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## The Collaborative Enterprise

How enterprises are adapting to support the modern meeting

This paper sponsored by



# Contents

- Executive Summary ..... 1
- Methodology..... 2
- Key Observations..... 2
  - Finding #1: The Modern Meeting = High Volume ..... 2
  - Finding #2: The Modern Meeting = Virtual, Visual, and Anywhere ..... 2
  - Finding #3: Workplace Transformation = Collaboration..... 3
  - Finding #4: The IT Environment = Growing Complexity ..... 4
  - Finding #5: Huddle Room Collaboration = A Traditional Mix..... 5
  - Finding #6: Huddle Room Technology = Lagging Behind..... 5
  - Finding #7: Users Want Better Collaborative Tools..... 6
  - Introducing the Logitech ConferenceCam Connect ..... 7
- Conclusion..... 7
  
- Figure 1 – Meetings per week..... 2
- Figure 2 – % of Meetings with Remote participation ..... 2
- Figure 3 – Where people collaborate ..... 3
- Figure 4 – Mobile initiated audio/web conferences ..... 3
- Figure 5 – Physical Workplace Transformation..... 3
- Figure 6 – # of redundant UC vendors in production ..... 4
- Figure 7 – UC feature deployments: >50% of end users ..... 4
- Figure 8 – UC feature deployments: >50% of end users ..... 5
- Figure 9 – % of huddle rooms outfitted with the collaboration technologies..... 5
- Figure 10 – % of conferences participated in from huddle rooms using specified devices..... 6
- Figure 11 – "Which features would you use more if your conference room were better equipped?" ..... 6
- Figure 12 – Preference for a portable audio/video/screen sharing device ..... 7

# Executive Summary

You are likely to hear the phrase “workplace transformation” on an increasing basis these days. The transition from an agrarian to an industrial economy and, ultimately, into today’s information age has had a profound effect on what we produce and the way we work. Looking around today’s workplace, we can observe a number of signs that these transitions are dramatically changing our work environment:

- **Who** we work with – By 2020, Millennials will comprise 50% of the global workforce<sup>1</sup>. As the veterans move on and younger workers move in, many established procedures, tools, and general preferences will change.
- **What** we do – In 2005, just 10 years ago, digital capital investment – those investments made in resources key to developing new products and services for the digital economy – represented barely .08% of the global GDP. Fast forward to today, and this investment exceeds 3%<sup>2</sup>. This represents over \$6 trillion US dollars of accumulated digital capital investments. And this digital momentum is only expected to increase. Our global output is becoming increasingly dependent on digital technologies and methodologies.
- **Where** we work – The stereotypical view of the knowledge worker facing a daily commute to the office has been shattered. Fueled by wireless networks, smartphones, and collaborative solutions, the newly-empowered mobile employee feels equally comfortable finding work time at home, from hotels, and while in transit.
- **Why** we work – Today’s workers are not particularly motivated by a “debt of servitude” to their employers, where work is performed for certain hours a day in return for a paycheck. Trying to balance work with their personal lives by time slicing between each has largely failed. Instead, today’s workers strive to find work that is personally fulfilling while simultaneously co-existing in harmony with their personal lives.
- **How** we work – The once powerful “lone wolf” individual contributor has gone the way of the dinosaur. Today’s workers rely increasingly on collaboration to accomplish their objectives as the process achieves better outcomes and is more fulfilling. Collaboration has become the new normal.

While not possible a decade ago, these seismic shifts in the workplace are now well underway, driven by advancements in technology and a commensurate set of enabling tools.

Aided by the analysis of survey data, this paper examines the evolution of the workplace and the tools that are being used to collaborate. Specific focus is given to ‘the collaborative workplace’ that blends highly interactive physical spaces with the tool set required to enable and encourage virtual collaboration.

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<sup>1</sup> 2013 PWC Report, Millennials at Work: Reshaping the Workplace

<sup>2</sup> 2013 McKinsey Quarterly, Measuring the full impact of digital capital, Bughin and Manyika

# Methodology

Wainhouse Research (WR) fielded an online survey to capture the pulse and quantify what is changing in regards to the way we work and the role of collaboration within today's enterprise. The survey was fielded to cross-functional decision makers at mid-to-large enterprises (>250 employees) and probed into facilities strategy, collaboration habits, and the tools the respondents use to get their work done. The results highlighted in this paper reflect the feedback from decision makers at approximately 200 commercial enterprises. This paper also includes observations based on WR situational data – consulting with enterprises and service providers, and data from other WR surveys.

## Key Observations

### Finding #1: The Modern Meeting = High Volume

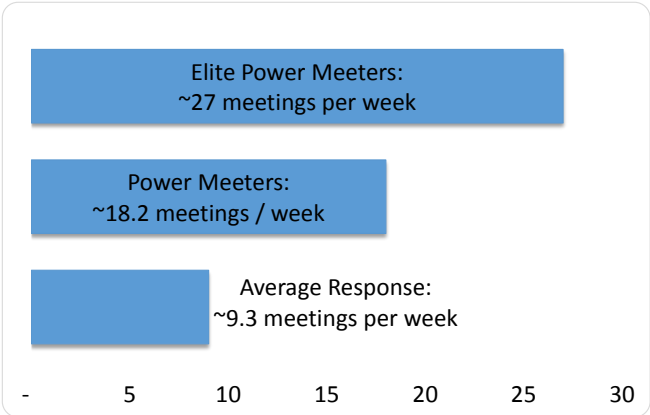


Figure 1 – Meetings per week

The way today's knowledge worker collaborates is changing. In terms of volume, today's employee spends a fair amount of time in meetings. The average respondent attends just over 2 meetings a day, or 9.3 meetings a week. However, these findings also uncovered the emergence of a 'power' collaboration segment – a group we are affectionately referring to as the "Power Meeters". Consisting of the top third of our survey respondents, Power Meeters spend almost half of their time in meetings (18 meetings a week, or 3.6 meetings a day). And the elite Power Meeters, consisting of the top

5% of respondents, attend over 27 meetings a week, or almost 5.5 meetings a day – any way you slice it, that's a lot of meetings!

### Finding #2: The Modern Meeting = Virtual, Visual, and Anywhere

High volume collaboration involves a mix of both in-person and virtual attendees. On average, over half (54%) of meetings include remote participants attending via audio, video and/or web conferencing. However, the Power Meeters involve remote participants in over 80% of their meetings! The more frequently a respondent meets, the more likely they are to include virtual attendees in their meetings – thus showing a correlation between increasing use and the benefits of collaboration application and services.

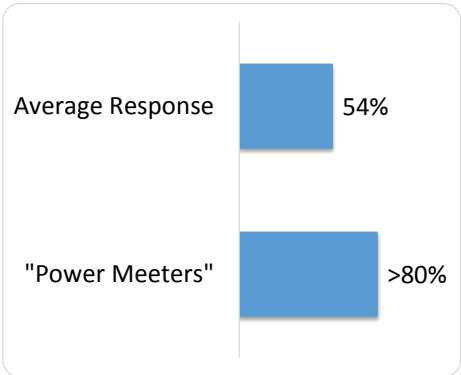


Figure 2 – % of Meetings with Remote participation

This combination of high meeting volumes, interaction with virtual attendees, and a tendency towards personal or private meeting locations begs the question: "What percent of meetings include video conferencing?" The results point to video as being critical component of collaboration, as the average respondent includes video in almost half (45%) of their conferences! And those Power Meeters? The top third of respondents use video in over 60% of their meetings, while the

very top 20% use video in over 80% of their meetings! Clearly the use of video has become the new normal in today's collaborative enterprise – catalyzed by the recent crop of cost effective room endpoints, personal video / web conferencing applications, and mobile video solutions.

The survey results are also very clear on this fact: people *go places* to collaborate. As shown in Figure 3, the most common place to attend an audio, video, or web conference is the conference room (39% of conferences). For the average user, this represents just over 3.5 meetings a week, and almost 11 meetings a week for the Power Meeters! However, respondents also attend conferences from their home office and while traveling – a trend we feel reinforces a growing commitment to work / life “harmony”, as enterprises embrace telecommuting and other policies intended to empower employees to manage their own schedules and work environments.

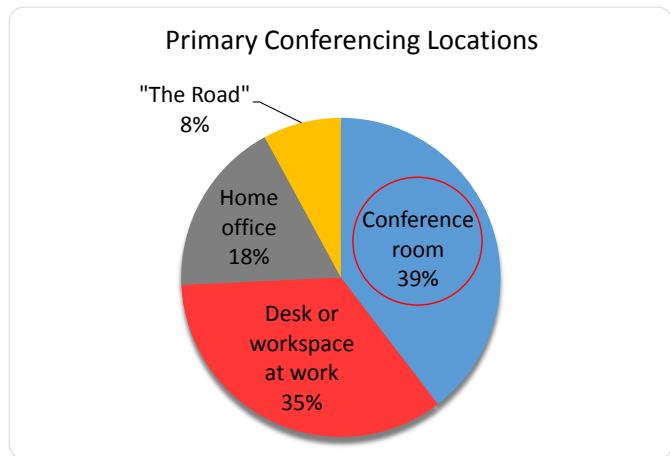


Figure 3 – Where people collaborate

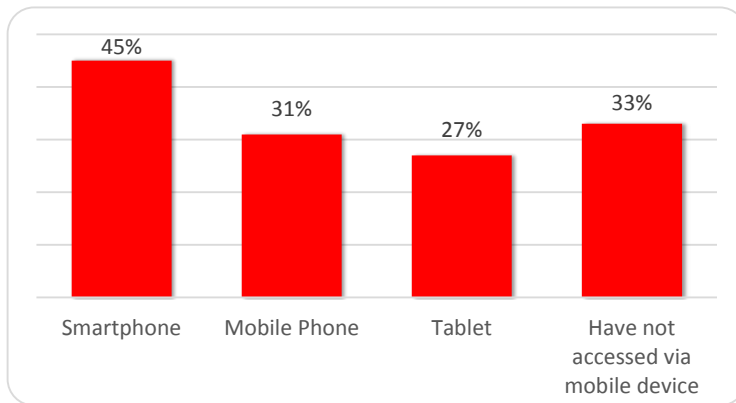


Figure 4 – Mobile initiated audio/web conferences

Regardless of the location, mobile devices have become commonplace when it comes to conferencing. As shown in Figure 4, over two-thirds of respondents that indicated they have initiated an audio or web conference, have initiated them from a mobile device. The smartphone is the most common mobile device for starting conferences (45%), although mobile phones (31%) and tablets (27%) are also used regularly to launch meetings.

### Finding #3: Workplace Transformation = Collaboration

In response to changing employee demographics, increases in the volume of collaboration, and shifts in the way work is getting done, the physical workplace is undergoing a similar and massive transformation. Figure 5 illustrates and quantifies this transformation, showing the results to the question “how are the following work environments within your organization changing?” The data illustrates the percent of enterprises who are seeing an *increase* in various conference rooms, workspaces, and teleworkers.

The results highlight growing support for the mobile worker, showing the ongoing growth of teleworking and flexible seating environments. The research also pointed to a shift in focus from

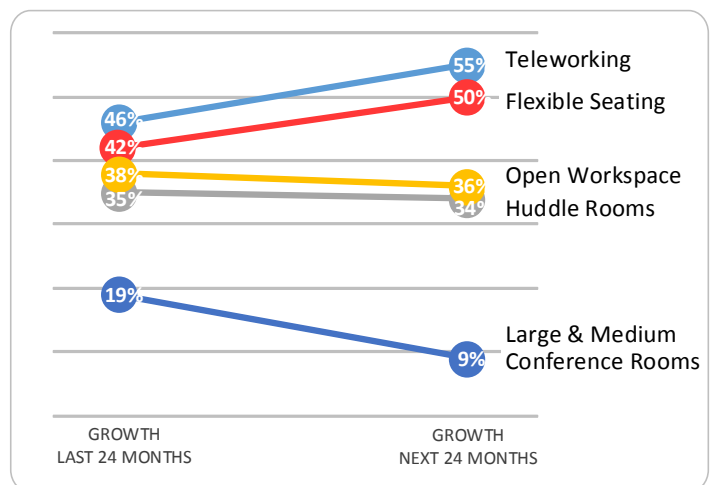


Figure 5 – Physical Workplace Transformation

traditional medium and large conference rooms, which primarily support structured meetings at scheduled times, to workspaces that support ad hoc collaboration for small groups and teams. Available on a first-come first-served basis, these workspaces provide employees with the freedom to get together and collaborate as the need arises.

### Finding #4: The IT Environment = Growing Complexity

Given the pace of change within the workplace and the growth of collaboration between end users, IT teams often find themselves managing a highly complex communications environment. This complexity often includes platforms from multiple vendors and various competing collaboration clients, technologies, and services.

In terms of the UC platforms in production today, survey results point to a list of usual suspects – Microsoft, Cisco, IBM, Avaya and other household UC names. However, a closer look at the data reveals that over 1/3 of the responding enterprises have two or more UC platforms in use to support their users’ communications requirements (Figure 6). Users have never had access to such a wide range of easily accessible collaboration tools – however, ironically, with the plethora of tools available, this poses a challenge for IT decision makers.

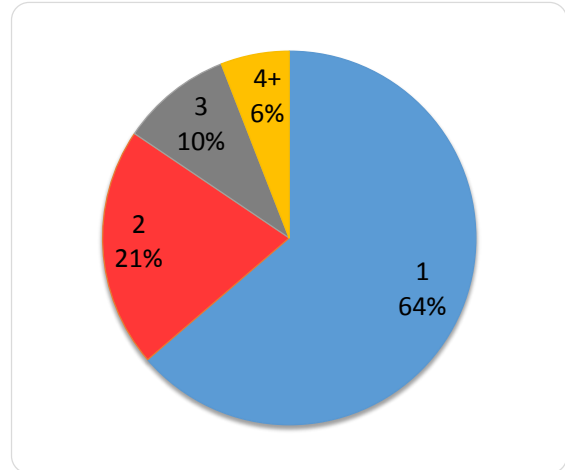


Figure 6 – # of redundant UC vendors in production

As a result, specific features are often not deployed across the entire enterprise – which can cause user adoption to suffer. Figure 7 highlights this challenge by showing the number of enterprises that are deploying specific UC features to the majority of their end users. Note that while Instant Messaging (IM) is deployed across the enterprise by almost 80% of survey respondents, the next feature group down –

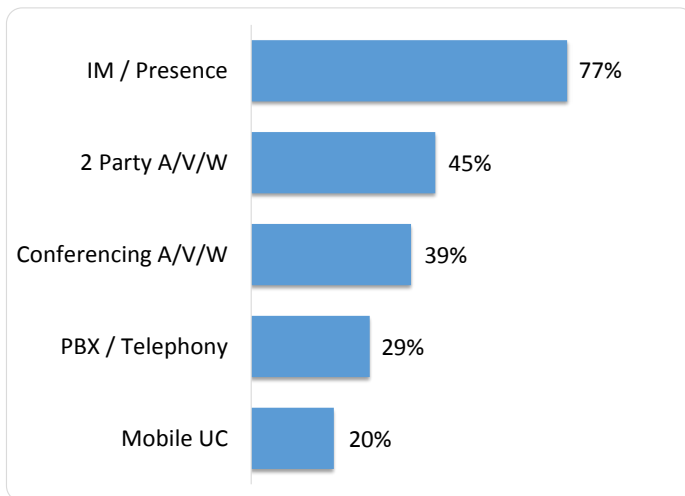


Figure 7 – UC feature deployments: >50% of end users

two party audio, video and web communications – falls by over 30 percentage points to 45%. The deployment numbers for conferencing, telephony, and mobility drop even further.

This lack of deployment of specific UC features is not holding back the overall adoption of enterprise collaboration. For example – and to the contrary – WR expects the use of enterprise audio conferencing to double over the next 5 years<sup>3</sup>. This increase is due in part to a growing mix of both IT sanctioned and user-supplied, unsanctioned solutions. The result runs the gamut from traditional audio conferencing solutions (InterCall,

<sup>3</sup> Wainhouse Research, 2014 Worldwide Audio Conferencing Forecast

Arkadin, PGI, etc.), hosted video providers (BT Conferencing, Blue Jeans Network, etc.), web conferencing services (WebEx, GoToMeeting, etc.), and a growing number of consumer-oriented tools (Skype, Google Hangouts, LinkedIn, Facebook, etc.). Users have never had access to such a wide range of easily accessible collaboration tools.

### Finding #5: Huddle Room Collaboration = A Traditional Mix

The survey results painted a heavy reliance on – and mix of – conferencing technologies in today’s huddle room meetings. As shown in Figure 8, about two-thirds (65%) of respondents use audio conferencing to involve remote participants in most of their huddle room meetings. Similarly, ~60% of participants share content with both local and remote participants in the majority of their huddle room meetings. While the popularity of video conferencing lags (perhaps due to lack of appropriate room equipment and/or usability issues), it is still used by well over one-third (37%) of respondents in most of their huddle room conferences.

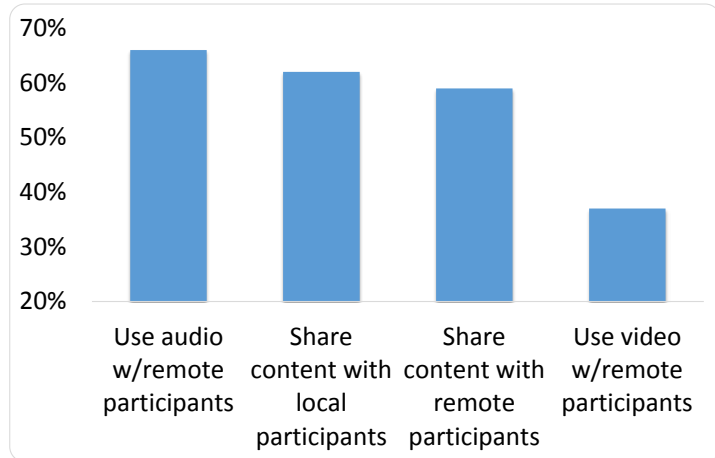


Figure 8 – UC feature deployments: >50% of end users

One other insight as to how huddle rooms are used for conferencing: they are rarely used as phone booths. Respondents indicate that when they are using a huddle room for conferencing, they are by themselves in the room only 17% of the time. The rest of their huddle room conferences involve others being in the room with them, with close to half (44%) of conferences involving 4 or more people in the huddle room. This has implications for outfitting the room, such as the display technologies, how participants connect to displays, how audio and video is captured, and how content is shared with both others in the room and virtual participants.

### Finding #6: Huddle Room Technology = Lagging Behind

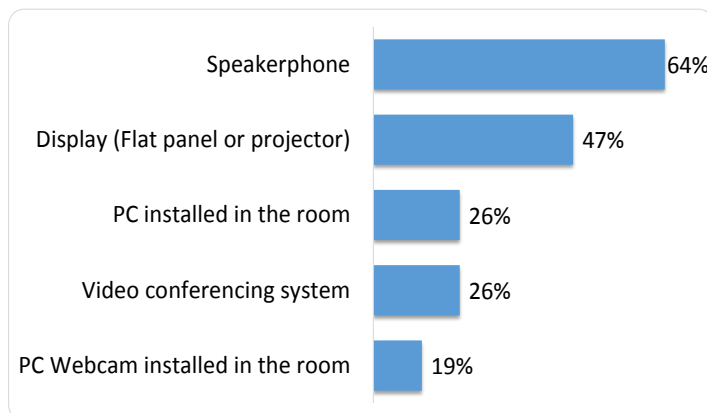


Figure 9 – % of huddle rooms outfitted with the collaboration technologies

The first evidence that shows huddle room technology is lagging: the collaboration technology most likely to be found in a huddle room is a speakerphone (64% of huddle rooms), followed by a fixed display (47%). As shown in Figure 9, video conferencing systems and PC technology, which enable visual collaboration, are the least deployed technologies.

Building on these results, respondents report that the tools used most frequently to participate in huddle room conferences are in fact a speakerphone

and a laptop (Figure 10). However, these results continue to reinforce that the use of mobile technology is on the rise: almost half of the respondents noted they use their smartphone or tablet to participate in at least *some* of their huddle room conferences.

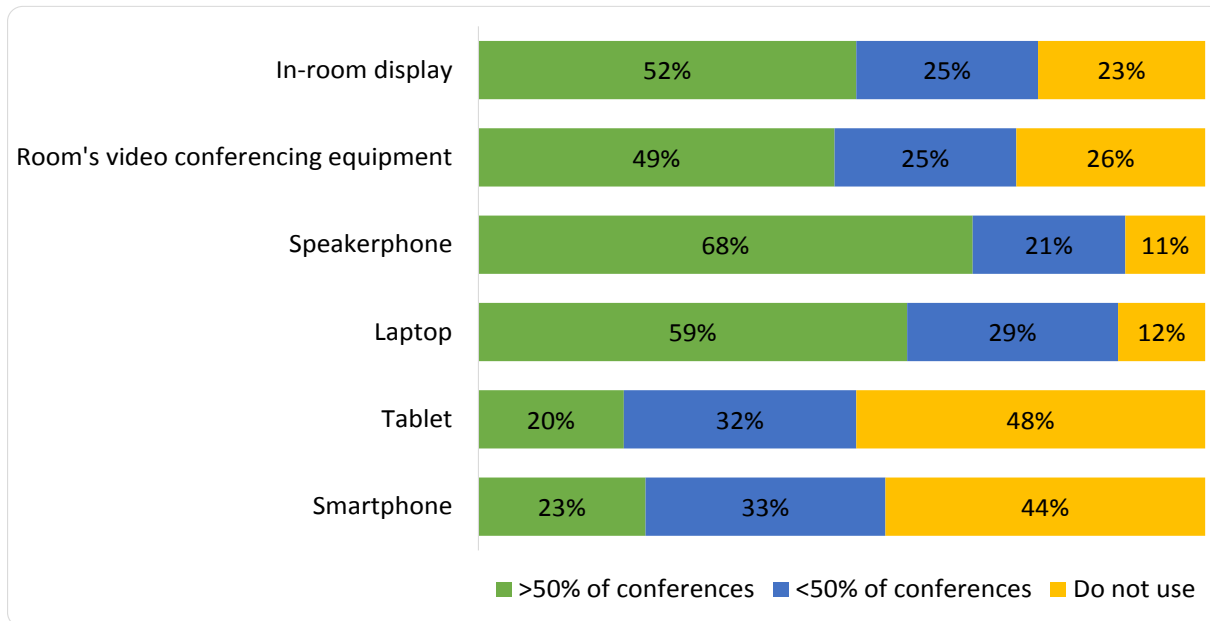


Figure 10 – % of conferences participated in from huddle rooms using specified devices

### Finding #7: Users Want Better Collaborative Tools

While using a laptop to collaborate in a huddle room may be status quo, there are caveats. Asked if they liked using their laptop’s microphone and camera for conferences, respondents were negative. Well over a third (37%) of respondents use their laptops for conferencing but feel that laptop mics do not perform well. Yet another quarter (26%) don’t use their laptops for conferencing – perhaps because they tried and were not happy with performance. This leaves only about one-third (36%) of respondents that believe their laptop’s mic performs well enough to hold an effective audio conference in a huddle room. Similarly, only 42% report that their embedded laptop camera performs well enough to conduct an effective huddle room video conference; while 26% (the same as audio) don’t even try to use their laptops for video.

These points taken, respondents appear to be hungry for more advanced collaboration in huddle rooms. When asked “would your usage change if your huddle rooms were better equipped”, 63% noted they would use more video conferencing, 56% would use more content sharing, and 47% would use more audio conferencing (Figure 11). Clearly, re-thinking how to best equip huddle rooms – not just making-do with a traditional speakerphone and the participant’s vanilla laptop – will result in both an increase in conferencing volume, effective collaboration, and perhaps most importantly, happy users.

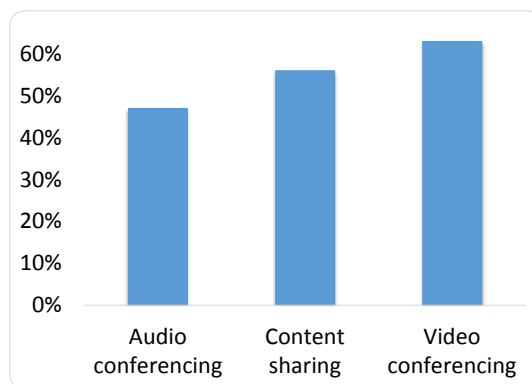


Figure 11 – “Which features would you use more if your conference room were better equipped?”



## Introducing the Logitech ConferenceCam Connect

The survey data gathered for this paper reveals an increase in video-hungry mobile collaborators and growth in the number of smaller huddle-room conferences – while revealing a lag in the technology required to enable today’s modern meetings. To address this issue, participants were asked if they would consider bringing a portable device to their huddle-room meetings – a hypothetical device that provides high-quality video and audio conferencing, and enables in-room screen sharing from a laptop or mobile device. As shown in Figure 12, the response was overwhelmingly positive, with 80% noting that they either would or might consider bringing such a device to their huddle-room meetings.



Logitech, the sponsor of this paper, recently announced the Logitech ConferenceCam Connect, a portable device capable of delivering 1080p video and 360 degree sound at a \$499 MSRP price point. The Connect is optimized for huddle-room meetings with 1-6 local participants and supports a range of connectivity options, including USB, Bluetooth, NFC, and HDMI for an in-room display. In addition, the device enables Android tablet and smartphone users to cast their screen wirelessly to an in-room display. The ConferenceCam Connect is optimized for Microsoft Lync, Skype certified, compatible with Cisco Jabber and WebEx, and works with most other business grade UC platforms.

This device is the third installment in Logitech’s ConferenceCam family. This group also includes the BCC950, a device sporting a 1080p video camera and built-in speakerphone for small groups, and the CC3000e, supporting larger workgroups of 6-10 with a mechanical pan/tilt/zoom 1080p-capable camera. This line of devices covers the waterfront in terms of small and mid-sized collaborative teams.

Additional information on the ConferenceCam Connect can be found at [www.logitech.com/connect](http://www.logitech.com/connect)

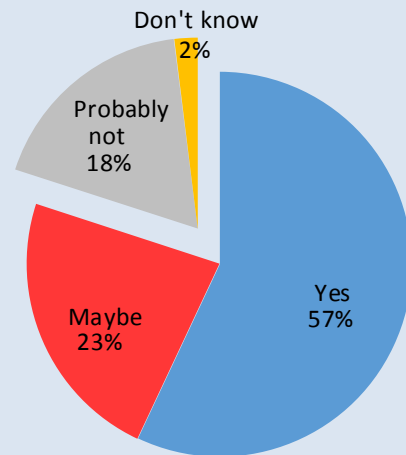


Figure 12 – Preference for a portable audio/video/screen sharing device

## Conclusion

The way users get their work done is undergoing a dramatic, historic change. We find this new work environment embraced by work-life-harmony-seeking millennials and driven by highly collaborative interaction. Technology has transcended the ability to simply enable virtual collaboration, to making it effective and desirable – with few barriers, anyone and everyone can instantly become engaged and help with the task at hand. Users are contributing in person and virtually from home and on the road. No longer satisfied with just audio conferencing and application sharing, users are increasingly embracing video conferencing to interact with their virtual peers. The physical workplace itself is changing to accommodate this increasingly mobile workforce through open office layouts, while making huddle rooms available to catalyze spontaneous, ad hoc, and private collaboration.

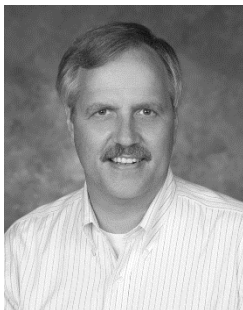
The role of IT is at a similar juncture – IT needs to lead by putting in place policies that encourage change, or employees will acquire their own, often sub-optimal solutions. “Change” is the operative word. The software apps enabling collaboration, driven by BYOA, will continuously change. The devices used to facilitate collaboration, driven by BYOD, will continuously change. Putting in place an environment and infrastructure that not only accommodates but encourages employees to try new things will keep them productive and happy – and your organization competitive.

The logical recommendation: pro-actively outfit your huddle rooms to accommodate change. Swap out the traditional speakerphone and video conferencing appliance for mic/speaker and HD-webcam equivalents that can be used with a wide variety of ever-changing collaboration applications and user devices. As the survey data in this paper reveals, users are ready to embrace advanced collaboration if it is easy and accessible – in itself a major step in realizing and enabling the transformed workplace.

## About the Authors



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## About Wainhouse Research



**Wainhouse Research**, [www.wainhouse.com](http://www.wainhouse.com), is an independent analyst firm that focuses on critical issues in the Unified Communications and Collaboration (UC&C). The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings.

## About Logitech, the sponsor of this paper



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