

# Is Your Cloud Provider Keeping Secrets?

Demand Data Transparency,  
Compliance Expertise, And Human  
Support From Your Global Cloud  
Providers

## Table Of Contents

<b>Executive Summary .....</b>	<b>1</b>
<b>The Cloud Is Here To Stay But Falls Short On Customer Satisfaction.....</b>	<b>2</b>
<b>Don't Let Compliance Concerns Deter Cloud Adoption.....</b>	<b>2</b>
<b>Make Transparency A Requirement .....</b>	<b>3</b>
<b>Demand The Support You Need To Grow Your Cloud.....</b>	<b>4</b>
<b>Key Recommendations .....</b>	<b>5</b>
<b>Appendix A: Methodology .....</b>	<b>6</b>
<b>Appendix B: Endnotes.....</b>	<b>6</b>

### ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit [forrester.com/consulting](http://forrester.com/consulting).

---

© 2015, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to [www.forrester.com](http://www.forrester.com). [1-TV74PF]

---

## Executive Summary

As companies expand their use of cloud services, they need to be confident that their cloud providers aren't holding anything back and are committed to their success. Moving important workloads and data to the cloud requires trust, and trust always starts with honesty and competency. However, over 50% of cloud customers today say their cloud provider doesn't understand their company's needs or care about their success.

Given that level of dissatisfaction, it makes sense that cloud users want their providers to be more transparent and act as true partners. In order to feel comfortable growing their clouds, buyers want detailed compliance information to satisfy auditors, greater cost and performance transparency, and the ability to talk to an expert who understands their business when they have a problem.

In April 2015, iLandscape commissioned Forrester Consulting to evaluate the data and human elements missing from commodity public cloud services. We tested the hypothesis that experienced cloud users require greater support for compliance, demand operational transparency, and need engaged onboarding and support processes before they feel comfortable expanding their use of cloud services.

**Over 60% of companies can't expand cloud use because of challenges with compliance, transparency, and support.**

We conducted in-depth surveys with 275 infrastructure and operations (I&O) professionals in the US, the UK, and Singapore who are responsible for the selection of and support of relationships with their company's public cloud infrastructure service providers. Forrester found that these companies are indeed struggling with the level of support they currently receive, from initial onboarding to ongoing operations.

### KEY FINDINGS

Forrester's study yielded four key findings:

- › **Compliance concerns are a barrier to cloud adoption.** For almost half of companies surveyed, compliance and audit requirements have prevented them from successfully adopting new cloud services.
- › **Secrets will further stall cloud growth.** A lack of clear cloud usage and operational data results in performance problems, challenges with reporting to management on costs of performance, payment for resources that customers ultimately don't use, and unexpected bills. One hundred percent of companies felt financial or operational impacts from missing or hidden data.
- › **Today's cloud providers fail at onboarding and providing ongoing support to new clients.** Over half of companies surveyed are not satisfied with the onboarding and support processes provided by their cloud providers.
- › **Cloud expansion is slowing down.** At least 60% said that lack of operational transparency, compliance information, and solid support hinders them from expanding their cloud use.

## The Cloud Is Here To Stay But Falls Short On Customer Satisfaction

Cloud spending and adoption are both on the rise. Forrester forecasts the global public cloud market will reach \$191 billion by 2020, from \$53 billion in 2013.<sup>1</sup> Over 70% of companies surveyed for this study have been using cloud services for more than a year, so they have had time to experience a range of interactions with cloud providers.

Business plans are being built on cloud now, and if the cloud fails to deliver, it can result in serious business issues. Companies aren't just using the cloud — they *depend* on it. Indeed, 73% already rely on two or more cloud providers, making the experience with each provider matter even more.

Nevertheless, cloud providers fail to keep cloud users happy. When we asked survey respondents about their relationship with their primary cloud provider:

- › Forty-four percent reported that their provider doesn't know their company or understand their business needs.
- › Forty-three percent believe if they were a bigger customer, their provider would care more about their success. They feel their provider is just offering a commodity service.
- › Thirty-three percent said they get charged for every little question or incident and don't feel like a valued customer.

Furthermore, companies are even less satisfied with their cloud provider's compliance, transparency, and onboarding/support processes.

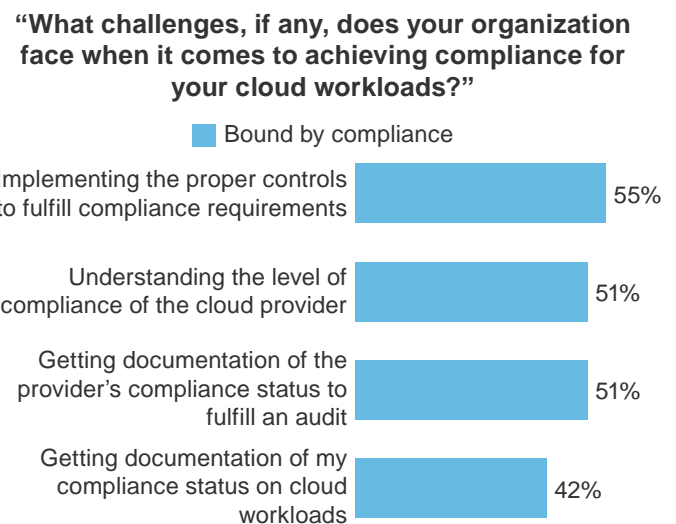
## Don't Let Compliance Concerns Deter Cloud Adoption

Who's responsible for your data in the cloud? You are. And if your organization is subject to regular audits, like the majority (72%) of the companies we surveyed, it falls to you to verify your compliance status, regardless of where your data lives. That's no small feat: Compliance concerns are a barrier to cloud adoption for almost half (47%) of the companies surveyed. But the point of compliance is to be transparent with your end users about your practices. When cloud providers hold onto or don't reveal this information, it prevents you from doing just that.

What's more, challenges with compliance restrict 63% of companies from growing their cloud usage. Companies reported a range of compliance challenges (see Figure 1), including:

- › **Fulfilling compliance requirements.** Fifty-five percent of companies bound by compliance indicated that implementing the proper controls to achieve compliance requirements is a top challenge for them.
- › **Understanding the provider's level of compliance.** Over half (51%) of these same companies find it difficult to understand the level of compliance their cloud provider offers.
- › **Getting access to the right level of documentation.** Fifty-one percent have difficulty getting documentation of the provider's compliance status to fulfill an audit, and 42% struggle to get documentation of their own compliance status for workloads they run in the cloud.

**FIGURE 1**  
Challenges With Achieving Compliance For Cloud Workloads



Base: 197 I&O decision-makers in the US, the UK, and Singapore who are responsible for their company's public cloud infrastructure and are bound by compliance

Source: A commissioned study conducted by Forrester Consulting on behalf of iland, May 2015

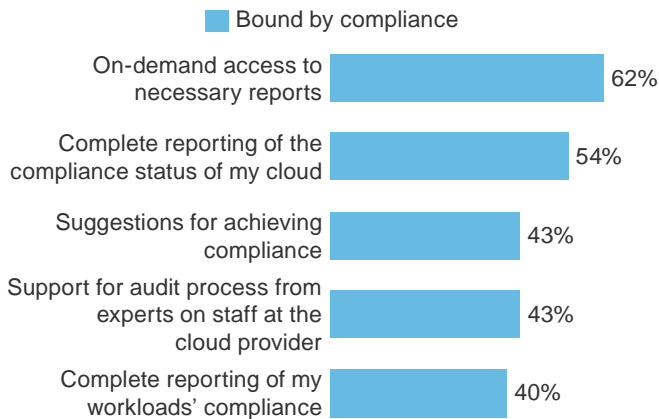
## DEMAND MORE FROM YOUR PROVIDER'S COMPLIANCE SOLUTION

If your company's cloud journey lacks the compliance support that you require to be successful, it's time to demand a compliance solution from your cloud provider that offers (see Figure 2):

- › **Useful reports.** Require access to complete reporting of your provider's compliance status as well as reporting of your own workloads' compliance. Among the I&O professionals surveyed, more than 60% want on-demand access to these reports.
- › **Audit support.** Ask for guidance for achieving compliance, but also mandate audit support from your cloud provider's compliance experts — the provider should have them on staff. Make sure you engage the provider's experts with your company's auditor for the best results.

**FIGURE 2**  
How To Improve The Compliance Process

“What would you need to make ongoing compliance and audit processes easier?”



Base: 197 I&O decision-makers in the US, the UK, and Singapore who are responsible for their company's public cloud infrastructure and are bound by compliance

Source: A commissioned study conducted by Forrester Consulting on behalf of iand, May 2015

You pride yourself on passing audits and communicating your security posture to your customers. Your cloud provider should deliver the data and support to bolster that goal — not hide the information you need to be successful. It should deliver customized alerts for compliance violations

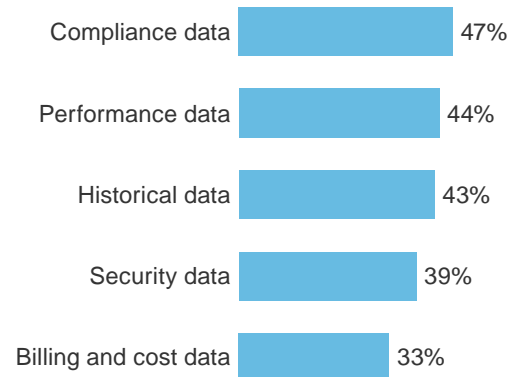
and give you the ability to monitor compliance and performance alerts yourself.

## Make Transparency A Requirement

Technology managers responsible for their company's cloud infrastructure want certainty and transparency for cost and performance metrics, but this requirement is often hard to articulate. Survey respondents indicated that they receive incomplete metadata about their cloud workloads, including compliance status, performance data, historical information, security data, and billing and cost metrics (see Figure 3). As a result, companies are forced to fill gaps by relying on tools provided by their cloud provider (41%), or by making new cloud purchase decisions that prioritize transparency (39%).

**FIGURE 3**  
Incomplete Data Across The Board

“Thinking about your cloud workloads today, in what areas do you feel the data you have is incomplete?”



Base: 275 I&O decision-makers in the US, the UK, and Singapore who are responsible for their company's public cloud infrastructure

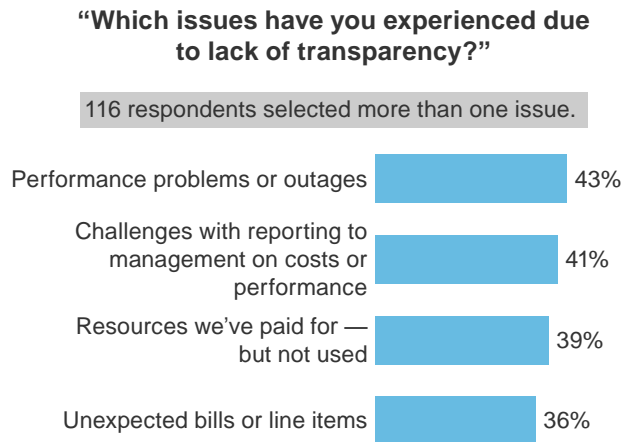
Source: A commissioned study conducted by Forrester Consulting on behalf of iand, May 2015

**Challenges with transparency restrict 63% of organizations from growing their cloud usage.**

But that's not all. Nearly two-thirds of organizations reported that transparency challenges limit their ability to do more in the cloud. A lack of transparency gives rise to a variety of issues, with performance problems or outages topping the list (see Figure 4). The rest of the concerns are cost-related:

- › Forty-one percent experienced challenges with reporting to management on costs or performance.
- › Thirty-nine percent paid for resources that weren't used.
- › Thirty-six percent received unexpected bills or line items.

**FIGURE 4**  
Issues Experienced Due To Lack Of Transparency



Base: 275 I&O decision-makers in the US, the UK, and Singapore who are responsible for their company's public cloud infrastructure

Source: A commissioned study conducted by Forrester Consulting on behalf of iLand, May 2015

What can you do to make sure you're not flying blind in the cloud? Look for a provider that offers improved visibility into metadata on workload performance, compliance, and especially costs. Nearly half of respondents told us they want this information in order to have a better relationship with their cloud provider. Don't settle for just seeing the data. Evaluate the native management tools to ensure they are easy to use, and include the analytics and alerting you need to stay ahead of the game.

## Demand The Support You Need To Grow Your Cloud

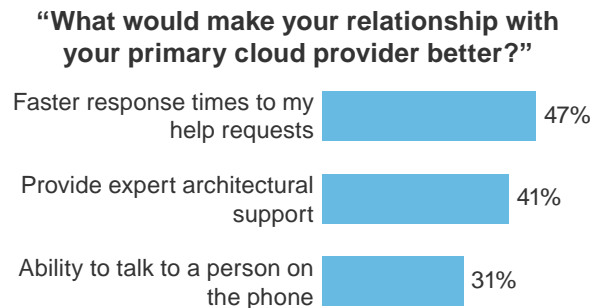
Moving applications and processes from running on your own infrastructure into the cloud isn't easy. Companies considering the public cloud need advisory and architecture advice and services to help them through this often disruptive transition. Yet a vast majority of providers fall short on the basic onboarding and support processes they offer to customers as part of cloud deployments.

Fifty-one percent of companies surveyed are not satisfied with their onboarding process, primarily because it took too long (26%) or lacked human support (21%). And 52% are not satisfied with the support process due to slow response times (22%), lack of expertise of the support personnel (20%), lingering support issues (19%), and higher-than-expected support costs (18%). These problems with support are keeping 60% of respondents from doing more in the cloud.

Forrester considers high-quality service and support key vendor differentiators in the public cloud market.<sup>2</sup> Your cloud service provider partners must deliver professional services to help you create the best architecture and implementation plan so that you can move workloads to the cloud with confidence and security. As you seek to grow your use of cloud services, look for a provider that gives you (see Figure 5):

- › Faster response times to help requests (47%).
- › Expert architectural support (41%).
- › Ability to talk to a person on the phone (31%).

**FIGURE 5**  
What Do Cloud Customers Want?



Base: 275 I&O decision-makers in the US, the UK, and Singapore who are responsible for their company's public cloud infrastructure

Source: A commissioned study conducted by Forrester Consulting on behalf of iLand, May 2015

In addition, 68% call a support phone number to receive cloud support. With so many relying on phone support, look for a cloud provider that actually staffs its phone lines with people who care about you. Can you reach your cloud provider when you need to?

## Key Recommendations

Whether you are a first-time cloud user or looking to grow your cloud portfolio, our research shows that your chances of success are greater with a trusted cloud provider at your side — one that gives you the technology and experts to solve your challenges. No one should have to take on greater business risk or accept subpar support in the quest to gain the economic and business agility benefits of cloud. For the most successful cloud experience, we recommend that you:

- › **Demand honesty and clarity about compliance data, processes, and expertise.** Your cloud provider can't keep any secrets. Look for a partner that offers proactive compliance, alerting you when something needs attention, and has comprehensive reporting and audit support to quickly resolve any issues. Make sure you can speak directly with the provider's compliance team.
- › **Get the performance, security, and cost data you need, when you need it.** As with any critical business relationship, you must verify the claims of your cloud provider. Your senior management will expect you to keep them informed as well. Are you getting the performance promised? How much are you spending? Are you being overcharged? Look for a cloud provider that's not afraid to share all the performance, security, and cost data you need to answer these questions.
- › **Look for a cloud provider staffed by experts who know who you are and who pick up the phone.** Are you just another account number to your cloud provider? Our research shows that providers that invest in the human element of cloud — such as helping with design and onboarding; offering access to experts; and having trained, caring human beings on the other end of the support line — will have a better relationship with their customers overall. And those customers, in turn, are much more likely to expand their use of cloud services in the future.

## Appendix A: Methodology

In this study, Forrester conducted an online survey of 275 organizations across industries in the US, the UK, and Singapore to evaluate the sales, support, compliance, and security elements from their cloud providers. Survey participants included decision-makers in infrastructure and operations responsible for their company's public cloud infrastructure. Questions provided to the participants asked about their satisfaction with the onboarding, support, transparency, and compliance processes with their primary cloud provider. Respondents were offered an incentive as a thank you for time spent on the survey. The study was conducted in May 2015.

## Appendix B: Endnotes

<sup>1</sup> Source: "The Public Cloud Market Is Now In Hypergrowth," Forrester Research, Inc., April 24, 2015.

<sup>2</sup> Source: "The Forrester Wave™: Public Cloud Platform Service Providers' Security, Q4 2014," Forrester Research, Inc., November 17, 2014.