Enterprises Leverage VoIP and Collaboration to Transform Business
Unified Communications Solutions Transform Business

In the age of the customer, enterprise organizations must be able to proactively communicate and collaborate with customers. In addition, enterprises rely on communication and collaboration tools to enhance employee productivity, reduce costs, and improve customer engagement. Our study showed that:

› VoIP is a critical piece of most enterprises’ IT infrastructure.

› Unified communications and collaboration tools, including audio, video, and web, are essential to the operation of many enterprise companies.

In May 2016, AT&T commissioned Forrester Consulting to evaluate the evolving adoption and implementation of voice over IP (VoIP) and unified communications solutions among US enterprises.

Region
United States

Company Size
› 23%: 500 to 999 employees
› 30%: 1,000 to 4,999 employees
› 19%: 5,000 to 19,999 employees
› 28%: 20,000 or more employees

Job Title
› 35%: Manager
› 36%: Director
› 17%: C-level executive
› 12%: Vice president
VoIP Technologies Are Widely Deployed

Enterprises have embraced VoIP and other IP-based communication and collaboration technologies; they enable employees to win, serve and retain customers:

- Nearly two-thirds of enterprises have implemented or are expanding or upgrading their VoIP telephony.
- Fifty-five percent are implementing or upgrading integrated conferencing, including audio, web and video.

SOME SERVICES ARE RELEVANT TO SPECIFIC FIRMS

Some VoIP technologies, such as voice over Wi-Fi, are applicable to enterprises with particular environmental conditions or use cases:

- Thirty-four percent of enterprises have implemented or are implementing voice over Wi-Fi services, and another 18% are expanding or upgrading implementation of these services.
- These voice over Wi-Fi solutions are particularly relevant for office campuses with poor cellular coverage, or in challenging environments such as energy-efficient buildings that use wireless-shielding coated glass.

What are your firm’s plans to adopt the following technologies / services?

- Implementing / implemented
- Expanding / upgrading implementation

<table>
<thead>
<tr>
<th>Technology</th>
<th>Implementing</th>
<th>Expanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional audio conferencing (non-IP)</td>
<td>53%</td>
<td>13%</td>
</tr>
<tr>
<td>LAN VoIP/IP telephony</td>
<td>47%</td>
<td>19%</td>
</tr>
<tr>
<td>Integrated conferencing (IP audio, web, video)</td>
<td>34%</td>
<td>21%</td>
</tr>
<tr>
<td>IP audioconferencing</td>
<td>36%</td>
<td>18%</td>
</tr>
<tr>
<td>Voice over Wi-Fi</td>
<td>34%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Base: 149 technology decision-makers in enterprises in the US
Feature Implementation Is Evolving

Unified communications features can be deeply integrated into a corporate communications system. In fact, many enterprises are currently incorporating or planning to incorporate various features in the next 12 months:

› Integrating voicemail with email is the most common feature, with 52% of enterprises adopting or planning to adopt this feature.

› Nearly half (49%) of enterprises are adopting presence features. These features enable employees to easily see who is available and the best way to reach them and help employees redirect communication accordingly.

› Forty-six percent of enterprises are integrating videoconferencing with their unified communications solutions. High-quality video, scalability, and resilience features enhance the benefits of videoconferencing features.

At what stage is your firm in adopting the following features of unified communications? (implementing/implemented)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated voicemail with email</td>
<td>52%</td>
</tr>
<tr>
<td>Presence (allows others to see other users’ status)</td>
<td>49%</td>
</tr>
<tr>
<td>Integration with CRM</td>
<td>48%</td>
</tr>
<tr>
<td>Integrated IP conferencing capability</td>
<td>48%</td>
</tr>
<tr>
<td>Videoconferencing</td>
<td>46%</td>
</tr>
</tbody>
</table>

Base: 216 technology decision-makers in enterprises in the US
Enterprises Face Various Deployment Challenges

Enterprises do experience challenges when deploying unified communications and collaboration technologies. Security is cited as a challenge by 40% of enterprises. In addition, about 30% of firms lack internal skills to deploy these solutions, and more than a quarter (27%) reported complex configuration issues as a barrier to implementing unified communications and collaboration solutions.

What challenges and/or barriers do you anticipate when deploying unified communications and collaboration technologies?

40% Security and privacy concerns
31% Lack of internal skills
30% Performance and reliability of the technology
27% Complex configuration

Base: 105 IT decision-makers who have responsibility for VoIP and collaboration strategy/decisions in enterprises in the US
Source: A commissioned study conducted by Forrester Consulting on behalf of AT&T, May 2016
Self-Provisioned, Self-Managed Solutions Are Preferred By Some Firms

Enterprises have many deployment options to enable their voice technology solutions, including self provisioned, self-managed, outsourced, or hosted services.

- Between 26% and 35% of enterprises prefer to self-provision or self-manage their voice technologies as they grapple with security and configuration issues.
- Outsourced or on-premises managed customer premises equipment (CPE-based) deployments are preferred by 31% of firms that are deploying WAN VoIP services and by 29% of firms that deploying LAN VoIP or IP telephony services.
- Off-premises cloud-type as-a-service deployments using shared infrastructure are less common. Between 16% and 24% of firms prefer to use this type of deployment for their voice technologies.

<table>
<thead>
<tr>
<th>Voice Technology</th>
<th>Self-provisioned, self-managed</th>
<th>Outsourced or on-premises managed CPE-based</th>
<th>Off-premises hosted (dedicated infrastructure)</th>
<th>Off-premises cloud-type as-a-service (shared infrastructure)</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP audio conferencing</td>
<td>35%</td>
<td>14%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>LAN VoIP/IP telephony</td>
<td>35%</td>
<td>29%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Traditional audio conferencing (non-IP)</td>
<td>34%</td>
<td>24%</td>
<td>18%</td>
<td>24%</td>
</tr>
<tr>
<td>Integrated conferencing (IP audio, web, video)</td>
<td>30%</td>
<td>25%</td>
<td>27%</td>
<td>17%</td>
</tr>
<tr>
<td>WAN VoIP</td>
<td>26%</td>
<td>31%</td>
<td>26%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Base: 96-118 technology decision-makers in enterprises in the US
Collaboration Momentum Will Continue In The Future

Unified communications and collaboration solutions are top priorities for many enterprises in the next 12 months:

- Sixty-three percent of surveyed enterprises identified unified communications and collaboration solutions as critical or high priorities in the coming year.
- Over half (53%) of firms stated that migrating more traffic to VoIP is a high priority.
- In addition, 49% of enterprises stated that migrating their network to an all-IP environment is a critical or high priority in the next year.

How much of a priority will each of the following initiatives be over the next 12 months?

- Implement or expand implementation of our unified communications and collaboration solutions: 24% Critical, 39% High
- Migrate more traffic to VoIP: 12% Critical, 41% High
- Migrate our network to an all-IP environment: 20% Critical, 29% High

Base: 105 IT decision-makers who have responsibility for VoIP and collaboration strategy/decisions in enterprises in the US
Source: A commissioned study conducted by Forrester Consulting on behalf of AT&T, May 2016
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Integrating Communication Systems Is An Enterprise Priority In The Coming Year

VoIP and other communication feature deployments are expected to continue because many firms identified these initiatives as critical or very critical priorities in the next year:

› Fifty-four percent of surveyed enterprises indicated that integrating communications features is a critical or very critical priority over the next 12 months.
› Implementing video solutions is a critical or very critical priority for 50% of surveyed enterprises.
› Integrating productivity solutions into VoIP services or converging mobile services with fixed communications services are critical or very critical priorities for 44% of enterprises.

How critical do you believe each of the following initiatives will be to your organization over the next 12 months?

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Critical</th>
<th>Very Critical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrating communications features</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>Implementing video solutions (e.g., desktop)</td>
<td>35%</td>
<td>15%</td>
</tr>
<tr>
<td>Implementing unified communications functionality</td>
<td>33%</td>
<td>14%</td>
</tr>
<tr>
<td>Integrating productivity solutions into our VoIP service</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Converging mobile services with fixed communications services</td>
<td>33%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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Source: A commissioned study conducted by Forrester Consulting on behalf of AT&T, May 2016
VoIP And Unified Communications Achieve Many Benefits

There is a significant upside for firms that implement VoIP and unified communications solutions. These benefits include the following:

› Employee collaboration is among the top three benefits of both VoIP and unified communications. Sixty-seven percent of enterprises deploying unified communications and 47% of enterprises deploying VoIP solutions achieve or plan to enable employee collaboration through these solutions.

› When businesses migrate to voice over IP, they are do so primarily for cost savings. Between 54% and 55% of surveyed enterprises identified the top benefits of deploying VoIP solutions as lower overall costs and lower total cost of ownership.

› Improving employee productivity and creating a flexible work environment are benefits identified by about 50% of enterprises. As employees use unified communications solutions to facilitate internal communications and see the status of co-workers, they avoid wasting time and can select the best form of communication for the task at hand.

What types of benefits are you achieving or planning to achieve from deploying VoIP?

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower overall cost</td>
<td>55%</td>
</tr>
<tr>
<td>Lower total cost of ownership</td>
<td>54%</td>
</tr>
<tr>
<td>Enable employee collaboration</td>
<td>47%</td>
</tr>
</tbody>
</table>

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What types of benefits are you achieving or planning to achieve from deploying unified communications?

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable employee collaboration</td>
<td>67%</td>
</tr>
<tr>
<td>Create a flexible working environment</td>
<td>50%</td>
</tr>
<tr>
<td>Improve employee productivity due to easy accessibility of advanced features</td>
<td>49%</td>
</tr>
</tbody>
</table>

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Conclusion

Deploying VoIP and unified communications and collaboration solutions is a top priority for many US enterprises in the coming year. Firms use VoIP and unified communications solutions to transform employee performance and enhance operations.

› Achieving cost savings is a key benefit of VoIP solutions, and enhancing employee productivity and collaboration are key benefits of unified communications solutions.

› Many enterprises are expanding the features of unified communications, including integrating voicemail with email, adopting presence features, and integrating videoconferencing.

› Firms must address various issues when deploying these communications technologies, particularly security, lack of internal skills to deploy these solutions, and complex configuration issues.

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