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Achieving Hybrid-Work Success

A proactive management approach is essential

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A proactive management approach is essential

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Executive Summary

The world of work has forever shifted. Gone are the days when the majority of employees are physically located in the same office and meetings are primarily held within conference rooms. Instead, the future of work is hybrid, with employees distributed among office, home, and remote-work locations. Succeeding in this new workplace requires investing in technologies that enable effective virtual collaboration. IT leaders must not only ensure that employees have the tools that they need, they must also optimize delivery and management to ensure high-quality experiences and that minimize operational costs.

To enable success, IT leaders should:

- Plan for continued growth in adoption of cloud-based applications, especially UCaaS, meetings, and team collaboration
- Ensure that they have a proactive management strategy supporting however many vendors they may have today, with flexibility to support new vendors tomorrow
- Implement a proactive strategy for security, administrative, and performance management
- Consider investing in specialty management tools to achieve measurable improvements in administration and provisioning, as well as Mean Time To Repair (MTTR)
- Extend management to the home worker by ensuring visibility into security and performance, as well as seamless provisioning and administration, regardless of employee location

The World of Work has Changed—Permanently

The global COVID-19 pandemic fundamentally changed how and where people work. Today, an average of 87% of employees work remotely, compared to 34% prior to the pandemic, according to Metrigy's global *Workplace Collaboration: 2021-22* research study of 476 organizations. Though some companies have expressed an interest in bringing employees back to the office in some fashion, just 21.4% plan to do so—and of those, only slightly more than half are planning for a full return. Additionally, 38.3% will require work-from-home while 36.4% will give employees the choice of where they wish to work at any given time.

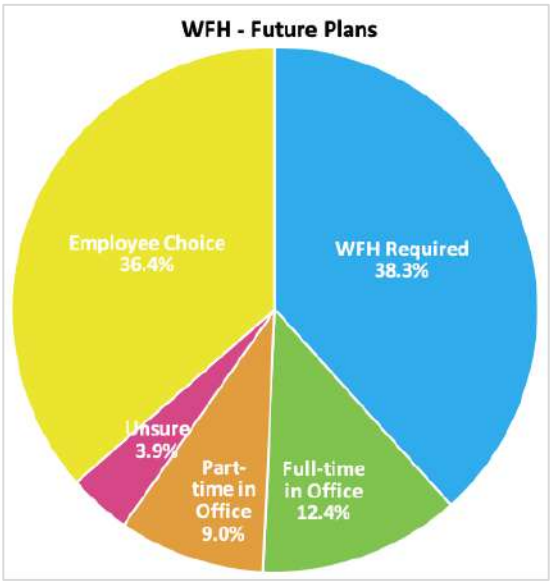

Figure 1: WFH - Future Plans

With virtual and hybrid work likely being the norm, rather than the exception, for the foreseeable future, IT leaders are increasingly focused on how best to meet the needs of the distributed work-force that is becoming more reliant on cloud-based applications, including telephony and video-enabled meetings. To meet this challenge, more than 56% of organizations are increasing their IT budgets, with primary growth areas being adding of new collaboration apps, expanding use of video conferencing and team collaboration applications, security, and application management. As they move forward, IT leaders must ensure that they are able to quickly provision and manage employees regardless of location, and that they have the insight into application performance.

Remote Work Is Driving Collaboration Investment Change

To enable hybrid employees to effectively collaborate, organizations have rapidly embraced cloud-based services, especially Unified Communications-as-a-Service (UCaaS) platforms that typically include an integrated suite of calling, video conferencing, team messaging / collaboration, and in some cases, contact center. For the first time since Metrigy started tracking UCaaS adoption in 2018, more companies use UCaaS than any other delivery model. Among larger companies, with more than 1,000 employees, 52.2% now use UCaaS (either fully, or along with remaining on-premises platforms. (Please see Figure 2 on the following page.)

Among the 25.6% who still only use an on-premises platform, 31.6% are moving to UCaaS by the end of 2021, or are evaluating such a move. Today, 16% maintain more than one telephony platform.

The UCaaS market is still highly competitive with buyers having the opportunity to choose from over-the-top providers or services available from their network service providers.

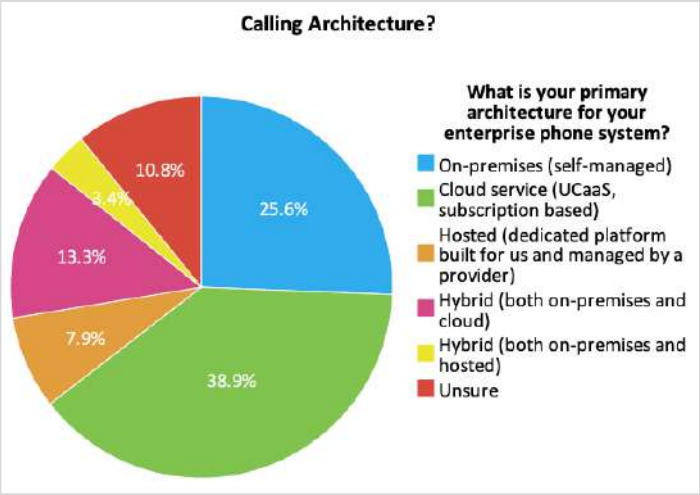

Figure 2: Calling Architecture

Among those with more than 1,000 employees, Cisco and Microsoft are the dominant UCaaS providers (Please see Figure 3.) Currently, 18.9% of research participants use Cisco Webex Calling, a service that has rapidly matured since Cisco's 2018 acquisition of BroadSoft. Cisco's share is only exceeded by the combined customer base of Microsoft Teams Phone System (17.9%) and Skype for Business On-line (8.5%) which Microsoft is retiring in July 2021.

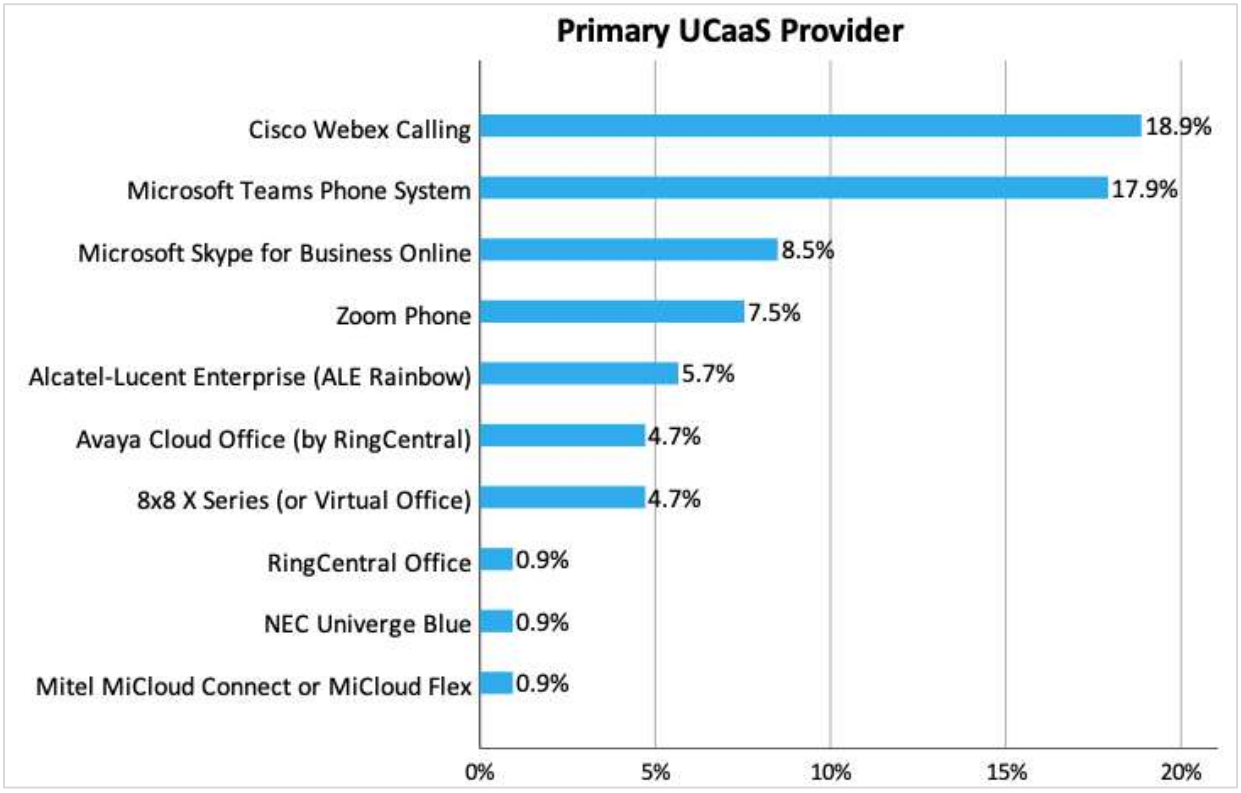

Figure 3: Primary UCaaS Provider (Companies With More Than 1,000 Employees)

The Changing Collaboration Application Landscape

The shift to hybrid work has created a need to deliver collaboration tools optimized for virtual engagement. As a result, the majority of organizations have rapidly adopted video conferencing and team collaboration apps to enable home and in-office workers to effectively meet and work together, regardless of location.

Video Conferencing

After years of hype, 2020 became the year of video, as individuals and organizations embraced the technology to improve virtual meeting experiences. Among our research participants, 86.9% of participants say that video is an important or critical technology for ensuring business operations. More than 80% use video for all or most meetings. Just 11.3% say there is little use of video within their organizations.

As IT leaders deal with the increasing prevalence and use of video in their organizations, they face a variety of challenges—primarily the need to ensure adequate performance, especially for remote employees. IT often lacks the appropriate tools to provision remote users, secure their connection to necessary applications, and manage application performance.

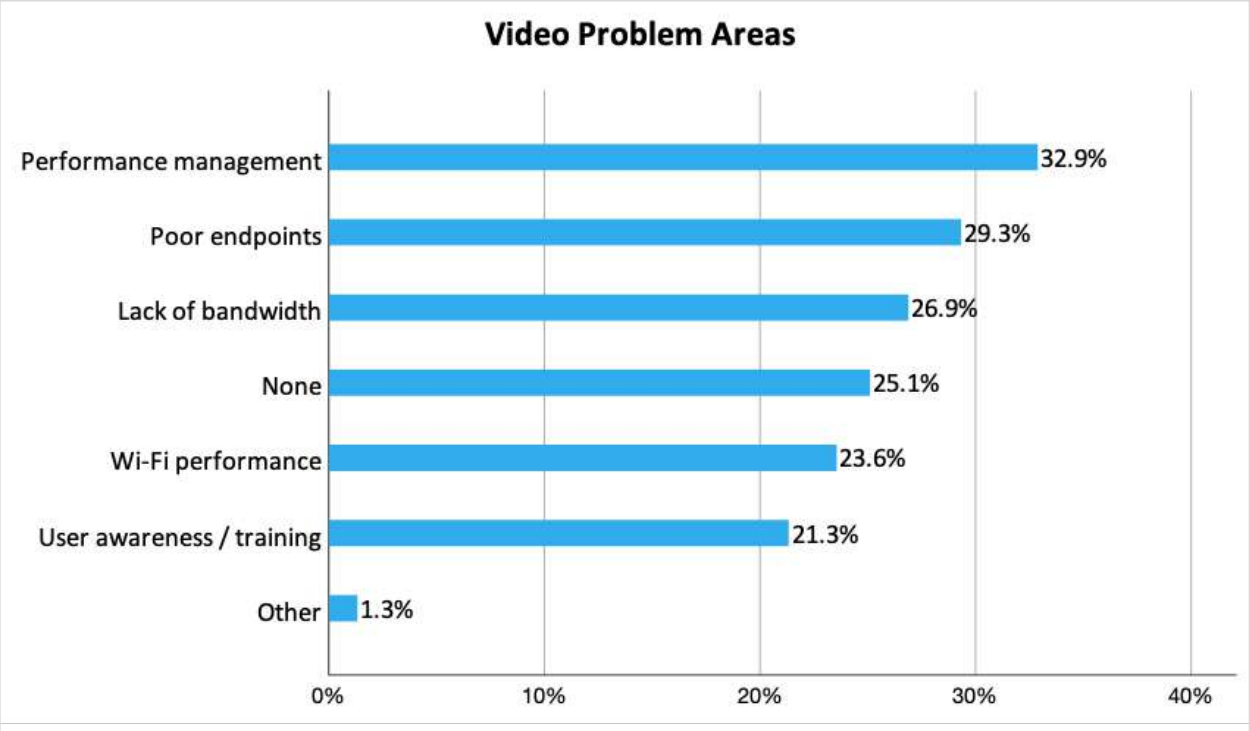

Figure 4: Video Problem Areas

IT leaders also face the need to employ management approaches (and tools) that support multi-vendor environments. Today, 41% of organizations use more than one meeting app, typically to

interact with partner companies using alternative platforms, or because they haven't yet settled on a single primary provider. Supporting a multi-vendor environment, or one in which there are separate meeting and telephony apps, creates significant administrative management challenges as IT operators must maintain separate configurations, provisioning approaches, and user management strategies.

Among those with multiple apps, the majority use Microsoft Teams Meetings (55.4%) and Zoom Meetings (52.3%), while another 34.4% are still using Microsoft Skype for Business On-line until its retirement date. About a third (33.8%) use Cisco Webex Meetings (Please see Figure 5.). Among those with multiple meeting providers, 25.1% consider Microsoft Teams to be their primary meeting app, the highest among all vendors.

Video conferencing is in some cases replacing traditional telephony system usage, with 26.8% of participants saying that 1:1 and group calls have transitioned from PSTN calls to meeting apps, adding to the criticality of ensuring highly available video meeting experiences and effective provisioning and ongoing management.

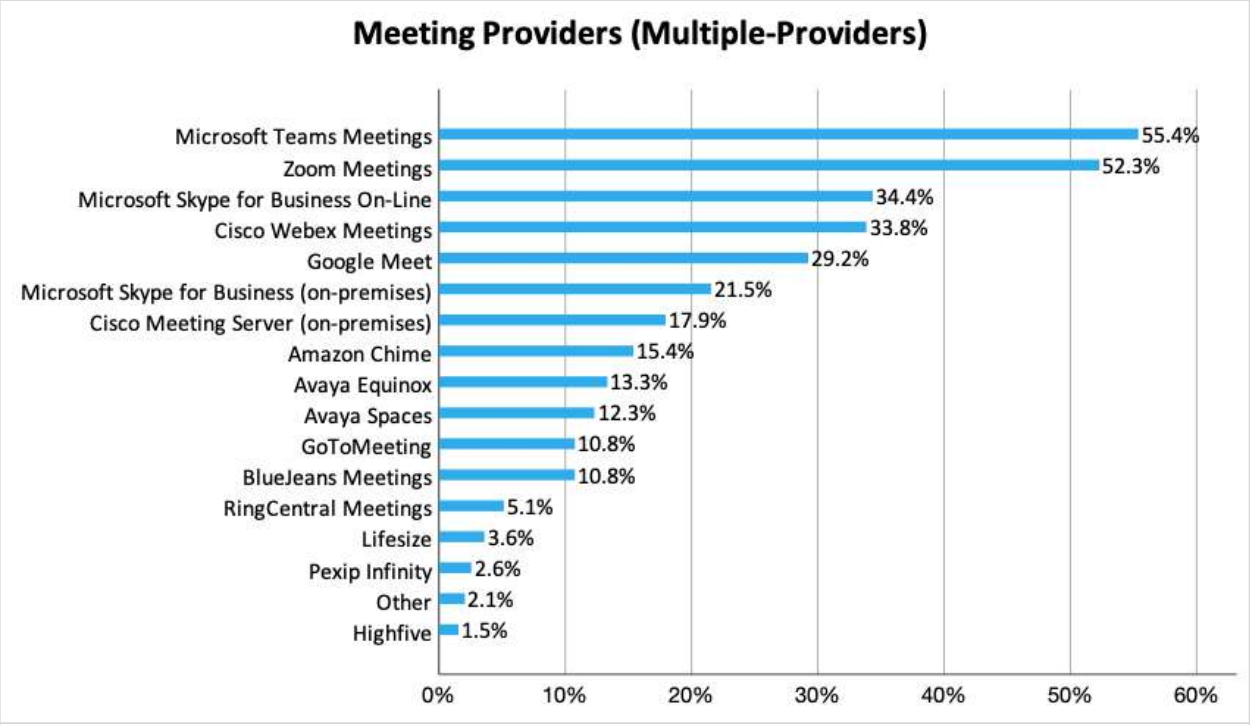

Figure 5: Meeting Providers (Multiple-Providers)

Team Collaboration

Team Collaboration applications were well on their way toward replacing instant messaging before the pandemic, but since then have become critical components of a successful hybrid work strategy. Team collaboration applications provide persistent channels that groups can use to chat, share and collaborate around files, and gain access to business data. Increasingly, low

and no-code tools enable individuals to create workflows within team spaces for activities ranging from software testing to expense approval. Almost 57% of companies extend their team apps to external participants either via federation or guest accounts.

The view of team collaboration apps as a work-hub, rather than just a persistent messaging tool, has drastically grown in the last year. Now, 57.1% of participants see team collaboration as a hub for work and collaboration, up from just 28.9% prior to the pandemic. Nearly half (46.9%) have already integrated at least one workflow or app into their team spaces and most (58.4%) leave administrative management of team spaces, including creating and archiving of channels and provisioning of users, up to IT.

The majority of companies (58.7%) rely on a single, enterprise-wide team collaboration provider, with again Microsoft holding a large share (60.8%) of the market (Please see Figure 6.) Even among the 37% of those with more than one provider, 71.9% use Microsoft Teams.

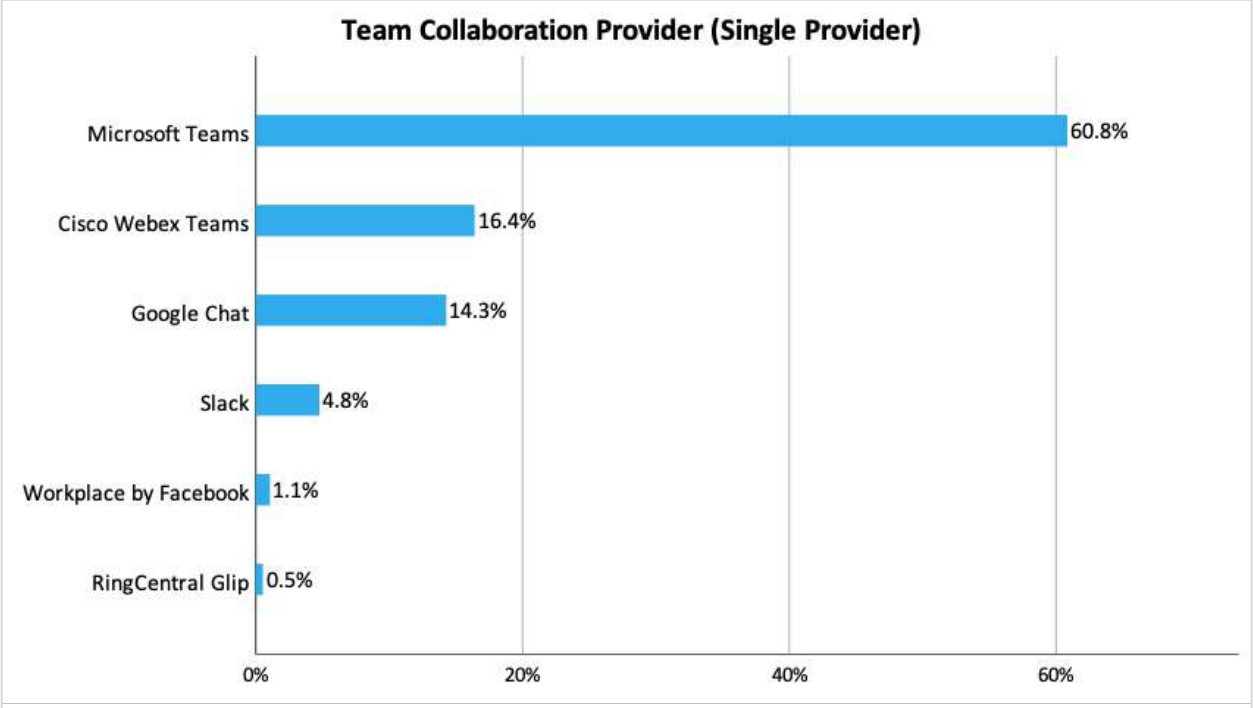

Figure 6: Team Collaboration Provider (Single Provider)

Key Success Requirements

Achieving hybrid work success in an environment that is increasingly cloud based—and where video and team collaboration are as critical as telephony—requires proactively addressing security, management, and the needs of remote employees.

Security

The challenges of supporting an increasing array of collaboration applications along with a largely remote workforce is leading to an increase in investment in collaboration security. More than half (53%) of companies, and 73% of those with the highest ROI or productivity gain for their collaboration investments, are increasing spending on collaboration security.

What's more, just 41% have a proactive security plan today, but among the most successful companies, almost 66% have such a plan. Key components of a proactive security approach include use of firewalls and/or application-layer gateways to control Internet access, data loss prevention to protect sensitive content from distribution, compliance management, internal and external audits, penetration testing, proactive patch management, and formal assessments of the security approaches of cloud providers. In addition, use of administrative management tools can centralize control over user account creation and deletion, as well as the assigning of appropriate permissions

Management

Companies are increasing their investment in specialty tools to manage provisioning and on-going administration and performance of their UC applications. Specialty tools come from providers that develop products specifically to address the management of UC and other communication products, such as contact centers and SBCs. Some provide tools to manage provisioning, configuration, and change management, others manage application performance.

Metrigy's *Enterprise and Customer Engagement Management* research study published in the third quarter of 2020, and based on data gathered from 207 organizations in 10 countries found that 61.5% of participants prefer third-party tools to effectively manage their UC environments. Among those using such tools:

- 73% have more visibility into app performance
- 51% are using for remote worker provisioning
- 42% are using for network performance
- 41% are using for remote worker app utilization

62%

Prefer third-party, specialty tools to effectively manage their UC environments

31%

Average reduction in provisioning time with administration management tools

In addition, the use of specialty management tools results in an average reduction of 31% in provisioning time, on average, and a nearly 16% average reduction in mean time to repair (MTTR). These savings lead to significant reduction in support and on-going operating costs. Administrative savings are primarily achieved via reducing automating and delegating

administrative tasks to help desks, reducing the potential for human error, and centralizing the management of multi-vendor environments into a single management platform.

Beyond simply ensuring that organizations have the right tools, IT leaders must proactively support remote workers. When the home office is the new office, it's not sufficient to simply treat remote employees as being on their own, with only best effort connectivity. IT leaders must invest in capabilities that enable insight into home employee application performance, and that allow home workers to identify and address potential network-related issues.

Additionally, successful companies invest in tools that optimize provisioning and support of remote workers including number assignment, move/add/change management, and self-service tools to enable remote employees to make changes to their profiles, reset passwords, or reassign themselves into different call groups as role change. Figure 7 below shows the administration tools that are most widely deployed to monitor communications applications.

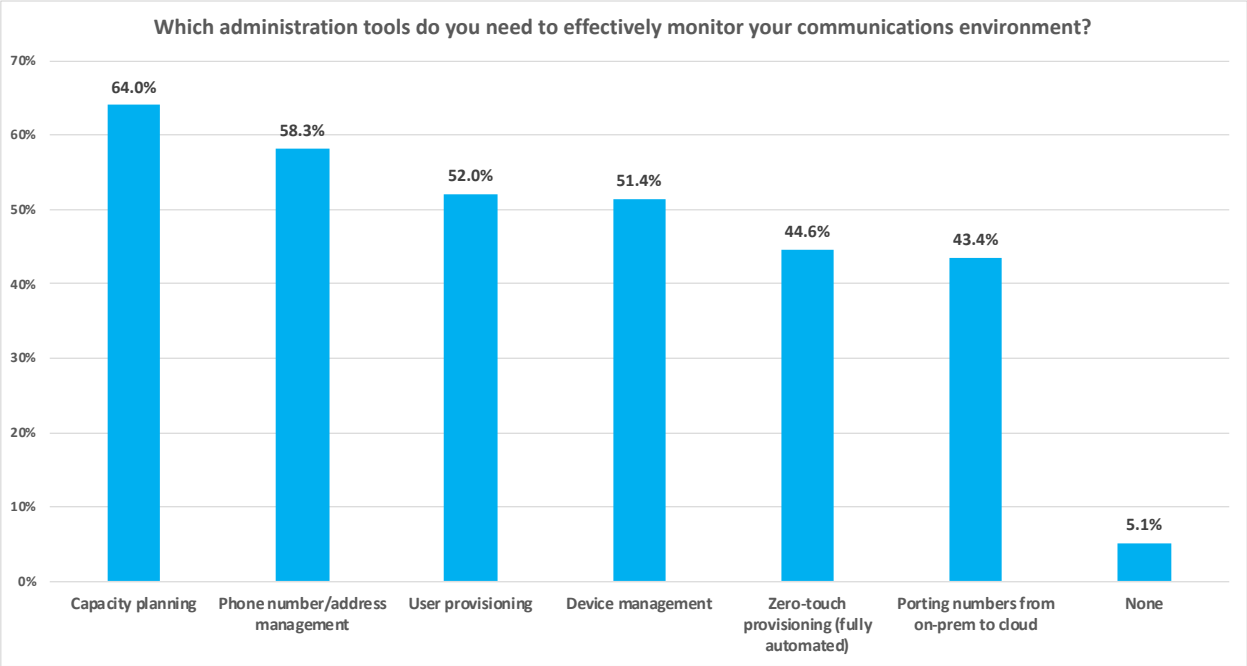

Figure 7: Which administration tools do you need to effectively monitor your communications environment?

Conclusion and Recommendation

Hybrid work is here to stay. To ensure success, IT leaders must embrace applications including UCaaS, video conferencing, and team collaboration that enable virtual, distributed teams to effectively meet and work together, regardless of location. And, they must ensure they have the right management capabilities to optimize support operations, administrative management, security, and performance, in both the office and in the home. To enable success, IT leaders should:

- Plan for continued growth in adoption of cloud-based applications, especially UCaaS, meetings, and team collaboration
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ABOUT METRIGY: Metrigy is an innovative research firm focusing on the rapidly changing areas of Unified Communications & Collaboration (UCC), digital workplace, digital transformation, and Customer Experience (CX)/contact center—along with several related technologies. Metrigy delivers strategic guidance and informative content, backed by primary research metrics and analysis, for technology providers and enterprise organizations.

About us

Kurmi Software develops software solutions that simplify and reduce the provisioning and administration costs of Unified Communications services. Kurmi offers a powerful, user-centric software suite for simple, customizable, and ultra-scalable management of the market's leading Unified Communications platforms (Cisco, Avaya, Microsoft, Alcatel-Lucent, and others). Founded in France in 2011, with offices in Paris, Rennes, Berlin, Montreal and New York, Kurmi Software supports Tier1 services providers and large Fortune Global 500 companies.