

The Value Of Collaboration Technologies To Desk-Based Workers

Introduction

The advancement of an increasingly mobile and tech-savvy workforce is shifting the mix of devices that employees demand for business interactions. Today most employees make the majority of phone calls from their work desk using their desk phones. Survey respondents project that in two years, 12% of work-related desk phone calls will shift and spread across softphones, mobile phones, video-enabled phones, and videoconferencing rooms. End users value hardware-based assets that facilitate better collaboration with others, such as videoconferencing through the use of video-enabled phones. This is prompting firms to reassess their unified communications adoption/strategy, which integrates real-time communication (e.g., instant messaging, telephony, videoconferencing, and data sharing) with non-real-time communication (e.g., voicemail, email, and fax). This profile looks at the current usage and perceptions of various communications devices for work.

The Majority Of Workers Are Still Desk-Based

In March 2013, Cisco commissioned Forrester to delve deeper into trends and perceptions of end users, business decision-makers, and technical decision-makers around IP telephony. Our study revealed that 71% of workers work from their personal desk at their organization four to five days per week (see Figure 1).¹ Our commissioned study confirmed that even for collaborative tasks, employees tend to spend time at their desk to a much greater extent than at any other location.

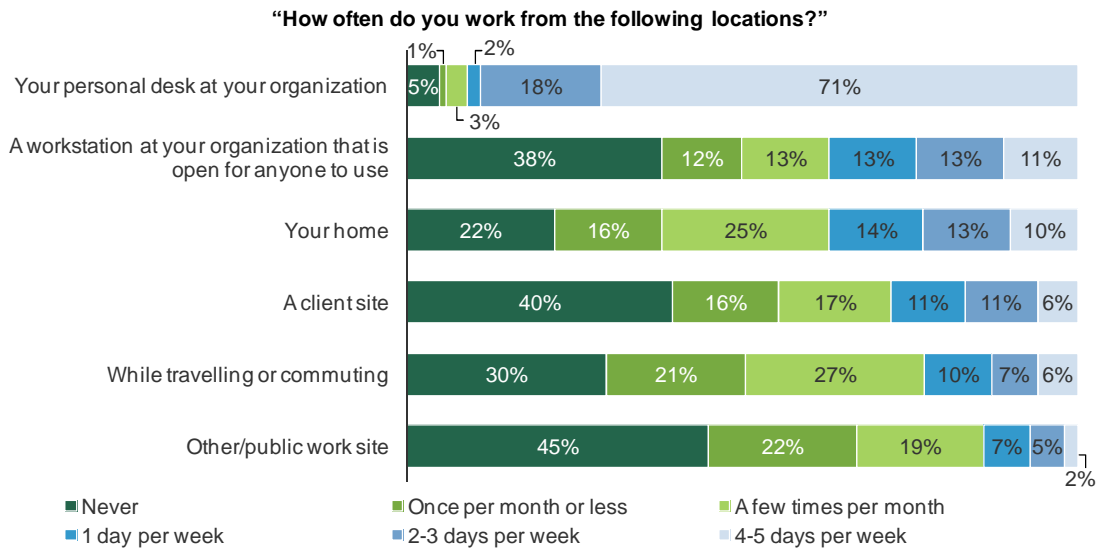
Additionally, 88% of work calls are being made from a personal desk at work, and 55% of those calls are being made from a desk phone (see Figure 2). In fact, close to half of respondents said that they could not function at work without a desk phone.



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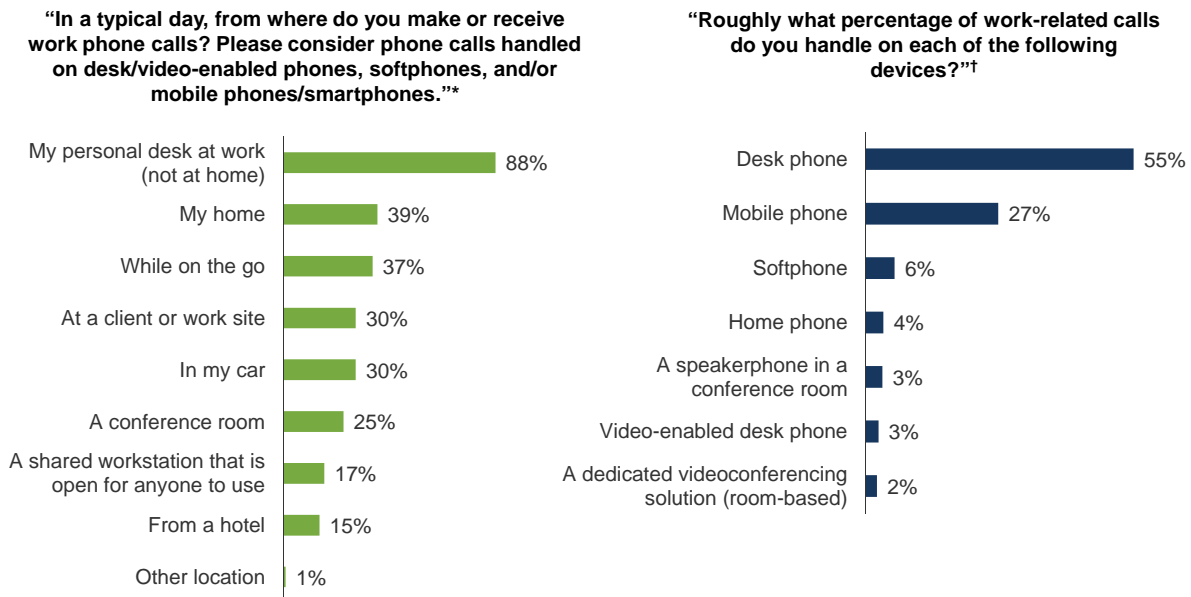
Figure 1
Work Locations



Base: 2,360 end users, business decision-makers, and/or technology decision-makers

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

Figure 2
Locations And Devices To Make/Receive Work Calls



Base: 914 end users

*(multiple responses accepted)

†(percentages do not total 100 because of rounding)

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

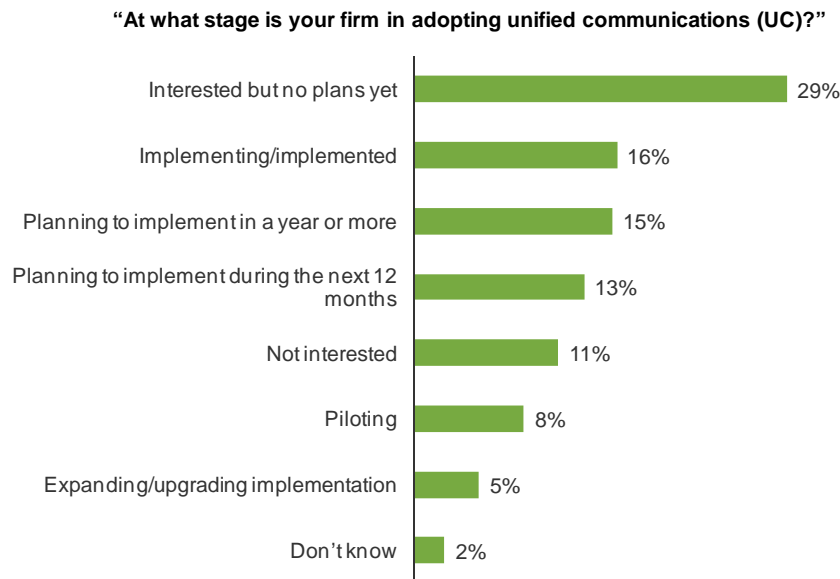
Firms That Have Invested In Unified Communications Are Seeing Business Benefits

Given the reliance of end users on their work phones, businesses are interested in implementing hardware with advanced capabilities (such as video and instant messaging) to provide more robust tools for their workers. However, most firms are nascent in their unified communications (UC) strategy. Eighty-seven percent of firms are interested in UC, but only 16% have fully implemented a strategy (see Figure 3).

Decision-makers who have implemented or piloted UC technologies enjoy a broad range of benefits. The top benefit reported is improved team collaboration (91%), followed by improved project management (86%), improved external customer experience (82%), and significantly faster problem resolution (82%) (see Figure 4).

Figure 3

Unified Communications Adoption



Base: 9,766 end users

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

Figure 4

Benefits Of Unified Communications



Base: 401 IT decision-makers that are piloting or have implemented unified communications

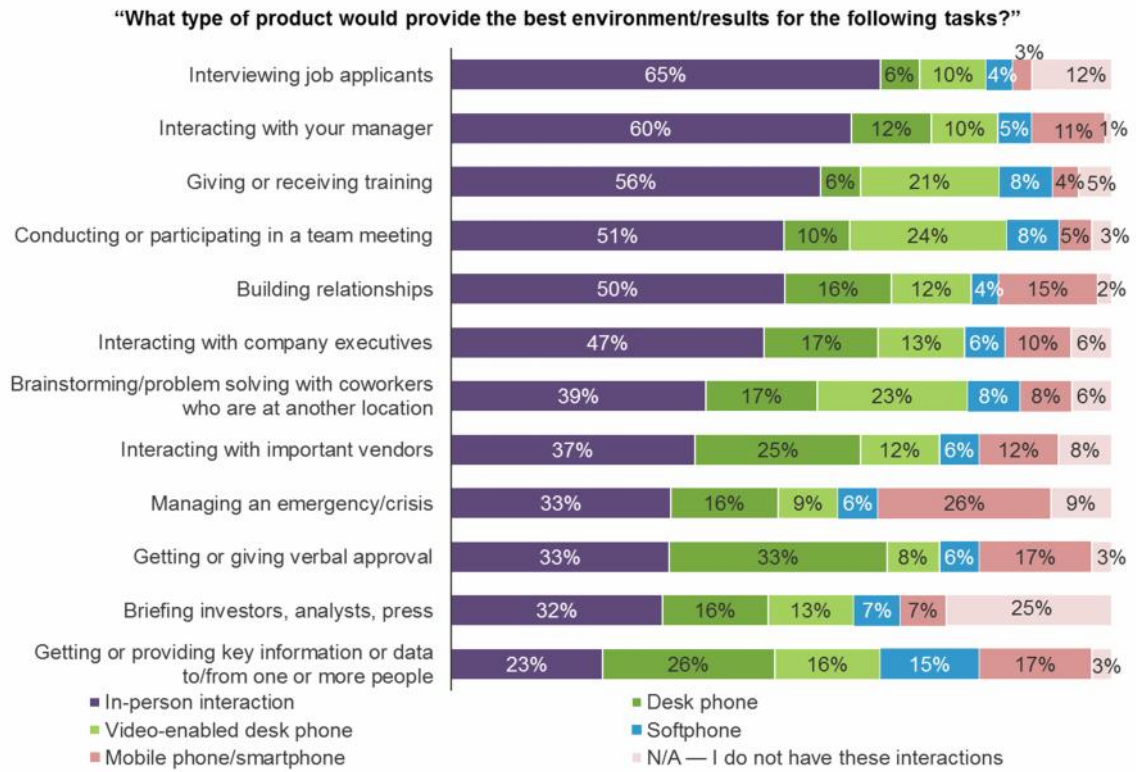
Source: Forrsights Networks And Telecommunications Survey, Q1 2013, Forrester Research, Inc.

Video-Enabled Phones Provide Value When Used

In-person interaction is still the preferred method of conducting many business activities, outweighing other forms of communication for almost every business task tested (see Figure 5). This finding supports the observed prevalence of desk-bound workers, as an office environment may best facilitate collaboration and other types of business interactions. Our study also tested customer-related tasks and found similar results, with 54% preferring in-person interaction for “demonstrating a product,” 57% for “engaging in complex negotiations,” and 41% for “closing a sale.”

Those who make use of feature-rich UC technologies, such as video-enabled phones, find a lot of value in them. A majority of existing users (87%) found that they were vital to their work (see Figure 6). Based on the high value placed on personal interaction, it is possible that video-enabled phones are being used as an alternative to in-person interactions. These findings point to the need to invest in innovative UC tools that deliver better collaboration and an in-person conversation experience.

Figure 5
Preferred Environments For Various Tasks



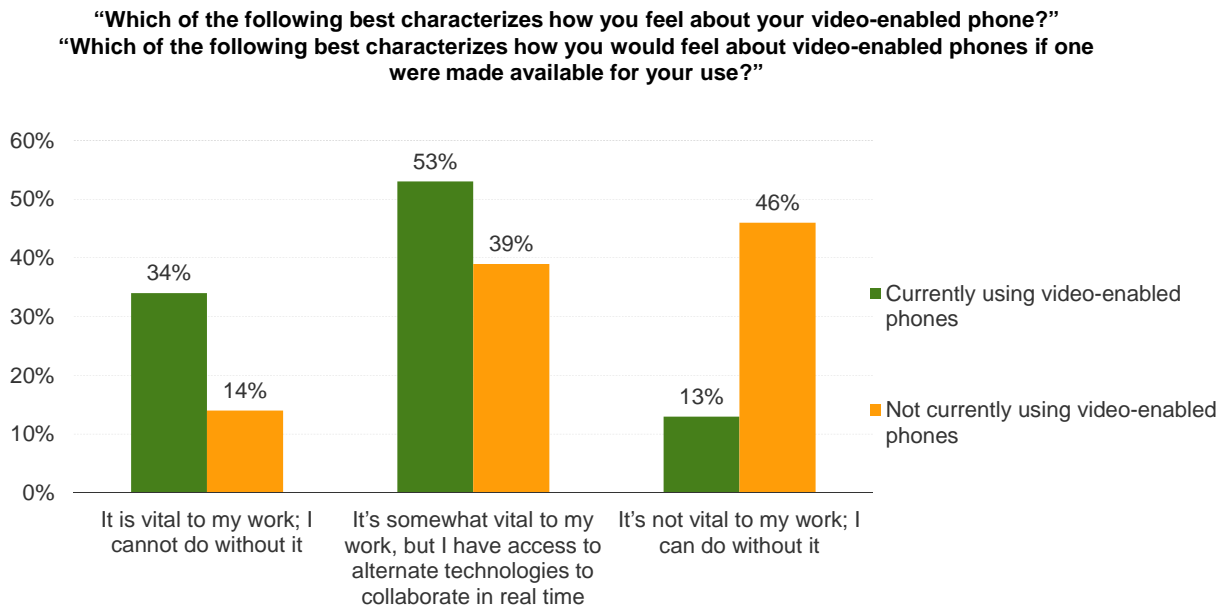
Base: 914 end users

(percentages may not total 100 because of rounding)

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

Figure 6

Perceptions Of Video-Enabled Phones



Base: 131 End-Users who are using video-enabled phones and 783 End-Users who are not using video-enabled phones
 (percentages may not total 100 because of rounding)

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

Key Findings

Firms that have implemented UC solutions are benefiting from them. In-person interaction still remains the preferred method for conducting business, indicating that firms have not largely adopted collaboration technologies that provide sufficient alternatives. As business and technical decision-makers look to provide collaboration technology that meets both future and current needs, they need to keep in mind that today, a majority of workers are still largely desk-bound and find their desk-based devices to be critical to their jobs. These workers thus require desk-based communications technologies that enable collaboration with customers and colleagues alike. Feature-rich UC devices such as video-enabled phones may be one solution, as they are considered vital among current users. As more users gain experience with video-enabled devices, the potential exists to shift face-to-face interactions to video. Until firms reach a point of sophistication in their UC strategy to enable these types of tools, standard communication technologies such as desk phones remain critical to desk-bound workers.

Appendix A: Methodology

This Technology Adoption Profile was commissioned by Cisco Systems. To create this profile, Forrester leveraged its Forrsights Workforce Employee Survey, Q4 2012, and Forrsights Networks And Telecommunications Survey, Q1 2013. Forrester Consulting supplemented this data with custom survey questions asked of 2,360 end users, business decision-makers, and/or technology decision-makers in the US, Australia, Brazil, the UK, Germany, China, and India at midmarket (250 to 999 employees) and enterprise (1,000-plus employees) firms. In this March 2013 survey, respondents were asked about their work and collaboration habits and their usage and preferences of various devices for work. The survey was conducted in English except in Brazil (Portuguese), Germany (German), and China

(Mandarin). For more information on Forrester’s data panel and tech industry consulting services, visit www.forrester.com.

Endnotes

¹ In our study, a “worker” or “end user” was defined as someone who met the following requirements: 1) interacts remotely with colleagues, customers, partners, or vendors who are at a different location at least monthly; 2) does not work in verticals that are computer-related (infrastructure, networking, services, support, and distribution) or marketing/research/public-relations-related; 3) uses at least one of the following for work at least weekly — desk phone, softphone, video-enabled phone, smartphone, or mobile phone; and 4) is not able to authorize/approve telephony-related purchases.

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