

Accelerating Your Workflow with Unified Conferencing

**Seamless Unified Conferencing
surpasses Web Conferencing
for generating savings
and productivity breakthroughs**



November 2009

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for generating savings and productivity breakthroughs*

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NOVEMBER 2009

Highlight: “Unified conferencing is much more than an audio bridge and/or a web conferencing service; in a unified conferencing environment, all conferencing functions are readily available to the users, so that they can better perform their job responsibilities within their typical working environment.”



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Conferencing is an essential business tool

“No man is an island¹” embodies the truth that both routine and innovative work in business requires conferencing and collaborating with others. Conferencing is a major business tool for a wide range of activities such as negotiating a price, planning events or services, or collaborating to create differentiating products or solutions. Good conferencing tools can be a major accelerator for any business or organization.

We often narrowly think of conferencing as people meeting at a scheduled time in a room, on an audio conference bridge, or in a scheduled web or video conferencing session; however, ad hoc real-time communications is emerging as a key capability for business conferencing. The days of gathering in a single meeting room at a specified time are dwindling as teams have become geographically dispersed, conferencing capabilities have improved, and conferencing costs have declined.

Conferencing goes far beyond scheduled meetings

While some conferences require scheduling, many occur in an ad hoc fashion. Individuals or groups may discover in the course of their work that they need information from colleagues or access to a manager or an expert to obtain some necessary information to proceed; conferences enable people to correlate and coordinate so that expectations and outcomes are properly aligned. Simple conferences consist of impromptu instant messages or quick phone calls. However, more and more frequently, conferences involve an element of “see what I see” data sharing capability which allows those in the conference to simultaneously view or modify data to get the work done. In addition, many conferences employ video as a means to assure a high level of understanding among participants as they see the facial expressions and body language of the other participants.

When high quality, easy to use conferencing features are built into the work environment, employees can “click-to-conference” any time they need to reach out to internal or external colleagues. Persistent chat sessions and conference archival capabilities, which are built into the better communications and conferencing environments, help extend the value of the conference far beyond the original meeting by allowing field personnel or busy developers, marketing staff or managers, to link to the conference after the fact to get caught up on the discussion – effectively providing an audio, web and video blog to further bolster the organization’s productivity.

Conferences are dynamic in size and scope

Many conferences focus on a “consultation or discussion”, with the goal of creating or deciding something. Such meetings are often dynamic in scope and size. If, in the course of the discussion, an outside resource is identified who could move the meeting along quicker or better, modern unified conferencing tools provide mechanisms for easily adding people to a meeting “on-the-fly” without that person leaving their current working area or location. Furthermore, unified conferences may vary fluidly between text chat, voice discussion, web information viewing, videoconferencing, or any combinations of those, depending upon the needs of the meeting participants. Ad hoc, multi modal conferencing

¹ John Donne, [Meditation XVII](#), 1623.

mimics the informal, immediate hallway/water cooler/office meetings people often have who are in close proximity to one another.

Conferences need to be easy to invoke and manage

One of the barriers to efficient work and collaboration has traditionally been the overhead that is often required when scheduling a conference; this includes arranging the room, separately scheduling audio and/or video conference bridge capability, coordinating with the web conferencing service, and then getting all of this information out to the participants in a timely manner. Further difficulty is encountered when a scheduled conference needs to be changed: the meeting moderator ends up repeating the entire scheduling process anew. In some cases, errors can creep in, with some persons failing to receive the updated meeting notice or conferencing facilities and infrastructure being double booked. Unified conferencing tools can eliminate these difficulties.

Introducing Unified Conferencing

Unified conferencing provides seamless, ad hoc or scheduled access to all communications functions. Unified conferencing is a purpose-built aggregation of the capabilities available in a modern unified communications environment, like Microsoft Office Communications Server 2007 R2. Unified conferencing is much more than an audio bridge and/or a web conferencing service; in a unified conferencing environment, all conferencing functions are readily available to the users, so that they can better perform their job responsibilities within their typical working environment. In a unified conferencing environment:

- There are no boundaries between media types. Thus, users can escalate a conference from an IM chat session into a voice and desktop sharing conference, adding video when appropriate, without changing applications or interfaces. Conversely, the user can also revert back to just voice or IM as the situation warrants.
- Two or more persons in a phone call, video call, or web sharing session can simply drag and drop the name of another person (or even a group of people) on their buddy list into the meeting and the system immediately connects that person to the conference.
- Visible presence status indicators eliminate delay, as well as phone and email tag, when trying to bring a person into a conference, or to have a sidebar consultation.
- Conferencing and collaboration capabilities become available from office productivity and workflow applications.

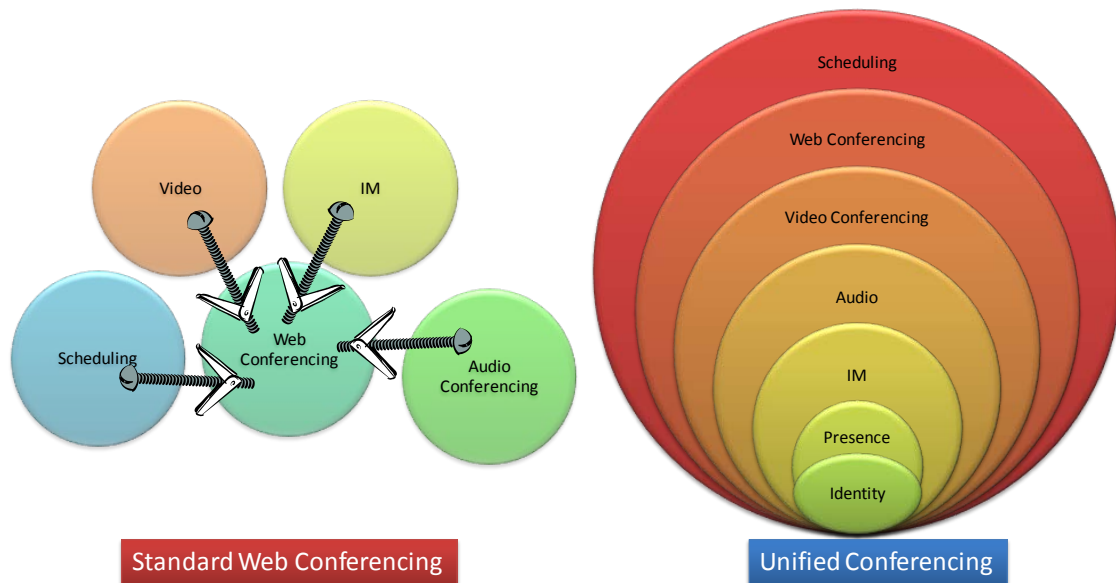
Throughout the collaborative session, a unified conferencing system provides a single, well integrated interface so that conference participants do not have to exit one meeting mode and enter another to add or release functionality during the conference. The goal of a unified conferencing solution is to make seamless and dynamic communications capabilities available to all users in order to support both increased productivity and improved business processes.

Unified Conferencing versus Standard “Web Conferencing”

Unified conferencing provides a seamless working environment and consistent user experience as the conferencing session moves from one communications mode to another (i.e. IM server vs. audio/video

bridges or Web conferencing servers) or uses different network resources while doing so (i.e. linking to federated IM or conferencing resources in another enterprise or in “the cloud”). This unified approach is in contrast to legacy conferencing environments in which if two people are engaged in a voice call and they want to escalate the call to a multiparty voice or video conference, they must first drop the voice call, set up a conference bridge, IM or email everyone the conferencing bridge information, and then dial into the bridge. The wasted time and work discontinuity, i.e. the “seams,” are obvious in this case.

Figure 1. Unified conferencing versus standard Web conferencing.



Many Web conferencing environments have, in recent years, bolted on additional communications modalities. For example, many Web conferencing tools now include voice over Internet Protocol (VoIP) and/or video conferencing capabilities. Most also include some type of basic instant messaging functionality. However, using these tools still requires the user to “leave” their normal work environment to set up and log into the web conference. Furthermore, these communications modalities, including the instant messaging and any presence functionality, are disconnected from the standard communications tools built into the regular workflow for the job. Not only must users invest extra effort, but in many cases the supporting functions, such as archiving the conference, are in a separate, siloed environment, as well.

Clearly, the business need for truly seamless unified conferencing goes well beyond just adding multiple communications channels to a particular conferencing tool; it requires a unified communications environment that is part of the everyday workflow.

Unified Conferencing Using Office Communications Server 2007 R2

Office Communications Server 2007 R2 (OCS 2007 R2) provides a leading example of unified conferencing that includes rich presence, instant messaging, enterprise telephony options, standard and high definition video, point-to-point and multipoint audio/video conferencing, Web conferencing, and instant desktop sharing.

From within OCS 2007 R2, users can easily invoke any of the unified conferencing modes it natively provides. These conferencing capabilities can just as easily be accessed from within Microsoft Office applications, and from properly integrated line of business software.

Enabling unified conferencing by deploying OCS 2007 R2 provides organizations with additional significant benefits including²:

- “Anywhere Access”: OCS 2007 R2 is equipped with a variety of access options ranging from the Office Communicator client installed on the PC, to Communicator Web Access for access from most popular web browsers, to Communicator Mobile on many types of mobile smartphones.
- Consistent User Interfaces: The OCS 2007 R2 interfaces are consistent across the various access methods, and they are consistent with other Microsoft Office products, allowing users to quickly and readily adapt the unified conferencing capabilities into their working environment.
- Ready to Use: All of the unified conferencing functionality works “out of the box,” i.e. without complex integrations or interoperation requirements. Integration of the unified conferencing functions with business applications such as SAP (ERP, CRM, SCM) or McKesson (Health Care) does require integration, but these integrations are facilitated by pre-packaged modules from Microsoft, from the application suppliers, or from their software solution partners.
- Secure Remote Access: Since the OCS 2007 R2 includes complete security features including end-to-end security and encryption without the need for a Virtual Private Network (VPN), it can be used with confidence for unified conferencing by remote employees and, through simple conferencing invitations, with customers and with business partners.

Unified Conferencing Saves Time and Increases Productivity

The uses and applications of unified conferencing vary by job type and by the related business processes in which people work. Valuable applications of unified conferencing certainly exist in almost all industries.

The opportunities for unified conferencing value can be seen by an evaluation of the value chain in your industry and your own enterprise. The value chain is the sequence of steps and activities that create, deliver, and maintain value for your customers, i.e. that fulfill the mission of your business.

When you look through your enterprise’s value chain to find the applications for unified conferencing, look for those activities that most impact on the speed and quality of your enterprises’ services to your customers. Also, look for those activities that involve “meeting for consultation or discussion”, that involve multiple parties, and that will introduce added costs or noticeable delays if not completed promptly or effectively. Here are some examples:

Manufacturing, Sales, and Service:

Manufacturing, sales and services, have spent the last 40 years integrating back end systems to speed transaction efficiency. Only incremental improvement will occur in improving transactional efficiency in

² To learn more about the specific conferencing functions of OCS 2007 R2, please read [“The Compelling Case for Conferencing.”](#)

these businesses. However, this segment often has significant conferencing needs. Preparation and adjustment of manufacturing production plans are very collaborative; purchasing and other supply chain actions require effective conferencing in the negotiation, procurement and logistics functions; and services requires conferencing both with internal experts and with the relevant customers for rapid problem resolution. For example, Schlumberger has integrated Microsoft Office Communications Server 2007 R2 with their industry leading Petrel oil exploration software, so that the exploration engineers can immediately invoke conferences with one or more experts to accelerate analysis and confirmation of new oil or gas reserves.

Product Development and Marketing

Product development and marketing are the engines that sustain competitiveness and growth potential. Both of these functions involve conferencing and can be improved with a unified conferencing approach. Multicultural meetings regularly benefit from videoconferencing in addition to any data collaboration as a way to ensure understanding by reading the body language. For example, the global pharmaceutical firm Astra Zeneca has linked the unified conferencing functionality of Microsoft Office Communications Server 2007 R2 (OCS R2) to SharePoint workspaces to accelerate, dramatically and confidentially, the time-to-market of new medications, shaving months off the product development cycle and enabling billions in additional revenues.

Enterprise management and governance

All enterprises have a set of functions needed to operate the business including executive management, human resources, finance, IT, facilities, etc. Each of these functions uses conferencing for planning their work, for making enterprise-related decisions, and for performing specific elements of their roles (e.g. conducting interviews and follow-up reviews in the hiring process). For example, Swisscom, the leading telecom provider in Switzerland, has deployed Microsoft OCS R2 to improve customer responsiveness while maintaining its competitive edge in a deregulated environment, cutting operational costs for telecom system maintenance, and reducing proposal cycle times by 20 percent – through unified conferencing.

Health Care – clinical and administrative

Consultative conferencing is required at many points in the patient treatment plans. Often these rely on unified conferencing functions. For example, when the physician receives notification of a radiology result, she can launch an IM session with the radiologist asking for clarification. Similarly, two or more caregivers may use voice and web conferencing to coordinate a treatment plan or to hand-off a patient between shifts or teams. For example, the Ontario Association of Community Care Access Centers is using the Microsoft OCS R2 as a unified conferencing tool to coordinate across 14 geographical disperse locations in order to deliver improved services to their health care clients, enabling those clients to live independently at home. Additionally, the Association has reduced external conferencing service costs.

Financial Services

Many financial services operations require a very collaborative team setting. In investment banking, this may be the rapid formation of “deal teams” using communications that are as seamless as possible which can make the difference in closing or losing a deal, worth millions in client value and potential

compensation for the banking firm. In insurance, the coordination between field agents and underwriting or claims is a very collaborative process in which speed and effective communications are critical. Persistent chat, video, and continuous shared data updates are real examples where unified conferencing technologies make a big impact in financial services. For example, Indiana Seguros, a major insurance provider in Brazil, found that the unified conferencing functions of Microsoft OCS R2 both improved responsiveness to customers, since the employees could quickly consult with experts in any of their offices to solve problems, and improved productivity, especially in training new employees on the details of their new assignments and account profiles.

These are a few of the many examples where unified conferencing can and will deliver breakthroughs in business outcomes, ranging from cost reductions to organizational efficiencies to revenue and margin gains through the speed and competitive differentiation unified conferencing can provide. Opportunities very likely exist in your organization, and we encourage an examination of your company's value chain to find them.

Suggestions for consideration and/or action

Based on this unified conferencing review, what is recommend as the best course of action for end user organizations wishing to improve their conferencing capabilities and participant experiences? It really comes down to just two steps to determine if your organization has a compelling case for a unified conferencing investment.

Look at how people work today

Begin with a high-level scan of the workflows, the business processes, and the employee working styles within your enterprise as well as how internal employees work with external customers, suppliers, and partners. Try to find processes or jobs with significant amounts of communications and meetings “for consultation or discussion.” Evaluate how often geographically dispersed teams and individuals collaborate with each other, including an assessment of delays incumbent with scheduling meetings as well as the occasional travel costs to meet their needs for a productive, multi-faceted experience. One way to do this would be to scan online individual calendars to see how often people are in meetings. The objective is to identify the groups most likely to benefit from unified conferencing. As these groups prove the value of a unified conferencing solution in your business culture and environment, unified conferencing can be expected to see broad, viral adoption.

To promote additional adoption, estimate or analyze the extent to which business communications activities could be improved with unified conferencing solutions such as those that were described above. You might ask:

- Do communication silos cause productivity losses or business delays and workarounds in your organization?
- Are these losses, delays and workarounds significant enough to fix?
- How much hard dollar savings, e.g. reduction of out-of-pocket costs for existing communications silos, could occur based on a unified conferencing solution?

- How much business improvement – revenue growth, margin improvement, and enhanced customer responsiveness – could be achieved with unified conferencing solutions?

Prepare a draft business case

Discuss the potential improvements with the appropriate lines of business management. Provide them with a draft diagram of the improved process flows and working styles based on unified conferencing. Where possible, a demonstration or case study reviews might support their understanding.

Evaluate the total spend on current siloed conferencing capabilities. Understanding the various costs for the specific processes and jobs will be helpful in determining the savings or profit improvements that would justify the unified conferencing investment. Obvious costs would be the current spending on separate products or services for voice conferencing, web conferencing, and/or video conferencing. But don't forget to look at travel budgets, mileage reimbursements, or even cellular and calling card billings. All of these are potential areas for expense elimination or reduction with a well-defined unified conferencing approach. Of course, there's some challenge here, since these costs may not occur in one centralized budget; but the expenses are often significant and the effort is usually warranted.

Understand the configuration and the resultant costs for installation, adoption, and operation of a unified conferencing solution. Factor in the reality that some kinds of meetings will still require external conferencing solutions, such as certain types of high level financial calls or some kinds of web events.

Combine the improvement potentials, the savings and the new costs into a business case. This should show you whether you have a compelling investment opportunity and will be able to gain management sponsorship and approvals. We should point out that some companies are able to justify their entire investment in a unified conferencing solution by reducing travel costs and conferencing service provider fees.

Proceed with well-justified Unified Conferencing Solutions

If the business case is compelling, proceed with steps to implementation.

Revise requirements development

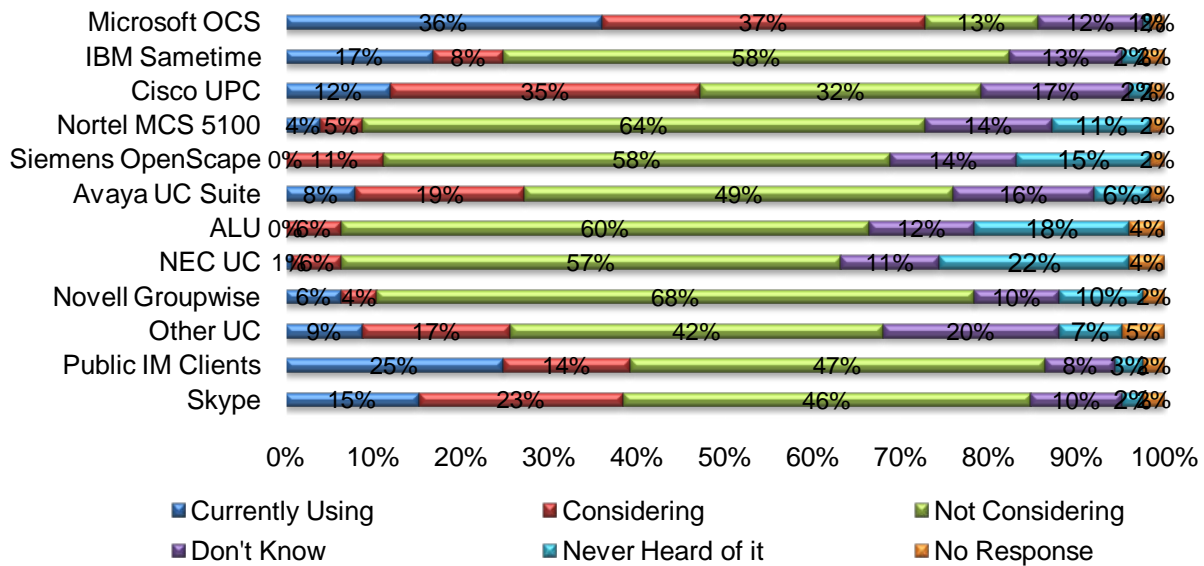
Any technology rolled out must interface with your people, processes, and existing technology. Plan carefully to understand your personnel and how they will use the solution. Consider how they will be trained on the new solution.

Higher benefit is achieved when processes are modified to seamlessly incorporate a new technology. Make sure the technology supports the process, and not the other way around. Just because unified conferencing may be a cool technology, if it does not meld into how your people perform the work that comprises their individual business processes, then the technology will likely provide little benefit. Changes to process and culture are hard. They will require executive sponsorship, training, incentives, and an understanding by employees of why a process is being modified.

Investigate integrated conferencing approaches.

The technology must support the people and processes. Consequently, significant effort should be expended in assuring that the workflow is not negatively impacted by the unified conferencing system. It helps to see what others are implementing and asking peers in other companies why they are deploying a particular solution.

Figure 2. Mindshare among unified communications environments.



Source: Wainhouse Research, July 2009
 125 End Users; 43% over 10,000, 29% over 1,000 people
 Caution: this does not imply number of UC clients deployed!

Avoid Piecemeal Approaches

Too often, companies fail to consider “whole solutions”. A whole solution is one which satisfies all of the requirements and needs that an organization identifies to improve a business process. This can certainly be achieved by an incremental approach, as opposed to a piecemeal approach. Piecemeal approaches, which occur either by losing sight of the end result or by failing to create a complete strategy, may provide short term gains but they often create long term losses. By contrast, an incremental solution will begin with the end in mind and maintain a laser-like focus on that desired end result, realizing benefits at each stage.

Target to highest potential workgroups

We almost always recommend several smaller implementations over a “big bang” deployment, both to reduce risk and to have a shorter time to ROI. Prioritization is best done by focusing on the business processes or workgroups with the greatest current barriers to their work objectives or with the most obvious communications inefficiencies. You can also prioritize based on those investments that will most notably differentiate your business, such as including customers or business partners in unified conferencing sessions so that they participate in the faster and more efficient outcomes that are produced.

Conclusion

In summary, we have seen that all communications are forms of conferencing and collaboration and that, in many cases, the conferencing experience and effectiveness can benefit significantly from improved conferencing tools and solutions. Productivity gains can be obtained for both individuals and groups, but the biggest gains will occur as business processes are streamlined. We have described unified conferencing as a solution that delivers high value by allowing individuals and groups to easily communicate with one another by seamlessly using any communications modalities best suited to convey information and understanding. Unified conferencing is most effective when embedded within an organization's normal business environment. We have also noted the advantages of unified conferencing has over traditional silo-based solutions, including standalone web conferencing services and programs (desktop and application sharing) even when other communications modes have been bolted on to the web conferencing tool. We reiterate that it is the seamless integration into the user's work and business environment that distinguishes and enables unified conferencing, and this seamless integration leads users to new, more efficient outcomes, not just an automated replication of historical meeting and work modes.

We have also reviewed Microsoft Office Communications Server 2007 R2 as an example of unified conferencing based on the thorough integration that it provides with Windows and browser-based desktop environments and with many business application packages.

The value of unified conferencing is highlighted by application examples in specific business processes and industry settings. Certainly, this includes the ability to decrease costs; yet, the ability to improve business outcomes with unified conferencing is even more prominent in those case study examples.

Follow a defined process improvement framework to determine if unifying the conferencing in your organization will lead to improved results. Scan your organization's processes and employee job types to determine if there is a solid justification for a move to unified conferencing. Opportunities abound in most organizations, and it is important to prioritize these opportunities within the framework of your organization's overall business objectives.

About Microsoft

Founded in 1975, Microsoft (NASDAQ “MSFT”) is the worldwide leader in software, services and solutions that help people and businesses realize their full potential.

About UniComm Consulting

UniComm Consulting is an independent consulting firm that works with clients in one area – unified communications (UC). Our goal is to bring together knowledgeable experts to help bring UC capabilities into organizations effectively and efficiently. We help enterprises to understand the potential for UC in their business, develop strategies appropriate to their goals and opportunities, identify specific applications and associated ROI, help identify supplier partners, and assist with implementation, including project management, change leadership, and metrics.

About Wainhouse Research

Wainhouse Research (www.wainhouse.com) provides strategic guidance and insight on products and services for collaboration and conferencing applications within Unified Communications. Our global client base includes established and new technology suppliers and service providers, as well as enterprise users of voice, video, streaming, and web collaboration solutions. The company provides market research and consulting, produces conferences on technology trends and customer experiences, publishes a free weekly newsletter, and speaks at client and industry events.

About the Authors

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Marty Parker has been involved with enterprise conferencing solutions since the mid '90s when he had product line responsibilities with Lucent and Avaya. Since the emerging versions of Unified Communications (UC) in 2001, Marty has held leadership roles in the definition and creation of UC products and solutions, sponsoring the blend of voice, web and video conferencing as core elements of effective UC packages. Since 2005, Marty has been an independent consultant specializing in UC.

Mr. Parker holds a BS in Business Administration from the Haas Business School.

E. Brent Kelly, Senior Analyst & Partner, Wainhouse Research



E. Brent Kelly has over 20 years experience in developing and marketing highly technical products. Prior to joining Wainhouse Research, Brent held senior management, marketing, and technical positions in both large and small communications, manufacturing, semiconductor testing, and petroleum companies. He has authored reports, articles, and seminars on migrating to IP communications, integrated conferencing environments, IP video network providers, and the conferencing reseller channel. Brent specializes in IP communications infrastructure, the rich media conferencing reseller channel, and strategic consulting.

Mr. Kelly holds a Ph.D. in engineering from Texas A&M and a B.S. in engineering from Brigham Young University.