

## UC And Collaboration Adoption By Business Leads To Real Benefits

July 2013

### Deployment Of Broad Set Of Collaboration Capabilities Across The Market

Most businesses are thinking about deploying a wide array of collaboration features — from VoIP to collaboration platforms and even WebRTC clients — and better than 80% of those companies are realizing real business benefit. Buyers value both on-premises and cloud-based solutions (57% use a hybrid deployment paradigm that mixes components deployed on-premises and in the cloud and plan to continue doing so) and are adopting new features and capabilities offered in the latest releases. To better understand the adoption of the latest collaboration technology, Cisco Systems commissioned Forrester Consulting to survey buyers in Q2 2013 and combine that with existing research to determine what value companies are deriving from unified communications and collaboration (UC&C) technologies and how. In this Technology Adoption Profile, Forrester found that, in today's fast-paced and distributed business world, buyers are investing in a wide range of UC&C capabilities. The data shows that they derive real business value when deploying multiple capabilities based on the latest innovations in ways that meet both IT operational and line-of-business requirements.

### There Is Broad Adoption Of UC&C Capabilities Today . . .

IT buyers in business are adopting UC&C solutions and capabilities that deliver the ability to accelerate business results across a broad range of roles and processes and enable better innovation. Features like presence (which 79% of buyers surveyed in Forrester's Forrsights Networks and Telecommunications Survey, Q1 2013 have adopted or plan to adopt within 12 months) provide the basic capabilities for all employees to connect more easily and effectively, while solutions like collaboration platforms (83% of buyers plan to adopt or have adopted) support more creative processes with tools to connect employees collaborating over project plans, creative development, and issue resolution. Newer features like WebRTC clients and HTML5 applications (48% and 58% of buyers) drive greater flexibility into deployments, enabling more choice in how business and social media applications can be integrated with these capabilities (67% and 55% of buyers) (see Figure 1).

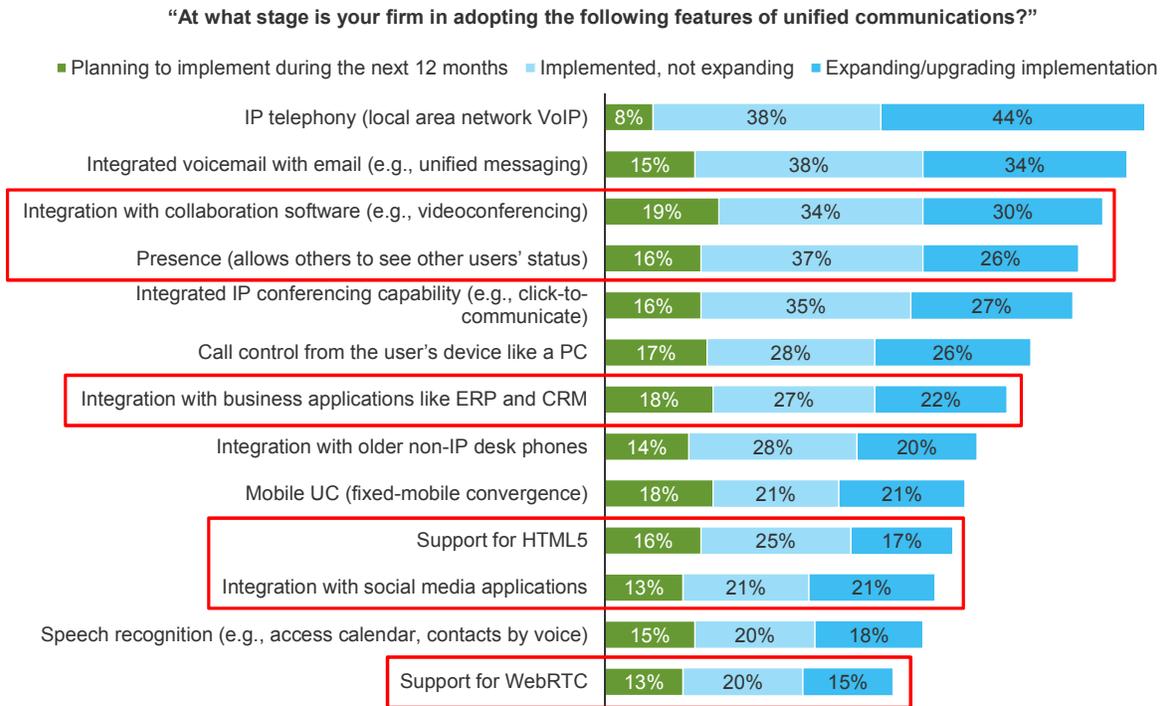


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**Figure 1**

Most Organizations Are Deploying UC&C Features . . .



Base: 506 enterprise network and telecom decision-makers in North America and Europe

Source: Forrsights Networks And Telecommunications Survey, Q1 2013, Forrester Research, Inc.

**... Resulting In Realized Business Benefits**

What’s the result of this widespread UC&C deployment? The adoption of UC&C has positively affected real business value in terms of key performance indicators at most of the firms that we surveyed (see Figure 2). Between 72% and 91% of IT buyers that deploy current collaboration features derive benefits from those deployments in terms of faster cycle times and better connections/relationships between employees, partners, and customers. In fact, the responses are powerful:

- 87% of firms reported that improvements in project management met or exceeded their expectations.
- 91% reported similar satisfaction with improvements in team collaboration.
- 84% improved customers’ experience and satisfaction when they interacted with the firm.
- 81% cited significant reductions in cycle time.

An example use case can be a manufacturing company using UC&C capabilities to reduce the mean time to repair in the manufacturing process, leading to higher overall productivity.

**Figure 2**

... And Deriving Some Benefit From A Broad Range Of Capabilities

“Has your unified communications implementation met your firm’s expectations on the following benefits?”



Base: 506 enterprise network and telecom decision-makers in North America and Europe  
(percentages may not total 100 because of rounding)

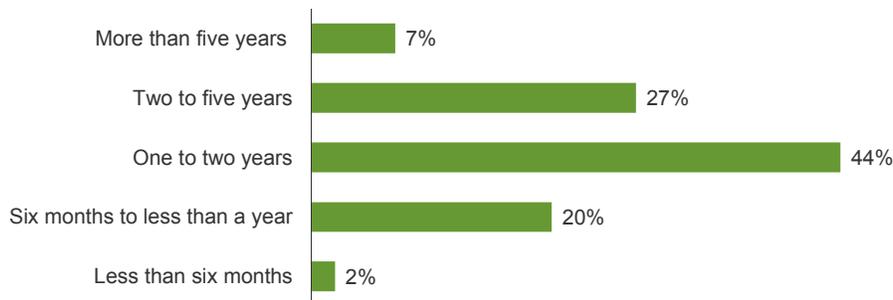
Source: Forrsights Networks And Telecommunications Survey, Q1 2013, Forrester Research, Inc.

The data makes a clear case for widespread UC&C adoption. To further explore adoption and the benefits derived from UC&C deployments, Forrester Consulting surveyed 150 global decision-makers at enterprise companies. The majority of our survey respondents had deployed their current UC implementation within the past two years (67%), while only 7% had a deployment that was more than five years old — meaning that the majority of respondents have fairly current deployments (see Figure 3).

**Figure 3**

Most Enterprises Have A UC Deployment That Is Less Than Two Years Old

“How long have you had your UC system in place?”

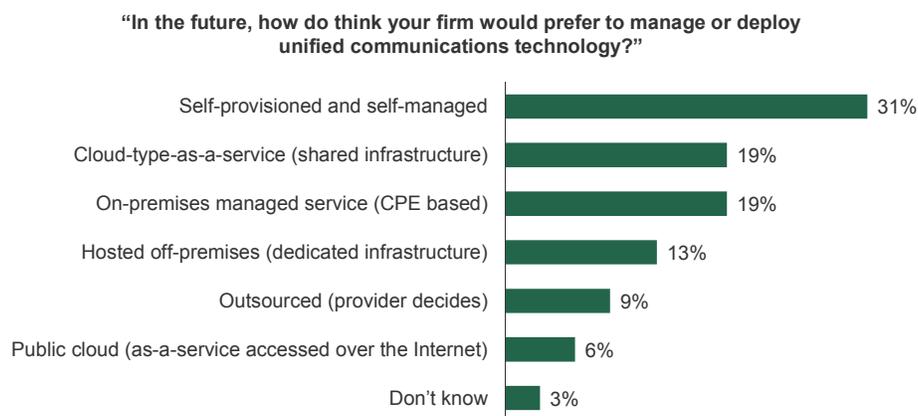


Base: 150 global UC decision-makers at enterprises

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

In discussions with Forrester clients, we often talk about the ability to take advantage of the latest features as new UC&C solutions are released, but clients are equally interested in managing and optimizing their deployment architecture. Buyers want to leverage cloud-based solutions to meet variable demand volumes and tighter capital expenditure guidelines from their finance teams — and they want a secure, reliable solution that can be managed from within their existing network management processes and teams. Based on this anecdotal evidence, respondents were asked to outline their deployment/management preferences in the future, regardless of how their technology is currently deployed (see Figure 4).

**Figure 4**  
Interest In All Manner Of Managed Services



Base: 506 enterprise network and telecom decision-makers in North America and Europe

Source: Forrsights Networks And Telecommunications Survey, Q1 2013, Forrester Research, Inc.

In evaluating their deployment options, 25% of survey respondents are interested in private and public cloud deployments (Forrester defines cloud as a standardized IT capability — services, software, or infrastructure — delivered via Internet technologies in a pay-per-use, self-service way), while 19% are interested in outsourced or dedicated hosted deployments. Of the remaining respondents, two-thirds plan to manage their solution themselves on-premises, while one-third are looking for someone to manage that deployment for them. Altogether, approximately 80% of respondents seek some level of managed services, from simple professional services to help plan or optimize to operational services like cloud or hosted architectures. This interest drives a common discussion with our Forrester clients. They want to determine where deployment models can reduce costs and balance capex/opex budgets, attain greater flexibility offered particularly by cloud-based solutions, or mitigate the risks of technology — for example, shifting the responsibility for selecting, managing, and maintaining the technology to a skilled and experienced service provider.

## Cloud And Rapid Technology Evolution Drive Buyers To Latest Releases

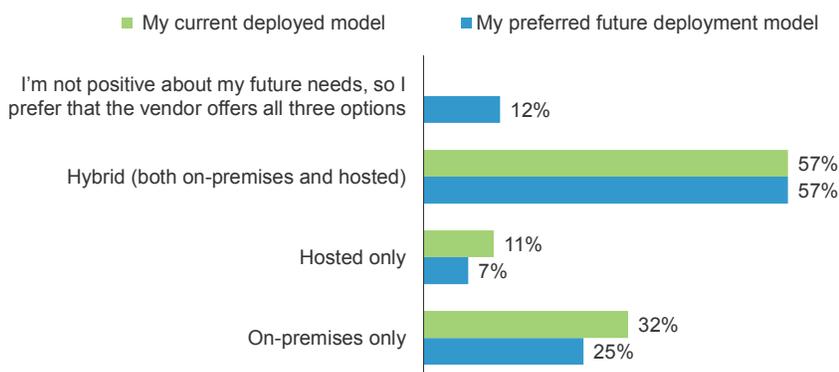
With such an overwhelming interest in cloud and managed solutions, and such a large installed base of many UC components on-premises (from email and PBXes to presence servers and corporate directories), it comes as no surprise that most buyers (57%) rate the ability of their vendor to offer a Hybrid solution as important today and tomorrow. A further 12% recognize the uncertainty of the future by saying their vendor must have a road map to offer on-premises, cloud-based, and hybrid solutions (see Figure 5).

**Figure 5**

The Majority Foresees A Hybrid Deployment Model That Will Dictate Maintaining The Latest Version Of UC Software Running On-Premises To Match The Cloud

“When acquiring unified communications capabilities, as part of RFP, how important are the deployment architecture options?”

(Please answer for your current deployment model and your preference for your future deployment)



Base: 150 global UC decision-makers at enterprises  
(percentages may not total 100 because of rounding)

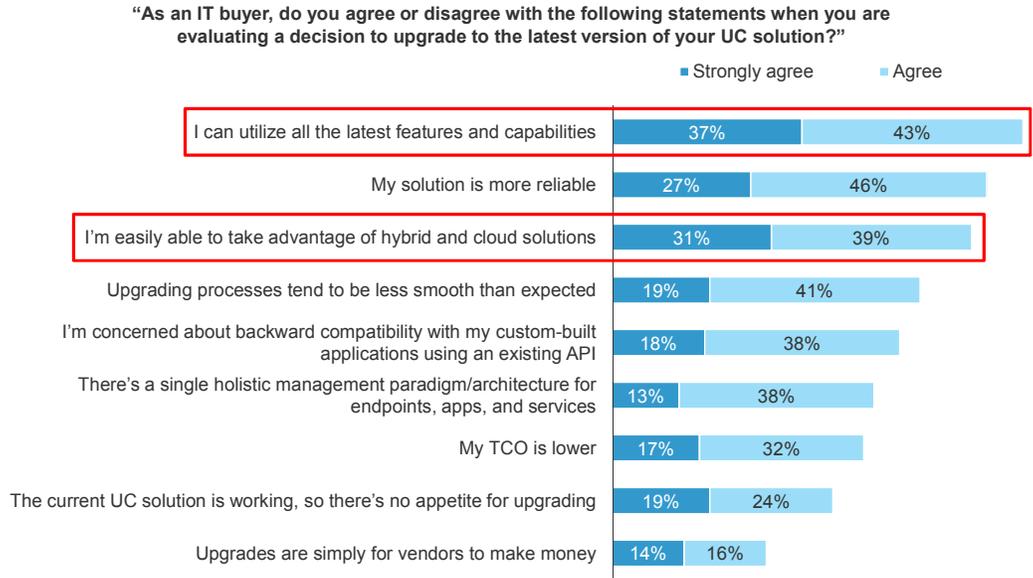
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2013

These hybrid solutions present a particular challenge to IT professionals and vendors: How should they manage the interaction between cloud-based platforms (which are constantly being updated to the latest version of the software) and on-premises components (which may follow a different upgrade schedule based on other needs of the business)? 70% of respondents believed that the answer is to move to the latest version of UC&C software — to make it easier to take advantage of cloud and hybrid solutions (see Figure 6).

Additionally, 80% of respondents value the ability to take advantage of the latest features and have upgraded over the past five years in order to be able to use features like federated presence, desktop video, and fixed-mobile convergence capabilities. In the future, as more new capabilities are integrated into collaboration solutions, we expect to see buyers continue to upgrade as the resistance to upgrades — based on the feeling that they're simply a way for vendors to ring up another sale — falls. Organizations are seeing increasing value in keeping current; as cloud deployments make upgrading simpler, this will lead to more to subscribe to licensing/payment plans that include upgrades.

**Figure 6**

**Buyers Are Maintaining The Most Recent Version Because They Believe It Drives Business Benefit**



Base: 150 global UC decision-makers at enterprises

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

**Conclusion**

Unified communications and collaboration technologies are delivering real business value today. Businesses are seeing measurable hard-dollar savings as well as improvements in human interactions that lead to better, faster innovation. As technology and business volume ebb and flow, buyers are looking for vendors and service providers that will help them take advantage of the latest technologies and services in order to build competitive advantage. Businesses will continue to deploy the latest UC&C features, services, and interoperability capabilities as they strive to improve their ability to leverage an increasingly distributed workforce in today’s fast-paced, innovation-driven economy.

## Methodology

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This Technology Adoption Profile was commissioned by Cisco Systems. To create this profile, Forrester leveraged its Forrsights Networks And Telecommunications Survey, Q1 2013, with a respondent pool from the US, Canada, UK, France and Germany. Respondent organizations were predominantly enterprise size (1,000 or more employees). Forrester Consulting supplemented this data with custom survey questions asked of 150 respondents from the US (47), Canada (3), the UK (13), France (19), Germany (18), China (13), India (26), and Japan (11) identified as network and telecommunications decision-makers at enterprises (1,000 or more employees in North America; 500 or more in Europe and Asia). Survey questions related to their key benefits and challenges associated with their deployment UC&C capabilities. The auxiliary custom survey was conducted in May 2013. For more information on Forrester's data panel and tech industry consulting services, visit [www.forrester.com](http://www.forrester.com).

### About Forrester Consulting

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