Forbes insights

The Visual Advantage: Harnessing Video-led Unified Communications To Drive a More Agile, Connected And Effective Culture

Numerous forces are shaping the workplace of the future—but all lead to greater reliance on video communication.

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Introduction

In an era of increasingly global footprints, remote workers and frequent travel, organizations must often forego meeting place intimacy for expediency.

At the same time, the nature of work itself is changing, shifting from routine, functionally-focused, lower valueadded jobs to roles requiring collaborative, strategic and critical thinking and decision making.

Meanwhile, driven by everything from quality of life initiatives to the rise of the gig economy, more work is being performed remotely.

All of this complicates but simultaneously increases the value of effective communication. In an era where inperson interaction is increasingly less feasible or even desirable, businesses are learning unified communications featuring video not only fills the void, but in many ways can be better than in-person.

For a closer look, Forbes Insights has, for a third communications provider Zoom to execute a global survey in Fall 2019. Completed by more than 300 senior executives, the findings are further illustrated through interviews with representatives from two organizations: F5 Networks and Western Union. The following report presents key findings.

The Workplace of The Future

Communication and collaboration more than ever will drive success.

One of the clearest trends is that more work is being performed over greater distances by increasingly dispersed teams and individual workers. This is much more than businesses going global. It's also a case of more "working from home" or "from the road"—including both employees and gig workers.

At the same time, the nature of work is becoming more complex, with less routine and more projects leading to a greater proportion of cross-functional or cross-organizational participants and stakeholders. Greater dispersion and mobility plus a proliferation of communications platforms and tools leads to greater complexity and challenge in achieving effective communication.

At the same time, significantly more employers are enabling larger percentages of work to be performed remotely, a trend that will accelerate over the next three years. For example, 55% of companies today enable remote working, rising dramatically to 77% within the next three years. Similarly, strong growth is anticipated in gig working, rising from 45% today to 64% within three years.

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Workforces are becoming more distributed

The survey shows 71% agree (39%) or strongly agree (32%) that their network of essential stakeholders—workers, managers, suppliers, customers and partners—is becoming more geographically distributed.

Note that this is a worldwide phenomenon, as there is little-to-no variation between the U.S, Europe or Asia/Pacific. Moreover, the figure rises to 85% for CTOs, most likely because technology-focused work is relatively easy to perform remotely.

To what extent do you enable (% who said they "enable" or "extensively enable" each):

Telecommuting or remote working

55% 77%

Today

Next 3 years

Gig/freelance/unaffiliated working

45% 64%

Today

Next 3 years

"This is a global business present in more than 200 countries and territories. It's a business that's always "on," 24/7/365. For these reasons, we see [video communications] as a real game-changer."

RICHARD WILLIAMS

Chief People Officer, Western Union



Work is becoming more team oriented

An array of forces is changing the nature of work in ways that will require an improved quality of communication. For example, 73% of survey respondents agree their workplace requires more teaming and collaboration across work groups. Seventy-two percent also report the rise of more "project-based" assignments, and 66% report an increase in virtual teaming.

And as the nature of work changes, more work must be conducted over greater distances. The finance team, for example, might work from building A while marketing is in building D and the IT team is in another city.

Note that 32% of survey respondents strongly agreed that their network of essential stakeholders (workers, managers, suppliers, customers and partners) and work locations (offices, fulfillment centers, manufacturing, remote workers) is becoming more geographically distributed. Designated in the remainder of the report as distributed enterprises (DE), their answers often vary significantly relative to the overall sample and help to illustrate the direction more and more businesses may be going.

> "Video dramatically improves the quality of communication. We have international meetings where there can be 10 different faces on the screen all working together as if they were in the same room. It changes the nature of the meeting, making it more engaging, fun and collaborative."

BRETT DURNELL

Manager, Unified Communications. F5 Networks

Forces reshaping the workplace

Are you experiencing the following changes in your organization?

(% experiencing to a large or significant degree)			are being replaced by more strategic and decision-making roles
	Overall	Distributed Enterprises	requiring critical thinking. More critical thinkers working within distributed teams throughout the workplace requires greater interaction and, again, more effective communication.
More teaming and collaboration across internal groups/functions	73%	89%	
			The rise of technology requires more critical thinking in the workplace
More "project-based" assignments	72%	89%	Technology is changing the nature of work in ways that will require clearer communications (% agree or strongly agree)
Closer collaboration with customers	72%	94%	Increased automation, including artificial intelligence, is reducing the number of repetitive, routine tasks and creating more time for creative and collaborative ones. 710/ 940/
Closer collaboration with external suppliers/partners	69%	93%	Overall Distributed Enterprises
Mana virtual tannoine			Increased time for creative and collaborative tasks is creating a need for improved ways for employees to communicate with each other.

More virtual teaming collaboration with "others" over distance

66% 88%

Fewer defined/static/ permanent jobs

55% 75%

77%

The rise of the machines

Artificial intelligence, machine learning, robotic process

automation and related technologies are further transforming

the nature of work. Repetitive, low- or relatively low-skill jobs

Overall

Distributed Enterprises

Video Meetings Address The Communications Challenges of The Future

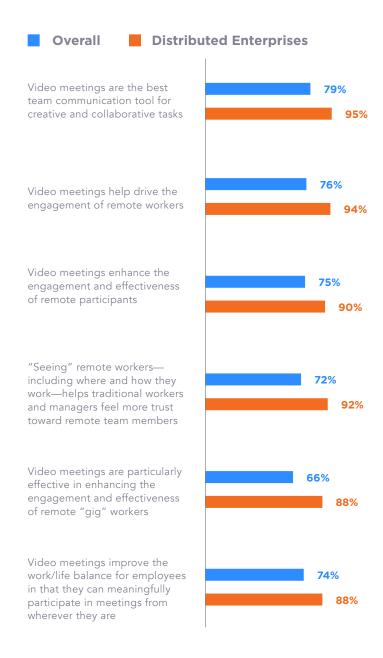
Given the changing nature of work itself, there will be no substitute for clear and efficient communication.

For now, accept that in-person remains the most effective means of communication. But in today's more agile and distributed workplace, a growing number of interactions, either practically or necessarily, are better executed over distance.

Comparable to "being there"

Where face-to-face interaction is not possible, 71% say video communication delivers many of the benefits of face-to-face interaction, rising to 95% among DEs. That is, participants are able to see the reactions of others, cues to effective communication. Compared with alternatives, 79% percent say video communication is more effective than audio conferencing, rising to 92% among DEs.

In fact, survey respondents agree or strongly agree on an extensive list of video communication benefits that complement shifting demographics and the workplace of the future. These include:



Expanding the reach

A key element of the workplace of the future—cited above—is more teaming with customers, suppliers and partners. Again, the survey shows that video communication is ideally suited to play a key role.

Specifically, 70% of the overall sample, and 94% of DEs, say that the use of video conferencing strengthens customer relationships. Similarly, 72% overall and 93% of DEs say the same for collaboration with suppliers and partners.

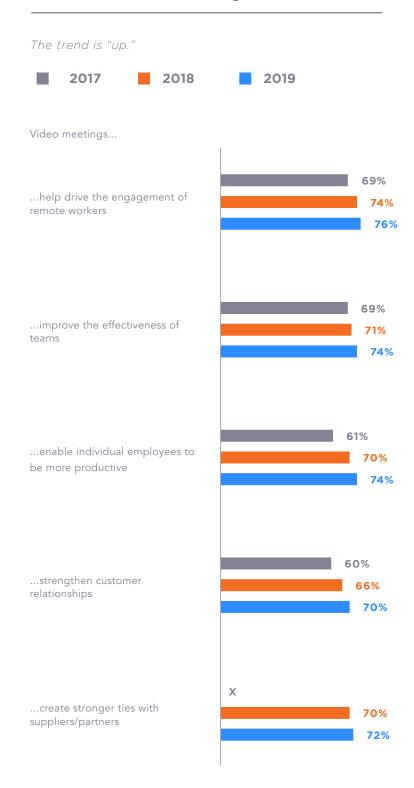
And whether testing video communication's impact on employee engagement or productivity or its role in customer/supplier/partner relationships, the general trend over this survey's three-year span is upward. Simply put, its value is increasing.

"Several users are also our customers—with whom we collaborate closely. So Zoom really extends our reach."

THOMAS HENSHAW

Director, End User Services, F5 Networks

The Value of Video Meetings¹



¹ Percentages are those who agree or strongly agree with the statement across three iterations of this survey.

X indicates the question was not posed that year.

VIDEO COMMUNICATIONS:

The Current State

Given so many needs that can be addressed through greater communication via video, the capability is enjoying a steady rise in usage.

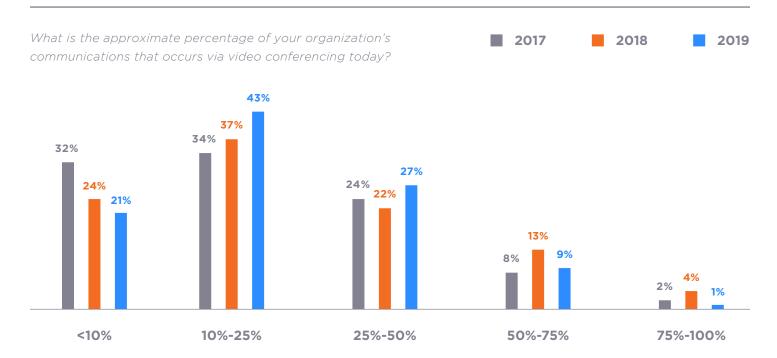
Video's share is increasing

For example, in 2017, 34% of respondents were using video conferencing in 10% to 25% of instances. The figure rose to 37% in 2018 and now reaches 43% in 2019. This growth comes mostly from the group indicating that they had been relying on video for less than 10% of their communications.

In terms of means of access, the most frequently cited is the conference room, which 73% overall and 92% of DEs say they use often/extensively. In a related finding, 80% say that they believe they can further improve the effectiveness of their teams by providing greater access to better-quality video conferencing facilities—93% among DEs.

Second and third place go to desktops/laptops (69% overall/87% DEs) and then mobile (58% overall and 78% DEs).

Reliance on video communication continues to rise

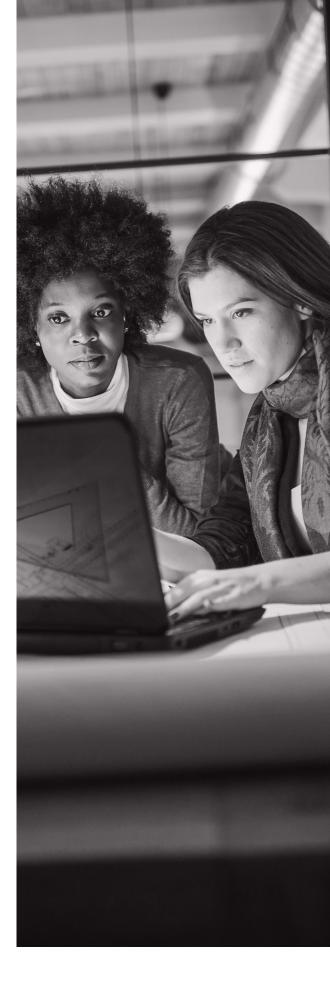


*Rows do not sum to 100% due to rounding

"Adoption has been remarkable. We've gone from a non-existent video environment a year and a half ago to a culture where video communication is second nature."

BRETT DURNELL

Manager, Unified Communications, F5 Networks



Consolidation Is Critical

But another issue from prior years, though improving slightly, still remains persistent: platform proliferation. Along the way, companies also need to evaluate their risk of platform proliferation. Sixty-four percent from the survey say that ease of adoption/implementation of discrete tools/solutions by end users—without centralized cooperation/coordination—is leading to a proliferation of communications platforms. In fact, 61% of executives report that their companies are operating three or more video communications platforms, with 16% indicating the figure is five "or more."

A key means to driving more and better use of video conferencing and communications in general is by moving to a unified platform. Multiple platforms hinder implementation but in particular stifle user adoption – thus inhibiting the quality of communication and collaboration across the business.

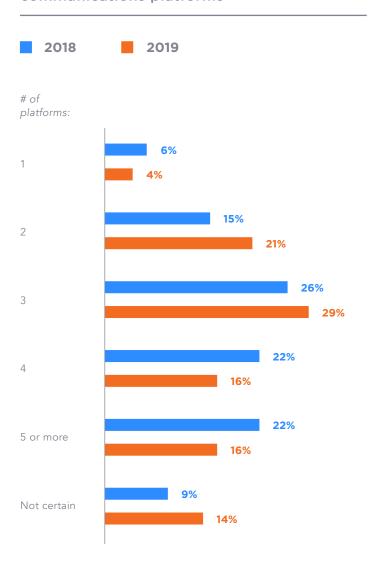
In accord, 64% say they need better strategies and policies to ensure their companies are making the most effective choices in communications providers. Meanwhile, 54% say they are just beginning or are in the process of reviewing such offerings with a mind toward consolidation.

The provision of a more uniform and simplified video and related communications experience will most certainly drive adoption rates. But 74% also believe consolidation leads to significant cost savings – and 69% say their companies can achieve greater governance and control through consolidation of communications platforms.

As for selecting a provider, 68% of executives say they need better strategies and policies to ensure they are making the most effective choices in unified communications providers. Note however: recognizing that issues such as ease of use, reliability, and overall quality matter, 66% insist that end users need to have greater input into any selection process.

It is also important to note: simply introducing a one-off video tool on top of existing communications tools—phone/chat/email etc.—is not an effective solution. Again, the lack of uniformity increases friction and stalls adoption, thereby inhibiting productivity. Instead, companies need to pursue unified communications so that all of the tools of collaboration and teaming are consistent and integrated across the enterprise.

Companies are consolidating their communications platforms



CASE STUDY

F5 Networks

Q&A with Brett Durnell, Manager, Unified Communications, and Thomas Henshaw, Director, End User Services

What are the origins of your video communications journey?

Durnell: A year and a half ago, every meeting we had was on a phone. Meeting rooms were equipped with video conferencing technology but it wasn't intuitive. Usage metrics showed our investments were not achieving objectives.

Henshaw: And we had been having some chatter about more people needing to work remotely—to drive productivity and work/life balance—so we went with Zoom in support of that initiative.

Durnell: And the change has been transformative.

How so?

Durnell: Video dramatically improves the quality of communication. We have international meetings where teams work together as if they were in the same room. It changes the nature of the meeting, making it more engaging, fun and collaborative.

Henshaw: The level of engagement in video conferencing has extended to our global teams and customers. The image of yourself you see on the screen is a constant reminder of how you look; your facial expressions; your posture. It motivates engagement.

Durnell: We also use virtual backgrounds, which are great for someone working from the road or home [and they don't want others to see a mess]—you can hide that.

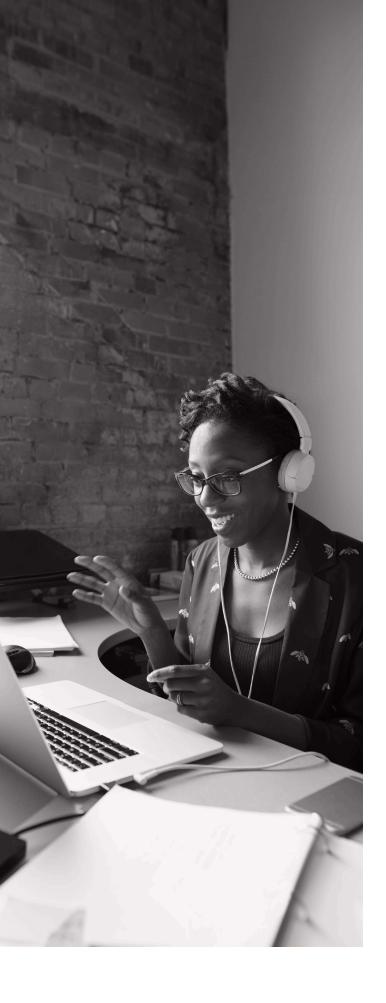
To what extent do you rely on video communications today?

Durnell: Adoption has been remarkable. We've gone from a non-existent video environment a year and a half ago to a culture where video communication is second nature. We have 6,700 Zoom users today and of these, 4,200 are "active" - that is they're people who have scheduled and run their own meetings.

Henshaw: Let me point out that several of these users are our customers—with whom we collaborate closely—and also contractors and interns. So Zoom really extends our reach.

Durnell: We also have 450 Zoom Rooms—video conferencing rooms—they're clean, they're bright, there's no wires or clutter. And from any one of them, you can just [enter], launch a meeting with one touch. It's intuitive and simple.

Henshaw: And being able to run these meetings so effortlessly, seamlessly—it has really improved the user experience and set the bar for our new global technology standards. It's been a wonderful balance of simplicity in technology and simplicity for our users.



How broad is your geographic footprint?

Durnell: We have Zoom Rooms in 12 countries across 23 different cities throughout North America, EMEA and Asia Pacific, China, Japan—and are actively deploying systems in an additional 21 sites. One of the key benefits of using a consistent platform around the world is that it's easier to provide remote assistance. We don't have to waste time to figure out what we're supporting – we already know.

Henshaw: There's also the benefit of consistency for the employee—ease of use for those who hop from office to office being one of many benefits. The user experience is the same regardless of your location.

Durnell: Let me add, if it's not simple to use and if the quality isn't there, people won't use it. Initially we were running five or six different platforms. And when we realized we needed to consolidate, Zoom impressed us in ease and quality. For their sales pitch, they came here and using one device, logged in to our guest wi-fi and then linked in 50 of their sales team. And it all seemed so natural and effortless, and the quality of video, voice clarity and everything else was just amazing.

What's in the future of video communications at F5?

Durnell: Zoom is coming out with new user and administrative features all the time as they continually improve their meeting and webinar platforms. Plus when we ask for a [custom] enhancement they often deliver.

Henshaw: And we were just at their user conference and heard about what's coming. They're developing AI that will do things to help with scheduling, meeting notes, action items and live on-screen transcription. They're also introducing an immersive presentation solution where you can insert yourself into the presentation to liven things up.

VIDEO COMMUNICATIONS:

The Future State

Each year, a growing number of companies indicate that they are planning to expand their use of video communications.

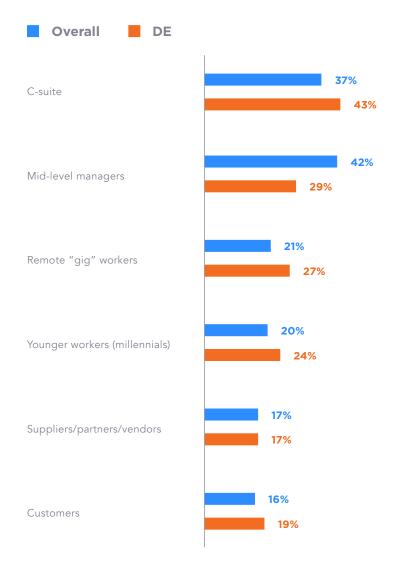
In 2017 the figure was 66%. Now in 2019, 73% of executives say their plan is to make greater use of video going forward. Note that 31% say they are in the process of reviewing and consolidating of video meeting solutions; 23% say they are about to begin that process.

As for who is championing these efforts, at companies in general, the data shows that mid-level managers are the most likely to lead the charge. However, at distributed enterprises, that role is significantly more likely to be taken up by the C-suite—a result that demonstrates the heightened importance of greater effectiveness in communications across enterprises with larger global footprints.

Indeed, the strategic nature of communication begs for greater use of video conferencing. This likely explains why a growing number of executives believe that executive leadership needs to play a greater role in promoting its use.

For Distributed Enterprises, video conferencing is a C-suite issue

Who has been the most visible champion for driving increased adoption or usage of video conferencing?



Other steps to drive adoption include active promotion of its usage and benefits, cited by 72% of respondents. In addition, 70% believe that companies need to provide their users with more training in order to help workers get the most from video communications.

Similarly, 66% believe that by giving end users more say in their choice of video platforms, adoption will increase. Finally, 63% go so far as to say that usage by managers/ teams/individuals should become a formal performance metric.

The C-suite should be driving adoption

Executive leadership needs to become a champion for greater use of video conferencing.



"Video conferencing is just amazing for people who need help to manage their work/life balance under stressful conditions. When situations arise, there's no need to travel to the office, you're able to collaborate and perform just as capably from a home office as you could in person."

RICHARD WILLIAMS

Chief Human Resource Officer, Western Union

Conclusion

Driven by rapidly advancing technologies, the nature of work is changing. By definition, more work today is crossfunctional and project-oriented, necessitating the formation of agile and efficient.

Organizations themselves are expanding their geographic footprints. At the same time, they are enabling greater work/ life balance by encouraging the use of home offices. Next, add a growing cadre of "gig"-based workers. Finally, add to the mix the trend of closer collaboration with customers, suppliers, partners and other stakeholders.

It all leads to more work being performed in more locations than ever before. Greater distance, more teaming and fewer organizational boundaries amplify the importance of clear, efficient and effective communication.

Enter video communications. All evidence indicates that when being there in person just isn't feasible, cost-effective or convenient, video delivers the closest thing to meeting in real life. Seeing others and reading their visual cues vastly improves the quality of communication and understanding.

Moreover, as the technology advances, video communications are fast-becoming an experience that in many ways can be better than in person. Features already offered for a seamless experience include Al-optimized framing and in-room people counting. But it's things like Al-based recording analysis and on-screen, multi-language translation that continue to elevate the value of video meetings.

Finally, note that the workplace is moving in the direction of unified communications—video, chat and voice capabilities in one platform. Offering these tools as part of your core communications technology will help to eliminate confusion and reduce friction faced by users in today's mobile, geodispersed business landscape.

This is the state of the workplace and of global communications. If a meeting isn't taking place in person, it's default setting should become "video on."

Methodology

The findings in this report are based on a Fall 2019 Forbes Insights global survey of 312 executives. Key demographics include:

LOCATION:

Asia-Pacific (37%), Europe (33%), North America (23%), Latin America (6%)

TITLE:

CEO/President (15%), CTO (13%), CIO (12%), Other C-Suite titles (5%), EVPs/SVPs/VPs (7%), Director (11%), Manager/Senior Manager (37%),

FUNCTION:

General management (51%), IT (49%)

RESPONDENTS CAME FROM A RANGE OF INDUSTRIES, LED BY:

Technology (13%), Financial services (12%), Healthcare (10%), Retail and consumer goods (10%), Manufacturing (10%), Energy and utilities (10%), Education (10%), Government (10%)

NUMBER OF EMPLOYEES:

500 to 999 employees (29%), 1000 to 1999 (21%), 2,000 to 4,999 (21%), 5,000 or more employees (29%)

RESPONDENT AGE:

18 to 24 (5%), 25 to 34 (28%), 35 to 44 (32%), 45 to 54 (20%), 55 to 64 (12%), 65 or older (2%)

Acknowledgements

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BRETT DURNELL

Manager, Unified Communications; F5 Networks

THOMAS HENSHAW

Director, End User Services, F5 Networks

RICHARD WILLIAMS

Chief People Officer,
Western Union

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