FORRESTER®

A Holistic Resiliency Strategy Reduces Business Risk and Complexity

End-to-End Services Providers are Essential to Transforming Your Cybersecurity Ecosystem

Get started →

FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY DELL TECHNOLOGIES
SEPTEMBER 2022

Complexity Drives the Need For Comprehensive Solutions

Digital transformation is essential for continued innovation, but it has also made managing and securing organizations more complex. This current reality has drastically changed security complexity, forcing IT security teams to manage a myriad of vendors and tools that rarely contribute to unified environment management. Decision-makers focus on security basics like vulnerability management, data protection measures, recovery after a cyberattack, and overall risk. Leaders need trusted services partners to guide their strategy, implement key technologies, and manage critical security capabilities to create a connected cybersecurity ecosystem.

Dell Technologies commissioned Forrester Consulting to survey 300 global security, risk, and resilience decision-makers to understand their challenges in relation to increasing complexity, preparing for proliferating cyberattacks, and managing disparate security vendor relationships.

Key Findings

Ninety percent of decision-makers report that cybersecurity teams require more effective collaboration when it comes to security landscapes.

Eighty-seven percent of decision-makers said they would benefit from getting access to external expertise to reduce risk and fill operational gaps.

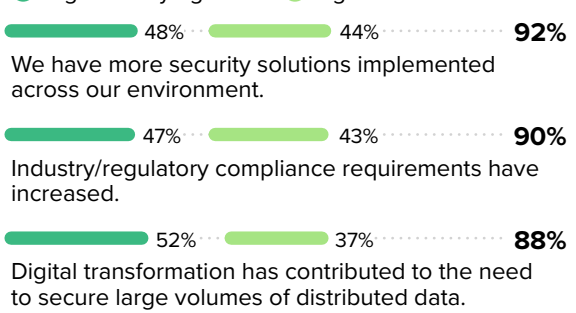
Eighty-four percent of decision-makers said a comprehensive solution that enables them to improve their security posture is very or extremely valuable.

Many Factors Significantly Increased The Number of Security Solutions

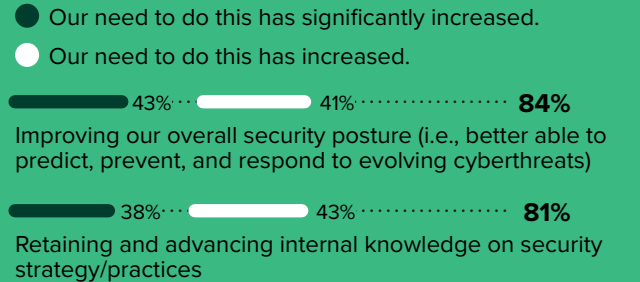
Security landscapes have become significantly more complex over the past two years. More than 90% of responding decision-makers have had to implement more security solutions across their environment. That complexity is exacerbated by business leadership demanding securely enabled workforces and an increase and expansion of both industry and regulatory compliance requirements.

In tandem with this rise in complexity, resiliency and security objectives have also increased in priority. Nearly 80% of responding decision-makers have increased prioritizing their overall security posture to support cyber resiliency goals.

"To what extent do you agree or disagree with the following statements about changes to your security landscape in the past two years?"



"Over the past two years, to what extent have the following resiliency and security objectives increased or decreased in priority?"



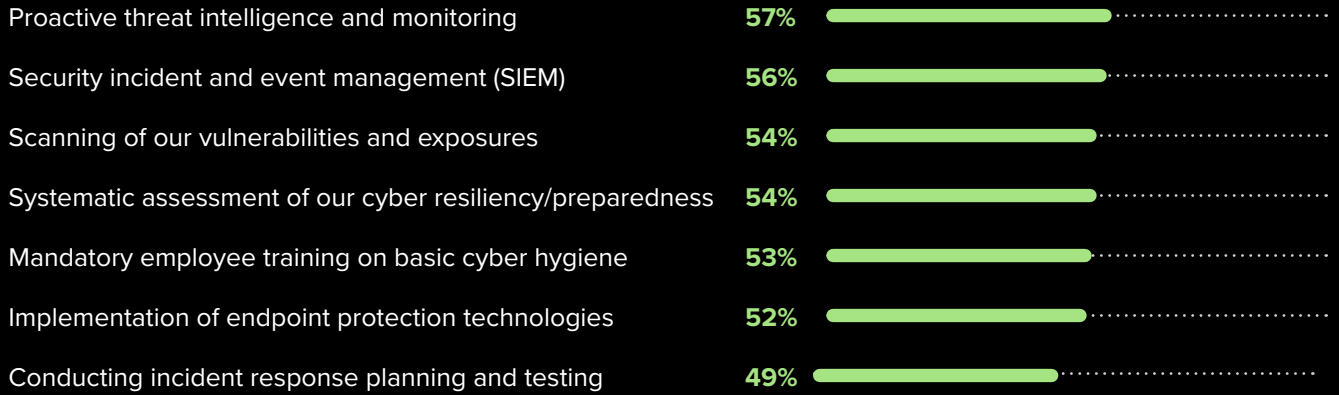
Base 300 Global security, risk, and resilience decision-makers
Note: Total percentages may not equal separate values due to rounding
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2022

Complexity Is Leading to Security Outsourcing

To address this rise in complexity, responding decision-makers have been focusing on the basics. More than 60% of leaders have already implemented data protection measures (68%) and recovery plans for after cyberattacks (63%), and they are managing risks associated with their vulnerabilities (62%). However, there are many key fundamentals that must go beyond implementation to build security and resiliency maturity through strategic capabilities — both internally and with partners.

Decision-makers are often outsourcing their security and resilience practices. Nearly a third of leaders have mostly or entirely outsourced security incident and event management (33%), the systematic assessment of their cyber preparedness (32%), and endpoint protection (31%).

"Which of the following practices have you already implemented as part of evolving your organization's resiliency and security strategy?"



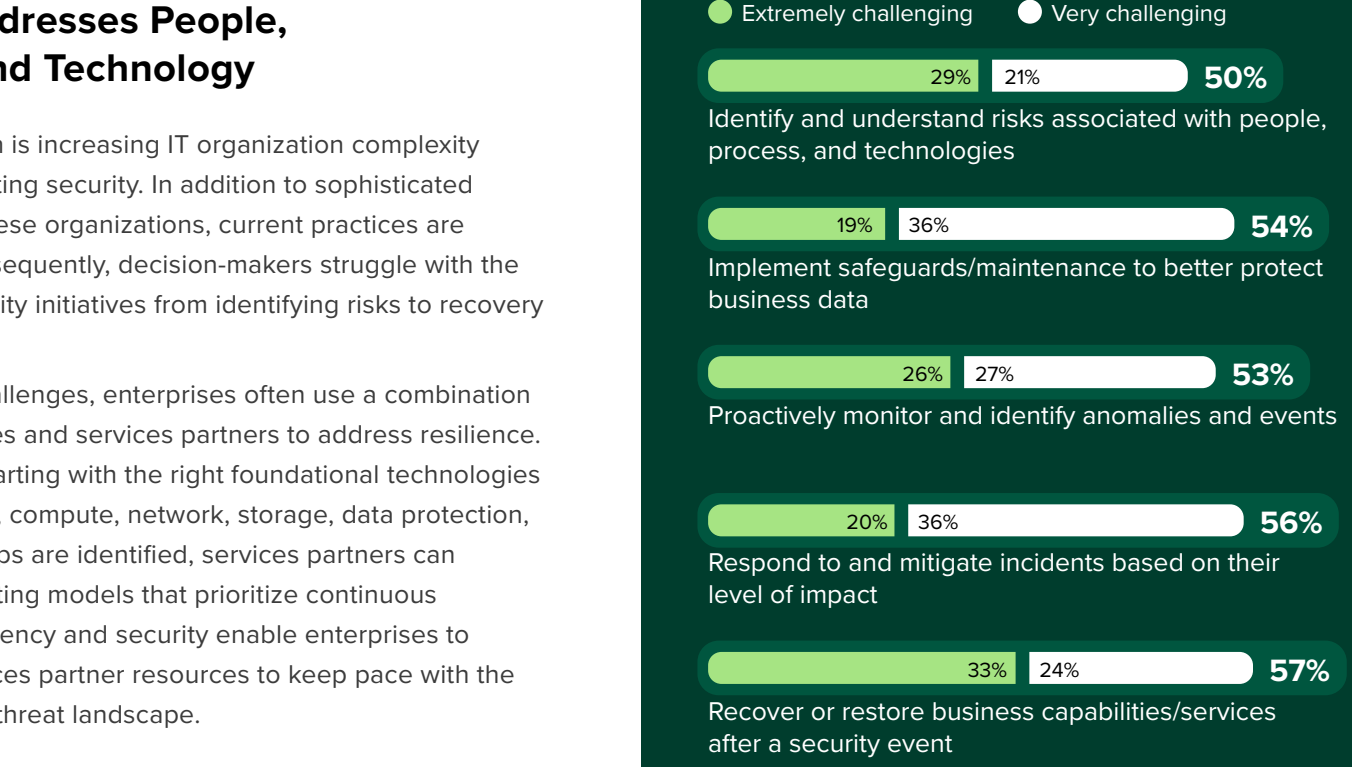
Base: 300 Global security, risk, and resilience decision-makers
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2022

A Balanced Approach To Resiliency Addresses People, Processes, And Technology

Digital transformation is increasing IT organization complexity and further complicating security. In addition to sophisticated attacks that target these organizations, current practices are lagging behind. Consequently, decision-makers struggle with the prioritization of security initiatives from identifying risks to recovery and restoration.

To address those challenges, enterprises often use a combination of internal approaches and services partners to address resilience. The basics matter, starting with the right foundational technologies that address devices, compute, network, storage, data protection, and cloud. Where gaps are identified, services partners can be leveraged. Operating models that prioritize continuous improvement of resiliency and security enable enterprises to blend staff and services partner resources to keep pace with the constantly changing threat landscape.

"Given your current practices, please rate how challenging it is to achieve each of the following within your security landscape."



Base: 300 Global security, risk, and resilience decision-makers
Note: Total percentages may not equal separate values due to rounding
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2022

Resources Are Spread Thin

In most cases, organizations struggle to hire, retain, and grow expert security resources to address security challenges, creating serious concerns for decision-makers. Negative financial impact — including lost revenue and fines/penalties for non-compliance — and a loss of customer trust are their top two concerns.

In addition, security and risk leaders must also prioritize protecting the business today while planning how they would respond to a cyberattack and recover business-critical applications. A holistic business resiliency strategy is required to address this range of challenges and concerns. Organizations need to balance investments across key areas through a blend of internal resources and external security partners.

"On a scale of 1 to 5, how much do you agree or disagree that the following are obstacles your organization faces in achieving its resiliency and security objectives?"

(Showing "Strongly agree" and "Agree")

Base: 289 Global security, risk, and resilience decision-makers
Note: Total percentages may not equal separate values due to rounding
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2022

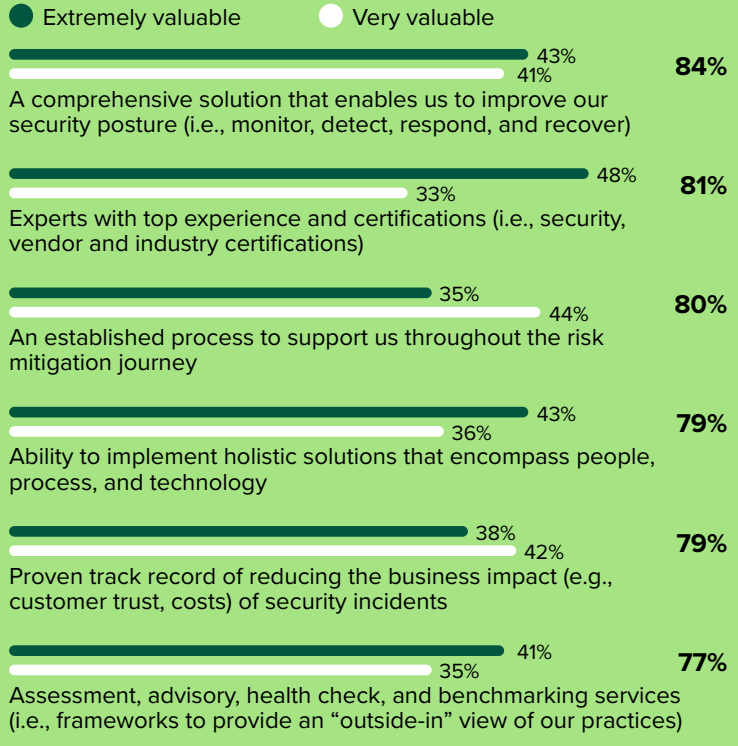
Security Leaders Seek Comprehensive Security Solutions

As decision-makers outsource security practices, they rely on service partners for advice, implementation support, and ongoing management. Those efforts are expected to continue to expand.

Today 59% of decision-makers rely on only one security partner, but 20% admit that not all their security needs are met. More than a third (36%) of respondents have to navigate managing relationships with multiple partners.

Eighty-eight percent of respondents said that they are looking for a repeatable assessment process that validates their organizations' risk identification, prioritization, and management strategies. Security leaders see value in partners that offer comprehensive solutions that enable them to improve their security posture (84%) and that can implement holistic solutions that encompass people, processes, and technology (79%).

"How valuable would each of the following be when selecting or working with a service partner to achieve your organization's resiliency and security objectives?"



Base: 296 Global security, risk, and resilience decision-makers
Note: Total percentages may not equal separate values due to rounding
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2022

Organizations Are Looking For Trusted Partners

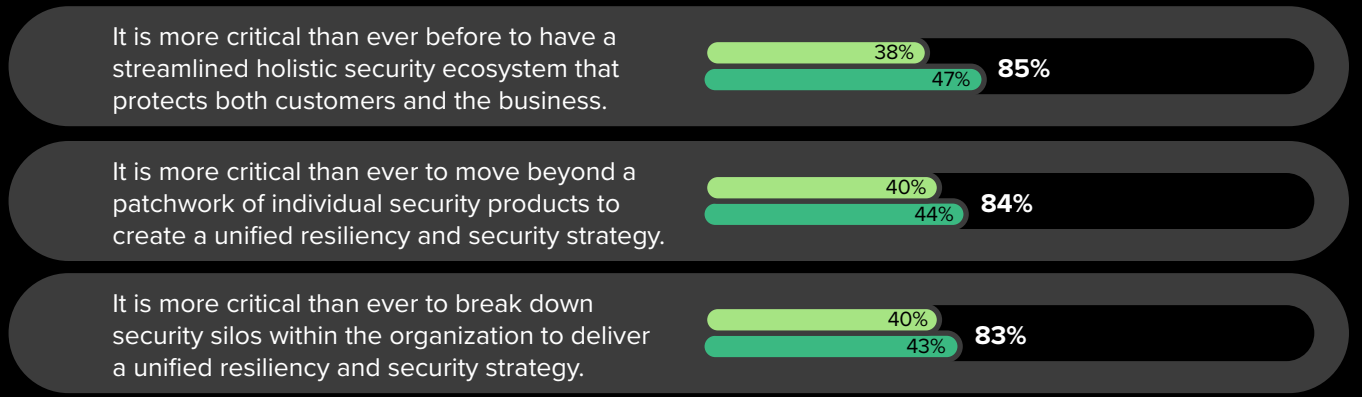
Due to the complexity of securing modern organizations, it is critical to have a security strategy that aligns people, processes, and technology. Achieving this on your own can be difficult, so finding a knowledgeable partner can ease the burden and free teams to focus on strategy and reducing business risk.

Decision-makers already leveraging security services partners have experienced key benefits such as more effective processes for detection, prioritization, and response to threats and vulnerabilities in their network (91%); continuous learning, education, and certification opportunities for their employees (90%); and adoption of technologies and policies to better protect the organization from endpoint to data center (91%).

87% of respondents agree that access to external expertise to reduce risk and fill gaps is a benefit.

"Please indicate your level of agreement with the following statements."

- Strongly agree
- Agree



FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY DELL TECHNOLOGIES
SEPTEMBER 2022

Base: 300 Global security, risk, and resilience decision-makers
Note: Total percentages may not equal separate values due to rounding
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2022

Conclusion

Addressing increasing complexity from digital transformation is essential to ensure the safety of the business and proactively combat increasingly sophisticated threats. As leaders seek services partners for help, they should:

- Evaluate partners that offer aid in standardizing best practices and offer proven methodologies that help secure the business and reduce risk.
- Leverage partners that address internal skills gaps today while providing strategic guidance and leadership for the security challenges of tomorrow. Partners can offer a range of experiences that may be missing internally while adding security team capacity.
- Prioritize partners that offer a unified resiliency and security strategy, can break down security silos within the organization, and move beyond a patchwork of individual security products.

Project Director:

Andrea Mendez Otero,
Market Impact Associate Consultant

Sophie Baboin,
Market Impact Consultant

Contributing Research:

Forrester's infrastructure & operations research group

Methodology

This Opportunity Snapshot was commissioned by Dell Technologies. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of 300 global security, risk, and resilience decision-makers. The custom survey began April and was completed in May 2022.

ABOUT FORRESTER CONSULTING

Forrester provides independent and objective research-based consulting to help leaders deliver key transformation outcomes. Fueled by our customer-obsessed research, Forrester's seasoned consultants partner with leaders to execute on their priorities using a unique engagement model that tailors to diverse needs and ensures lasting impact. For more information, visit forrester.com/consulting.

FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY DELL TECHNOLOGIES
SEPTEMBER 2022

Demographics

COUNTRIES	
United States	27%
India	20%
United Kingdom	12%
Brazil	10%
Germany	10%
China	9%
France	8%
Canada	3%

TITLE	
C-level	44%
Vice president	12%
Director	25%
Manager	19%

COMPANY SIZE	
100 to 499 employees	4%
500 to 999 employees	18%
1,000 to 4,999 employees	47%
5,000 to 19,999 employees	21%
20,000 or more employees	10%

POSITION/DEPARTMENT	
IT/IT Operations	86%
Finance/accounting	9%
Legal/governance, risk and compliance (GRC)	5%

INDUSTRIES	
Technology and/or IT services (e.g., electronics)	20%
Financial services and/or insurance	13%
Retail	13%
Healthcare	12%
Manufacturing and materials	9%
Consumer products good and/or manufacturing	6%
Energy, utilities and/or waste management	4%
Telecommunications services	4%
Construction	4%
Business or professional services	3%

INDUSTRIES (CONTINUED)	
Transportation and logistics	2%
Other (please specify)	1%
State, local and education (SLED)	1%
Consumer services	1%
Chemical and/or metals	1%
Agriculture, food and/or beverage	1%
Advertising and/or marketing	1%
Media and/or leisure	1%
Legal services	1%
Travel and hospitality	1%

Note: Percentages may not total 100 because of rounding

FORRESTER®