

Next Generation Enterprise Communications

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Singapore

A large, powerful blue wave crashing over a rocky reef, with white foam and spray. The water is a deep, vibrant blue, and the sky is a lighter, hazy blue. The wave is the central focus of the image, moving from the left towards the right.

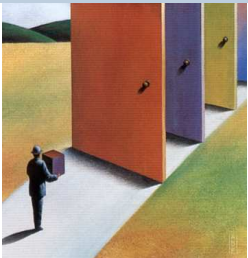
The Internet changes everything

“A New Way of Doing Business”

The way we use Information

Globalization - The future of the Firm

- Global firms will look like geographically differentiated network of capabilities and resources, instead of geographical subsidiaries in the traditional multinational model
- Each geographical entity will have a strong set of local market facing capabilities. Some geographical entities will become “global leaders” for specific products, resources or services, which they will provide to the entire firm, as well as to external customers.
- The firm as a whole will rely more partners for non-core activities and resources – so the core will shrink and the periphery will expand.

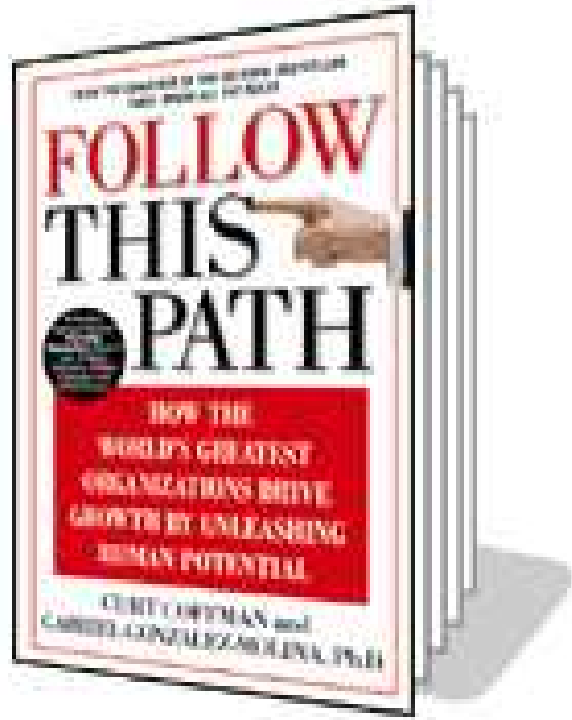


Mohan Sawhney
McCormick Tribune Professor of Technology

Top consumer communication trends

- 1. Primary form of communication moving away from voice to other means**
 - Instant messaging
 - SMS
 - Presence
 - Email
- 2. Collaborative working**
- 3. High expectation in terms of responsiveness**
- 4. Major form of self expression is evolving**
- 5. Work life balance -> work life blending**





"Great organizations achieve sustainable growth and profits because they do what other organizations don't: **they maximize the innate, individual talents of their employees to connect with customers.** They know that tapping the resources of humans is the only remaining area where significant improvements can--and do--lead to an unlimited source of competitive advantages."

Curt Coffman Gabriel Gonzalez-Molina

#1 IP Communications

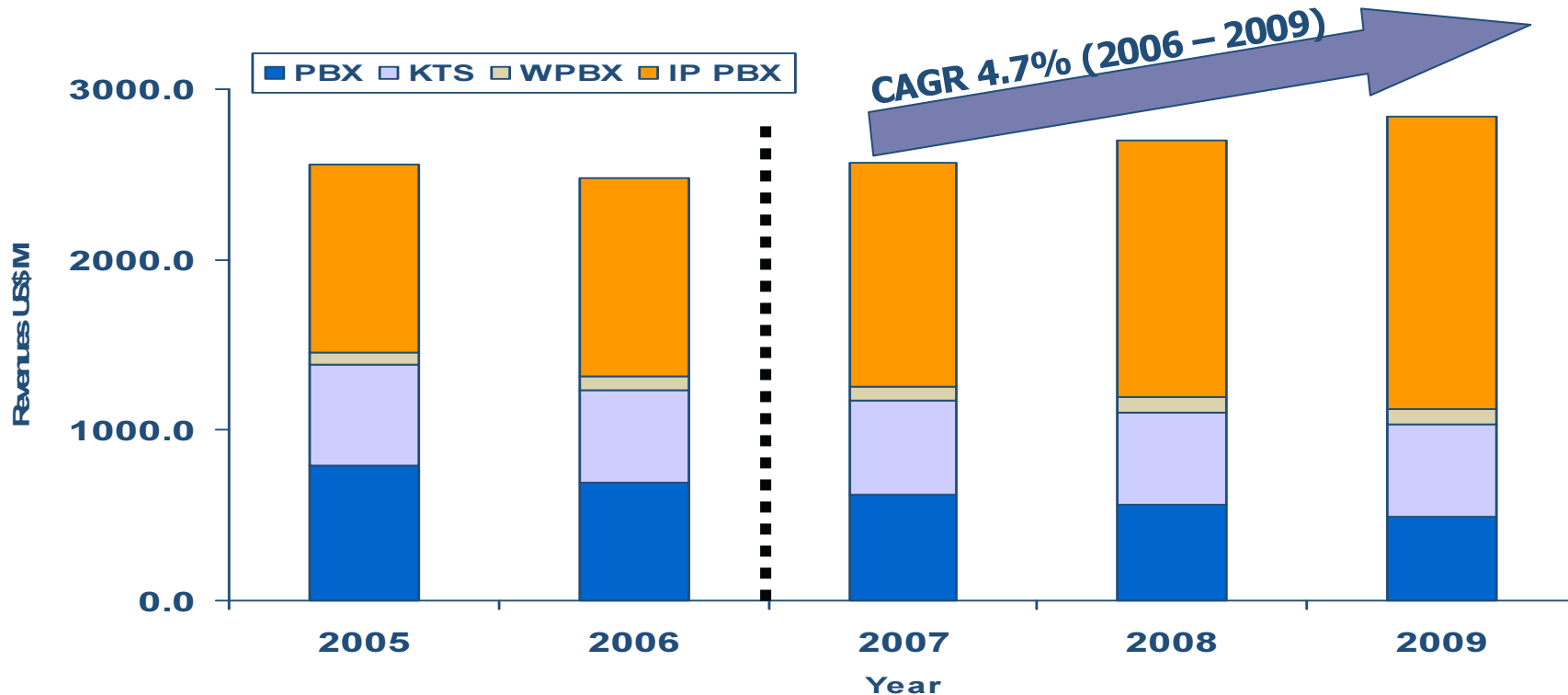
- **Unified and converged transport for voice and data**
- **Cost reductions**
- **Operating efficiencies**



IP Telephony as a platform to optimize business applications of every possible type.

Transition to IP drives market growth

Enterprise Telephony Market: Revenue Forecasts (Asia-Pacific), 2005-2009

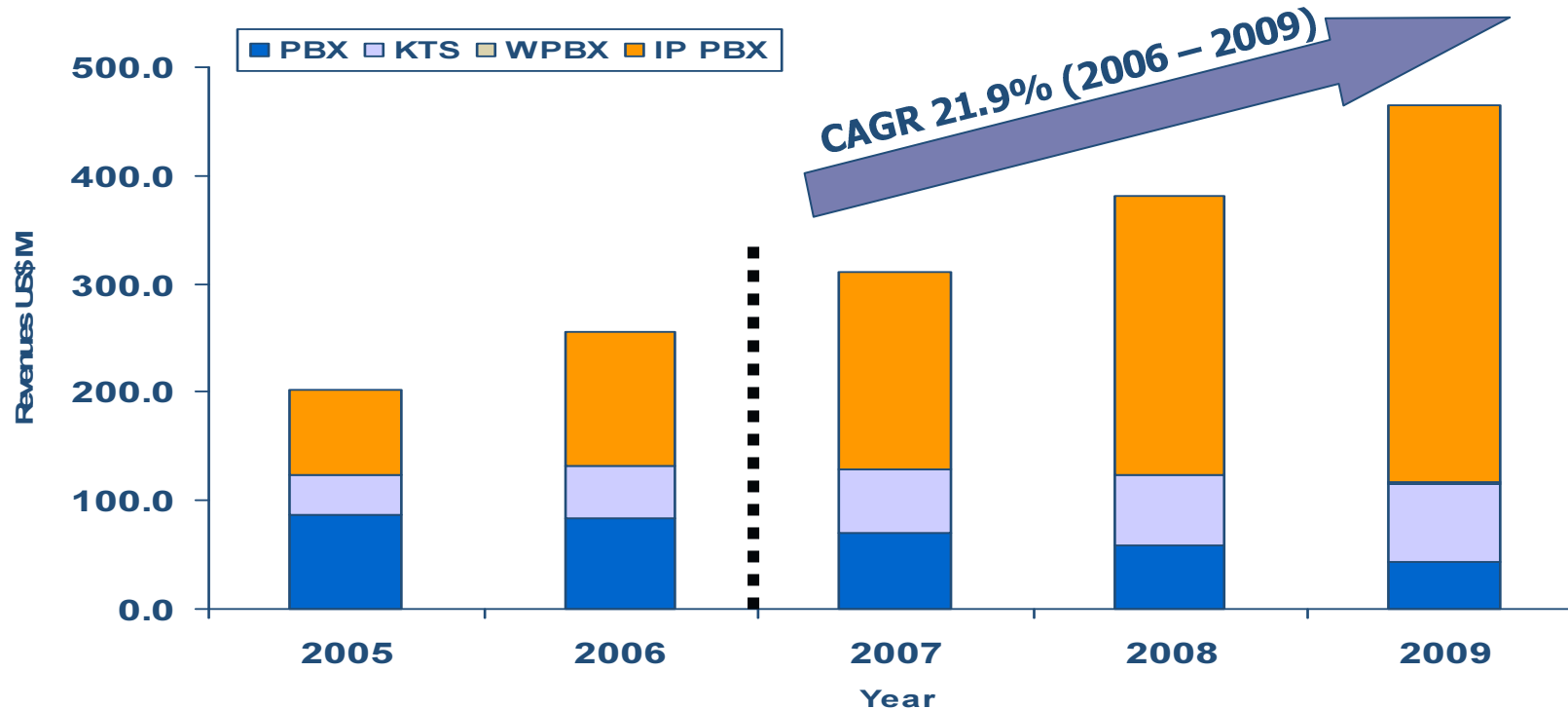


Note: All figures are rounded; the base year is 2006. Source: Frost & Sullivan

- **Estimated CAGR 4.7%**
- **IP-PBX continues to replace PBX and drives growth at CAGR of 13.9% (2005 to 2009)**
- **PBX declining steadily with a decline of 12.4% during 2006**

Rapid IP adoption drives market growth in India

Enterprise Telephony Market: Revenue Forecasts (India), 2005-2009

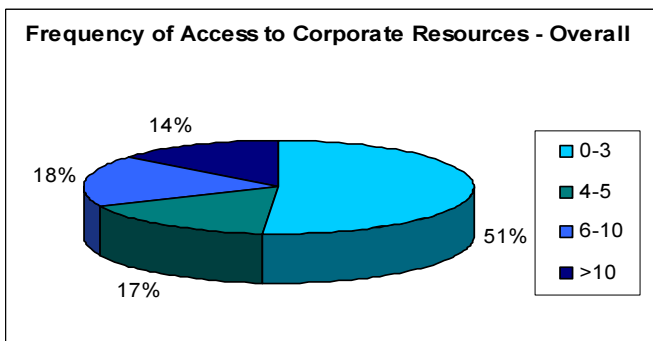
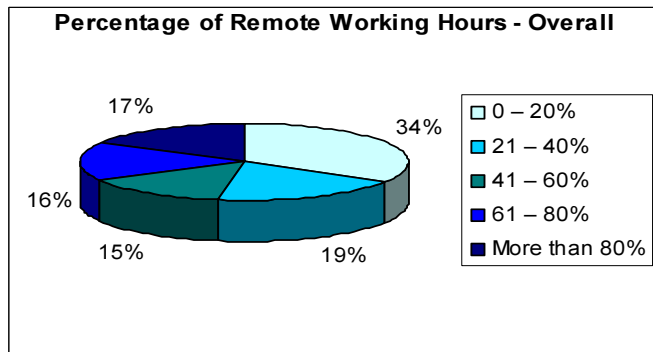
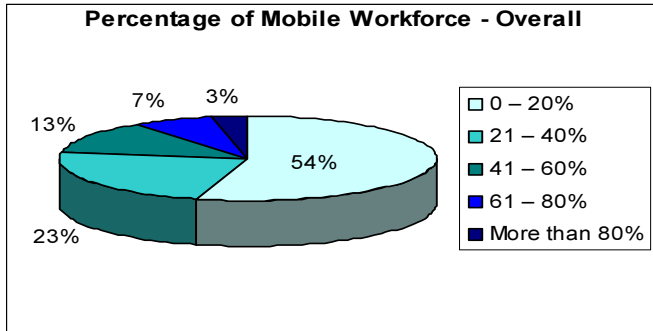


Note: All figures are rounded; the base year is 2006. Source: Frost & Sullivan

- YoY growth 21.0% and estimated CAGR 21.9%
- IP-PBX continues to replace PBX and drives growth at CAGR of 40.9% (2005 to 2009)
- PBX declining steadily with a decline of 3.4% during 2006

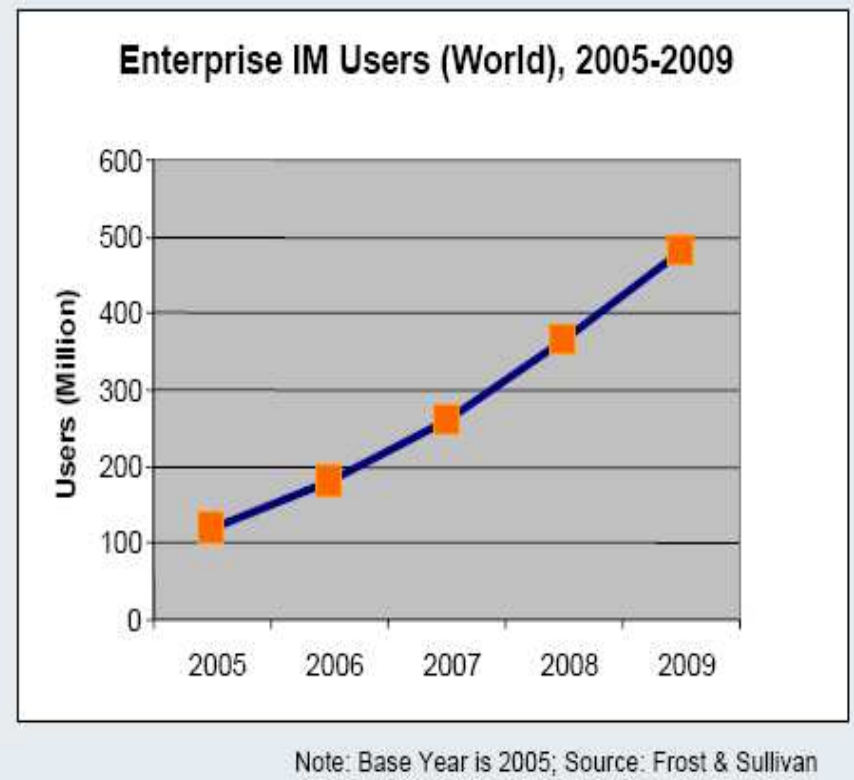
#2 Mobility

Wireless enabling existing enterprise applications is a key priority for most CIO's.



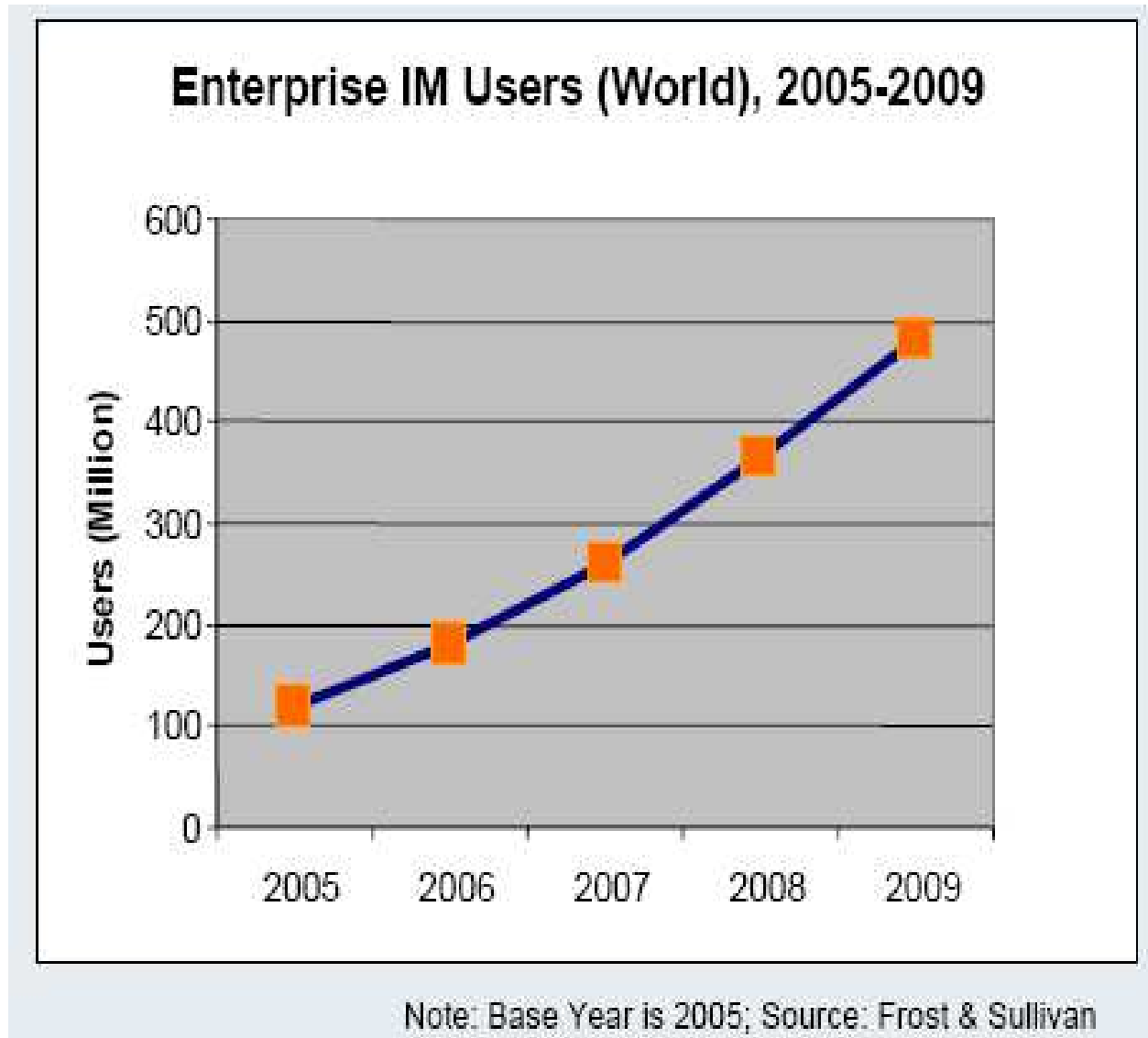
- **46 percent of companies have greater than 20% of workforce mobile**
- **MNCs tend to have higher percentage of workforce that is mobile – 23% of the MNCs have at least 40% of their workforce mobile compared to 18% for Large Companies and 15% for SMEs**
- **66% of the respondents' mobile workforce spend more than 20% of their working hours remotely**
- **MNCs' workforce spend more remote working hours, followed by Large Companies and SMEs**
- **Most respondents' mobile workforce access corporate resources remotely less than 4 frequencies a day**
- **MNCs mobile workforce access corporate resources most frequently, followed by Large Companies and SMEs**

#3 Presence & Availability



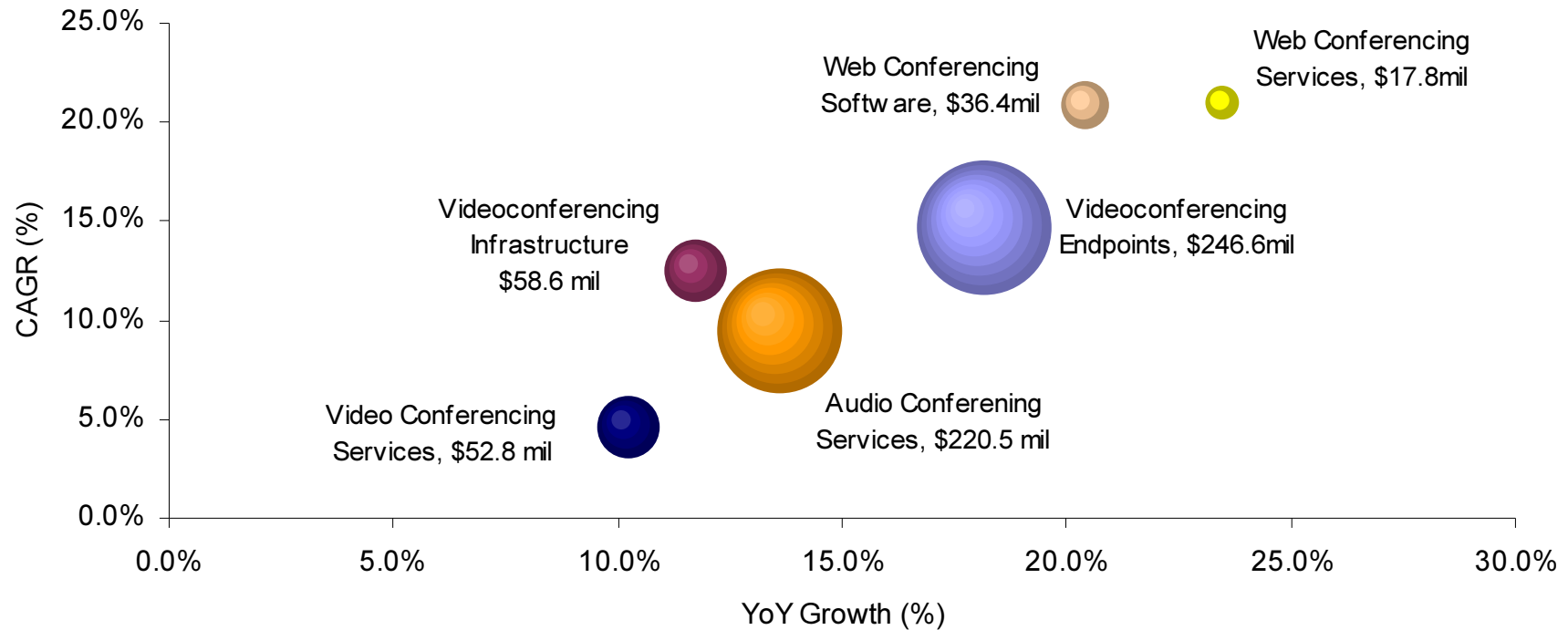
At the end of the day, people will pay money for the ability to complete calls to you and you may pay money not to be found.

IM emerging as an integral communication tool...



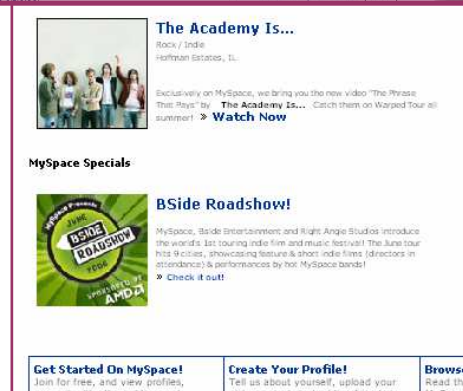
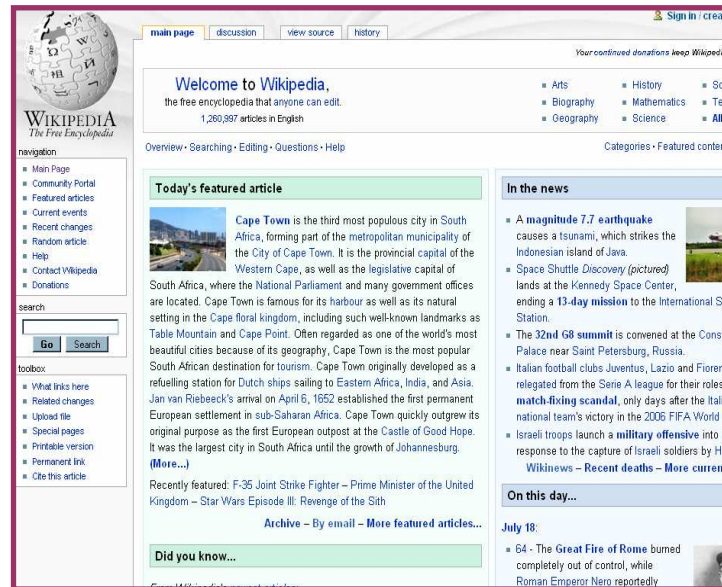
#4 Conferencing – Video and Web experiencing high growth

Conferencing Market: CAGR, YoY Growth and Revenue Contribution (Asia Pacific), 2006-2012



#5 Internet collaboration tools

- Intranets and shared workspaces
- Message boards and forums
- Wikis
- Blogs
- Social Networking



Get Started On MySpace! Join for free, and view profiles, connect with others, blog, rank.
Create Your Profile! Tell us about yourself, upload your pictures, and start adding friends to...
Browse Through Profiles! Read through millions of profiles on MySpace! See who's real, fake, and...
Invite Your Friends! Invite your friends, and as they grow, they'll invite your network, too!

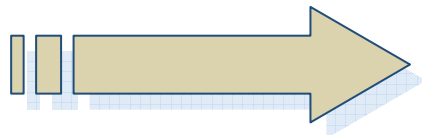
#6 Next Generation of IP Applications

- **Information retrieval & presentation;** includes applications such as broadcasting, enterprise announcements, and paging applications.
- **Business processes regulation;** includes applications such as voice recording and billing applications.
- **Communications enrichment;** includes applications such as unified messaging, fax on demand, and fast handover.
- **Industry specific vertical applications;** includes third party applications developed by specific vendors deployed on the IP platform

#7 Growing demand for Managed / Hosted Solutions



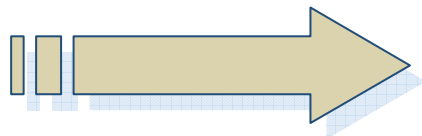
- Pressure on reducing capital expenditure



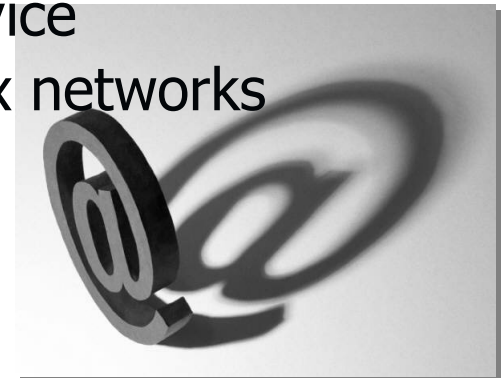
- Increasing cost pressure to optimize internal operations and reduce operating expenses



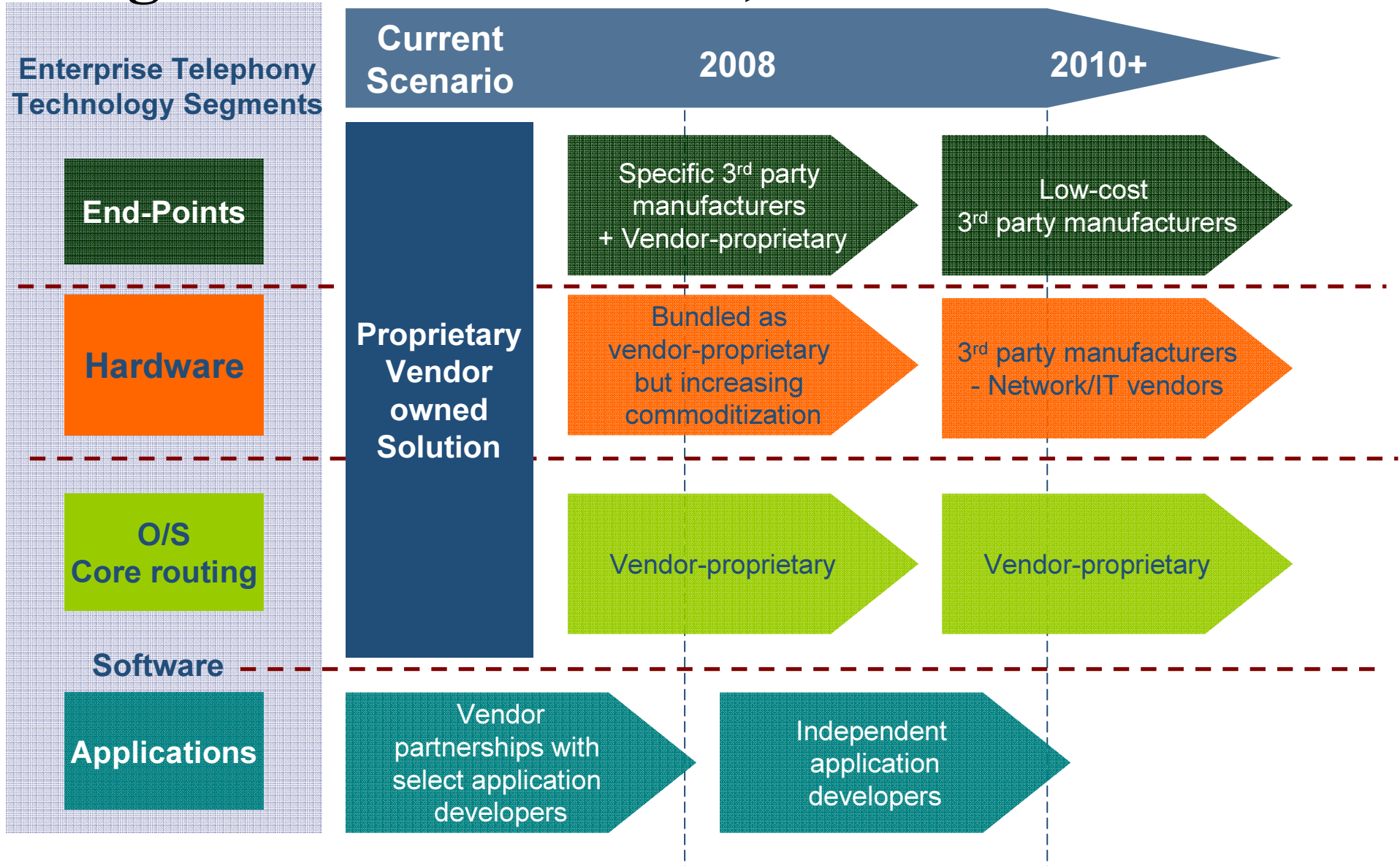
- Enables earlier deployment of new applications and services



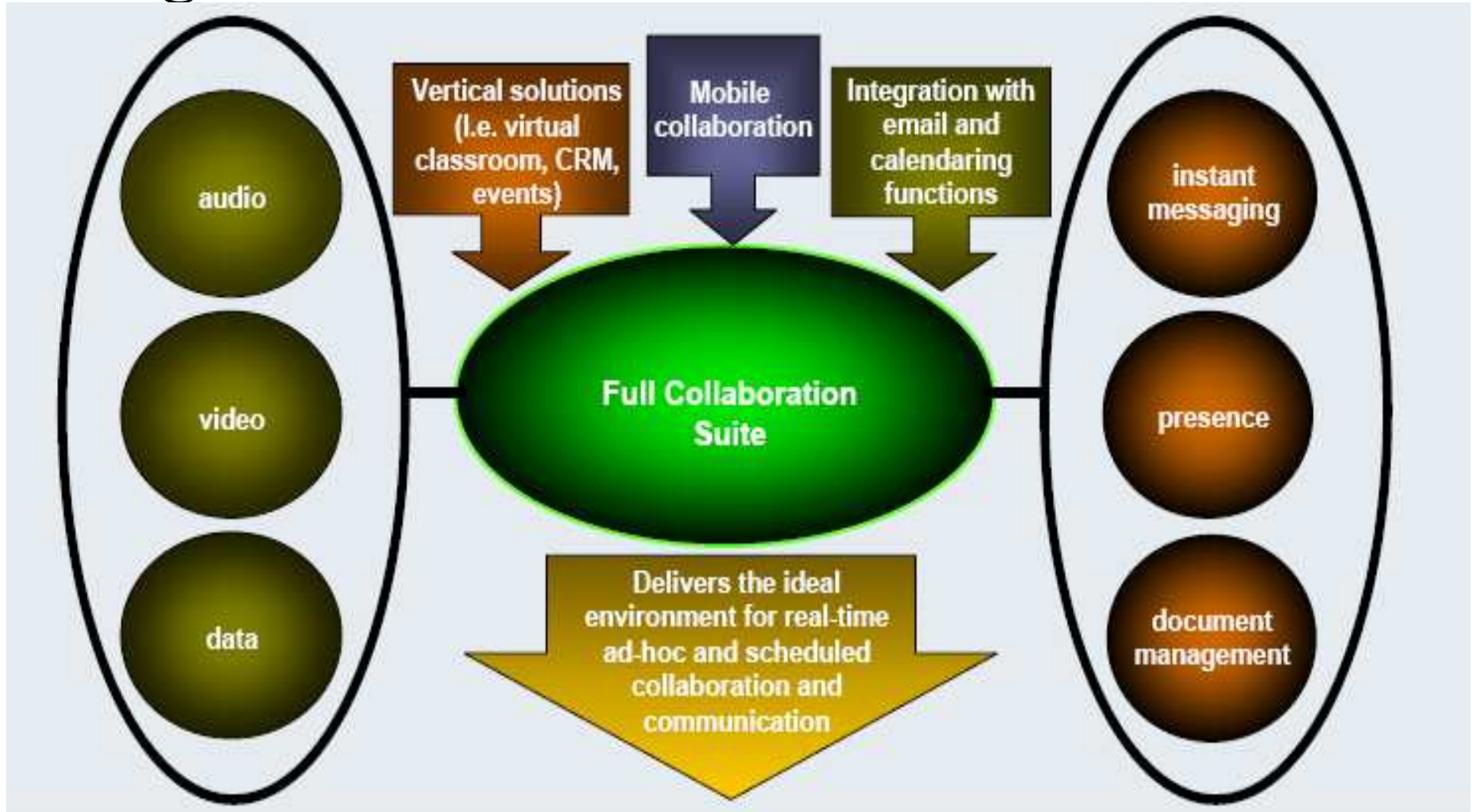
- Leverage on the specialized expertise of the vendor / channel / service provider in managing complex networks



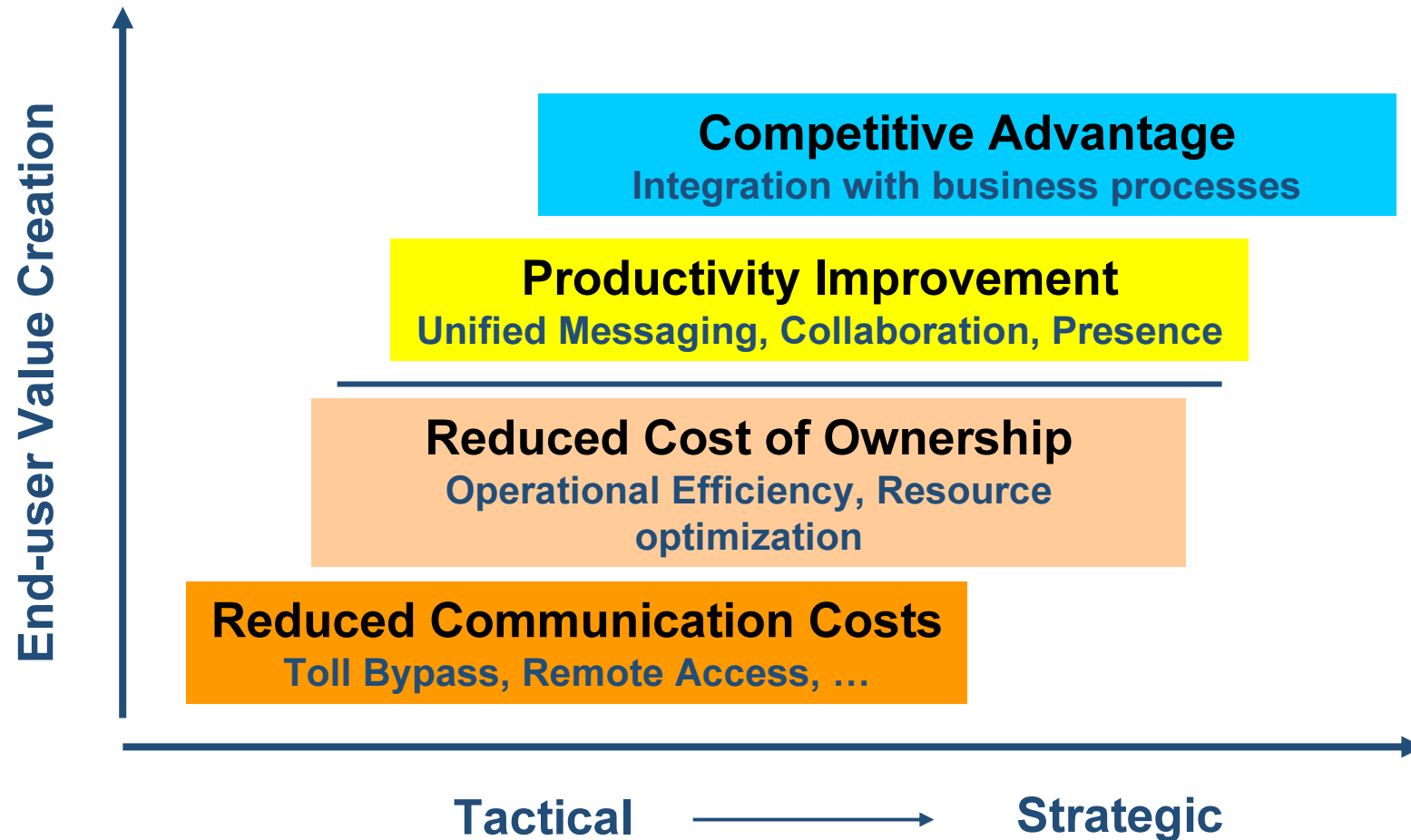
Industry moves from hardware to software; integrated to unbundled;



Migrating from isolated islands to an integrated service



Evolution of the Business Case



A Happy meal on a 1000 mile round trip !

Hello Sir, Would you like your coke and orange juice medium or large?



Order sent to McDonalds Kitchen using Internet

A Call Center Agent, some 500 miles away...

Order taking through VoIP



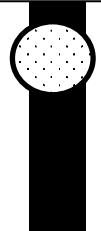
Cheese Burger and Fries..

18 months – 2.55 million orders
Peak time: 95 orders/hour

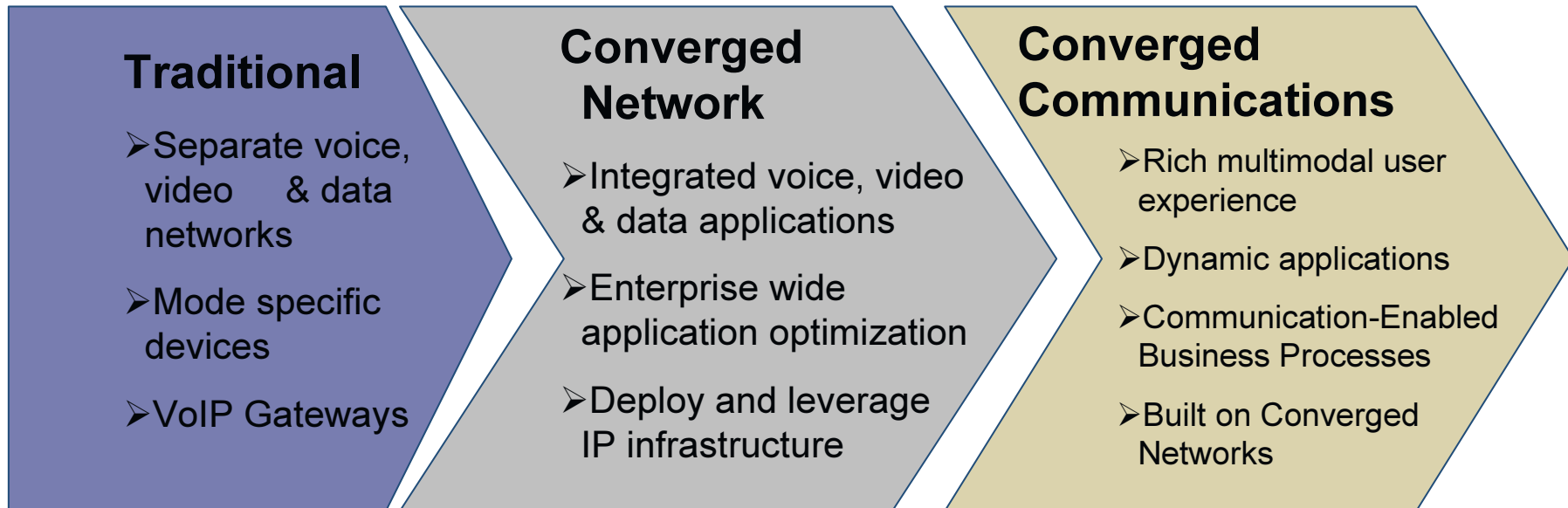


Impact:

1. Leveraging Cheaper communication infrastructure
2. Centralized staff of order takers
3. Focused customer service
4. Saving seconds to make millions!



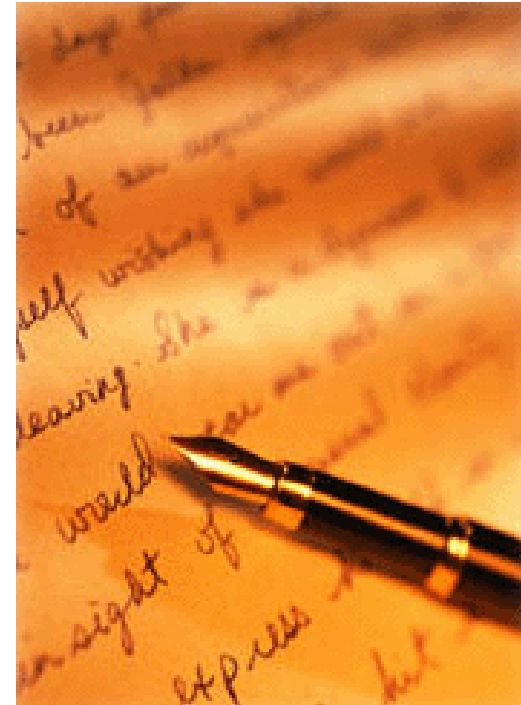
with a roadmap of evolution to converged communications



Large enterprises now moving towards the Converged Network phase, with aim to optimally leverage on applications through Converged Communications by the end of this decade

Summary

- **IP Telephony – a platform to optimize business applications, not just a replacement for traditional voice;**
- **Unified Communications will help unlock productivity and efficiency in the enterprise;**
- **Large enterprises will leverage UC as a competitive differentiator by end of the decade;**



Role of Enterprise Communications in Business Strategy



"Would you tell me, please, which way I ought to go from here?," said Alice.

"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where," said Alice.

"Then it doesn't much matter which way you go," said the Cat.

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A discussion between Alice and the Cheshire Cat from Lewis Carroll's Alice in Wonderland.