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Aiming to Increase UC Adoption? Look to Video. Pervasive Video Users Embrace UC by 30 Percent More

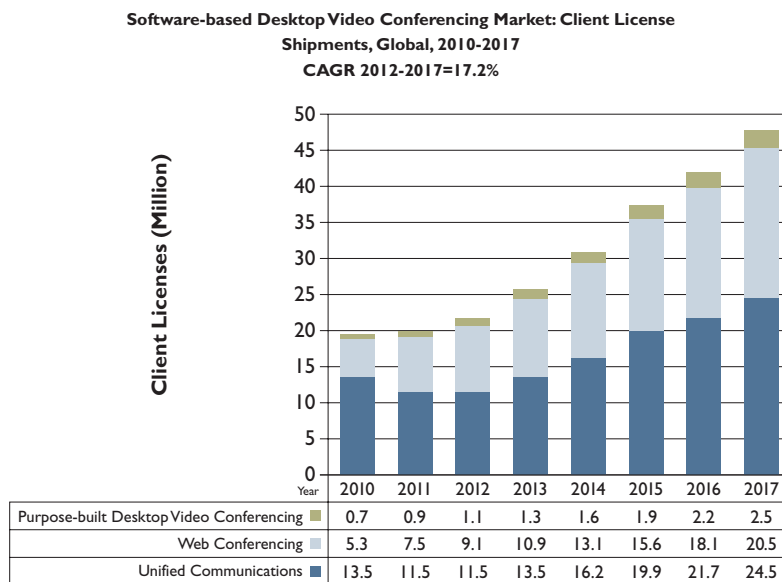
A Frost & Sullivan
White Paper

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There is a clear shift in how employees communicate today, compared with only a few years ago. Thanks to soft phones and unified communications (UC) clients, video conferencing has evolved from conference rooms to individuals at desktops. According to Frost & Sullivan research¹, desktop and laptop computers are end users' primary devices when video conferencing, rather than the once-dominant traditional video conferencing room. And with top-tier infrastructure vendors promoting inexpensive software clients and enabling partners to launch hosted, cloud and managed services with an emphasis on software-based desktop video conferencing, IT's priority will be connecting an increasingly flatter workplace of virtual teams, locally and globally.

In fact, Frost & Sullivan expects software-based desktop video conferencing client licenses to more than double by 2017, reaching 47.7 million client licenses sold. (Please see Figure 1.)



Source: Frost & Sullivan analysis

Figure 1: Software-Based Desktop Video Conferencing Clients

In order to maximize effectiveness and return on investment (ROI), companies must take advantage of new desktop and mobile software and peripherals that make it possible to deliver a high-quality video experience throughout the organization. According to a recent Frost & Sullivan survey of 263 C-level executives from a wide range of industries, businesses where video conferencing is deployed extensively at all levels also use other UC tools on average 30 percent more than other organizations. By ensuring everyone can benefit from video collaboration, communication will be more fluid and managers and executives can help employees at every level make faster, better decisions; speed work flows and development time; increase collaboration across geographic and cultural boundaries; and quickly jump on new business opportunities.

¹ Frost & Sullivan IT Decision Makers' Views on the Evolution of Enterprise Communications, Jan. 2013, N=880 IT decision makers, North America

Productivity benefits: Businesses generate value when collaboration delivers shorter sales and product-development cycles.

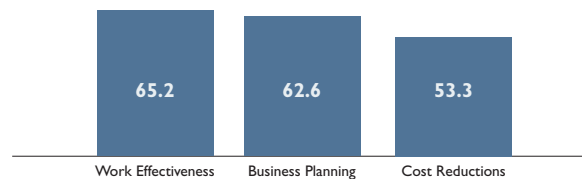
Strategic Planning benefits: Being able to connect the right people at any time and from anywhere lets teams make better strategic decisions in real time.

To drive successful video conferencing deployments, this article offers best practices for four key worker profiles within most organizations, with recommendations for determining the right combination of endpoint devices and peripherals for each group. The goal is to improve adoption and effectiveness of the organization's UC applications investments; a positive experience drives utilization, which is what any organization needs to transition to new ways of working and to achieve maximum ROI.

THE BUSINESS VALUE OF UC IS MORE THAN OPERATIONAL

When it comes to UC, it is not enough to measure ROI on just cost-savings. In fact, the recent Frost & Sullivan survey of 263 C-level executives shows that organizations are more focused on improving work effectiveness and business planning with their IT and communication investments. (Please see Figure 2.)

IT and Communications Belief Index-Mean Scores: United States, 2012



Source: Frost & Sullivan analysis

Figure 2: Perceived Value of Communications in the Enterprise

VIDEO CONFERENCING IMPROVES PRODUCTIVITY AND BUSINESS PERFORMANCE

As discussed, companies that reported using video conferencing extensively throughout the organization also reported using other communications tools as much as 30 percent more often than the general survey respondents. (Please see Figure 3.) What does this mean?

Better business enablement drives revenues: Extensive users of video conferencing generally have a better impression of enterprise communications and collaboration technologies, often by 10 or more percentage points. For instance, 100 percent of such users say video conferencing helps them accelerate decision making, compared with 58 percent of all survey respondents; and 75 percent say video helps improve customer service, compared to 53 percent of all respondents.

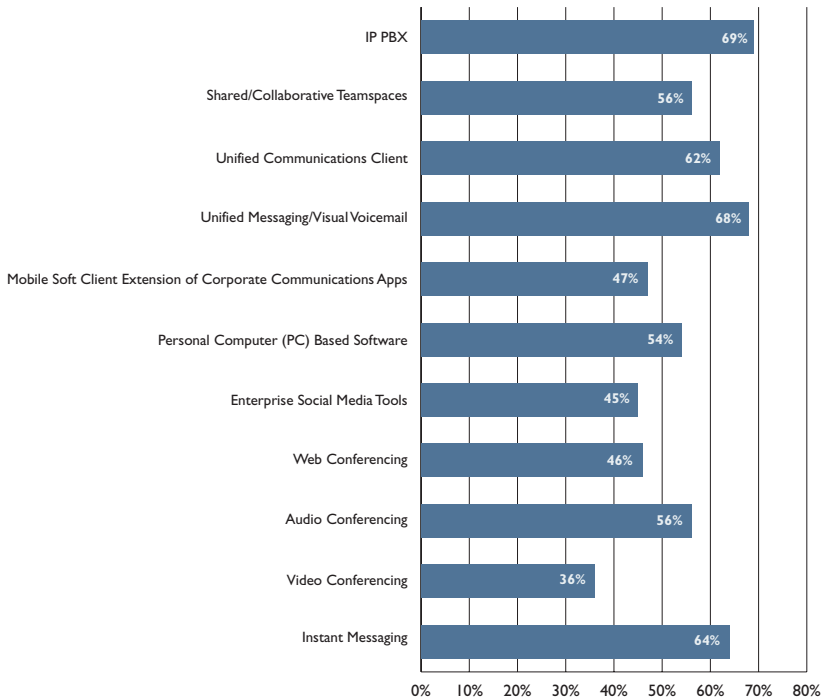
Effective work maximizes efficiency: 75 percent of extensive users of video conferencing say it improves collaboration and productivity across dispersed teams, compared with 56 percent of all respondents. And 50 percent of extensive users say it improves competitiveness, compared to 36 percent of all respondents.

Video conferencing supports the new workplace: 75 percent of extensive users of video conferencing say it enhances employee mobility, compared with 49 percent of all respondents; 63 percent say it helps advance corporate environmental goals, compared with 36 percent of all respondents.

DESPITE THE MOMENTUM, USERS RELY MAINLY ON VOICE

Although video conferencing is becoming more prevalent, the research shows it isn't yet the dominant means of business communication. Many employees still defer to instant messaging, audio conferencing or Web conferencing to communicate, and only 36 percent of businesses deploy this tool extensively at all levels. (Please see Figure 3.)

Extensive Use of UC Tools Throughout the Organization



Source: Frost & Sullivan analysis

Figure 3: How Tools are Used Within Organizations

One of the best ways to increase the ROI of UC is making video prevalent: the more employees use the technology, the more they and the organization will get out of it. But every employee is different, and what he or she needs in terms of applications and endpoints to support a rich video collaboration experience will vary according to his or her job role, location and personal preferences. Video collaboration tools shouldn't be deployed with a generic one-size-fits-all approach, but according to end-user needs; a mobile worker will require different capabilities than an office-bound employee, who, in turn, needs different tools than an executive or home-based worker.

Regardless of their job role, all employees need a combination of software, hardware and peripherals to personalize their experience and make them most effective at their jobs. High-quality webcams and headsets that integrate with video communications technology—and which are specific to certain use cases—can significantly increase utilization, drive productivity

and improve performance.

MATCHING TOOLS TO END USERS FOR MAXIMUM ROI

When companies deploy video collaboration solutions, they must pay close attention to the hardware their end users have access to (desktop, laptop PC/Mac, mobile device or small-group system) and the peripherals that can make the video session more productive for all involved.

- **External HD Webcams** deliver superior resolution, focus and flexible positioning compared with cameras embedded in laptops. Organizations should purchase industry-standard USB cameras with support for up to 1080p HD resolution as well as swivel, pan/tilt/zoom, wide field of view and other features that meet differing user preferences and environments.
- **USB Audio Equipment**, including USB speakers, microphones, and headsets, can be readily sourced to deliver HD audio, echo and noise cancellation, ergonomic comfort, and other features that improve the quality of multi-media communications, limit distraction and improve efficiency of interactions when matched to each user's specific tasks, preferences and work environment.

In working with our clients, Frost & Sullivan has determined that when it comes to successfully deploying video collaboration in the enterprise, customization for each user is critical to adoption and utilization. Customer feedback indicates that users of business-grade, software-based desktop video conferencing solutions have greater expectations compared with users of consumer solutions, and they are more likely to demand higher-quality components to facilitate a better experience.

All employees will benefit from an external webcam that is optimized for UC, offers HD quality for crisp video, and is easy to use thanks to plug-n-play capabilities. But given the vast array of software and hardware options, it's important to match the right technology to the right user. Frost & Sullivan recommends using the following "playbooks" to ensure maximum return on

your video collaboration investment.

WIN CHALLENGES	KEY NEEDS	KEY USERS	VIDEO	BENEFITS
I spend most of my days in meetings, taking video calls at my desk with external clients and customers. I need to be able to collaborate in a busy office environment.	Environmental noise reduction Sound quality Video quality	Customer care Client services Inside sales Management	<ul style="list-style-type: none"> • HD 1080p • H.264 to free up PC bandwidth • Webcam with integrated double mic 	Improved Collaboration With headsets and video cameras optimized for high performance in a noisy, busy office, I can stay focused and keep clients happy.
I have to provide regular updates to, and get feedback from, my team, including documents and blueprints.	Clarity of sound Autofocus Document sharing	Engineering Technical staff Marketing Product development	<ul style="list-style-type: none"> • HD • Wide field of view to share and collaborate in real time • Autofocus 	Global Team Support High-quality picture and document sharing lets me work with teammates around the world.
I am on the road at least half the time, and I have to maintain a professional communications experience.	Durability Reliability Ease of use Mobile persona Plug-n-Play	Sales Executives Field support	<ul style="list-style-type: none"> • Easy fold-and-go design for durability and portability • Autofocus • HD 	Remote Collaboration With mobile cameras and headsets, I can work from anywhere, on any network.
I have board meetings, customer meet-and-greets and other strategic meetings I need to attend virtually.	Very high performance You-are-there experience Quick set up	Executives Upper management Business owner	<ul style="list-style-type: none"> • Wide field of view • HD 1080p • Pan/tilt/zoom • Wide field of view to accommodate multi-party 	Constant Connectivity Even on all-day board meeting calls, high-quality audio and video improve remote decision making.

CONCLUSION

Video collaboration can have enormous impact on an organization's ability to increase productivity, improve decision making, shrink cycle times, enhance relationships and generally support the growing virtual workplace. These benefits accrue even more value when the technology is deployed to and used by a critical mass of employees, whether at their desks or on the go. But getting employee buy-in and adoption requires that companies also deploy the right set of tools to each user, based on job roles, location, and use cases. Software, hardware and peripherals that make video collaboration more personalized and easier to use will drive utilization rates, deliver better performance, and significantly improve ROI.

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