Rethinking Workforce Collaboration

What's Next

Content

Introduction

The objective of this paper is to help readers make an informed decision about what's next in enterprise communications and collaboration. Topics include a) a review of today's modern collaboration experience, b) an update on the market's current value proposition, c) perspective on the market leaders, and d) guidance on successful enterprise strategies for ensuring long-term business continuity.

While Cisco commissioned this study, the details provided in this report are unbiased and represent Wainhouse's perspectives on the topic. The reader should evaluate this insight, and all other technologies and solutions, against their own unique environment and enterprise requirements.

State of the Personal Meetings and Cloud Calling Market — What Has Changed and Why

From the depths of a crisis to an enabled workforce — a change in how work gets done

The recent pandemic has created the greatest transformation in the widespread use and adoption of modern calling and collaboration services — ever. Over the course of a two-week period, the distributed workforce more than doubled, with telecommuters jumping from an average of 27% to almost 65% of the global workforce.[1] No other technological or societal event has created the current level of reliance on advanced workplace communications. But what's most interesting is the relative speed and ease with which this took place — a success only made possible by a tight partnership between IT, users, and technology vendors.
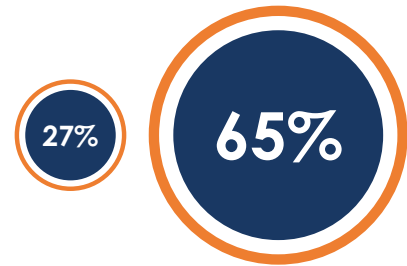
27% **65%**

Over the course of a two-week period, the distributed workforce more than doubled, with telecommuters jumping from an average of 27% to almost 65% of the global workforce.

True, this shift was not pain-free — war rooms were created, technical teams scrambled, bandwidth was augmented, and resources were provided at mass scale. But put this event in context — the biggest challenges were experienced and largely addressed within that initial two-week period, followed by a dramatic increase in cloud — and specifically online meeting — volume. Most enterprise collaboration vendors reported 3-10x more meeting participants in early Q2 2020. Many IT teams worked long hours to enable their newly displaced users, and many users adapted their business workflows based on new solutions. We believe the combination of a scalable and resilient cloud, user-friendly apps, flexible and agile partnerships, and highly responsive IT teams are what made it all possible.

[1]Source: Netskope: https://www.netskope.com/blog/remote-work-increasing-exponentially-due-to-covid-19

While this event was both unwanted and wildly disruptive, tech vendors, IT teams, and end users are the better for it. In one very short period of time, more people have made better use of modern communications — initially to retain the continuity of operations for critical businesses and services, and now to drive individual and team productivity moving forward. In short order, we have built new muscles that did not previously exist — a strength that we expect will drive large-scale benefit as we return to a new normal.

The current situation begs the question: "What's next?" Wainhouse believes workplace communication and collaboration has found a new plateau of use that very few users will fall back from. So, what is the current state of personal meetings and where does it go from here?

A drive for authentic and meaningful connections

It is easy to be impersonal on an audio call. A lot less so on a video call. And it's nearly impossible **not to be engaged** when someone is sharing content and asking your opinion. Culture is key and drives personal habits of adoption, more than feature availability. The pandemic has delivered a culture-shock in this regard, exposing a wave of new users to a full collaboration experience and educating teams as to the benefits.

Why the WFH movement never adopted Houseparty — what it means to be built for the enterprise vs. built for the consumer

Authenticity and engagement require personal connections — the same conversations we used to have in-person to catch up on one another's personal lives before the meeting or just after. These types of connections are critical for relationship development — and they're fun. But as casually as we start off our meetings, we all realize that breaches of security and organizational compliance require a serious approach to meeting platform selection. Built for the enterprise versus the consumer means secure, compliant, and something that enables each of us to perform at levels, or better, than we did in-person.

Velocity & agility —finally — come to enterprise communications

We must acknowledge that many iterations of prior technology often got in the way of work. We are all familiar with the legendary problems of call entry, poor voice and video quality, and sharing tools so buried in a menu tree, users often had to abandon the online share and revert to email sharing. However, this is an officially outdated problem statement — today's cloud delivers a modern UI & UX design, driven by agile development, and deployed on virtual and highly scalable infrastructure that drives a dramatically improved experience.

No longer set and forget it — why ongoing security and privacy vulnerabilities require a community effort

While selecting a platform built for the enterprise (versus built for Houseparty) is the first step toward security, a complete security strategy requires work on behalf of the technology vendor, the network provider, the enterprise IT staff (security, network, operations), and the user community. It also requires vigilance — bad actors don't stop working because you put up a wall; they just work harder to find a way around it.

Islands no more — workforce app integration

Finally, there is a friendly community of often-competing vendors who recognize the need to play well together. The days of one-vendor vertical integration of "everything you need" (or what they think you need) are over. Open APIs, vibrant DevOp communities, and a broad and ever-expanding universe of developer tools enable users to thrive in today's app-connected world.

Wicked smaaahht — collaboration increasingly becomes intelligent

Right. We've all heard about how AI is gonna rock our world. But, really, in workplace communications, what does that mean? Increasingly, a number of vendors are rolling out intelligence that encompasses: a) pre-meeting preparation, e.g., who's attending, what is their professional and social profile, and automatically starting the meeting, b) in-meeting — anticipating and improving processes, e.g., real-time closed caption, automatic note taking, notifying a participant they are trying to talk, but are muted, or their background noise is too much and should be muted, and c) post-meeting outcomes, e.g., automatically transcribing and indexing meeting notes and creating action items.

With this background, let's jump into a quick review of the top vendor solutions, how they are ranked by active users, where they came from, and what sets each apart.

Comparing the Top 5 Vendors for Personal Meetings and Cloud Calling Solutions — How and Why Each Are Different

There is a huge transformation underway where calling, team collaboration, and meeting features are melding into one tightly integrated, cloud-based platform. Typically, these platforms prioritize a specific workload and support others as additional "features."

Primary Workload	Additional Features		Example
Calling	Meetings	Team Collaboration	RingCentral + Zoom meetings + Slack
Meetings	Calling	Team Collaboration	Webex Meetings + Webex Calling + Webex Teams
Team Collaboration	Meetings	Calling	Slack + GoToMeeting + 8x8 Cloud PBX

While there can be many variations of vendors to consider based on your principle workload, here, we'll focus just on personal meeting services and cloud calling services. The recent pandemic has certainly re-shuffled market share percentages (%); however, it is likely the rankings (1,2, etc.) are close to what we captured for the full year of 2019.

Personal Meetings

Sure, we have heard a lot about Zoom — and their growth has been phenomenal. For the period of February through April 2020 (Zoom fiscal Q1 2020), revenues grew 74% from the prior period. Wainhouse estimates that paid licenses grew from 4.4M at YE 2019 to 8.1M in Q1 2020. It is also important to remember that Microsoft already had over 30M Teams commercial users at YE 2019 with a Wainhouse estimated 4.5 Teams monthly active users (MAUs) specifically for meetings. Wainhouse estimates Teams users (mostly using messaging) jumped to over 100M in 1H 2020 with Teams meeting users likely more than doubling. Cisco, who was already the personal meetings leader, will likely close 1H 2020 with over 25M paid MAUs. This is all to say, while the numbers for each vendor changed dramatically in 1H 2020, the rankings likely did not change very much.

Below, we focus only on the *meeting* workload of **monthly active users** with **paid licenses** (no free accounts) for vendor solutions primarily focused on the enterprise market (e.g., no consumer products) for year-end of 2019. We focus on this designation because paid enterprise accounts are more likely an indication of a long-term trend versus participant count or free accounts that may be temporary spikes based on the pandemic — we have seen this before with SARS, 9/11, and other global events.

Ranking	Personal Meeting Services	2019 (WH est.) # of MAUs with Paid Licenses	2019 (WH est.) Market Share by # of MAUs with Paid Licenses
#1	Cisco Webex Meetings	17,300,000	48%
#2	Microsoft Teams and SfB MAUs	4,500,000	13%
#3	Zoom Meetings (paid licenses)	4,400,000	12%
#4	LogMeIn GoToMeeting	3,700,000	10%
#5	Google Meet MAUs	3,000,000	8%
#6	Others	3,000,000	8%

What's the difference between each personal meeting service? Here's a quick summary.

Cisco Webex **Cisco** Webex	On-premises / cloud calling and meetings have been a primary focus for some time, but now the primary focus is the total ecosystem for workplace communications — robust and secure networking; apps for calling, meetings, and team collaboration; and devices for the conference room — primarily anchored on the Webex platform.
Google Meet	Similar to Microsoft Teams in Office 365, Meet inside G Suite completes the majority of day-to-meeting app needs for most knowledge workers. Google has fleshed out the Meet app with Chat, Jamboard, and Meet hardware to complete the desktop-to-conference room single-platform play. On par with Microsoft as one of the largest providers to the education market, with more than 140M students using G Suite (many using Meet).
LogMeIn GoToMeeting **LogMeIn**	Four years ago, LogMeIn acquired #3 personal meeting service (at that time), GoToMeeting from Citrix. Two years ago, acquired Jive Communications and have developed a complete portfolio of cloud calling, meetings, and call center solutions under the GoTo brand.
Microsoft Teams	Originally introduced as Office Live Meeting, the current iteration, Microsoft Teams, is now first and foremost positioned as team collaboration (persistent messaging) with calling and meeting features. While a huge group adopted the meeting features in 1H 2020, Wainhouse believe the majority of users still only use the messaging feature in Teams. With over 150M students using Microsoft services, they are one of the largest vendors in the EDU space.
Zoom Meetings zoom	Organically created as a video-first personal meeting platform intended to grow into a full-featured workplace communications platform. Platform has been designed to be extensible — additional features like calling and team collaboration are added within a common user experience, security controls, and administration tools. Massive consumer adoption in 1H 2020 exposed existing security vulnerabilities which the company is rapidly addressing with 90-day sprints.

Cloud Calling

Just 15 years ago, the enterprise cloud calling market was a simple space, filled with a handful of vendors promoting "next-gen" solutions. This is not the case with today's market — it seems you can't turn around without bumping into a vendor promoting the latest and "best" cloud calling solution. As cloud services evolve, the calling workload is an attractive addition for many vendors, and for good reason — we're talking about a business-critical feature, historically complex to implement and manage, that has a lot to gain from cloud agility. Simplified administration, improved and cost-effective resiliency, anywhere access, enhanced business analytics, and a simplified and unified experience are all key benefits of a cloud calling service.

Those cloud vendors delivering a single workload, be it meetings, messaging, or collaboration, inevitably find themselves at a disadvantage in the race for market dominance. Most turn to acquisition to add calling features to their stack, although a few brave souls have chosen to develop their own. Below, we provide a current snapshot of the cloud calling market, with market share based on paid licenses (no free accounts) and solutions primarily focused on the enterprise market (e.g., no consumer products) at year-end of 2019. The vendor rankings are relative to Cisco and selected market competitors — this is not the market ranking by size of all competitors.

Ranking*	Cloud Calling Services	2019 (WH est.) # of MAUs with Paid Licenses	2019 (WH est.) Market Share by # of MAUs with Paid Licenses
#1	Cisco Cloud Calling	32,500,000	60%
#2	Metaswitch**	2,900,000	5%
#3	RingCentral	2,500,000	4%
#4	Microsoft	1,800,000	3%
#5	8x8	1,200,000	2%
#6	Zoom	170,000	NR
#7	Others	14,300,000	26%

* Reflects the ranking of chosen competitors, not the market ranking by size of all competitors
** Microsoft acquired Metaswitch in 2020.

What's the difference between each cloud calling service? Here's a quick summary.

8x8 **8x8**	Single platform for calling and contact center with acquired API tech — increasingly focused on leveraging APIs to embed its communications experience within enterprise apps and workflows.
Cisco **Cisco Webex**	An enterprise cloud for users and IT alike. A proven global enterprise cloud calling platform with 33M users in business, public sector, and education institutions of all sizes with a full-stack workplace communications and collaboration platform for apps and devices. Uniquely positioned to enable your cloud, don't migrate to it, friction-free, on your terms: whether it's hosted in your data center, a partner's data center, the Webex Cloud, or in a hybrid model.
Metaswitch **metaswitch**	A cloud-native provider of voice, meeting, and messaging solutions to the carrier and service provider market. Acquired by Microsoft in 1H 2020.
Microsoft **Microsoft**	Cloud calling has been a part of the Skype for Business solution for years and organically part of Teams. Their E5 license in Office 365 — which offers direct-from-Microsoft telephony — has emerged as a popular solution to SMBs in 1H 2020. Larger enterprises connect to Teams server via SIP trunking. The mash-up with Metaswitch indicates their long-term commitment to voice.
RingCentral **RingCentral**	The best-known native cloud calling service — won the first round of the Cloud Marketing War, continuing to expand its stack to include calling, team collaboration, and meetings features. Recently developed an in-house meeting app (RC Video) after initial reliance on Zoom.
Zoom Phone **zoom**	UI is well designed for novice users and IT teams who want to use it, without spending a lot of time in training. Smart design extends to developers — current, dev-friendly, and dev-familiar. Built for SMB meetings but quickly making noise up-market.

The New Criteria for Success in Vendor Selection — e.g., Things to Consider in Your Next RFP

Today, somewhere between 25% and 100% of the workforce needs to operate at full capacity remotely. For some organizations this is a transitional strategy, but for many, this is the new standard. In a recent Wainhouse survey of IT decision makers, nearly 40% stated that changes in workforce communications and collaboration due to the COVID-19 pandemic will be permanent.[2]
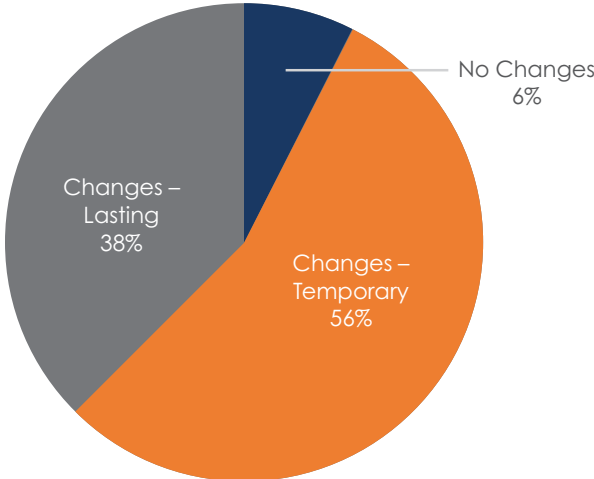
Whether temporally transitional or permanently transformative, IT needs to deliver workplace calling and collaboration solutions that scale dynamically, securely, and seamlessly.

Wainhouse believe there are three critical areas in vendor selection for today's workplace communication and collaboration services:

• Experience
• Security
• Single platform

Experience

Today, experience trumps features. Yes, features matter, and each persona and organization will have features that are more important to them than others — a quick needs analysis will uncover this. But, a poorly designed user interface with 100% of the features required won't get used, will drive up help desk demands, and will likely cause user abandonment to an unsanctioned app that works better.

For the user, experience means:

1) Easy scheduling via the same calendar tools they use now
2) Easy meeting or call entry — one-click to connect
3) High-quality audio and video — that dynamically adjusts to changing bandwidth
4) An in-call menu that is clean and intuitively obvious — e.g., it's easy to find and use content sharing and initiate recording

Once we get past the critical four capabilities, features that enhance the user experience include:

- Common and consistent authentication, and a consistent look and feel across mobile and desktop apps and in-conference room devices — eliminating the fatigue of pivoting between multiple vendor apps within the workday
- Actionable insights before, during, and after the meeting — get meeting participant backgrounds, automate note taking and action items, and quickly skim call transcripts for relevant discussions

For IT: Experience means a vendor can deliver a comprehensive suite of the services and devices with a common user interface and experience that supports a remote, office-based, and hybrid workforce — and has the tools to enable IT to provision, monitor, and manage each experience. For IT, experience means:

1) Easy-to-understand commercials — straightforward pricing, discounting, and contracts
2) Service setup and configuration that is simple, automated, and compatible with your enterprise infrastructure, PCs/Macs, mobile devices, and conferencing room devices
3) Easily accessible and clearly informative data and analytics on apps, devices, and networks. Consider the idea that there is a totally new set of information — conference room utilization, room cleaning, temperature, room scheduling, and people in rooms vs. capacity — with alerts. These are critical in the new environment and provide data that optimizes space planning, real estate investments, and productivity.
4) Expert and available support resources — when things inevitably go sideways, you quickly realize the true value of your cloud partners. Support teams must be easy to access, speak on your terms, have the answers, and solve your problems — fast, fluid, and efficient.

COVID-19 Context: The displaced workforce has forced many buyers to rethink their ideal vendor experience. There is more interest in cloud-based communication services that support a distributed workforce, providing flexible access and enhanced / video-enabled communications. We anticipate this will drive a new target experience that includes a focus on fluid onboarding, turnkey provisioning, burstable license plans, and expertise in delivering a high-quality user experience across unmanaged environments (home offices, coffee shops, etc.). New apps and room systems should be intuitive and have built-in training, e.g., videos, general overviews, feature overviews, and constant update information. This is the cloud!

Security

Today, security is not just the domain of IT, but also heavily in the hands of the users. Today, private data is easily sold, and enterprise data is sometimes routed through unsuitable geographies. And if not addressed properly, it is very costly. The average data breach in 2019 cost $3.9M and is up 12% in the last five years.[3]

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[3] Ponemon Institute, 2019 Annual Cost of Data Breach

First, the vendor needs to strike a balance between enterprise-class security and a friction-free user experience. Lean on security too hard, and the user will find a potentially risky workaround or alternative solution. Of course, lean toward user experience too much, and your enterprise data is simply at risk.

Second, IT needs a management and control platform that encompasses network, apps, users, and devices — and is secure by design and by default. "Oops, we didn't think our service would be used in this way" is not an acceptable vendor excuse.

Overall, the most important security attributes include:

- Cloud confidence – trust is paramount, and the buyer needs to know the vendor's cloud is impenetrable. This includes the relevant technologies — think current encryption standards, flexible key storage, and multi-tiered authentication — and processes to ensure data will not leak from the vendor's resources or contractors.
- Admin controls – critical settings that can be applied at an organizational level that align with the enterprise's unique requirements. These controls must be accessible to the admin team, via an intuitive online portal, or embedded in the existing tools they use today, and ideally consolidated into a single pane of glass — friction for the admin increases the security risk.
- End-user awareness – today's solutions afford the user more control over their experience, sometimes outside of the controls the admin can implement at a company level. End users need education and awareness to ensure they are using these solutions securely — when to use, how to use, and why to use.
- Audit-ability – data is key to a secure user environment. The admin should have access to a consolidated view of the user experience — who is doing what and when. Data should be discoverable and auditable, and become part of the administrator's workflow. Again, friction here can be a killer — multiple tools, hard-to-access reports, and data that is too high-level all drive a lack of awareness. Data needs to fold into the admin's workflow to become an effective security component.
- Alerting and automation – the admin cannot see everything at once, and the biggest security breaches are driven by this fact. The ideal solution will highlight risks and potential security events to the admin, instead of the admin looking for potential breaches. Some risks can be mitigated automatically — think account-lock based on known hacking patterns. Others can't, but the solution should surface the right controls to allow the admin to act quickly and confidently once they've been alerted.

COVID-19 Context: The home office has traditionally been a "black-box" for most admins — completely unmanaged from edge to endpoint. This poses a material security risk — routers with default passwords, unpatched computers, and unknown vulnerabilities. Admins historically either restricted access to confidential data or accepted the risk — but the displaced workforce makes both approaches untenable. The ideal solution provides more visibility into these environments and affords IT controls that apply to a personal environment — mobile device management, ring-fenced data on personal computers, and portal-based access as examples. Confident home-access to enterprise communications is a key attribute — if the user has a hard time accessing these tools or has a poor experience, they will quickly fall back to their preferred and familiar consumer-based communications — transferring enterprise data from secure and auditable to unsecure and hidden.

Single Platform

A single-platform solution drives both experience and security benefits across the board. A single platform enables a common experience, driving user and admin familiarity, and provides a consolidated data-set across all supported services. The platform approach reduces complexity and related friction across admins and end-user workflow alike. It also makes integrations with other apps more secure and manageable, e.g., OneDrive for data storage, calendar integrations, etc., versus a costly DIY.

Conversely, islands of different apps and devices create opportunities for poor user adoption, costly multi-vendor licensing and management, and security breaches. For example, think about your car's automatic security system — one button locks all windows and doors vs. you having to lock each individually.

The target benefits of a single-platform solution are:

- Consistent and intuitive user experience — lowering helpdesk needs/costs and increasing user satisfaction and adoption
- Rapid development – built on current web-oriented technologies that enable the vendor to deliver new features and an enhanced experience
- IT offload – simplifying the admin workflow is good — transferring IT tasks is better. Racking and stacking, updating and patching, and adding bandwidth are the low-hanging fruits. End-user support, training, and automated break-fix are the ideal targets. Reducing troubleshooting overhead is also a prime example — the platform should deliver a consolidated view of both historical and real-time analytics, enabling troubleshooting without the need to pivot to a different solution to resolve an issue.
- Cost consolidation – as more services add support for calling, meetings, and messaging, the enterprise finds itself paying for redundant services. The platform should serve as a consolidation play, reducing and eliminating extra costs. The real savings are in the device and app integrations in rooms / huddle / jump spaces (quiet space in common areas, e.g., phone booth), and the impact on IT resources due to centralized security, network views, apps views, and new next-gen utilization data for spaces.
- Transformation opportunity – all the enhanced features in the world are irrelevant if they aren't used. As the platform simplifies IT and end-user workflow, it returns time to the enterprise — time that can be applied to business transformation. As the enterprise becomes a platform expert, it becomes easier to find ways to leverage the solution in actual transformation opportunities.

COVID-19 Context: The newly displaced workforce has highlighted the core challenges that come with a fragmented and complex service environment. Enabling users on a service-by-service basis is a recipe for a painful virtual experience — a common experience that we anticipate will drive higher demand for consolidated platforms. The services that gained the most attention supported enterprise-class meetings with a friction-free experience — they were easy to enable; included familiar and intuitive features; and supported high-quality, video-enabled collaboration by a virtual workforce, with little-to-no training required.

Cisco's Webex Value Proposition

Nearly every workplace communications vendor has a similar narrative around cloud, platform, security, and managing the experience. Additionally, the recent pandemic has had every vendor staking a claim as the perfect remote worker solution with the best personal video conferencing apps. Most vendors say: "We were prepared for this."

But that's just not true. No one was prepared for this.

What *is* true, is that every vendor has worked overtime to enable servers, networks, and apps to accommodate an unprecedented and overwhelming demand for work-from-home cloud calling and collaboration.

Cisco is a little bit different than most vendors in that they have more experience, with more users, over a longer period of time, yet remain agile — leading with new quality standards, new features, and expansive security. And most importantly to IT and the user, Cisco is a) willing to meet you where you are in your cloud journey, and b) offers one of the most advanced and modern experiences on the market.

This is a transition and transform strategy.

Cloud Journey

While nearly every enterprise is on a journey to the cloud, most aren't there yet. Wainhouse insight indicates that before the COVID-19 pandemic, 80% of voice calling remained on-premises, not in the cloud. It is also estimated that 20-30% of personal audio and video services were on-premises. And less than 50% of room-based video conferencing was cloud-connected. COVID-19 has changed those percentages dramatically, and will continue to do so.

on-premises ▶ hybrid ▶ 100% cloud

Cisco positions their current Webex Cloud experience as delivering the following key benefits that drive and expand enterprise value:

Integrated communications and collaboration platform – although the user may see different Webex Meetings, Webex Teams, and Jabber applications, they are all connected to the same cloud service. Moreover, they are recently updated with the same code base — one stack, different skins. Add devices to the mix across headsets, desk and conference phones, and video devices, and you have the ideal experience — like your device, keep your device, but engage with any Webex user, regardless of their personal preference.

Flexible deployment options – Cisco has put a lot of energy into delivering its cloud as an extension to existing on-premises solutions, rather than a wholesale replacement. As most teams prefer to add new users to the cloud, they also prefer to maintain a standard admin and user

experience. For the existing on-premises CUCM enterprise, this means you can deploy Webex Teams as a soft client to your existing calling solution — while maintaining the user's existing hardware. IT gains the benefit of a cloud-based admin portal, unified analytics, and enhanced real-time quality data without implementing more on-prem gear.

DIY and partner-supported app integration – the new Webex Cloud was built with integration in mind, supporting a range of open APIs (e.g., pre-built for Microsoft, Google, and Slack) and expected SDKs. Cisco DevNet provides a resource community for developers, with a broad range of partners available to provide additional support and expertise. And its AppHub serves as an online distribution point for all published Webex applications — with over 150 apps for Webex Teams and Meetings.

Single administration portal for the entire ecosystem of users, apps, and devices – Webex Control Hub unifies key admin workflows, including provisioning, management, compliance, analytics, and security. Control Hub includes in-office and WFH diagnostics for things like conference room utilization and remote home network performance.

Secure by design – the Webex cloud supports end-to-end encryption, with a focus on actually being end-to-end. Data is encrypted at rest and in transit, and admins have the option of maintaining their keys in an on-premises server. Cisco promotes enhanced visibility and compliance in this model via its unified set of Webex analytics. This is where time-in-place and experience count — Cisco's hardened platform helps keep your data secure.

Collaboration analytics – an updated and evolving set of analytics across messaging, calling, meeting services, conference room utilization, and WFH network diagnostics. Promoted as deep and detailed, driving meeting intelligence and adoption of the service.

Flex plan – delivering one subscription for all Webex apps, services, and devices — simplified one-license for on-premises and cloud. Tiered to meet the demands of calling and meeting-oriented SMBs, medium, and large enterprises, with team collaboration included.

Next Steps & Summary

- ✓ **Primary Focus** – prioritize the targeted experience first, the technology second, and the purchase last
- ✓ **Assessment** – determine all the communication and collaboration infrastructure and services being used in your enterprise today — you'll be surprised at the number of rogue deployments
- ✓ **Determine and Design Your End State** – create the ideal communications and collaboration environment for your organization — considering different personas, business unit needs, security protection, and compliance regulations
- ✓ **Reduce Complexity and Retain Assurance** – consider an environment that unifies the user experience, yet accommodates different modalities of working in-office, remote, and mobile
- ✓ **Rethink** – the traditional role of telephony. Calling is still very important, but now just one component of workplace collaboration
- ✓ **Transition and Migration** – it is likely some call control or collaboration infrastructure is not ready to be moved to the cloud yet. Today, on-premises, hybrid, and cloud tools can be seamlessly mixed and matched to allow enterprises to make the transition at their own pace

Today, a combination of agile vendor technologies and practices offer services that never age — with a level of security and favorable price points most enterprises could not deliver on their own. When adopting a cloud service, enterprises benefit from a tremendous economy of scale, amortized across a large base of subscribers.

What's next for your workplace?
Wainhouse believe service type and vendor selection can only be made within the confines of your organization's unique needs. Armed with a framework of the criteria for success, any enterprise should be able to take the next steps to provide their organization with an exceptional experience anchored with hardened security, operating on a platform agile enough to deliver today's needs and anticipate tomorrow's.

ABOUT WAINHOUSE AND THE RESEARCH TEAM

Wainhouse provides in-depth research and analysis that helps you gain a clear perspective on the market, technology, and services for workplace communications and collaboration. Wainhouse analysts are industry experts in enterprise voice, video, team collaboration, and streaming applications, services, and devices. Our expertise is backed by one of the most comprehensive data sets and models in the world. Our domain expertise and market data combine to deliver in-depth forecasts, enterprise insight, and objective product evaluations that frame the industry's current state and anticipated direction. Services include syndicated market insight, custom research, and sales enablement. Content and additional detail is available at https://insight.wainhouse.com/ and www.wainhouse.com/intro

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William A. Haskins, Senior Analyst and Partner. Located in Denver, CO, Bill spearheads Wainhouse's strategic focus on unified communications products and services. Bill has over 15 years of experience supporting, delivering, and designing converged collaboration services in a global communications environment. He has authored multiple white papers and articles detailing the keys to a successful UCC implementation and delivered various UCC presentations, highlighting his experience integrating collaboration solutions into business process and enterprise applications. Prior to joining WH, Bill served as Director, Unified Collaboration, leading a team of product line managers and application developers responsible for service development, marketing, PandL, customer experience, and product road mapping. Bill holds a B.S. in Marketing from the University of Colorado, and an MBA from Colorado State University.