is responsible for maintaining and updating the packages.

The Monthly Consumption Target includes costs for data and international calling, and considers the employee's base location. Managers may at their discretion, choose not to provide a Mobile Device for their employee, even though the employee may be eligible per the above table.

The Mobile Policy Board must approve exception requests for Mobile Devices. The Board meets on a quarterly basis to review exception requests.

To ensure the security of COMPANY's network, no external employee-owned devices (iPhones, iPads, Smartphones, Blackberrys, laptops, PDA's, etc.) are allowed to be used on the COMPANY's network, and employee-owned devices are not permitted to be connected to COMPANY's e-mail service.

Alternate:

To ensure the ongoing security of COMPANY's network, only the following employee owned devices: <List the approved manufacturer(s) and model (s)> are allowed to be used on the COMPANY's network for e-mail service. If personnel no longer work for the COMPANY, all corporate data will be remotely wiped from devices. Personnel are not permitted to store data on remote memory cards. The COMPANY is not responsible for accidental deletion of personal data on devices that connect to corporate e-mail.

Mobile Devices will not be issued to student workers, contractors, temporary personnel, consultants, or other workers without out prior approval from the Mobile Policy Board. Part time workers performing technical functions may be eligible for a Mobile Device.

Aircard Eligibility

Aircards are devices that facilitate wireless connectivity for laptop computers through a Wireless Carrier's network. COMPANY allows Aircards on a very limited basis. Where applicable, Aircards have been included in the package and Monthly Consumption Target.

Text Messaging

Text Messaging or SMS is provided in all packages. Text Messaging costs count towards the Monthly Consumption Target and, therefore, text messaging should be minimized.

Text Messaging through a Mobile Device is different from using Microsoft Office Communicator or Lotus Notes Sametime on a Smartphone. These services utilize the Smartphone's data plan without additional charges from the wireless carrier. The use of Sametime or Office Communicator is acceptable providing that data consumption stays within the allowance for data service plans.

Mobile Data Costs

Mobile data plans are provided in select packages. Data consumption costs count towards the Monthly Consumption Target and, therefore, data use should be minimized. Currently, our carrier service plans allow for unlimited data usage, but this may change in the future. Sending and receiving e-mail, photographs, web browsing, GPS and software applications all use data when employees are using the carrier's network. A number of inappropriate websites are blocked through our IT policy management protocols. If you are unsure, refer to our COMPANY Code of Conduct and refrain from accessing unknown websites with your

mobile device(s). Employees should not use personal devices to access Facebook or sports websites. A more complete listing of banned websites and categories is listed on the corporate intranet at: http://www.companyintranet.com.

Employees may use secure corporate Wi-Fi networks at corporate locations and their carrier's network. Employees must never use any other public networks.

International Calling

International Calling can be very costly and these features are only included in a select number of packages. Employees with regular business travel and interaction outside of the borders of their business country are eligible for these plans. Employees that have infrequent international travel should make arrangements with the Mobile Policy Board for a loaner device that has been optimized for the international regions in which they will be traveling.

Employees are encouraged to use alternative communications such as a landline while transacting business in a COMPANY facility abroad.

Acceptable Use

Use While Operating a Motor Vehicle

The safety of COMPANY's employees is critical to our ongoing success. Therefore, COMPANY requires all employees with a company issued Mobile Device to utilize hands-free equipment when using the Mobile Device while operating a company owned vehicle, personal vehicle, or rental vehicle for business.

Only voice calling with hands-free equipment is permitted. When dialing a number, employees should pull over to the side of the road for safety. Employees may also use voice activated calling or pre-programmed numbers providing it does not distract from safe driving. Any other Mobile Device enabled activity that prevents an employee from focusing on driving such as surfing the internet, text messaging, checking email, use of applications, or other activities, is prohibited.

The Company requires its employees to adhere to all federal and state laws and regulations regarding the use of Mobile Devices. For more information on the specific laws and regulations in your state, access this link:

http://www.statehighwaysafety.org/html/stateinfo/laws/cellphone_laws.html

Personal Use

Charges associated with using a company provided Mobile Device for personal communications, including text messages, email and voice calling, will count towards the Monthly Consumption Limit. Therefore, personal use of a company provided Mobile Device should be minimized.

Use in Accordance with COMPANY Code of Conduct

No employee is to use company-owned Mobile Devices for the purpose of illegal transactions, harassment, or obscene behavior, in accordance with other existing employee policies.

Financial Responsibility

Travel & Entertainment

COMPANY will no longer approve Mobile Device expenditures through the Travel and Expense Reporting System for any employee that is eligible for a Mobile Device under this policy.

Employees who are not eligible for a Mobile Device may continue to process Mobile Device expenditures utilizing the Travel and Expense Reporting system with prior approval by their manager or supervisor. Expenditures processed through the T&E system must be reasonable and will be monitored.

Invoice Payments

All COMPANY invoices will be charged to applicable Cost Centers. All COMPANY invoices will be processed through a third party Telecom Expense Management ("TEM") provider. The TEM provider will verify that the contracted rates are applied to the invoice (e.g. that the rate per minute is correct), and that the Mobile Device was/is active. Once validation is complete, the TEM provider will forward the invoice to COMPANY for payment.

Early Termination of Employee Owned Personal Mobile Devices

Individuals who are approved for a Company Mobile Device will be personally liable for any early termination fees associated with an employee-owned personal mobile device and service plan if they decide to discontinue their personal services prior to the conclusion of their contract. These fees will not be reimbursed by the Company, and any expense submitted will be denied.

Porting of Existing Cell Phone Numbers

COMPANY will not transfer ("Port") personal cell phone numbers to a COMPANY Mobile Device. Exceptions may be made if not Porting a number would negatively impact COMPANY's customers. In addition, COMPANY will not Port existing COMPANY cell phone numbers between wireless carriers. Exceptions may be made if not Porting a number would negatively impact COMPANY's customers.

COMPANY cell phone numbers will not be ported to personal cell phone devices.

Program Management

Governance and Process

The Mobile Policy Board is empowered to govern this Policy. Package selections, eligibility, compliance and exceptions are handled only through the Mobile Policy Board.

The Mobile Policy Board is made up of members of COMPANY Procurement, COMPANY Business Analyst and the Telecom Category Owner. Further, COMPANY's Telecom Expense Management (TEM) partner maintains the Mobile Device inventory and is a member of the Mobile Policy Board.

Ordering

Local Points of Contact ("POC") have been designated for each business site. Employees should contact their local POC to place orders for new phones or to make changes to their existing phones (e.g. warranty repairs, etc.).

Manager approval will be requested by the Mobile Policy Board prior to processing all Corporate Mobile Device Request Forms.

The TEM provider will verify Employee eligibility for all requests. Requests submitted that do not meet the eligibility requirements by Job Code will be denied and returned to the requestor.

New Features

New features and equipment that become available will be evaluated by the Mobile Policy Board, and those deemed beneficial with a business justification and ROI for COMPANY will be added to the Packages.

Additional features not included in the packages may not be added by Employees or by POCs.

Redeployment

Local POCs will redeploy COMPANY owned Mobile Devices not in use prior to ordering new devices.

Accessories

Accessories provided with the package can be found at the MOBILITY PORTAL. Other accessories, such as bluetooth headsets, are not provided by COMPANY. Employees may, at their own expense, purchase other enhanced accessories. A listing of enhanced accessories that have been certified to work with COMPANY Mobile Devices can be found at the MOBILITY PORTAL. COMPANY does not offer technical support for enhanced accessories.

Software, Ringtones and Other Downloads

Approved software can be found at the mobility portal, and approved applications are pre-installed on devices. Additional software applications, ringtones, and downloads are not provided by COMPANY. Mobile applications may adversely affect performance of devices and batteries, and consume data. Employees may, at their own expense with a personal PayPal account, purchase approved applications as listed on the COMPANY intranet (http://www.companyintranet.com) from the Blackberry Applications Store, Android Marketplace, and Apple App Store. All other applications require approval from The Mobile Policy Board.

Employees should not download applications from other sites since these sites may have viruses and malware that can affect security and device operability.

COMPANY does not offer technical support for software downloaded from any of the listed application stores. Ringtones, music or other items must not be downloaded.

COMPANY will not approve Mobile applications expenditures through the Travel and Expense System.

If an employee is no longer employed by COMPANY, they shall forfeit any software that has been purchased for the device.

Liability

COMPANY will not assume liability for personal wireless devices. All Employees that are eligible for a company issued Mobile Device will receive a company issued phone number.

» COMPANY will NOT assume liability for early termination of employee paid personal wireless devices.
» COMPANY will NOT transfer any personal phone numbers to Company issued Mobile Devices unless not transferring a personal phone number would negatively impact a COMPANY Customer.

Equipment

Approved Equipment

Approved Equipment Packages can be found at the MOBILITY PORTAL.

Replacement Equipment

Equipment provided to an employee that is lost, broken, or stolen may be repaired or replaced and charged to the employee's cost center unless it is a proven defect of the equipment. Lost, broken or stolen devices must be reported to the local POC immediately by either the employee or their manager.

If an employee reports more than one lost, broken or stolen device in a 12-month period, the employee may be subject to appropriate disciplinary action regarding the misuse of a company asset. This action may include a deduction from the employee's pay for replacement of the hardware.

Loaner Equipment

Local POCs will have a small supply of Mobile Devices available for short-term assignment.

All policies for appropriate use of company-owned devices (stated above) also apply to company loaner Mobile Devices.

Employee Responsibility

Mobile Devices owned by COMPANY and used to conduct business must be used appropriately, responsible, and ethically. The following must be observed:

- » Company-owned Mobile Devices are the property of COMPANY and must be treated, used, and safeguarded as such. If an employee damages or loses a company-issued Mobile Device, the employee must notify their manager immediately.
- » If an employee damages or loses a company issued Smartphone Mobile Device, their manager is responsible for notifying CONTACT immediately to have the device de-activated.
- » No employee is to use company-owned devices for the purpose of illegal transactions, harassment, or obscene behavior, in accordance with other existing employee policies.
- » Employees are prohibited from using a company-issued Mobile Devices while operating a motor vehicle unless utilizing a hands-free device. Further, if state or local laws are more restrictive, the employee must follow the appropriate law.
- » Mobile Devices must not be loaned to, or used by, others.
- » All employees with a company issued device will utilize # dialing where available.

Important: All users of Company-provided Mobile Devices are subject to random audits by their Managers and the Board to ensure compliance with this policy.

Conclusion

When an effective mobile policy is combined with mobile provisioning technology, organizations can reduce mobile expenses, better support employees, improve efficiencies, mitigate liability for inappropriate use of devices, and improve security.

Telesoft Mobility Management solutions reduce wireless expenses by automating mobile provisioning, invoice management, usage management, mobility reporting, and helpdesk functions. The Telesoft Mobile Provisioning Portal provides a web-based portal to enforce

mobile policy and give end-users the ability to easily request or cancel devices and service plans, upgrade services, or replace devices from a single interface across all carriers.

Next Steps

Free Wireless Cost Savings Analysis

Let Telesoft help you uncover hidden wireless savings. In just 30 minutes we will:

» Show you how much you can save with wireless expense management
» Pinpoint opportunities to lower your current wireless expenses
» Provide a detailed report showing the savings you can expect in five major areas of wireless expense management

Try it now

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