

Are You Ready for the Meetings of Tomorrow?:
A Guide to Choosing the Best

ONLINE MEETING PROVIDER

WHITE PAPER

Prepared by
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ABOUT THE AUTHOR

Zeus Kerravala is the founder and principal analyst with ZK Research. Kerravala provides tactical advice and strategic guidance to help his clients in both the current business climate and the long term. He delivers research and insight to the following constituents: end-user IT and network managers; vendors of IT hardware, software and services; and members of the financial community looking to invest in the companies that he covers.

INTRODUCTION: ONLINE MEETINGS DRIVE EFFECTIVE DIGITAL TRANSFORMATION STRATEGIES

Digital transformation has arrived, and it's creating unprecedented opportunities for companies of all sizes to become market leaders through the evolution of business processes and the creation of new products and services. Organizations that master digital transformation will see a dramatic increase in revenues and profitability by converging people, processes and technologies; those that do not will struggle to survive. Evidence of this is clear to see by looking at the churn in the biggest companies in the world. For example, a Capgemini study found that since 2000, 52% of the Fortune 500 has disappeared through acquisitions or bankruptcies. The study also found that digital organizations control 70% of market share in all industries today. Therefore, making the shift to a digital business must be a top initiative for IT and business leaders.

In the digital era, sustained market leadership is no longer based on which company has the lowest prices, superior products or even the best people. Rather, market leaders will be determined by a company's ability to recognize changes in the business environment and adapt to them faster than the competition. This requires the ability to make the best decision while involving the right people, regardless of their location.

The challenge for many organizations is that the workforce is now highly distributed. It's possible to have a single meeting involving people from multiple companies in all regions of the globe ([Exhibit 1](#)), making it impossible to have all participants gather in a single location.

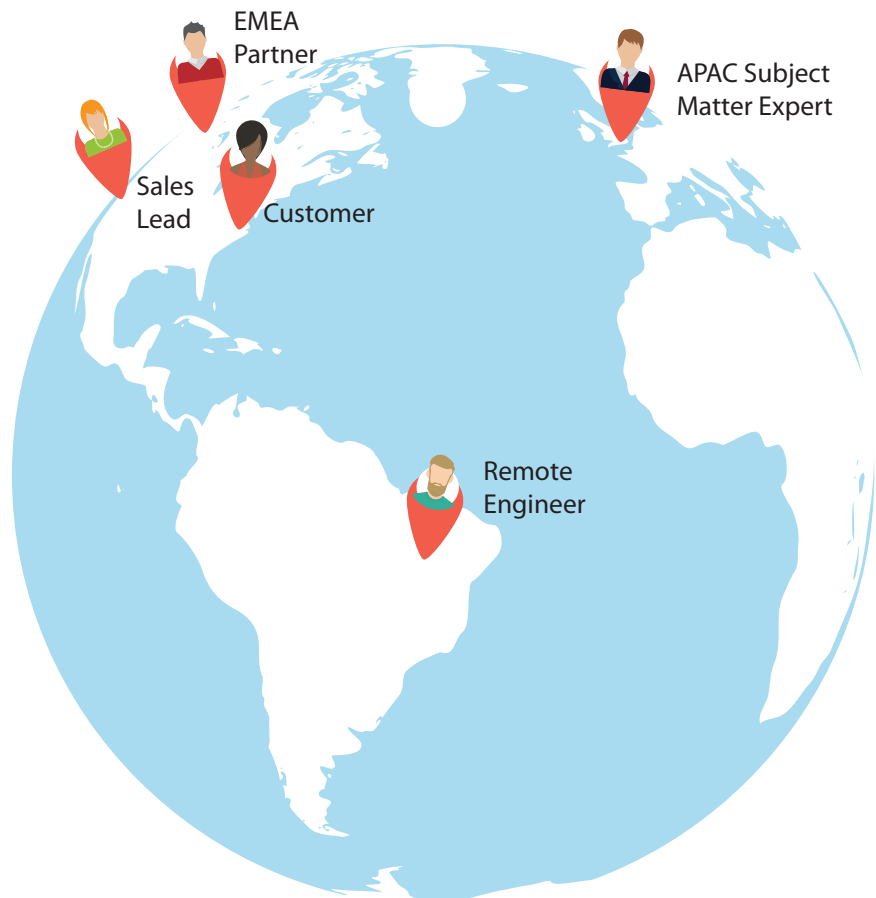
Consequently, the meetings of tomorrow will be much different from the meetings of yesterday. Digital companies need to ensure they can connect workers, partners, customers and other constituents of the extended enterprise in real time.

Applications that allow people to share content with others over the internet have been available for decades, but they have evolved tremendously in the past five years and are now capable of facilitating almost every aspect of a meeting. However, not all online meeting services are the same, and they can vary widely in their breadth of features, quality of service, protection of data and other elements that may not be obvious.

Although it's critical that businesses use online meeting tools to fuel their digital transformation plans, it's equally important that they choose the best provider to optimize the meeting experience.

SECTION II: CHOOSING THE BEST ONLINE MEETING PROVIDER

Online meeting applications are critical in enabling distributed groups to work together more effectively. The decision to use these tools as part of the collaboration tool kit is likely an easy one for IT leaders and line-of-business managers. However, deciding which vendor to use may not be as simple given the wide range of service providers available today. Although it might be easiest to select the one with the lowest cost or even one that is free, low-cost or free products rarely have the range of features that most businesses require.

Exhibit 1: Meetings Require Global Reach

ZK Research, 2017

It's critical to understand that the decisions made today will have a significant impact on the meetings of tomorrow. Instead of focusing on price, evaluators of online meeting tools should consider the following criteria:

Easy to join: Through conducting dozens of interviews with IT individuals as well as workers, ZK Research has found that the first 15 minutes of every meeting is wasted getting the technology up and running. Although the entire 15 minutes is not consumed by starting up the online meetings, many have complicated interfaces that can take several minutes to access. Also, it's important to note that "easy to join" extends past logging into the interface and joining by audio. Some systems require external audio bridges, and others have the user input a long series of digits. This may be the norm today, but it should not be. A worker should be able to join an online meeting with a single click of the mouse or tap of the screen, and then all services should start.

Users should have the ability to enjoy the benefits of online meetings regardless of the device they are using.

Web application: The standard for online meetings has become a lightweight application that the meeting runs in. Typically, software is downloaded the first time a worker joins the meeting on a new computer. However, there are situations when the user might not want this to happen—for example, if the computer is being shared by several people, or if the individual is joining on a tablet and does not have time to download the mobile application. In those cases, a web application that runs in the browser is the only way to join the meeting.

Personalized meeting spaces: The online meeting tool should offer “personal” virtual spaces in which each user has his/her own meeting space. This obviates the need to book it as a resource, and there’s never a concern regarding whether it’s being used. With personalized spaces, the meeting URL, video address and call-in numbers never change, so facilitating meetings is simple. Ideally, the meeting URL could be associated with a certain user, making scheduling and joining easier.

Rich mobile functionality: Users should have the ability to enjoy the benefits of online meetings regardless of the device they are using. The mobile application should let workers attend meetings but also perform other tasks such as scheduling and administering meetings. Another example is having the invitation information automatically populated in the message body, which obviates the need for workers to return to the office, update the invitation and send it out again. The automation of these small tasks can have a big impact on meetings.

Space management: Owners of a meeting space should have the ability to manage and customize it. This includes tasks such as configuring the host PIN, customizing the view, assigning personal avatars or images and personalizing the wall. Also, users should be able to lock the space so no one can enter it until it’s unlocked.

Breadth of meeting types: There are a multitude of reasons people meet, and the online meeting tool should accommodate all of them. This includes a collaborative meeting, a training session, an event or customer support. It’s important to note that the solution should have features unique to each role. For example, training sessions require a moderator feature.

On-premises version: Most of the online meeting applications operate in the cloud, which is perfect for the majority of businesses. However, in several industry verticals, data cannot leave the premises of the business. Also, if sensitive data is being shared, security-conscious firms may feel that sharing information in the cloud is too risky. Whatever the reason, vendors should be able to accommodate these requirements with an on-premises version of the application.

Every organization
needs to be
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collaboration.

Hybrid deployment: Customers that choose an on-premises deployment may have the system sized for average utilization. There will be times when the capacity required is greater than what the system can handle. In this case, the solution should be able to “burst” to the cloud in a hybrid scenario where the public cloud is used to handle the overflow. An important criterion for hybrid deployments is that the user experience should be identical regardless of whether the worker is joining the meeting via the cloud or on premises.

High-quality, interoperable video: Many meetings are improved by the addition of video. ZK Research conducted interviews with approximately 30 businesses to understand the impact of video on several aspects of meetings, and the results are shown in [Exhibit 2](#). High-definition video is an absolute must and is table stakes today, but there are other considerations for video. The video system should interoperate with other video systems for a seamless experience, work across hardware and software systems, and provide video callback.

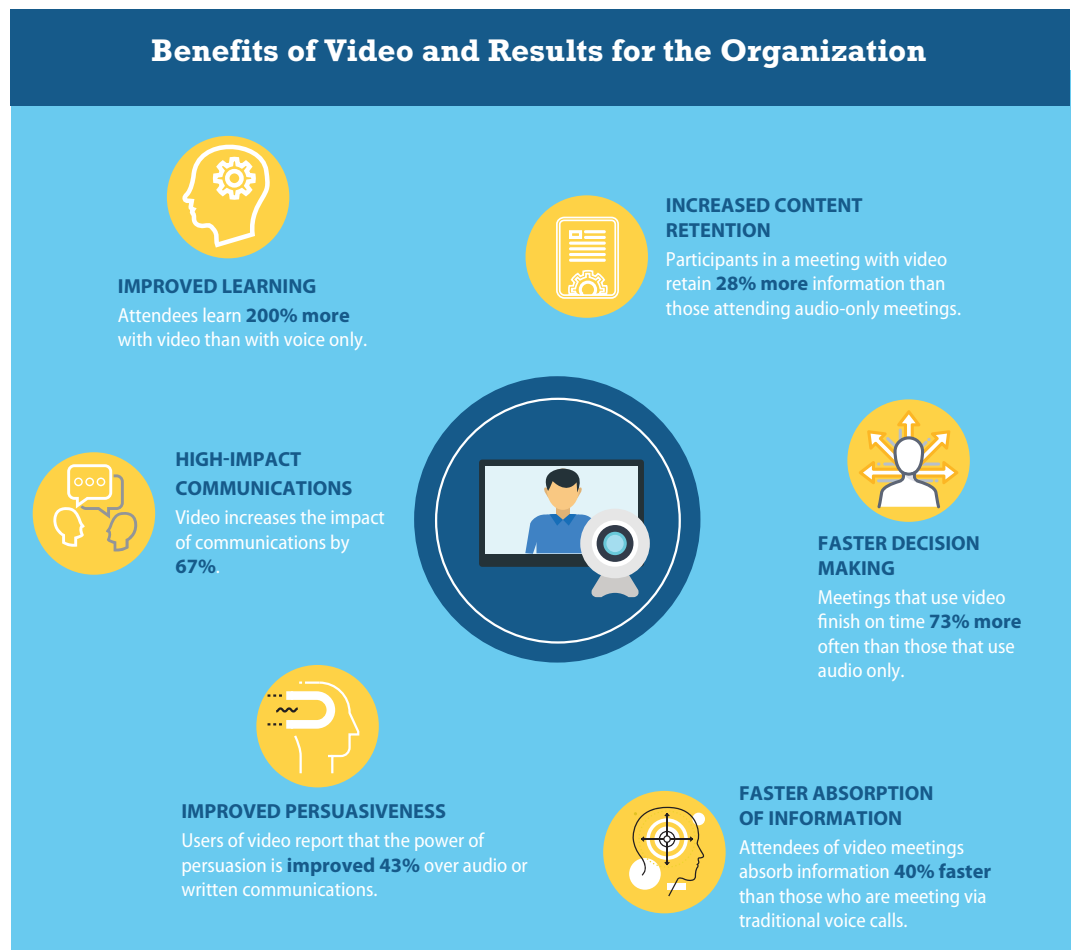
Background noise detection: Remote attendees often join meetings from places with lots of background noise, such as coffee shops, conference centers, airports and other public places. The online meeting solution should have the intelligence to recognize background noise from human voices and signal noisy users to mute themselves.

Content-sharing quality: As is the case with most features in an online video solution, check boxes on an RFP don’t always tell the whole story. All online meeting tools enable users to share content with one another, but the quality can be significantly different. This can have a major impact on users’ ability to interpret text, images or other content with fine detail.

Global scale and reach: Every organization needs to be prepared for global collaboration. Even regional companies that don’t consider themselves global will likely need to hold online meetings with customers, partners, suppliers or other people outside of their local region. A global service provider needs to do more than just offer the service over the internet; it also needs to have data centers in different regions to deliver an optimized experience. Consider the experience of a user in Europe who can access the service in a regional data center. His/her experience will be significantly better than that of a user who must connect to a data center in the United States. Another criterion for being global is offering global language support so workers can communicate in their native language.

Continuous collaboration: Ideally, the online meeting provider would integrate with a team collaboration tool to facilitate continuous collaboration. This would enable a group of people to start a collaborative session in the online meeting application or a physical whiteboard, but then store content and documents, update people and send messages through the team collabora-

Exhibit 2: The Many Benefits of Business Video



ZK Research, 2017

tion tool. Integration between the two would enable workers to move seamlessly between the two applications, allowing them to collaborate in an ad hoc manner using the team collaboration tool and formally with the meeting application.

Third-party integration: Meetings rarely happen in isolation, as they are normally part of a larger workflow. The online meeting provider should have integrations into a wide range of third parties—such as Apple, Salesforce, IBM, Zapier and Built.io—to simplify workflow integration.

Enterprise-grade security: Online meetings enable groups to share a wide range of information, including potentially sensitive data. The provider should have multilayer security in place so that the data center, applications and information are secured using state-of-the-art tools.

There are more than two dozen online meeting providers to choose from. Delivering a high-quality, rich, secure experience requires heavy investment from the vendor to keep the application

and systems up to date. Given the maturity of the market, vendors with large market share generally have an advantage, as they have more resources to invest in keeping the system on the leading edge of technology. Also, their large installed base provides a robust feedback loop for continually adding new features, which creates a differentiated meeting experience. This ensures that customers of these vendors can always stay one step ahead of their competition.

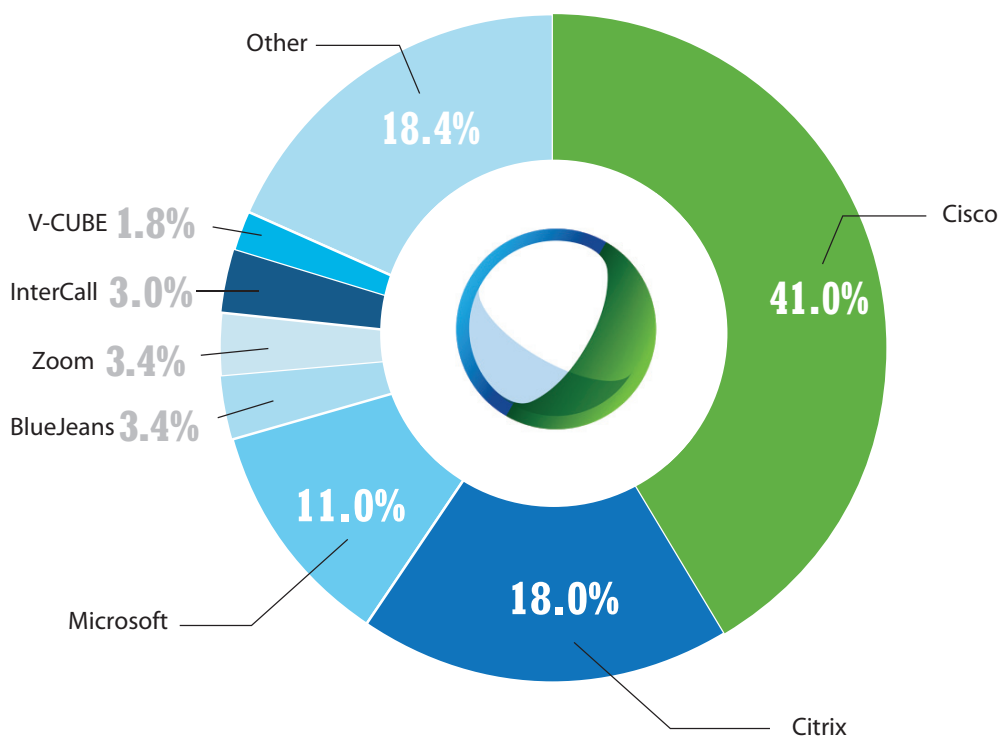
Exhibit 3 presents market share data from Synergy Research Group showing that Cisco’s WebEx product is the market share leader. Although the exhibit includes year-to-date data for 2017, Cisco’s share has exceeded 40% for several years—emphasizing the point made above about a market leader’s ability to continually invest and innovate in a mature industry.

SECTION III: CONCLUSION AND RECOMMENDATIONS

The digital era is here, and it’s transforming all industries at a pace faster than ever before. Businesses that master digital transformation have a good chance at achieving and sustaining market leadership; those that do not will find it increasingly more difficult to keep up with the competition.

Exhibit 3: Cisco Is the Market Share Leader in Online Meetings

Hosted Web and Video Conferencing Market Share, YTD 2017



Synergy Research Group

This digital transformation is putting an emphasis on a company's ability to bring the right people together and make the best decision quickly. An online meeting application can be an excellent tool to facilitate collaborative sessions involving just a few people as well as large, company-wide meetings. Choosing the best online meeting vendors is of critical importance to IT leaders, line-of-business managers and anyone else responsible for this technology purchase. In addition to the key purchasing criteria outlined earlier, ZK Research recommends that decision makers keep the following in mind:

Understand that meetings are evolving. Technology is moving very fast, and the meetings of tomorrow are changing just as fast. For example, meetings never used to include mobile workers, but now this is the norm. Video used to be a rarity, and now it is commonly used. Choose a platform that you know will evolve as meeting requirements change.

Consider the entire meeting life cycle. A meeting involves far more than just the time that people spend collaborating. There are also pre- and post-meeting processes that include scheduling, inviting users, populating content, recording the meeting and playing back the meeting. The entire meeting life cycle must be considered when evaluating a vendor.

Don't discount established vendors. Despite the longevity of the online meeting market, there are always new startups emerging—many of which promise to deliver exciting “consumer like” interfaces. Remember that the bar is set very high today, and some of the smaller, newer vendors do not have many of the core components such as global data centers, enterprise-grade security and broad video interoperability. Plus, the technology landscape can change quickly. Today's smaller providers may not be around tomorrow. This would cause support issues and lead to stagnant technology that could pose challenges in terms of remaining competitive and meeting customer expectations. So, choose a stable provider with a strong balance sheet and a proven solution.

Be cautious of free or low-cost vendors. There is a common axiom in IT services that states, “You don't get what you don't pay for”—and that certainly applies to online meetings. Many vendors offer extremely low-cost or free solutions, and these may be appealing because of price and the perception that significant money will be saved. However, these low-cost solutions are often missing critical capabilities for businesses such as those discussed earlier. A low-cost vendor might be the right solution, but businesses should do their due diligence and understand how that vendor plans to fund research and development, what kind of support it offers and how strong its solution road map is. Only providers that continue to innovate and evolve their solutions will be able to meet ever-changing market needs and customer expectations.

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