

Forrester Opportunity Snapshot: A Custom Study Commissioned By AWS | May 2018

Optimize Your Cloud Performance With Proactive Support

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Optimize Your Cloud Performance With Proactive Support

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Overview

Cloud has become a key pillar of most enterprises' digital transformation strategies. Businesses are both migrating new processes to the cloud and augmenting their existing cloud operations to take advantage of new and evolving services. However, these are complex initiatives that many organizations stumble through due to skill and knowledge gaps.¹ This ironically leads to slow and costly processes to implement and optimize systems meant to deliver speed and agility. Cloud and managed service providers offer support services, which have become much more proactive and strategically focused in response to market demand for increased levels of responsiveness, access to tools, and strategic guidance. Today's cloud support services are much more than just "insurance" to be used in reactive circumstances, and their value extends beyond reactive assistance.

In March 2018, AWS commissioned Forrester Consulting to explore the use of cloud support services and the related challenges and benefits. Our study found that using proactive cloud services can effectively accelerate IT transformation and facilitate robust understanding and visibility of an organization's cloud environment.



Location

100% US



Company size

- › 42% 1,000 to 4,999 employees
- › 41% 5,000 to 19,999 employees
- › 17% 20,000+ employees



Respondent level

- › 18% C-level executive
- › 12% Vice president
- › 39% Director
- › 31% Manager



Top industries

- › 19% Financial services and insurance
- › 17% IT
- › 12% Healthcare
- › 12% Manufacturing/materials

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Cloud Management Comes With Many Challenges

Cloud requires an array of new skill sets that many IT teams are learning as they go. While organizations are more comfortable with ongoing cloud operations, ticket response, and network design, they are often not equipped to easily migrate to or manage cloud on their own. Our study found that organizations struggle with:

- › Managing privacy and compliance.
- › Planning, architecting, and choosing services.
- › Initial implementation and optimization.

Cloud migration is a complex process that requires several considerations for each workload to ensure connectivity, interoperability, reliable application deployment, and monitoring.²

To what extent are the following aspects of cloud implementation and management challenging for you?

Privacy concerns	53%
Initial implementation of cloud services	51%
Understanding/comparing different cloud platform services	48%
Access to skilled personnel to implement/operate cloud environments	45%
Architecting for cloud-native applications	45%
Managing compliance levels across environments	45%
Managing latency	41%
Migrating applications to the cloud environment	40%
Security concerns	40%

Base: 100 cloud decision makers
Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, March 2018

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Firms Need Cloud Support Services To Go Beyond Reactive Issue Fixes And Be A Proactive Partnership

While 42% of firms rely on cloud support services for reactive support for ongoing issues — the traditional use case for cloud support — this is not their biggest need. Because of the challenges faced with cloud adoption, firms demand that service providers deliver skills, best practices, and tools that will make implementation and migration easier across the board.

Firms look to their service providers to be proactive, rather than reactive, and to fill in the gaps with subject matter expertise and guidance to help achieve their desired business outcomes.



Skills shortages remain the largest single barrier to achieving cloud success — leading customers to look outside their organizations for proactive and strategic help.³

What are your needs when using cloud support services?

Access to expert skills needed to implement cloud services	49%
Access to guidance/best practices on how to achieve desired outcomes	45%
Access to operational tools/services that help alert to potential issues	44%
Access to reactive support for ongoing issues	42%
Access to training for developers and user SMEs	35%
Visibility into road maps of future functions provided by CSP	34%
Support for specific events/to enable specific business priorities	34%

Base: 100 cloud decision makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, March 2018

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Cloud Support Services Have Evolved Into Essential Solutions

Cloud support has evolved to become much more than a reactive problem-solving service. Support extends the value of cloud services and accelerates implementation by providing best practices and guidance to help decision makers achieve business success.

Cloud support can ease security, implementation, support, and management challenges. Almost three-quarters of firms report that support services addressed their security and compliance concerns, as well as the initial implementation of the services themselves.



To what extent are support services beneficial in helping you to address these challenges?



74%
Security
concerns



72%
Implementation
of cloud services



70%
Managing
compliance



68%
Ongoing
cloud operations



65%
Ticket
resolution time



64%
Tracking
across resources

Base: Variable, percentage indicates "very beneficial"
Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, March 2018

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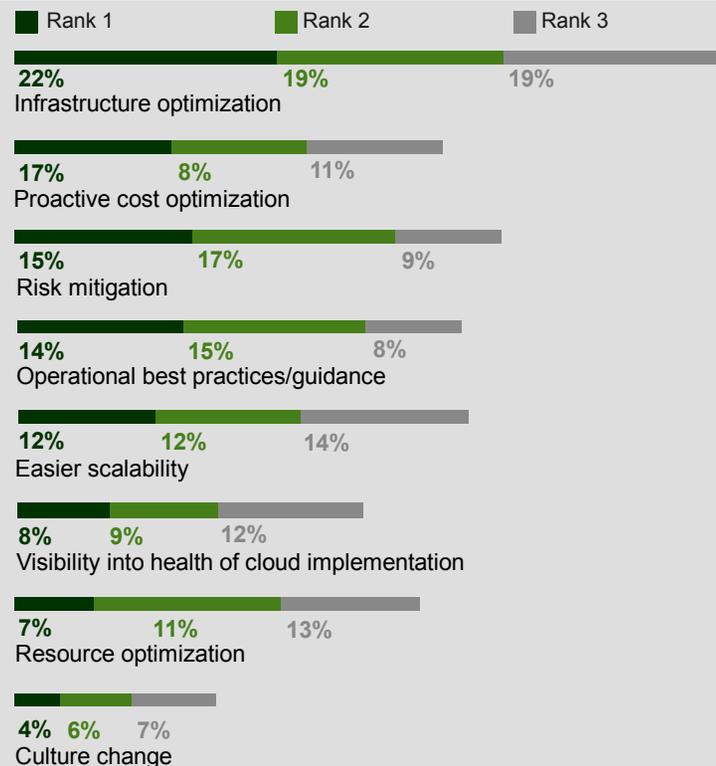
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Value Lies In Knowledge And Optimization

Growing the use of cloud — spurred by heavy migration — drives increasing requirements for continuous optimization across multiple dimensions. Customers perceive a lot of value in premium support services that can help optimize cost and infrastructure, mitigate risk, and offer best practices and guidance along the way.



Which of the following benefits of a support service are most valuable to you?



Base: 100 cloud decision makers
Source: A commissioned study by Forrester Consulting on behalf of AWS, March 2018

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Leverage Your Cloud Provider’s Premium Support Services For Best Results

While both cloud and managed service providers are popular resources, public cloud providers are the support service providers of choice. Consumers rely on their cloud service providers for implementation/adoption guidance already, so it’s no surprise that more than two-thirds of respondents choose to extend these same relationships to include advanced levels of support.

Respondents prefer to receive support from their public cloud providers because of their well-regarded product knowledge, due to cost advantages, and because they’ve already built a trusted relationship with them.

71% of respondents receive their cloud support services from their public cloud providers.



Why do you use a cloud provider (as opposed to other types of service providers) for cloud support services?



Base: 71 cloud decision makers who currently use a cloud provider for cloud support services
 Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, March 2018

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Cloud Support Services Deliver Significant Value

The desire for faster change implementation and better cost optimization drives cloud support use, but that’s not all. Customers have found that cloud service providers are brimming with guidance, and they say they rely on these providers for access to best practices and consultations with subject matter experts.

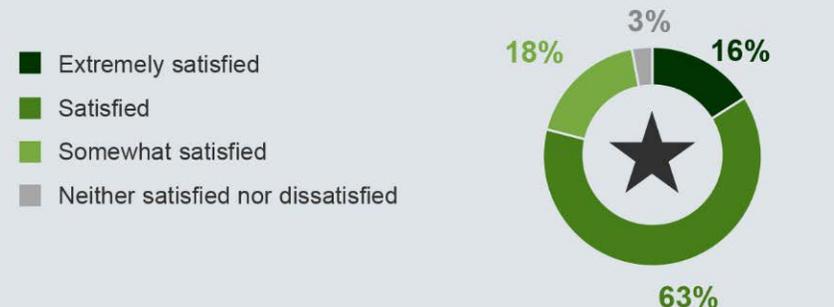
Whatever the reason, investments pay off. Ninety-seven percent of firms that use cloud support services say that they are at least somewhat satisfied with their investments, and not a single respondent is dissatisfied.

You indicated that your firm has used cloud support services. What were the key drivers behind this decision?



Base: 100 cloud decision makers
 Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, March 2018

How would you rate your overall satisfaction with your cloud support services?



Base: 100 cloud decision makers
 Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, March 2018

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Conclusion

Across industries, enterprises consider cloud to be an important strategic play, and they should consider their cloud partner relationships the same way. Support services have the potential to be much more than a reactive break-fix service and, in fact, are often drivers of cloud success, thanks to their significant value to infrastructure optimization, proactive cost optimization, risk mitigation, and more. Cloud service providers are well-positioned to be successful partners due to their deep product knowledge and often advantageous pricing.

ENDNOTES

- ¹ Source: "Use Managed Cloud Services To Speed Transformation — But Choose Carefully," Forrester Research, Inc., February 28, 2017.
- ² Source: "The State Of Cloud Migration, Portability, And Interoperability, Q4 2017," Forrester Research, Inc., January 5, 2018.
- ³ Source: "Understanding The Cloud Services Provider Landscape," Forrester Research, Inc., October 31, 2017.

ABOUT FORRESTER CONSULTING

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METHODOLOGY

This Opportunity Snapshot was commissioned by AWS. To create this profile, Forrester Consulting completed a custom survey of 100 cloud decision makers who are involved with their organizations' cloud implementation and support strategies, at North American enterprises that currently use cloud support services. The survey was completed in March 2018.

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