Introduction

For some of us, it feels like just yesterday that a simple video conference was a thing to behold – teams would gather around an overheating monitor, just to see a blocky, pixelated, barely moving image of the person on the far end. “Look! Dave’s actually in Wichita today, but we can see him right here in New York!”

For others, it might be the advent of VoIP that sticks in the memory, filed under “tech that knocked my socks off”. Or, maybe it was the UC craze of the early 00’s: “messaging PLUS audio PLUS video? In one app? What will they think of next??”

Well, as they say in the industry, “times – they are a’changin”. And fast. Gone are the days of “good enough” communications. Today’s enterprise expects much, much more from their digital communications. Our data shows IT leaders are looking for platforms that deliver a solid mix of quality, cost savings, and bullet-proof security (and not necessarily in that order). And more to the point – everyone is looking for solutions that enable one magic word: Transformation.

So, to the analyst, it’s not surprising to see Team Collaboration solutions positioned as the foundation for enterprise transformation. The real question: can Team Collaboration serve as the foundation for transformation in the real world? To find out, we’ve conducted extensive research on the topic, briefing with vendors, interviewing IT decision makers (ITDMs), testing and implementing these solutions ourselves, and combining our insight with our market data. We segment our findings as follows in this report:

1. Defining Attributes – from architecture to experience
2. Target Outcomes and Benefits – transformational opportunities
3. Best Practices, Key Steps – based on interviews and observations
4. Transformational Use Cases – from the real world
5. Market Momentum and Research Summary – wrapping it all up

Full Disclosure: this study was commissioned by Cisco, an acknowledged leader in the UC&C market. However, this report delivers an objective and unbiased overview based on research conducted independently by Wainhouse research and does not endorse any specific vendor’s product or service. As always, we recommend the reader evaluate all UC&C solutions for fit within their own unique environment.
Team Collaboration – Defining Attributes

If you’re wondering “what’s different this time”, you aren’t alone. Team Collaboration (TC) solutions are often compared to Unified Communications (UC) – providing presence, messaging, and audio, video, and content sharing. But from the analyst’s perspective, these platforms are very different animals – Team Collaboration represents the evolution from UC into a digital, connected, and integrated future.

Most Team Collaboration solutions have been built from the ground up in order to deliver this evolutionary experience – using current, if not cutting-edge, technologies, systems, and architectures:

**Cloud Native:** built on microservice and serverless architectures, leveraging intelligent traffic control, and distributed across global data centers – connected by a vendor-managed and high-performance network.

**Cloud Developed:** with agile, DevOps methodologies, delivering user-focused features at a rapid pace, without disrupting the service or experience – rapid evolution is the key.

**Cloud Enhanced:** augmenting and enhancing the TC experience with Artificial Intelligence (AI) / Machine Learning (ML), massive storage, and “everywhere-access”.

**Cloud Billed:** supporting an OPEX purchasing model that allows the organization to expand or contract based on its own business needs.

**Highly Extensible:** providing developer-friendly RESTful APIs and SDKs, enabling custom integration and automation.

This cloud-first approach delivers an improved experience, designed to eliminate barriers between users and the information they need to get their jobs done – reducing *infofriction* within the business. While traditional communications and UC solutions tend to focus on real-time interactions, these platforms focus on broad connections and enhanced collaboration – connecting users to each other, partners, customers, content, data, and systems. They serve as a platform, dashboard, and collaboration portal for the connected team, improving and transforming the UC feature set:

**Team Management:** of course, TC solutions provide a strong teaming construct – users create teams (aka channels, spaces, groups, etc.), invite contacts, and collaborate as a group. Privacy, security, and team moderation controls underpin the Team Collaboration experience.

**Real-Time Communications:** the UC stack has been ported over and improved across most TC platforms, with a familiar ‘click-to-communicate’ experience:

– Contact List: with enterprise directory integration and single-sign-on experience.
– Presence: Implementation varies by platform, but contact availability, do-not-disturb, and custom messages are common.

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`Cloud vs. On Prem Communications:
• On Prem: -10%
• Cloud: +21%`

*Wainhouse Research 2018 UC Forecast*
Messaging: Now with new emojis, GIFs, text markup, file sharing, and more! Key improvement here is the addition of persistence – messages and content are stored server-side and replicated across clients.

Audio and Video: VoIP is standard, and some platforms include calling (PSTN) options. Depending on your previous UC experience, you will likely find the video experience much improved – better quality and stability.

Content Sharing: screen, app, and file sharing – with the occasional remote desktop control thrown in on some platforms.

Meetings: Native support for multiparty meetings, complete with audio, video, and content sharing – and accessible over standard web connections (firewall friendly).

Updated Clients: expect a “user-first” app and consistent experience across personal computer and mobile devices. The mobile experience specifically is a big step up from many previous UC solutions – expect high quality and reliability.

Insight Aggregation: interactions, shared content, and team output – all stored in the cloud – are indexed, discoverable, and surfable.

Extensions and Integrations: TC platforms are built with integration in mind, providing users with in-frame access to internal, 3rd party, and external systems – your content platform, your CRM, your line-of-business application, your partner, your customer. Most provide off-the-shelf integrations in addition to APIs for customizing the experience.

Compliance and Administration: As insight, data, and enterprise IP is aggregated in these platforms, data security becomes a key area of focus. Most enterprise platforms make this a core area of focus, providing secure content storage, centralized IT admin control, end-user privacy and moderation features, and support for common regulatory and compliance requirements.

While TC platforms exhibit these common attributes, there is still plenty of room for differentiation. Key differentiated features and experience include:

Borderless Collaboration: supporting external users, with the same control, features, and experience as your internal ones – easy to invite, easy to access, and easy to manage.

Advanced Meeting Features: look for more than the basic, ad-hoc meeting experience – advanced platforms support scheduling, recording, multiple video layouts, PSTN access, guest support, lobby, integration with conference room video devices, agendas / notes, and support for large meetings.

Platform Extension: the TC platform built as an extension to existing services – leverages a familiar user experience, integrates to existing data stores, extending existing compliance models, and managed via existing IT admin tools.

Device Ubiquity: extending the service across a range of devices – on the desktop and in the conference room, from desktop phones to mobile docks to video conferencing devices. Bonus: those services who extend to existing devices, without the need for upgrades or replacements.
Hybrid Flexibility: expect core services to be anchored in the cloud – directory, authentication, presence, messaging, and app distribution. But differentiated services connect existing and distributed elements of the communications stack, between the cloud and your datacenter: call control, SIP trunking, and media mixing are primary targets.

Security: you’ll see security highlighted in most TC marketing collateral. The key is to probe past the brochure – look for true end-to-end encryption, certifications that matter, data center security measures, and the option for on-premises and self-managed keystores. Engage your security team to qualify the solutions you are evaluating. And make sure to understand how security and data policies apply to internal and external collaboration to ensure your IP is protected across all workflows.

So, while size, shape, and even maturity vary across various TC solutions, we still find plenty of differentiation across vendors. The question now on the table: what benefit can I expect out of my TC solution?

**Transformational Benefits**

The confluence of cloud horsepower, broad feature-sets, and a universe of integrations create a unique opportunity to transform the enterprise. Of course, every enterprise is unique, and “your mileage may vary” based on your environment, requirements, and approach. That said, our research uncovered a common set of benefits and opportunities that a well deployed and fully adopted Team Collaboration platform can deliver:

**Service Consolidation:** The average mid-to-large enterprise supports 2 different PBX solutions, 2 separate UC platforms, and 5+ meeting services – and most of these platforms deliver an overlapping feature-set. Team Collaboration platforms serve as a primary target for consolidating these redundant services, driving a host of benefits:

– Cost Savings: the elimination of redundant conferencing costs is a standard line-item in many TC business cases. Licenses are the obvious “low hanging fruit” – but don’t forget PSTN access costs. TC enables the transition from PSTN to VoIP conferencing, and depending on your organization’s current conferencing profile, your PSTN access savings may be as-or-more material than your licensing savings.

– Pivot Reduction: standardizing on a TC platform delivers the end-user with a universal collaboration client. But when you integrate with the business applications your users spend the most time in, you create a universal productivity portal. This universal-client approach creates familiarity, drives expertise, and focuses the user’s attention – fewer pivots between apps, faster access to content, fewer missed messages, faster response times, and more organizational collaboration are the targets.

– Enhanced IT Control: fewer applications means fewer pinholes in your edge – pinholes primed for data leakage. Moreover, service consolidation drives a common IT admin experience – reducing overhead for provisioning, move-add-changes, discovery, and auditing processes. The related security benefits are amplified when non-sanctioned and / or consumer services are part of the consolidation effort.
Cloud Enablement: Built on Cloud 2.0 technologies, Team Collaboration platforms serve as a logical path to the cloud, delivering the following benefits:

- Datacenter Footprint: combine the TC cloud and broad feature-set and you have an opportunity to reduce your on-premises equipment inventory – UC servers, PBX infrastructure, session border controllers, and storage arrays are all common targets. Of course, this consolidation is generally not completed overnight – reinforcing the benefits of a hybrid TC model.

- Operational Resources: leveraging the TC vendor’s support resource reduces demand on IT and operational staff. Many TC vendors have embedded advanced monitoring, alerting, and support tools into their platforms – fewer issues, faster resolution.

- Storage Optimization: as users adopt the TC platform for messaging and file sharing, the load on email, shared storage, and content sharing platforms shifts to the TC cloud. Data aggregation makes it easier for users to find what they are looking for while reducing demand on existing storage systems.

- Access to AI: every enterprise TC solution is applying Artificial Intelligence (AI) at some level within their platform, and we’re already seeing the leaders using AI to deliver an improved TC experience – voice recognition, transcription, translation, automated meeting entry, advanced meeting analytics, intelligent support bots, and more.

Collaboration Transformation: Of course, the most effective platforms are designed to transform the way your teams collaborate:

- Email Reduction: The TC solution uses two key attributes to reduce email and IM noise: persistence and teams. This creates a message subscription vs. interrupt process as users post and review content on their schedule, communicating at a team or individual level - no need for reply-all, never-ending email chains, and distribution lists.

- Workflow Automation: Messaging, collaboration, integration, and AI combine to deliver a world of opportunity. Integrate your trouble ticketing system, add an “approval bot”, and managers can click-to-approve related requests – no more email ping pong. Add integration to your CRM and your sales team can receive actionable messages about new leads, engage with prospects, and update customer records – all synchronized in real-time and without leaving their TC application. Extend these examples to your partners and end customers, and the benefits expand from productivity into profit.

- Video Enablement: Combine cloud horsepower, “anywhere access”, enhanced PC and mobile apps, and integration to video-capable conference rooms and desktop devices, and you have a recipe for increased video adoption. Optimized TC clouds address common video barriers, across network, endpoint, and user environments, delivering a confident and consistent video experience on every participating device.

- Borderless Collaboration: Those enterprises who have adopted a TC solution highlight this key benefit. True, the TC cloud connects mobile and office workers via audio and video across geographies. It also eliminates time zone barriers, as teams leverage persistent messaging and content sharing to interact when it makes sense for them. But Team Collaboration also breaks down organizational barriers, supporting connections with external resources – enabling teams to collaborate securely with contractors, partners, customers, and other external members.
Use Cases – From the Real World

Whether you’re looking to transform the way you communicate, your project timeframes, or your customer experience, Team Collaboration can serve as the platform to get it done. Our research uncovered a number of interesting use cases, provided by the enterprise decision makers we interviewed. We’ve picked our “top three” here.

TC Use Case – Email Transformation

Enterprise Description: IT Consulting | ~3,000 Users

Problem Statement: This enterprise relied on a distribution list (DL) for technical escalations between field sales and their sales engineering teams. The DL generated between 150 and 200 emails per day, clogging the inboxes of over 500 engineers. The message flow was unmanaged, unstructured, filled with redundant questions, and ultimately resulted in slow response times to customer-impacting queries.

TC Solution: The enterprise used their TC solution to create a central Support Team, adding a series of technology-specific sub-teams – field sales posts queries into the appropriate technology track, sales engineering reviews, updates, and responds accordingly. Individual teams focus on their areas of expertise and the technologies their customers need. All prior queries are saved within each technology track, reducing redundant questions and duplicated support efforts, and creating a searchable knowledge base for new team members.

Results: Email flow reduced from 200 a day to 20 a month.

“I used to constantly check my email – but now I’m checking [TC]. I can hone in on what’s important to me - @mentions and key topics. I would call it a more efficient filter.”

Sales Engineer
IT Consulting Firm

TC Use Case – Meeting Transformation

Enterprise Description: Network and Media Services | 8,500 Users

Problem Statement: Redundant platforms were creating a culture of confusion – 7 IM services, 3 video conferencing solutions, and one large events platform had confused users and driven them away from virtual meetings. As a result, meetings started an average of 15 minutes late as users walked between buildings or wasted time figuring out which tool to use for each interaction.

TC Solution: The enterprise rolled out a ubiquitous TC solution across all 8,500 users and 37 sites, complete with advanced meeting features, single-sign-on, support for external guests, and integrated with internal user provisioning and change management processes.

Results: Running-to-the-room has largely been replaced by meeting-from-the-desk (or road), and meetings start on time – everyone knows how to schedule, host, and join. Weather is no longer an excuse to cancel a meeting. Interestingly, this enterprise saw their peak meeting time shift from 11am to 9am as they no longer had to account for a “commute period”. And most importantly, traditional conferencing minutes dropped by almost 70% as users shifted from PSTN to VoIP and video meetings.

“Our main office is renowned for poor weather, and last year this was a huge impact – many snow days and office closures. But this year, with our new TC platform, we’ve had no impact – no canceled meetings.”

IT Decision Maker
Network & Media Services
TC Use Case – Transforming Customer Engagement

**Enterprise Description:** Hi-Tech Manufacturing | 100,000+ Users

**Problem Statement:** Application Pivot Fatigue, pure and simple. A complex web of systems were responsible for delivering the customer experience – email, audio conferencing, customer support, ticketing, CRM, proprietary inventory and ordering systems were all critical to delivering the product but lacked integration, creating ‘islands of information’. Users would pivot between systems to fulfill orders and solve customer problems, relying primarily on email and audio conferencing to communicate with partners, vendors, and customers. The process was slow, expensive, and posed a huge security risk as information was stored across this fragmented ecosystem.

**TC Solution:** Working with their primary technology vendor, this enterprise tied it all together by deploying a TC platform as a secure hub – integrating with existing telephony and conference room systems, WiFi, CRM, financing, inventory, and ordering systems. The implementation team also built a customer-facing mobile application and integrated the platform with strategic partner systems.

Now, when a customer walks into a retail environment, they receive an automated welcome message while the appropriate sales and support personnel receive an instant message with pertinent customer details in their TC app. If the customer needs something unique, the system automatically validates inventory and notifies the appropriate team members. A customer-specific team is created, keeping track of the customer’s request and prior history, meeting with external resources directly on the platform. The customer is kept in the know through their mobile app, and each system is updated automatically.

While this level of integration took a material effort to plan, the roll-out only took 90 days as the TC platform was compatible with existing PBXs, desk phones, and meeting room devices. Compare this roll-out to the anticipated 3- to 5-year roadmap required to implement a greenfield TC solution.

**Results:** Positioning the TC platform as the foundation of the customer experience is delivering massive benefits. From a security perspective, confidential information is managed from a central platform – external users connect only to the information they need and can be removed when appropriate, while confidential information remains secure and auditable on the TC platform. Time-to-deliver and quote-to-cash timeframes are much faster as communications moved from a serial email and audio conference workflow to persistent team messaging and meetings – and 67% of all voice calls are now conducted via VoIP and video on the TC meeting platform. The bottom line: a massive cost-savings over the next five years.

It’s common for an enterprise to view Team Collaboration solutions through a workload-specific lens, evaluating messaging, meetings, and calling features independently. Of course, this limits the potential of the solution – instead, view Team Collaboration as a foundational platform, capable of integrating, enhancing, and transforming the way your users get their jobs done.
Successful Transformation: Best Practices

Most enterprises follow a standard “plan-deploy-operate” model when introducing any new solution or technology. While this framework applies to Team Collaboration, our research uncovered some unique best practices that will maximize your benefits and deliver transformational opportunities.

**Start at the Top:** If you expect to transform elements of your business, you will need your executive team to lead by example – those who do it best have an executive sponsor central to the implementation team, with their peers all serving as early adopters on the new platform. After all, if the best way to get a response from your boss is via the new TC platform, the rest of the team will quickly join the party.

**Establish your Vision:** Before evaluating solutions and technologies, establish your business vision. Think big, past individual workloads – this is more than “better messaging” and “cost-effective collaboration”. Which legacy workflows are holding you back? Most find a host of bad behaviors tied to legacy email, meeting, and calling platforms. What are your opportunities to transform as a business? Look for cost models, security gaps, and workflow automation. Where can you optimize your customer’s experience? Extend the benefits outward.

“Bottom line: target transformation up front, then tackle the technology.”

**Platform choice is Critical:** This point surfaced regularly during our research, positioned as critical to a successful Team Collaboration implementation: set your targets on the right platform, and deploy widely. The level of transformation, benefits achieved, and overall value that TC delivers relies on its network effect, and each additional user brings exponential value to the overall solution. Adoption is critical and supporting a fragmented environment will only hamper your efforts.

As you establish a target platform, keep in mind Team Collaboration’s broad scope, integration capabilities, and core architecture. You are delivering a cloud first, one that will connect multiple services together. Key is a common directory, presence, messaging, collaboration, and administrative experience. However, the right TC cloud will afford you more flexibility over the user experience than you might expect – by integrating with critical line-of-business applications, supporting a confident guest and B2B experience, and connecting your existing end-user and meeting-room devices.

Your platform selection will also determine your required level of effort, cost, and, ultimately, implementation timeframe. Your choice should be driven by your unique environment, user requirements, and long-term transformational goals. This platform must evolve with your enterprise and technology in general, but the platform that aligns with your current environment will deliver the fastest path to adoption – look for a solution that minimizes cycles spent in training IT and end-users, integrates with existing infrastructure, and maps to existing administrative and employee lifecycle processes.
Engage your Users: ..early and often. The standard IT Best Practices apply – requirement gathering, persona mapping, and workflow modeling are all key steps along the path to adoption. The relevance of these best practices, however, is amplified in a Team Collaboration implementation. Your success will hinge on a tight alignment between the TC platform and end-user benefit – find your champions, understand their requirements, and engage them to configure the platform to meet their needs.

Guide the Team: The broad TC feature-set can overwhelm some teams, or worse, users can create an overly complicated and inefficient environment without proper guidance. Remember, these are more than just IM solutions, and features that make sense to one team may confuse another. Establish guidance focused on content storage, standard taxonomies, and when and why to create teams on the new platform.

Keys to Adoption: While user adoption is the number one key to success, it’s also a proven challenge in many enterprises. While some users will jump in with both feet, some will require some gentle coaxing. We’ve seen both carrot and stick used effectively on this topic and expect a balance between the two is your best bet. One of our favorite tips came from an IT team who engaged their users to identify legacy workflows that can be optimized in the TC solution. Their users were tasked with both identification and implementation – as individual teams ported their services over, they became experts in the new environment, owned their success, optimized their results, and naturally pulled other team members onto the platform. The IT team noted this “crowdsourced adoption” as core to their success.

Equally important: deliver a consistent experience for internal and external collaboration, enabling users to easily (and securely) interact across borders – conducting meetings, making calls, sharing files, joining and leaving teams as needed. Teams require collaboration tools that apply across traditional organizational boundaries – and the more friction your users experience when engaging external team members, the lower the chance they will fully adopt your TC platform.

Lastly, many IT teams we’ve interviewed note that “without turning the competing services off, we’d never have full adoption on the new platform”. We agree this is a key step – map requirements, enable the platform, and communicate well. But, in the long run, keeping redundant services available for too long can create unnecessary barriers to adoption – remember, the TC value proposition is maximized based on critical mass. If users have access to multiple messaging platforms, they will gravitate to the one their team prefers – if that’s not the “standard”, it’s unlikely they will see value in the new platform.

Bottom line: turning services off is as important as turning them on.


Find the benefits that matter to your users, and they will apply to your business.”

Sales Engineer
IT Consulting Firm
Enterprise Trends and Market Momentum

While we still consider it “early days” in the Team Collaboration market cycle, substantial momentum is underway. Our market data shows more than 150 million users were licensed for a Team Collaboration solution at the end of 2018. Note, these are licensed users – very different than active users. Most of these licenses have been purchased as part of a larger suite of software, and many remain un-deployed.

Still, our survey data shows over 55% of North American knowledge workers use a TC solution for business communications – a number closing in on the almost 70% who use a UC solution. Couple this with a -15% year-over-year decline in standalone UC app purchases, and the analyst will tell you: the shift from UC to TC is underway.

The next big step along this journey, from our perspective, requires a fundamental shift in how the enterprise enables their users with these new tools. Those teams who are ahead of the curve are engaging the user to create, deliver, and drive the solution. This can represent a material change in course for some teams, especially those who are used to “throwing services over the wall”, then wondering why adoption metrics are so low.

Those early adopters, of course, appear to be reaping the early rewards – boasting lower email volumes, reduced conferencing costs, fundamental shifts in meeting behaviors, and a few transforming their customer experience. As their platforms gain critical mass, their users are generating mountains of data – data that AI requires learn, evolve, and realize its potential. And AI is a game changer when combined with the TC experience, delivering a host of current and potential benefits:

**Authentication:** Voice and facial recognition deliver a smooth and secure connection between the user and the service.

**Meeting Control:** “Hey <service>, start my meeting.. call Amy.. mute Bill..” Lost remotes will be a thing of the past.

**Intelligent Transcription:** Speech to text transcribes each meeting, making the content searchable, and logging tasks and action items in real time.

**Context:** AI can deliver relevant details for each interaction, from the last conversation you had to appropriate professional details for each meeting attendee.

**Security:** finding suspicious patterns in user activities, like failed login attempts, fraudulent calling patterns, mass downloads, and more.

**Digital Assistants:** The holy grail: “Hey <service>, book me at my favorite spa and reschedule my afternoon meetings”. We’re not quite there, but we’re on the way.

Again, we’re early days here, but we’re already seeing the AI value proposition begin to surface in the leading TC platforms. And we expect the early TC adopters are best positioned to experience a growing wave of benefits as the platform matures and evolves along the way.
About Us:

Wainhouse Research is an independent firm focused on the Unified Communications and Collaboration industry. For over 20 years, we have provided technology vendors, service providers, and enterprise decision makers with objective insight and deep analysis of the UC&C market. Our team comes from the industry, bringing both context and expertise to the discussion – and our objective insight is delivered with ethics and integrity at its foundation.

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