

# *Unified Communications Survey*

## *Summary Results*

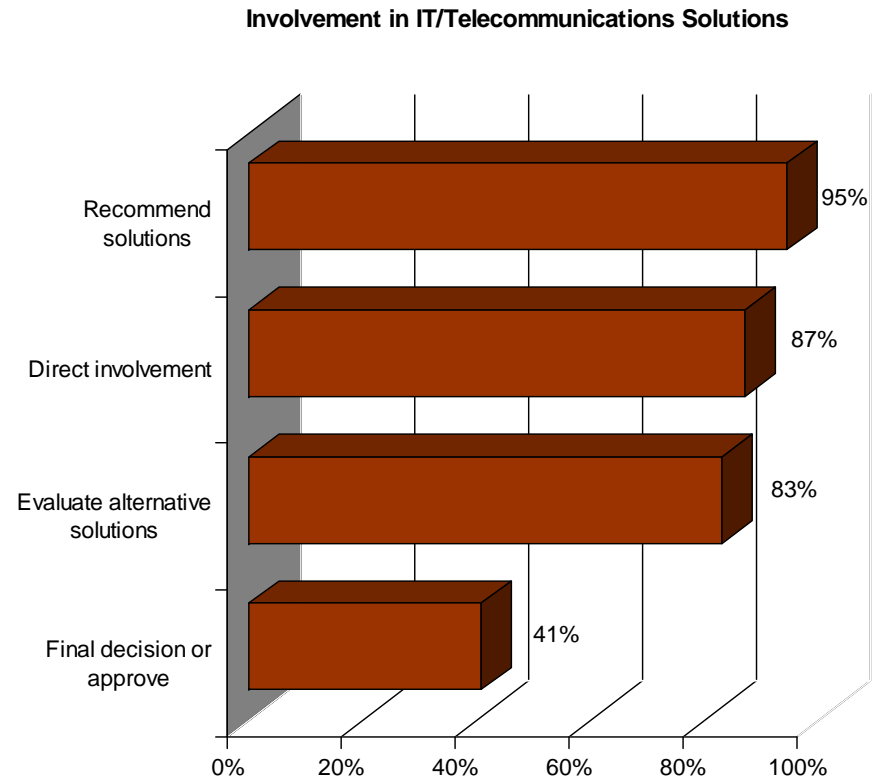
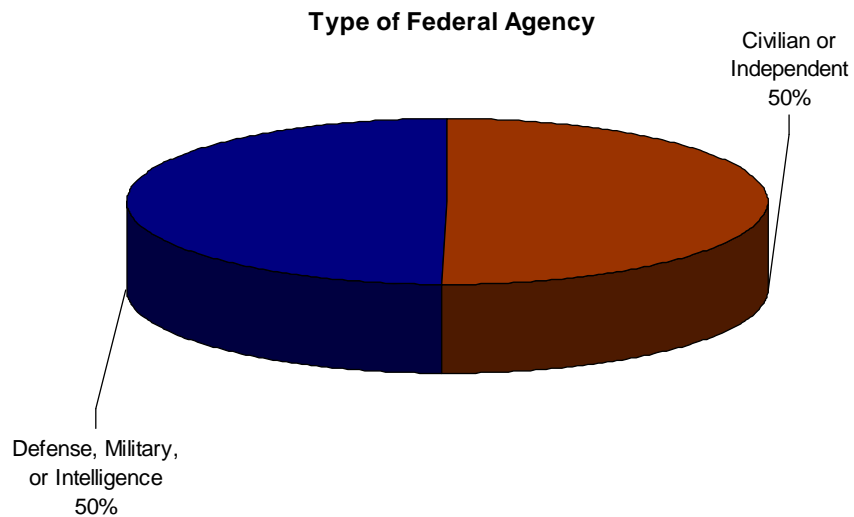
Market Connections, Inc.  
June 2007



# *Background*

- In April 2007, 201 federal telecommunication decision-makers were interviewed about their communication systems, general business issues, current unified communication status and action plans, and vendor/partner perceptions.
- Respondents were all employed by defense or civilian agencies and had some involvement in the implementation of IT and telecommunications solutions.

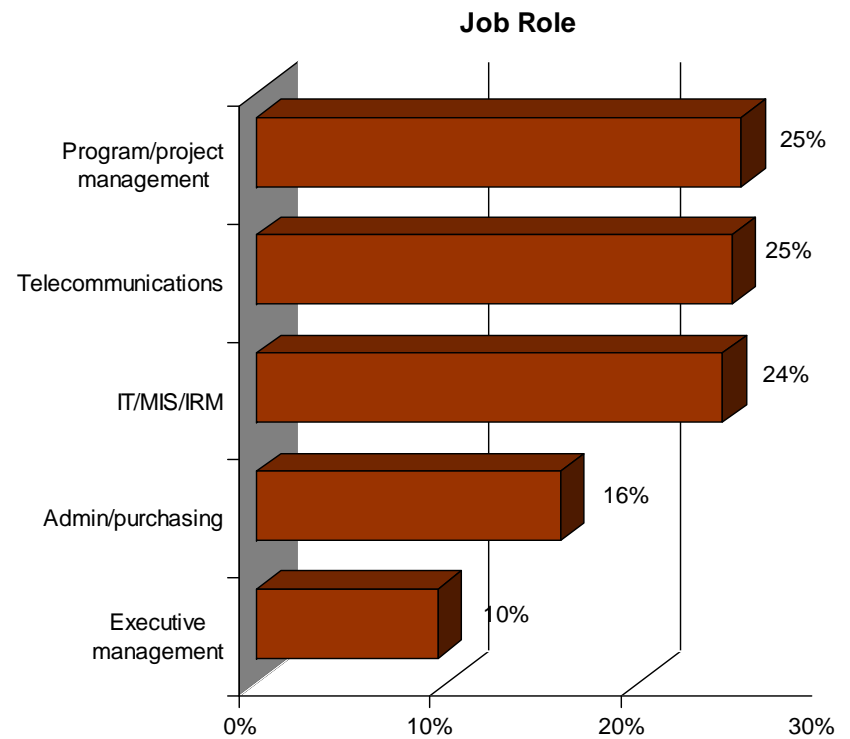
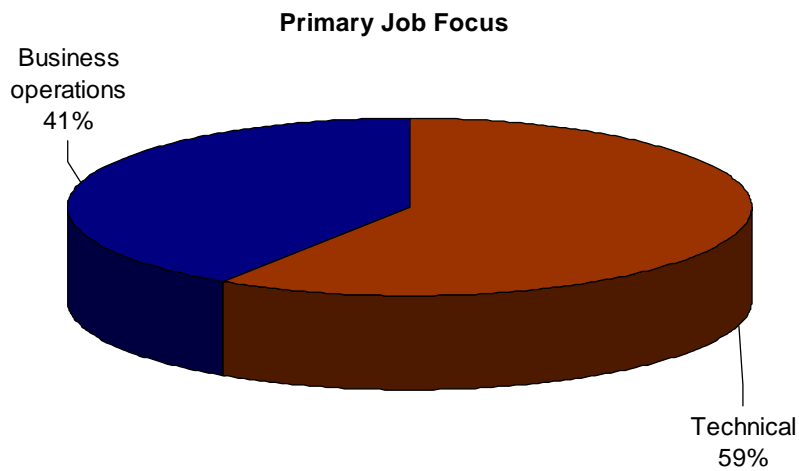
# Overall Sample Population: Agency and Involvement



*You are an employee of which of the following?*

*Please indicate the scope of your involvement of IT and telecommunications solutions for your agency or organization.*

# Overall Sample Population: Job Function and Job Role



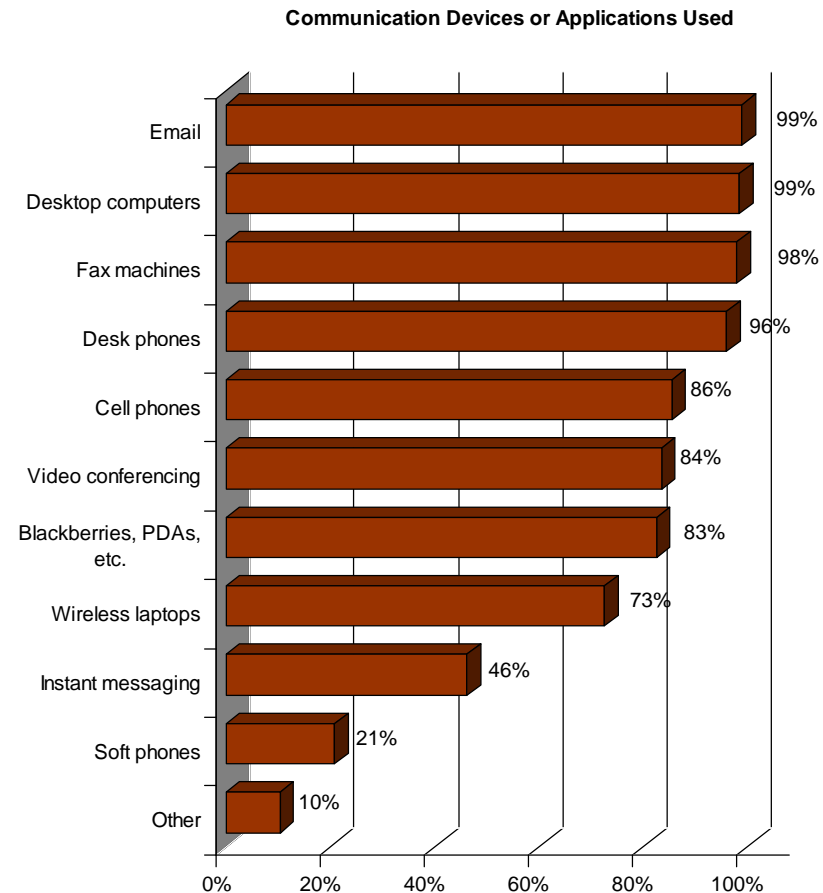
Are you mainly involved in the daily business operations or the technical aspects of IT and telecommunication systems within your agency?  
Which of the following best describes your role in your organization?



# *Communication Systems*

# Communication Devices or Applications Used

- Virtually all respondents used traditional “wired” technologies within their agencies, such as email, desktop computers, fax machines, and desk phones.
- More than 80% of respondents’ agencies also use more mobile-oriented virtual technologies, such as cell phones, video conferencing, and mobile devices, such as Blackberries and PDAs.
- Civilian agencies (53%) were significantly more likely to use instant messaging than their defense counterparts (40%).

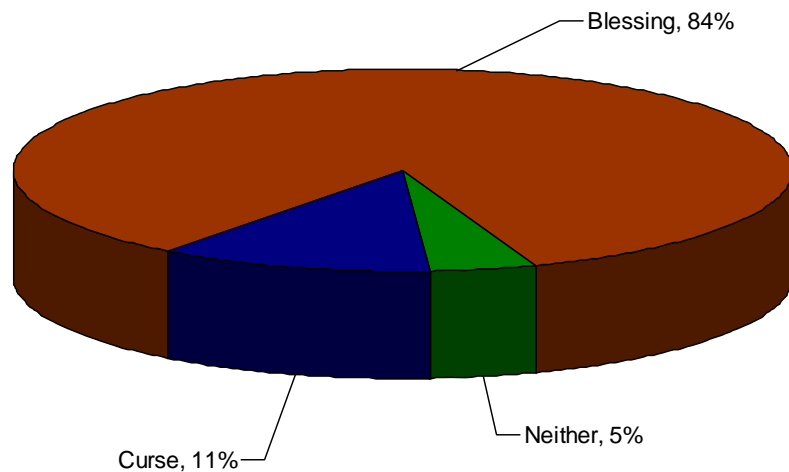


Which of the following communication devices or applications does your agency currently use?

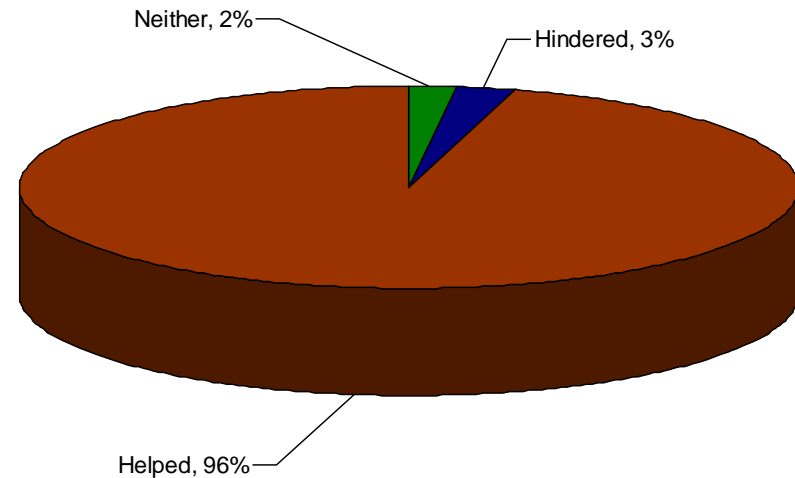
# Effects of Communication Devices and Applications

- The proliferation of communication devices, including mobile phones and Blackberries, and technologies like instant messaging has generally been a blessing in respondents' daily lives. Nearly all of respondents said these devices helped communication in their organizations.

Communication Devices:  
Blessing or Curse in Daily Life?



Communication Devices:  
Helped or Hindered at Work?

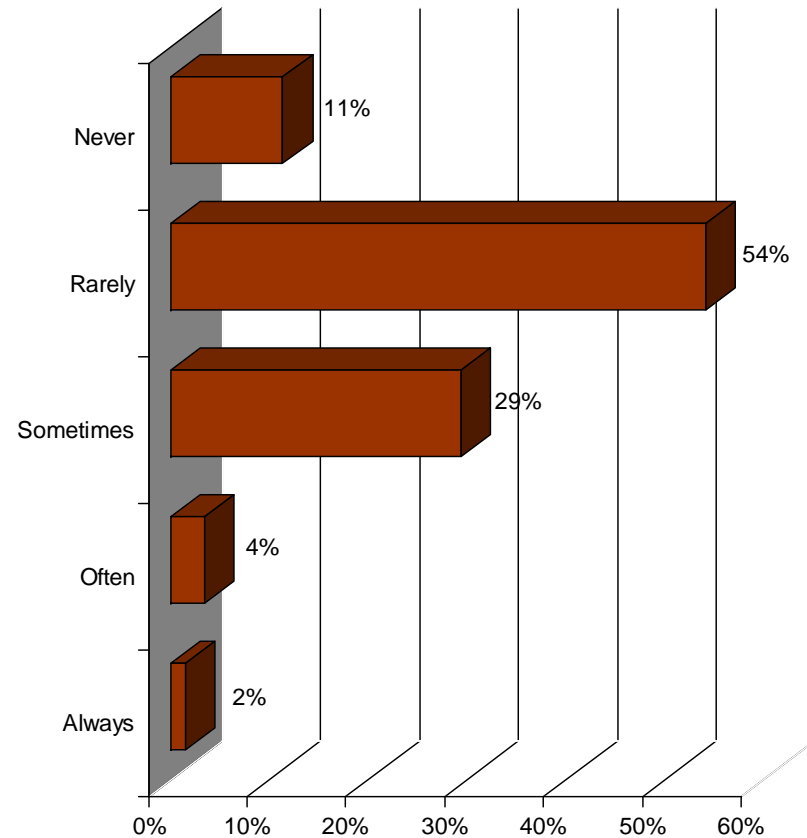


*Has the proliferation of communication devices been a blessing or a curse to you in your daily life?*

*Have these devices helped or hindered communication with people in your organization?*

# *Frequency of Delays or Missed Deadlines*

- Despite the proliferation of communication devices, more than one-third of respondents said that projects have still been delayed or deadlines have been missed in their agencies due to communication difficulties.



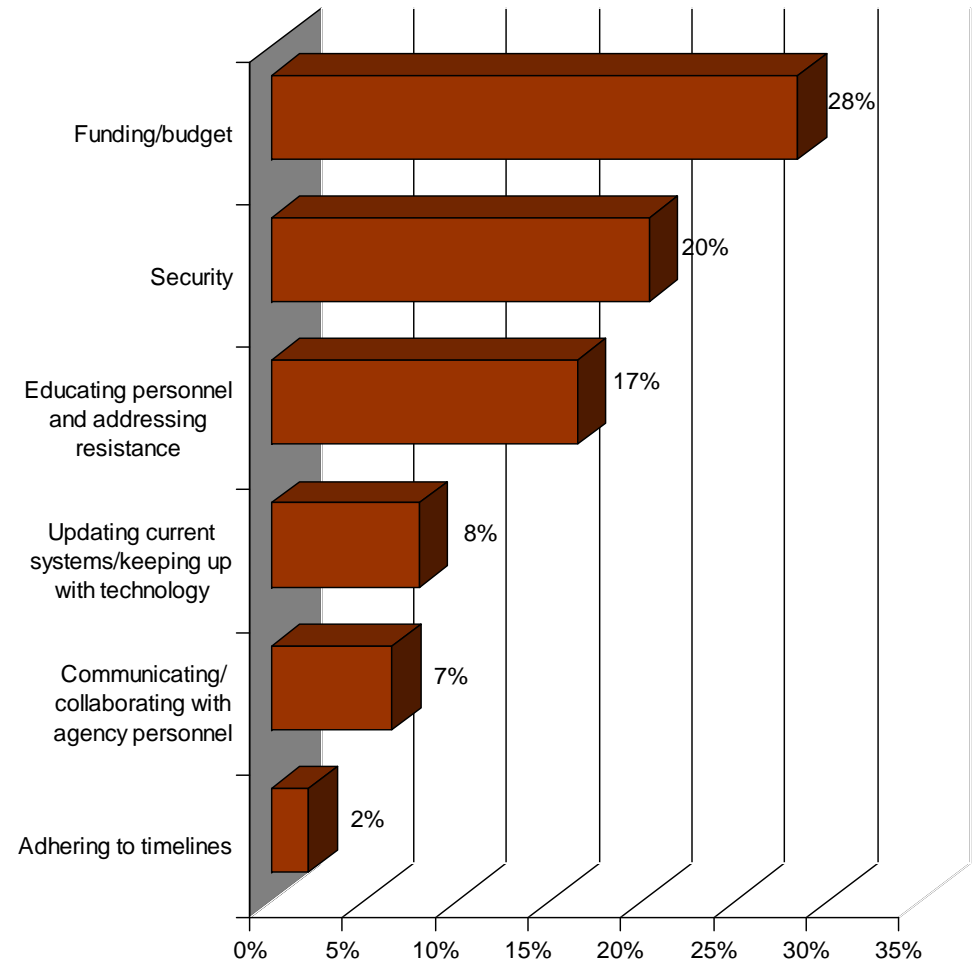
*How often are projects delayed or deadlines missed as a result of not being able to contact a co-worker or decision-maker in your organization?*



# *Business Issues and Challenges*

# Greatest Challenge to Achieving Communication Goals

- Funding was the most commonly cited challenge for respondents in achieving their agencies' communication goals.
- Security was listed by one-fifth of respondents as the most significant challenge.



(UNAIDED) What do you believe will be the ONE most significant challenge you will face in achieving your communications goals within your agency or organization?

# Priority of Business Issues

- Those business issues with immediate impact on the agencies' missions, including security, reliability, and productivity, were of greatest priority to respondents.
- Factors with less immediate, but potentially long-term impact, including collaboration and coordinating a mobile or remote workforce were lower priorities overall.
- Defense respondents considered data and communication security and disaster planning to be more of a priority than civilian respondents.

**Priority of Business Issues**

Business Issues	Total Priority	Extremely high/ Somewhat high
Data and communication security	88%	61%/27%
System reliability	87%	54%/33%
Increased productivity	78%	45%/33%
Disaster planning and COOP	77%	39%/38%
Cost savings	72%	46%/26%
Reduction in delays and missed deadlines	72%	27%/45%
Increased collaboration	70%	38%/32%
Interfacing with other agencies	60%	30%/30%
Increased accessibility to employees	59%	29%/30%
Coordinating a mobile or remote workforce	49%	21%/28%

Key: Total Priority = Extremely high (5) + Somewhat high (4)

On a scale of one to five where one is "extremely low priority" and five is an "extremely high priority", how much of a priority are the following business issues for your agency over the next 24 months?

# Importance of Capabilities to Agency Mission

- Real time notification and identification of employees was considered the most important capability in assisting respondents' agencies to deliver on their missions.
- In general, civilian respondents placed more importance on one-to-one communication capabilities, such as mobile devices and instant messaging than their defense counterparts.
- Defense respondents focused on more one-to-many communication methods, such as video and audio conferencing.

**Importance of Capabilities to Agency Mission**

Capabilities	Total Importance	Very/Somewhat
Real time notification and identification of employees	62%	36%/26%
Remote/mobile access to agency files	58%	21%/37%
Wireless access and networking	54%	26%/28%
Mobile devices	53%	25%/28%
Video conferencing	51%	18%/33%
Audio conferencing	47%	15%/32%
Instant messaging/live chats	14%	7%/7%

Key: Total Importance = Very important (5) + Somewhat important (4)

On a scale of one to five where one is "not at all important" and five is "very important", how important are the following capabilities in assisting your agency to deliver on its mission?

# Unified Communications Implementation Challenges

- More than three-quarters of respondents considered perceptions and concerns over security to be challenging to unified communications implementation.
- Significantly more defense respondents (82%) than civilian (74%) considered perceptions and concerns over security to be challenging.

**Challenge Level of Factors to Unified Communications Implementation**

Factors	Total Challenge Level	Very/ Somewhat
Perceptions and concerns over security	78%	52%/26%
Compatibility with legacy systems	68%	31%/37%
Complexity of product integration	62%	24%/38%
Reliability and trust in VoIP	57%	27%/30%
Lack of best practices and clear track record	51%	16%/35%
Untested technologies	44%	21%/23%
No sound business case	41%	12%/29%
No compelling need for new functionality	38%	11%/27%

Key: Total Challenge Level = Very challenging (5) + Somewhat challenging (4)

On a scale of one to five, where one is "not at all challenging" and five is "very challenging", how challenging are the following to the enterprise-wide implementation of an integrated system that combines IT and telecommunication infrastructure?

# Benefits of Unified Communications

- More than 90% of respondents said that integrating IT and telecommunications systems would improve data and communication security, system reliability, productivity, and collaboration.

**Improvement of Factors from IT and Telecommunications Systems Integrations**

Factors	Total Improvement	Significantly /Somewhat
Data and communication security	93%	69%/24%
System reliability	93%	65%/28%
Productivity	91%	63%/28%
Collaboration	91%	52%/39%
Disaster planning and COOP	88%	56%/32%
Accessibility to employees	86%	40%/46%
Cost savings	85%	55%/30%
Reduction in delays and missed deadlines	85%	38%/47%
Interfacing with other agencies	79%	48%/31%
Coordination of a mobile or remote workforce	76%	39%/37%

Low

Key: Total Improvement = Significantly (4) + Somewhat (3)

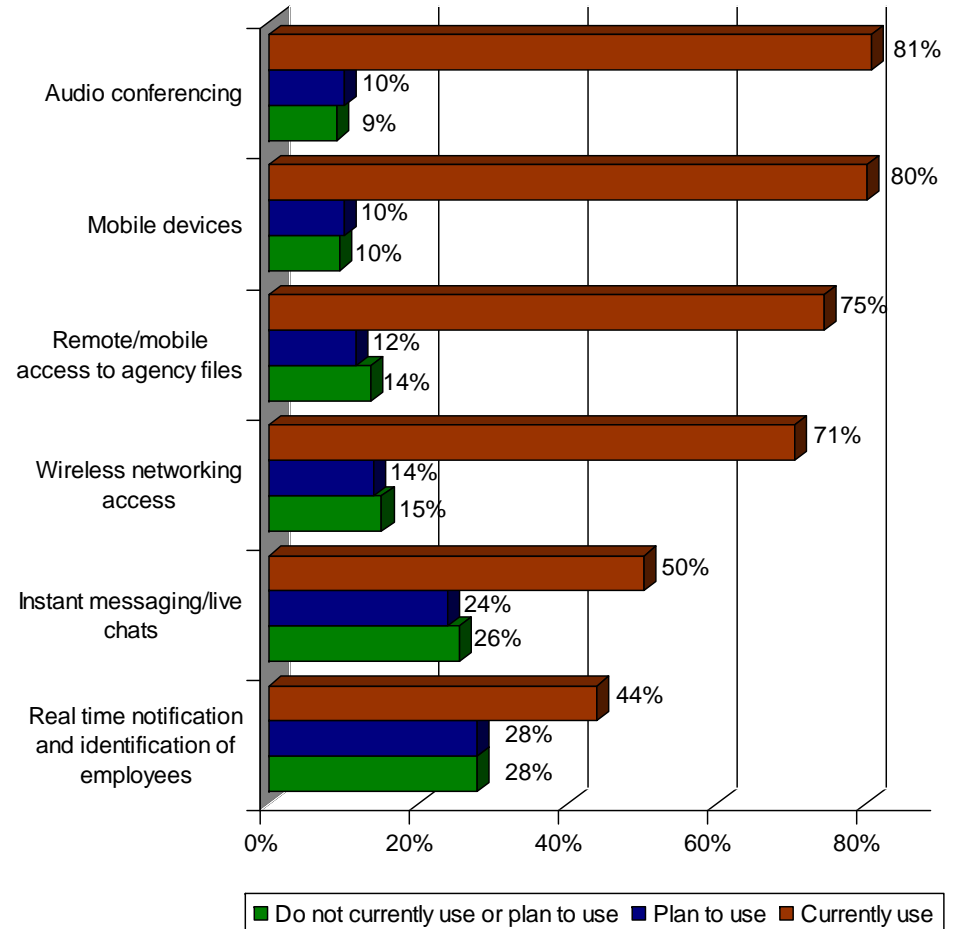
Please tell me to what extent you believe the following would be improved by integrating IT and telecommunications systems.



# *Current Status of Unified Communications*

# Communication Capabilities Status

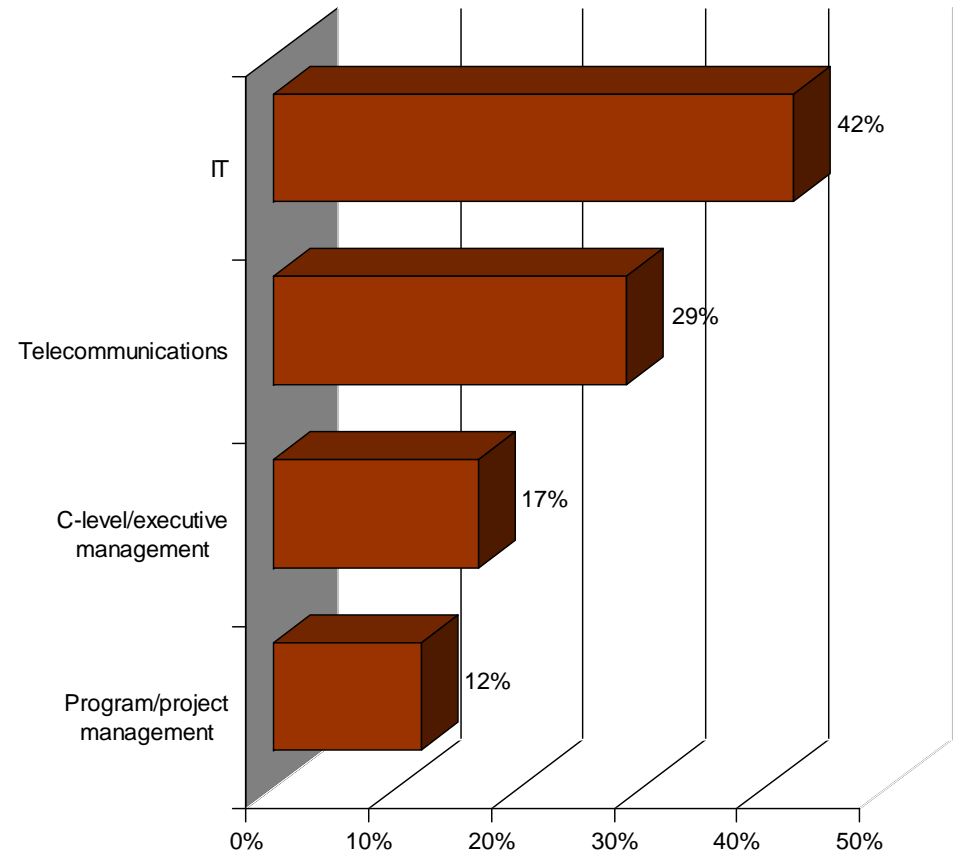
- While low in terms of current use, more than one-quarter of respondents plan to use real time notification and identification of employees and instant messaging/live chats.
- Significantly more civilian respondents (82%) than defense (67%) currently use or plan to use instant messaging/live chats.



Which of the following communication capabilities do you currently use or plan to roll out over the next 18-24 months?

# Development and Roll-Out of New Communication Systems

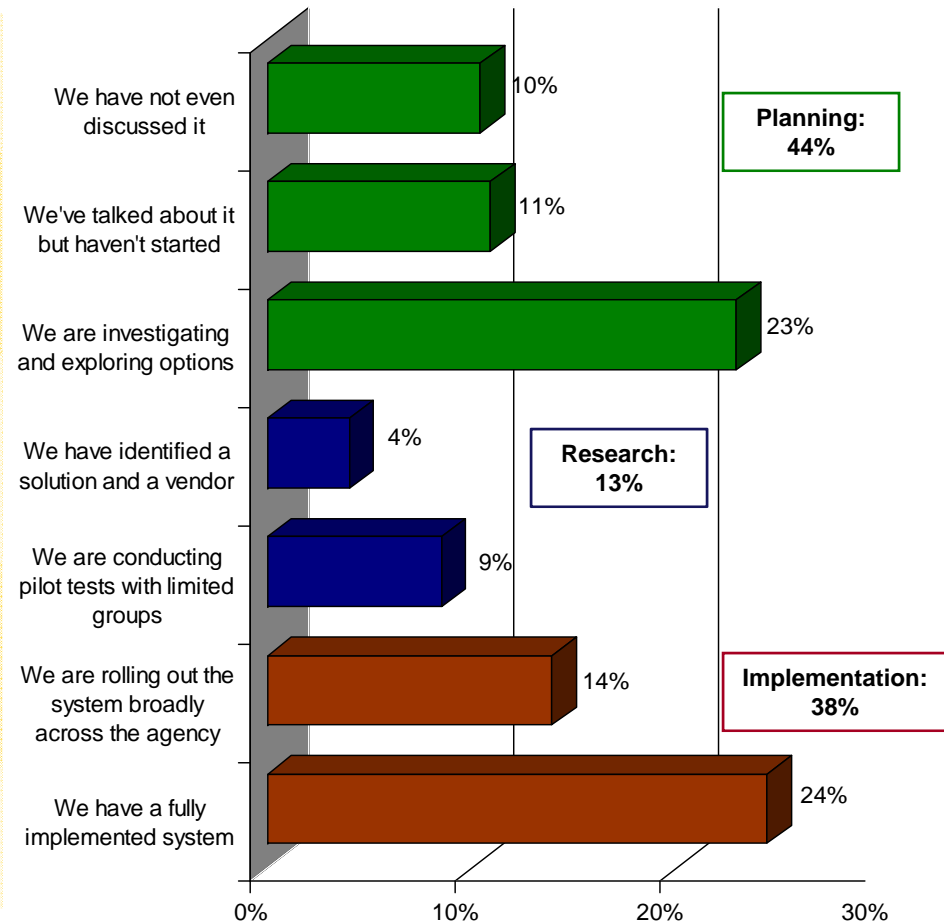
- IT personnel were most likely to be the primary department involved in the development of new communication methods in their agency.
- Telecommunications personnel had a higher level of involvement in civilian agencies (35%) than defense (22%).



Which department or personnel are most involved in the roll-out and development of new communication methods within your agency?

# Roll-Out of a Unified Communications System

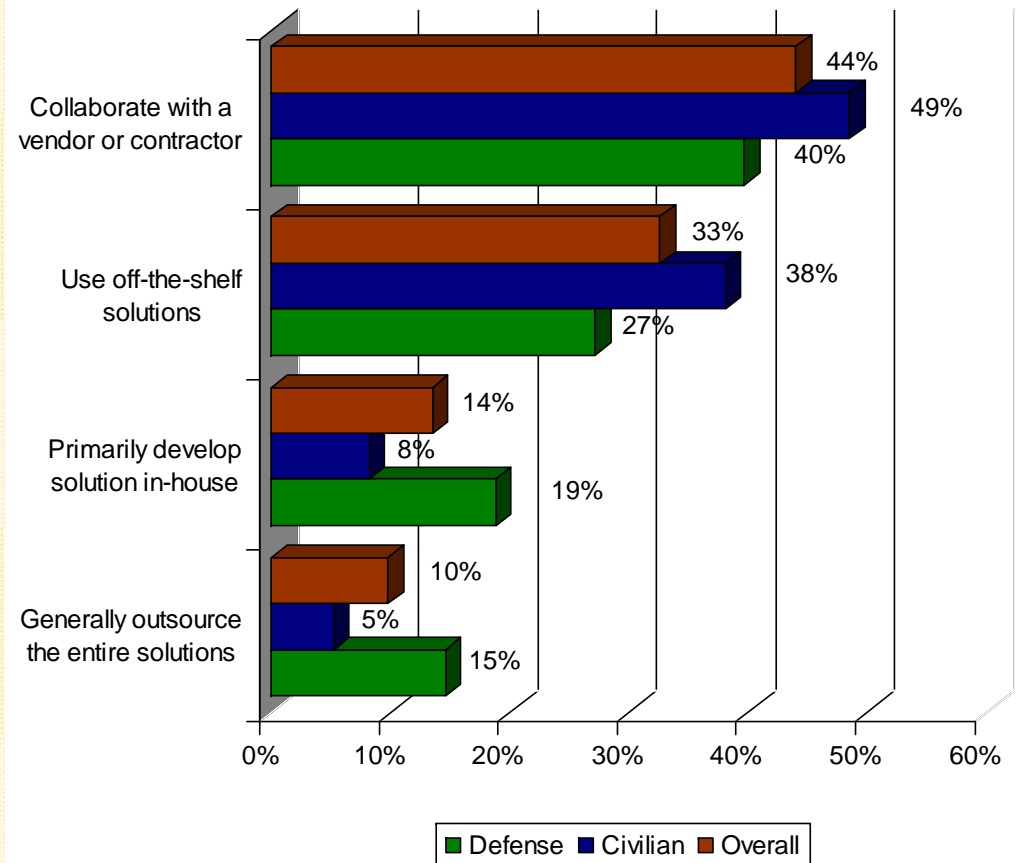
- More than 40% of respondents said they were in the early planning stages of unified communications system roll-out.
- Nearly one-quarter of respondents said they had a fully implemented unified communications system.
- More civilian respondents reported to be in the implementation phase (48%) than defense respondents (29%).



Which statement describes the current stage of your unified communications system roll-out?

# Unified Communications Planning and Implementation

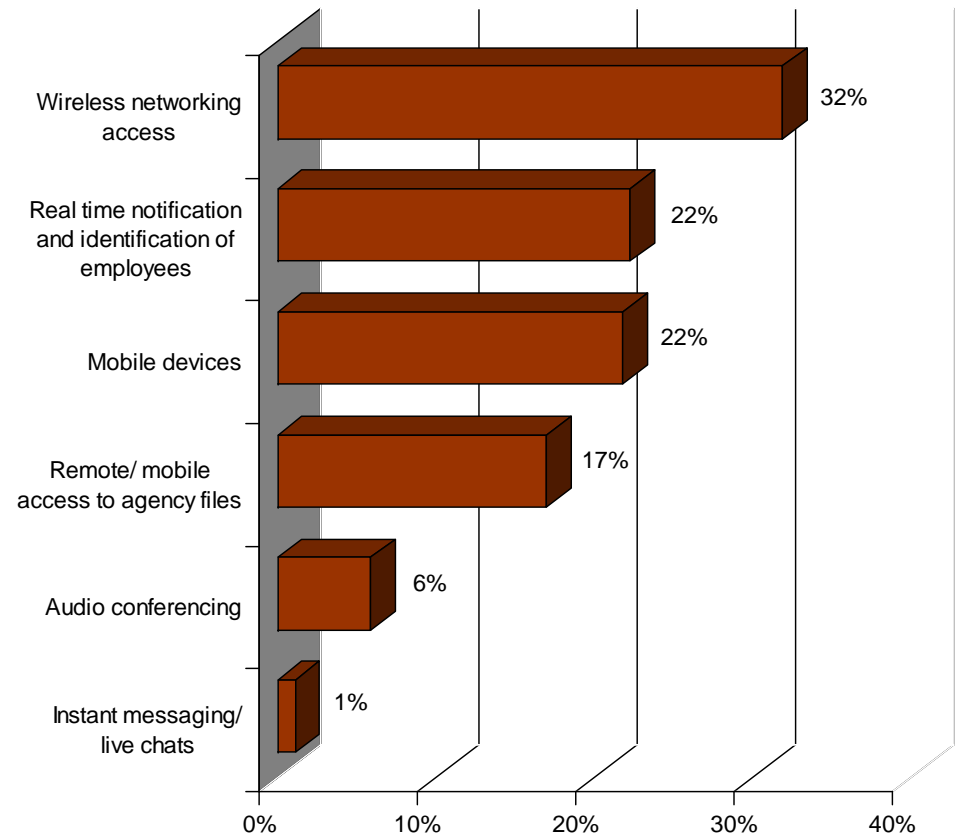
- Over 40% of respondents plan to collaborate with a vendor or contractor when addressing their communications planning and implementation.
- Civilian respondents were significantly more likely to plan on collaborating with a vendor or use off-the-shelf solutions than defense respondents.
- There was less of a consensus from defense respondents on how to address future communications planning and implementation.



Which of the following statements best describes how your agency plans to address future communications planning and implementation?

# Future Investments Needed

- Nearly one-third of respondents said that wireless networking access would require the greatest amount of their organization's resources.
- More than 20% said real time notification and identification of employees and mobile devices would require the most from their organizations.



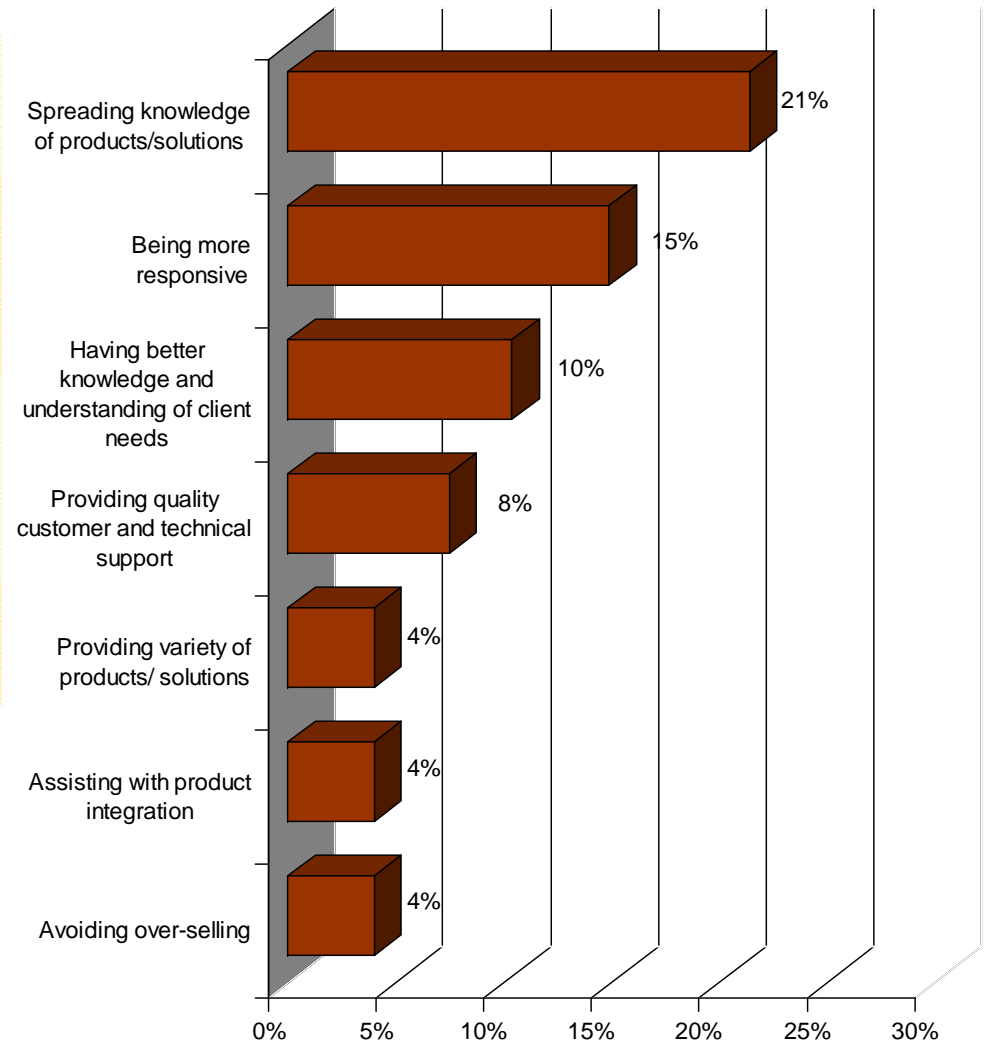
Of those, which will require the greatest amount of your organization's resources?



# *Vendor Perceptions and Challenges*

# Ways Vendors Can Help with Unified Communications

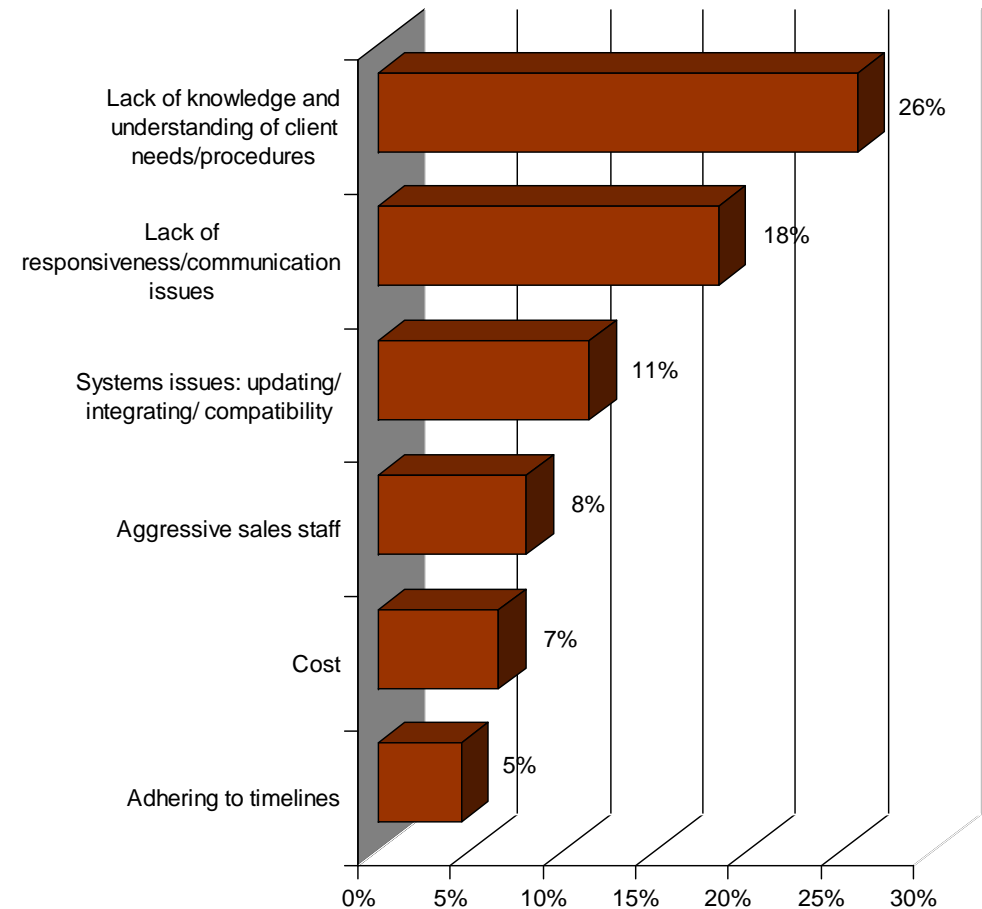
- More than 20% of respondents said that vendors could be most helpful in implementation by sharing their knowledge of products and solutions.
- Technical personnel and civilian respondents were significantly more likely to request greater information dissemination and training about products and solutions than business operations personnel and defense respondents.



(UNAIDED) In what ways could vendors be most helpful in assisting your agency's implementation of unified communications?

# Greatest Challenge in Working with Vendors

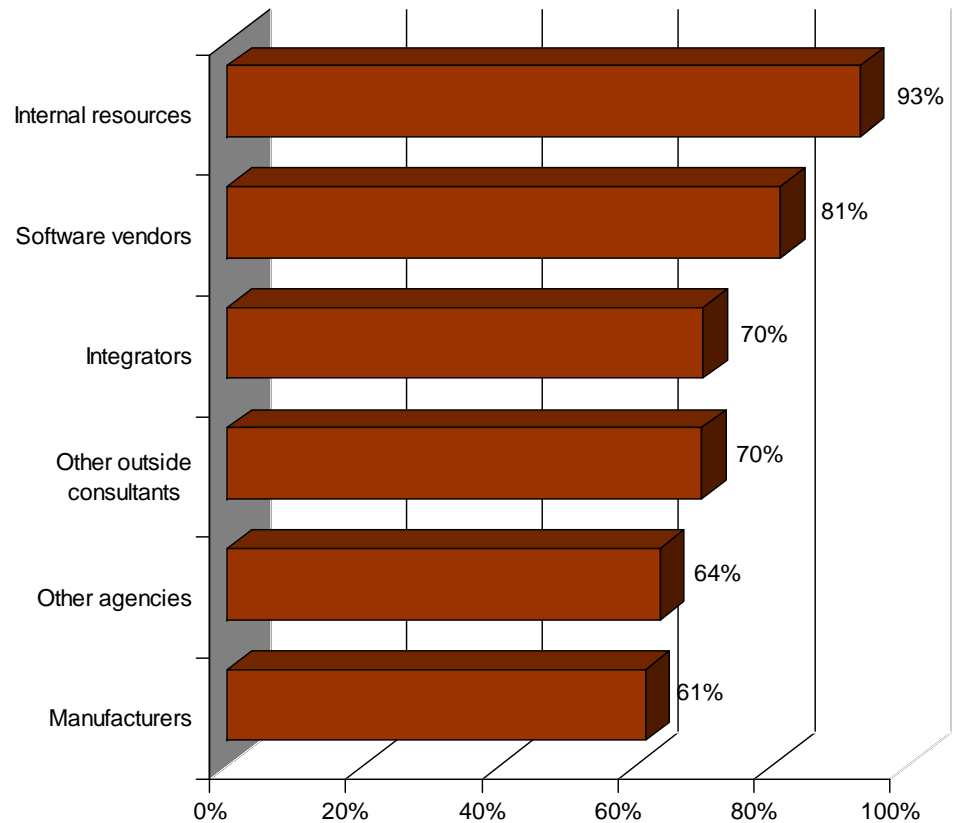
- Lack of knowledge and understanding of client needs was the most commonly cited challenge in working with communications solutions vendors.



(UNAIDED) In general, what ONE challenge do you most often face when working with outside communications solution vendors to accomplish your goals?

# Sources to Help Address Communications Needs

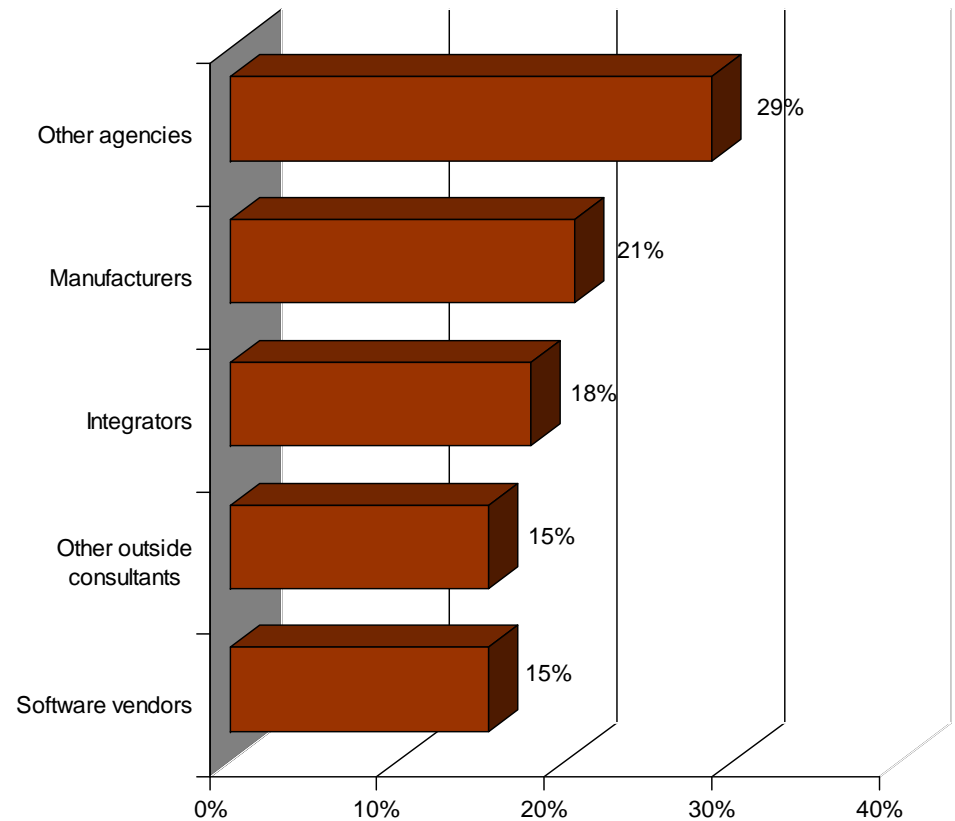
- Other than internal resources, software vendors were the most commonly cited source for respondents' communications needs.
- Significantly more civilian respondents reported relying on software vendors and manufacturers than defense respondents.



Which of the following sources do you regularly rely on to address your agency's communications needs?

# Partner With Cutting Edge Solutions

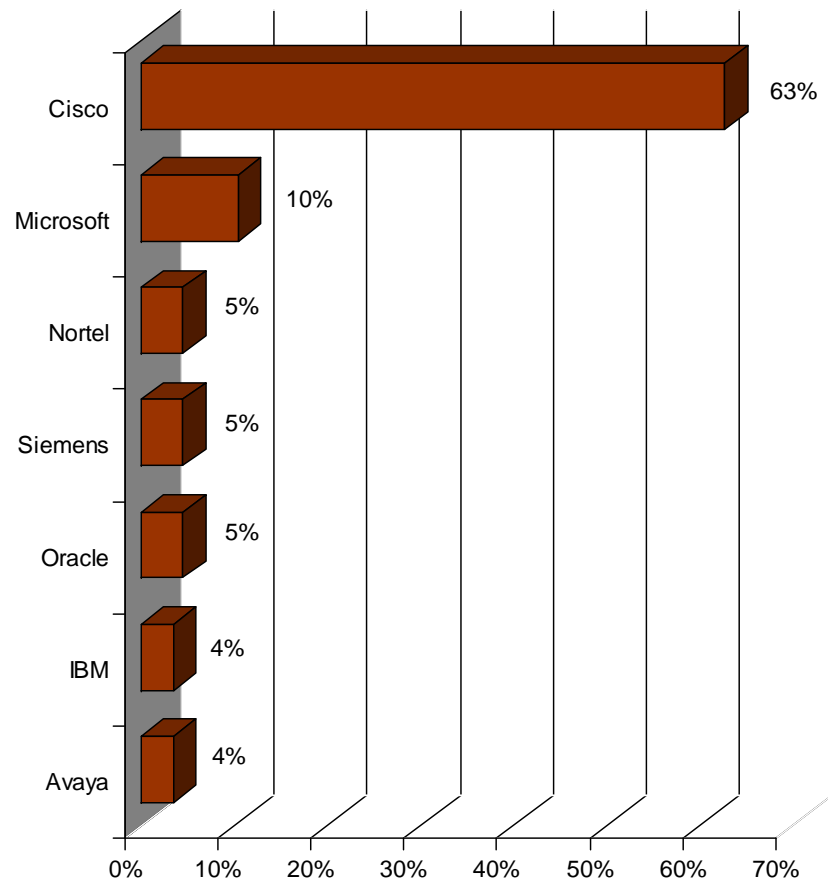
- Respondents most often considered other agencies as offering the most cutting edge communications solutions.
- Approximately one-fifth of respondents said manufacturers had the most cutting edge communications solutions.



Which ONE type of partner do you perceive as offering the most cutting edge communications solutions?

# Leader in Unified Communications

- The majority of respondents considered Cisco to be the primary leader in unified communications.
- Significantly more IT personnel and civilian respondents cited Cisco as the leader in unified communications than business and defense respondents.
- Business and defense respondents were more likely to name Microsoft than IT and civilian respondents.



Which of the following vendors would you consider the primary leader in unified communications?

# *Contact Information*

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