Top Unified Communications Trends For Midsize Businesses

Introduction

As the corporate landscape becomes increasingly mobile, and workers collaborate across a growing range of devices, organizations are implementing an agile and secure unified communications infrastructure. Active deployment of UC technology solutions has been on the rise among enterprises; however, adoption among midsize businesses has been notably slower. Yet in seeking ways to do more with less, midsize organizations are increasingly turning to the cloud and converged networks to provide UC solutions.
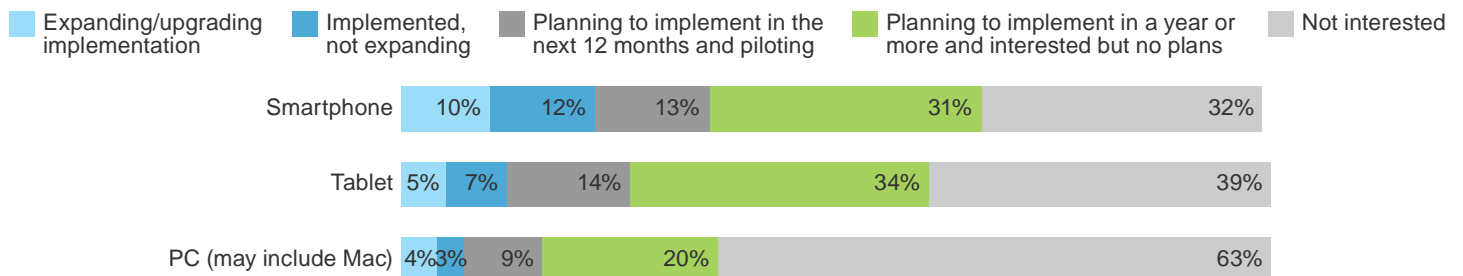
In October 2013, Cisco commissioned Forrester Consulting to dive deeper into the current usage trends and perceptions of unified communications among midsize organizations (100 to 999 employees) across North America, Asia, and Europe.

Empowered Employees Influence IT Organizations To Support BYOD

Since the introduction of the first smartphone, employees increasingly have put pressure on IT to provide enterprise applications on their device of choice. Companies across the globe are exploring BYOD initiatives that enable the untethered employee to work productively and securely. According to Forrester's Forrsights Mobility Survey, Q2 2013, 31% of midsize companies across all industries are planning to implement a BYOD deployment model for smartphones in a year or more, 13% are planning to implement within the next twelve months, and 22% have already implemented a deployment model for smartphones (see Figure 1). Additionally, 34% of organizations are planning to implement a BYOD deployment model for tablets in a year or more, 14% within the next twelve months, and 12% have already implemented a model, which is also shown in Figure 1.

FIGURE 1
BYOD Deployment

"What is your IT organization's interest in offering or requiring a bring-your-own-device (BYOD) deployment model for the following end user devices?"

Legend:
- Expanding/upgrading implementation
- Implemented, not expanding
- Planning to implement in the next 12 months and piloting
- Planning to implement in a year or more and interested but no plans
- Not interested

Device	Expanding/upgrading	Implemented, not expanding	Planning to implement next 12 months	Planning in a year or more	Not interested
Smartphone	10%	12%	13%	31%	32%
Tablet	5%	7%	14%	34%	39%
PC (may include Mac)	4%	3%	9%	20%	63%

Note: "Don't know" not shown.
Base: 898 network and telecommunication decision-makers from companies with 100 to 999 employees in North America and Europe
Source: Forrsights Mobility Survey, Q2 2013, Forrester Research, Inc.

FORRESTER®

Providing UC capabilities across a wide range of devices presents IT professionals with a number of challenges. According to Forrester's Forrsights Mobility Survey, Q2 2013, 18% of respondents expect the number of devices that midsize organizations support to increase significantly over the next year, and 11% believe that the number of operating systems will increase significantly as well. More devices mean more risk, so it is not surprising that the same network and telecommunication decision-makers at midsize organizations anticipate an increase in security requirements over the next year.
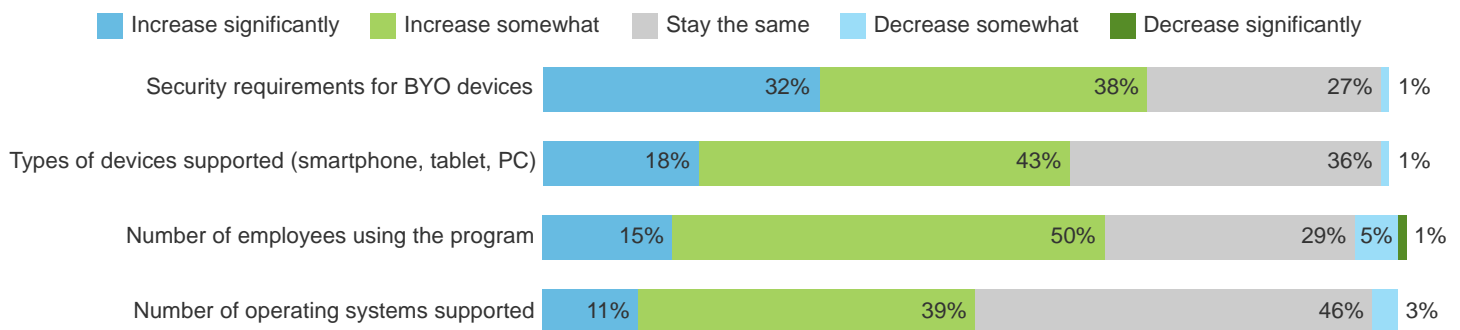
Meanwhile, 65% expect the total number of employees using an organization's BYOD program will increase either slightly or significantly (see Figure 2).

Current And Future Midsize Deployment Models For UC

While 42% of midsize firms currently manage or deploy UC through self-provisioned and self-managed models, this is expected to drop to 36% over the next few years, and Forrester's Forrsights Networks And Telecommunications Survey, Q1 2013, suggests that more and more midsize organizations will turn to the cloud to effectively deploy UC and support its demand on a wide range of devices. Survey respondents indicate that their use of on-premises deployment models will drop from 19% to 15%, whereas they see cloud-type as-a-service, or shared infrastructures, as gaining popularity (see Figure 3).

FIGURE 2
More Devices Mean More Risk

"How do you expect the following aspects of your firm 's BYO smartphone or tablet policy will change over the next 12 months?"

■ Increase significantly   ■ Increase somewhat   ■ Stay the same   ■ Decrease somewhat   ■ Decrease significantly

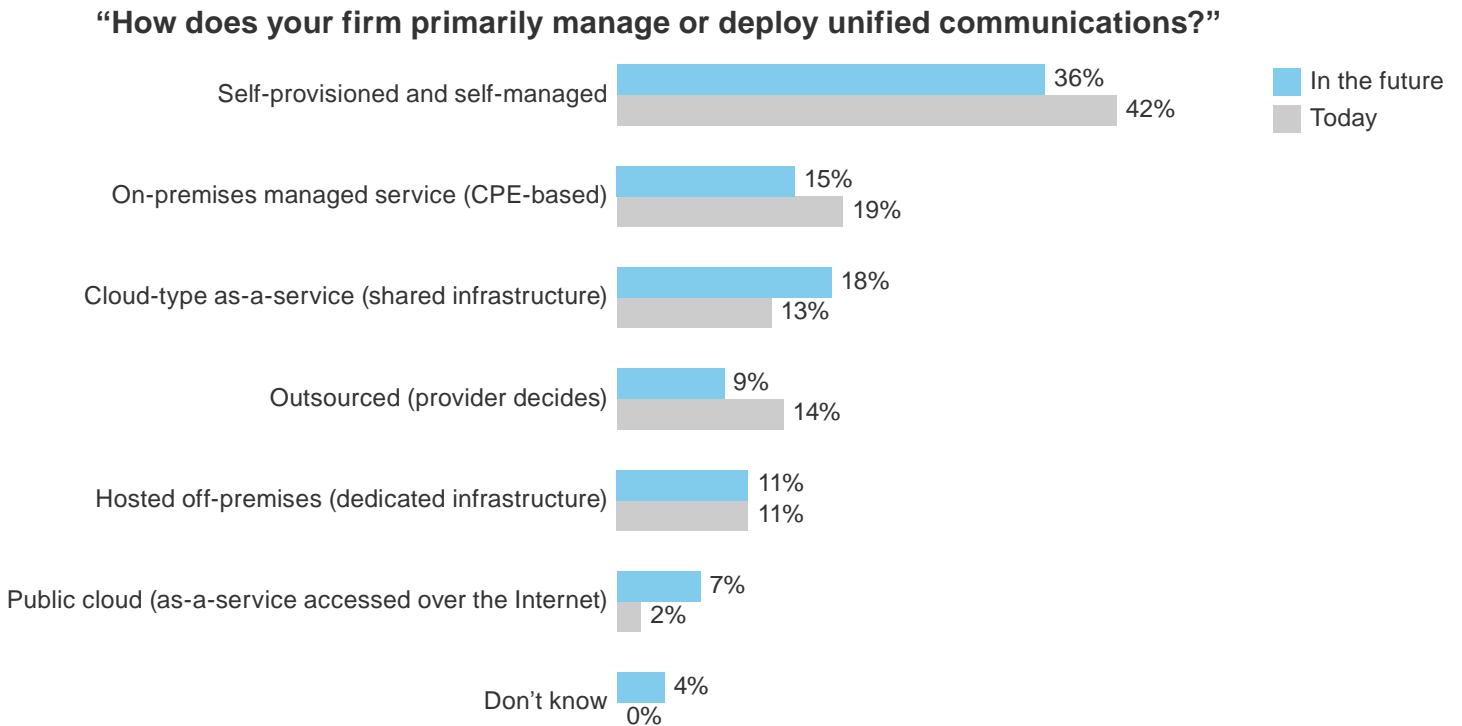|				
Security requirements for BYO devices	32%	38%	27%	1%
Types of devices supported (smartphone, tablet, PC)	18%	43%	36%	1%
Number of employees using the program	15%	50%	29%	5% 1%
Number of operating systems supported	11%	39%	46%	3%

Note: "Don't know" not shown.

Base: 295 network and telecommunication decision-makers from companies with 100 to 999 employees in North America and Europe

Source: Forrsights Mobility Survey, Q2 2013, Forrester Research, Inc.

FORRESTER®

FIGURE 3
On-Premises Models Losing Out To Cloud

"How does your firm primarily manage or deploy unified communications?"

	In the future	Today
Self-provisioned and self-managed	36%	42%
On-premises managed service (CPE-based)	15%	19%
Cloud-type as-a-service (shared infrastructure)	18%	13%
Outsourced (provider decides)	9%	14%
Hosted off-premises (dedicated infrastructure)	11%	11%
Public cloud (as-a-service accessed over the Internet)	7%	2%
Don't know	4%	0%

Note: "Don't know" not shown.

Base: 190 network and telecommunication decision-makers from companies with 100 to 999 employees in North America and Europe
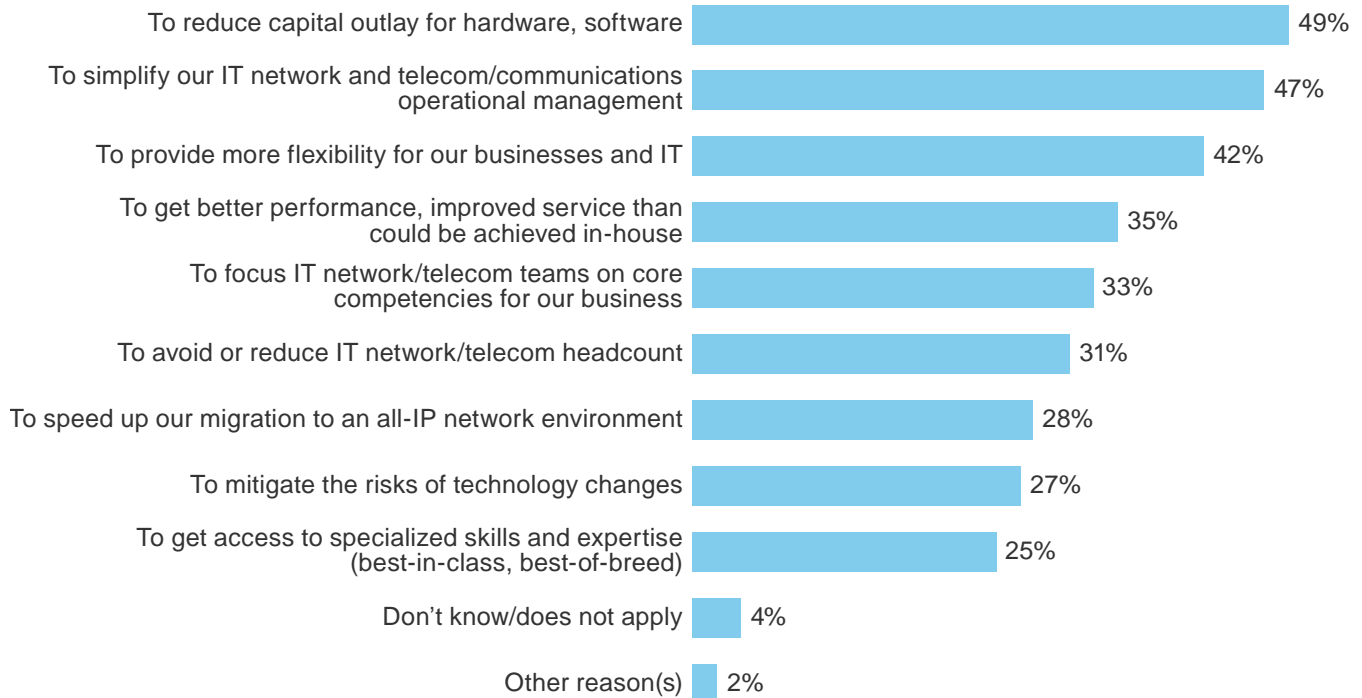
Source: Forrsights Networks And Telecommunications Survey, Q1 2013, Forrester Research, Inc.

Cloud services for unified communications can sharpen a company's business edge by reducing expenses, increasing flexibility, and boosting efficiency and productivity. The desire to reduce capital outlay for hardware and software (49%) and simplify network and telecommunications operations (47%) are the top reasons motivating midsize organizations to consider hosted, private cloud, or public cloud service for UC (see Figure 4).

Other reasons include promoting more flexibility for businesses and IT (42%) as well as heightening performance and service than could be achieved in-house (35%).

FORRESTER®

FIGURE 4
Benefits Of Cloud

"What reasons would you use to consider a hosted, cloud, or public cloud service for your firm's unified communications?"

To reduce capital outlay for hardware, software	49%
To simplify our IT network and telecom/communications operational management	47%
To provide more flexibility for our businesses and IT	42%
To get better performance, improved service than could be achieved in-house	35%
To focus IT network/telecom teams on core competencies for our business	33%
To avoid or reduce IT network/telecom headcount	31%
To speed up our migration to an all-IP network environment	28%
To mitigate the risks of technology changes	27%
To get access to specialized skills and expertise (best-in-class, best-of-breed)	25%
Don't know/does not apply	4%
Other reason(s)	2%

Base: 165 UC technology decision-makers (IT manager+) from companies with 100 to 999 employees in North America, Asia, and Europe

Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, December 2013
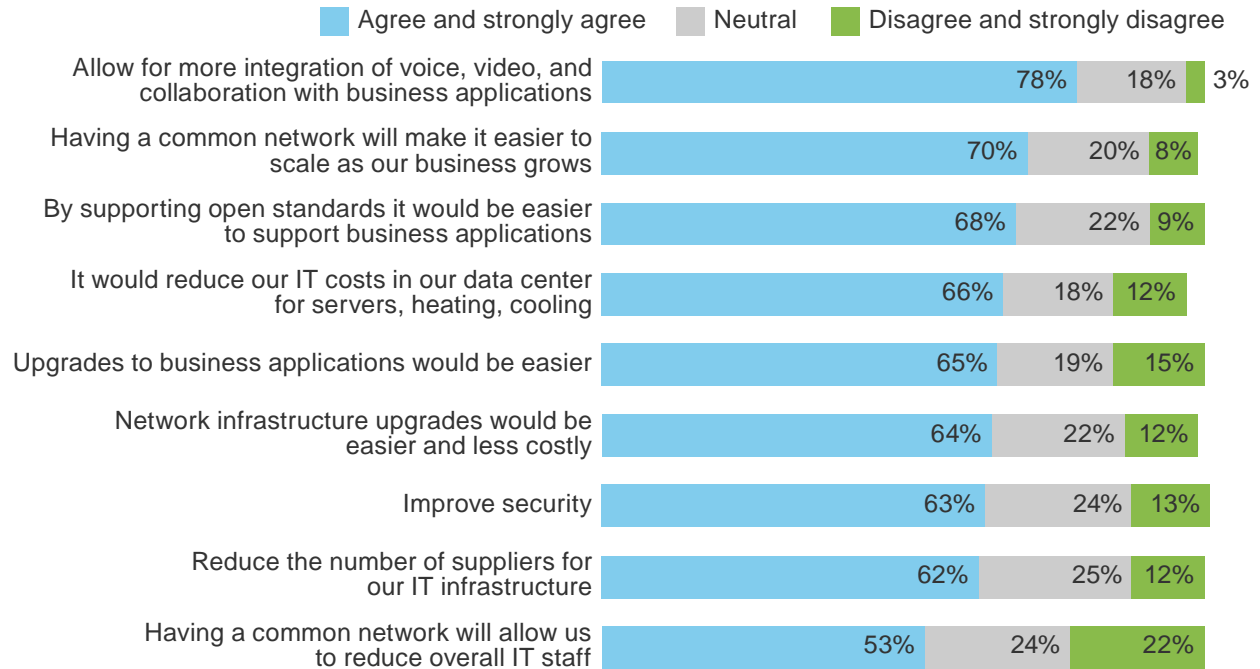
Midsize Organizations Look To Converged Networks To Provide UC

As converged networks offer more and more capabilities to meet the needs of the empowered mobile employee, midsize organizations are turning from separate voice, video, and data networks to converged networks for UC. The underlying quality of service (QoS) capabilities of converged IP networks have reached a high level of maturity, so midsize IT managers are more comfortable choosing this approach today.

Increasingly, service providers are offering all-IP cloud options that connect their UC service to the enterprise via SIP trunks. When asked about migrating to an all-IP network for voice, video, and data, 78% of respondents surveyed for this profile agree that this will allow for more integration of voice, video, and collaboration with business applications. Evolving network functions also mean easier manageability, as 70% agree that having a common network will make it easier to scale as the business grows, and 68% agree that supporting open standards will make supporting business applications easier (see Figure 5).

FORRESTER®

FIGURE 5
Converged Networks Gaining Popularity Among Midsize Organizations

"How much do you agree with the following statements about migrating to an all-IP network for voice, video, and data?"

■ Agree and strongly agree ■ Neutral ■ Disagree and strongly disagree

Statement	Agree	Neutral	Disagree
Allow for more integration of voice, video, and collaboration with business applications	78%	18%	3%
Having a common network will make it easier to scale as our business grows	70%	20%	8%
By supporting open standards it would be easier to support business applications	68%	22%	9%
It would reduce our IT costs in our data center for servers, heating, cooling	66%	18%	12%
Upgrades to business applications would be easier	65%	19%	15%
Network infrastructure upgrades would be easier and less costly	64%	22%	12%
Improve security	63%	24%	13%
Reduce the number of suppliers for our IT infrastructure	62%	25%	12%
Having a common network will allow us to reduce overall IT staff	53%	24%	22%

Note: "Don't know" not shown.

Base: 165 UC technology decision-makers (IT manager+) from companies with 100 to 999 employees in North America, Asia, and Europe

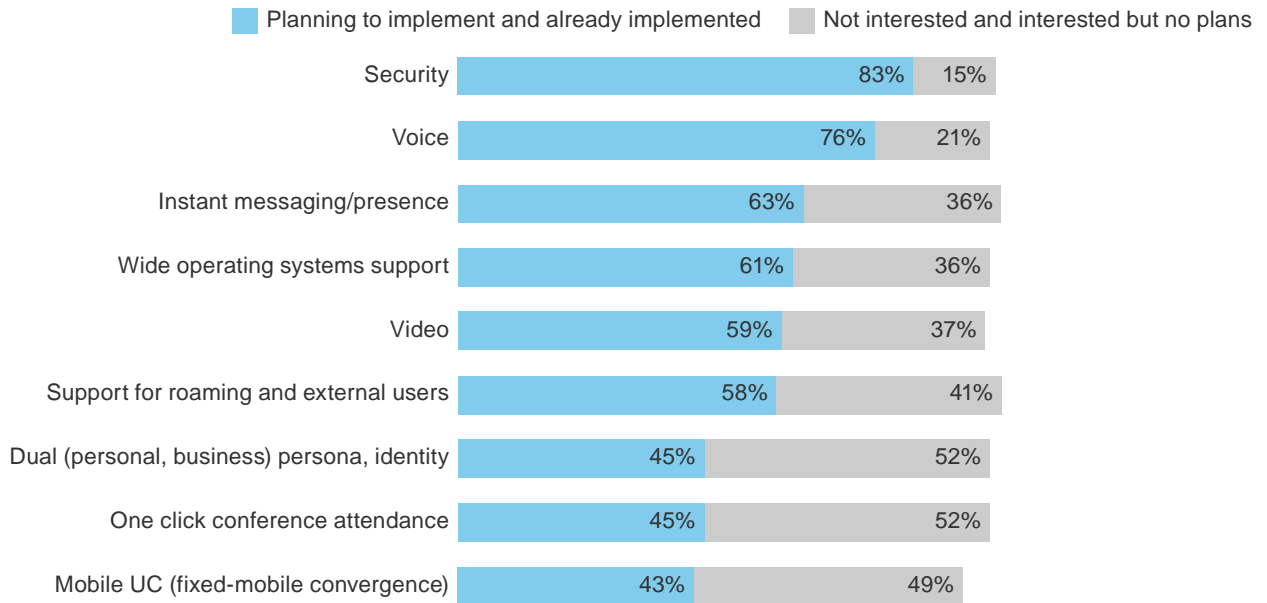Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, December 2013

Security Tops The List Of UC Features Midsize Managers Want

In an increasingly hacker-prone world coupled with employees' desire to choose their own devices, it comes as no surprise that securing UC sessions is a top item for IT managers at 83%.

After that, IT decision-makers indicate that they plan to implement — or have already implemented — real-time voice (76%), video (59%), instant messaging (63%), and web collaboration (61%) along with security features (83%) to support their BYOD programs (see Figure 6).

FORRESTER®

FIGURE 6
UC Capabilities At Top Of BYOD Program Plans

"What unified communications features are you planning to implement to support your BYOD program?"

	Planning to implement and already implemented	Not interested and interested but no plans
Security	83%	15%
Voice	76%	21%
Instant messaging/presence	63%	36%
Wide operating systems support	61%	36%
Video	59%	37%
Support for roaming and external users	58%	41%
Dual (personal, business) persona, identity	45%	52%
One click conference attendance	45%	52%
Mobile UC (fixed-mobile convergence)	43%	49%

Note: "Don't know" not shown.

Base: 165 UC technology decision-makers (IT manager+) from companies with 100 to 999 employees in North America, Asia, and Europe

Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, December 2013

Conclusion

Today's global business environment puts pressure on midsize organizations to innovate and compete. Unified communications tools help boost productivity, innovation, and customer service but can be a challenge for midsize company IT managers to deploy and support. To succeed with unified communications, these managers need to consider the following:

› **The time to question BYOD is past.** Employee choice of smartphones and tablets is now a well-established concept. Midsize IT managers are already on the way to providing UC capabilities across those devices, but are clear that securing those sessions is a top priority.

› **Interest in UC from the cloud is rising.** Midsize IT managers face the ongoing challenge of maximizing the investment in current systems coupled with mapping out their future UC road maps. They view the cloud as providing a better option for future-proofing these investments, but are timing their migration from on-premises systems carefully.

› **Midsize company IT manager confidence in converged networks is high.** The long slow change from circuit switched networks to all packet networks for voice, video, and data is at its peak. Midsize managers understand the benefits and have more confidence in their ability to provide the appropriate quality of service for UC.

FORRESTER®

Methodology

This Technology Adoption Profile was commissioned by Cisco. To create this profile, Forrester leveraged its Forrsights Mobility Survey, Q2 2013, and Forrsights Networks And Telecommunications Survey, Q1 2013. Forrester Consulting supplemented this data with custom survey questions asked of IT decision-makers at midsize organizations in the US, UK, France, Germany, India, Singapore, and Australia. Survey respondents included IT managers and above with responsibility for making company decisions about UC technology. The auxiliary custom survey was conducted in December 2013. For more information on Forrester's data panel and Tech Industry Consulting services, visit www.forrester.com.

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.

FORRESTER®