Capitalizing on Enterprise Video Convergence:

Tips for Building Business Value from the Integration of Streaming and Web Collaboration Solutions

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Wainhouse Research White Paper: Capitalizing on Enterprise Video Convergence

Executive Summary

Video is a fact-of-life in today's enterprise. Whether used in one-on-one meetings or to broadcast messages organization-wide, video is emerging as the venue of choice for enriching business communications between far-flung co-workers. Results from Wainhouse Research's Fourth Quarter 2018 Enterprise Video End-User Survey illustrate video's extended reach at work:

- *Sixty-three percent of all 2,002 survey respondents say they use video for business meetings with one-quarter of all respondents (25%) saying they engage in one-on-one video meetings at least daily.*

- *Four out of 10 (40%) of organizations represented in the WR survey spend at least $100,000 annually implementing technologies that enable one-to-many streaming video, with 46% of all organizations anticipating a boost in spending on streaming technologies in 2019 compared to the prior year.*

- *Almost nine of 10 (89%) of executives surveyed describe video as an effective tool for communicating work-related information.*

As video grows more pervasive, the demands on the technology that enables video communications in the workplace become more extensive, as well. For years, large companies have been implementing a hodge-podge of platforms designed to support different flavors of business video. Web collaboration services can bring small group video meetings to the desktop. Dedicated "group video conferencing" devices deliver this brand of video collaboration into the corporate conference room. And enterprise streaming platforms can take video of virtually any type and distribute it to hundreds – or even thousands- of workers simultaneously.

Until recently, each technology typically would stand on its own in the workplace, seemingly operating as a self-contained island of video communications. In this report, Wainhouse Research will explore why that is changing and explain how market forces are beginning to blur the lines between the worlds of video collaboration and one-to-many streaming. Along the way, the report will identify strategies that organizations can employ to better capitalize on this emerging era of business video convergence.

The Blurring Lines of Business Communications

Technology is transforming the way executives communicate. Two decades ago, executives had only two viable options for putting themselves in front of their co-workers to deliver a message in real-time: They could meet with them in person, or they could speak with them on the telephone.

Since then, the venues enabling enriched communications in the enterprise have proliferated. Web collaboration services were perhaps the first of the technology platforms to extend the value of the traditional telephone conference call. Services such as Cisco WebEx and GoToMeeting made it possible for presenters to share PowerPoint slides and other on-screen data with meeting participants. Today, more than two-thirds of WR survey respondents (68%) say they have used this type of "web conferencing" technology for work applications.

As web collaboration has grown in the enterprise, adoption of video solutions has increased, as well. Today, for instance, 49% of WR survey respondents say they work in offices with at least two conferencing rooms equipped with video conferencing devices. Other workplaces are equipped with enterprise communications platforms, such as Microsoft's Skype for Business offering, that incorporate video capabilities. And even traditional web collaboration platforms are incorporating video into more desktop meetings than ever before.

Strongly Agree: We Should Do More to Capitalize on Video

42%

14%

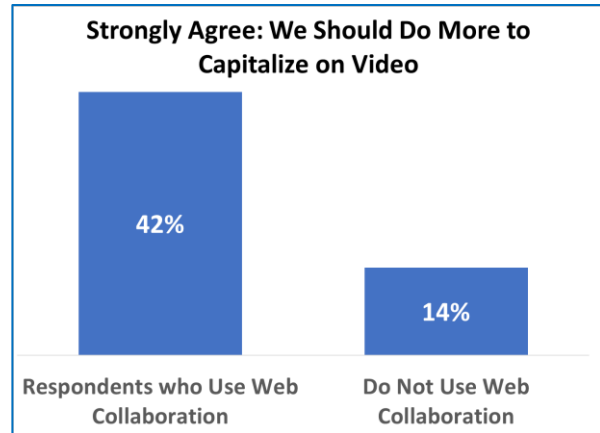Respondents who Use Web Collaboration

Do Not Use Web Collaboration

Figure 1: Agree/Disagree: "My Organization Should Do More to Capitalize on Currently Available Video Technologies" - Segmented by Use of Web Collaboration Services

Indeed, the appetite for video-enriched communications is strongest among those actively using web collaboration solutions. Those with a taste of its impact want more: as illustrated in Figure 1, 42% of those of use web collaboration say they "strongly agree" with the statement that "My organization needs to do more to capitalize on currently available video technologies." That sentiment is shared by only 14% of those who do not use web collaboration.

Building a Bridge to Streaming Video

For many organizations, further capitalizing on video hinges on efforts to expand the audience that can watch online video – whether live or on-demand. As a result, the next logical step on the enterprise communications journey typically involves the implementation of technology platforms that enable the one-to-many distribution of video behind the corporate firewall. With such platforms in place, web collaboration and video conferencing solutions become much more than venues for small group meetings. Instead, they become tools capable of creating video that can disseminate information to thousands of workers at the same time.

Historically, web collaboration solutions have not been optimized for broadcasting video to large audiences online. Certainly – from the presenter's perspective, at least - services designed for small group meetings do seem to share some common characteristics with webcasting platforms. In both cases, after all, presenters typically speak to PowerPoint slides or other data shared on-screen. Big differences loom behind the scenes, though. Web collaboration platforms typically do not offer the networking infrastructure needed to distribute content to large audiences on an internal corporate network. Many also lack the viewership analytic tools and technologies needed to capture, archive and manage archived business video content.

The dearth of one-to-many features in today's web collaboration solutions does nothing to diminish interest in using video beyond the small meeting environment. In fact, the individuals most interested in the capabilities enabled by streaming platforms are those who use web collaboration most
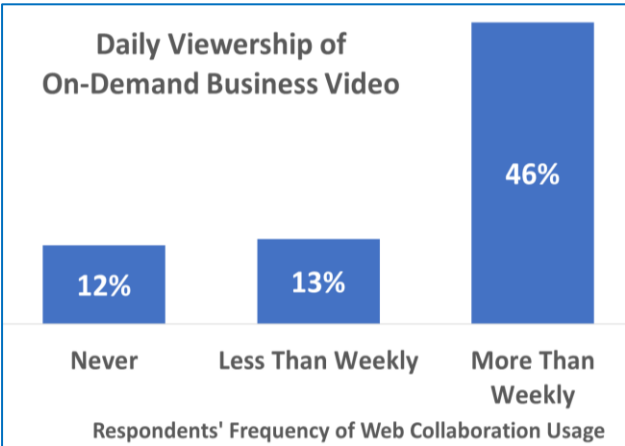
Figure 2: Daily Viewership of On-Demand Business Video Via PC –
Segmented by Frequency of Web Collaboration Usage

frequently. Consider the survey results illustrated in Figure 2 that highlight the extent to which workers view content stored in organizations' video libraries: Among those who report participating in web collaboration sessions at least weekly, 46% say they also watch on-demand video for business purposes via their PC daily. Among those using web collaboration less than weekly, only 13% report daily viewership of on-demand videos– a viewership pattern virtually equivalent to the 12% of those who never use web collaboration who watch on-demand video on a daily basis.

Identifying Opportunities for Video Convergence

The survey results presented above suggest that active users of web conferencing solutions have an affinity for viewing engaging executive presentations via their PC and would be interested in technology solutions that do a better job of integrating the worlds of business collaboration and streaming video. Today, the challenge comes in converting this affinity into tangible action that drives to the core of

"video convergence" -- defined here as the implementation of streaming platforms with the ability to unify and broaden the reach of other communications solutions that are already in use in the enterprise.

Expanding the reach of established communications solutions can take multiple paths. The first is simply broadening distribution of live meetings already taking place. In this case, the path of least resistance can be found by enabling employees to create presentations in communications technology venues that are already familiar to therm. As illustrated in Figure 3, two-thirds of all survey respondents (66%) agree that they would be more comfortable appearing in a webcast if they could present using the same application that they use for

Figure 3: Agree/Disagree: "I would feel more comfortable appearing in a webcast if I could present using the same application I use for video meetings" - Overall Respondents

small-group video meetings. The implication here is that web collaboration solutions – which increasingly are incorporating two-way video options – may be a preferred venue to use when webcasting, as well.
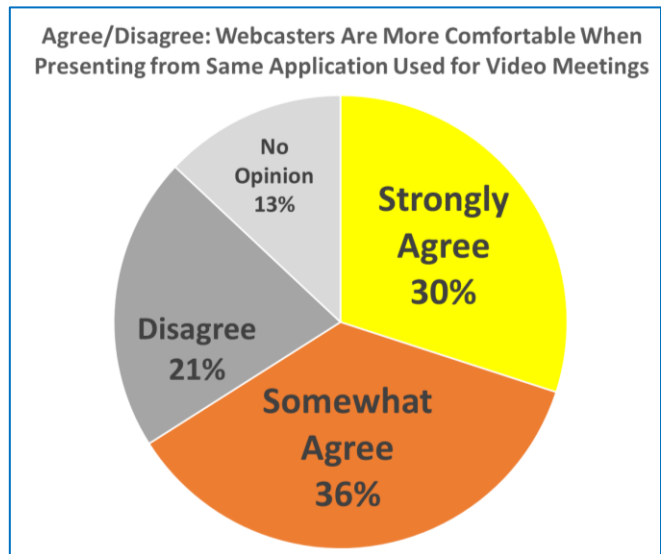
A second path to expanding the reach of content created in collaborative venues is to record it and make it available to the workforce for viewing on-demand. As illustrated in Figure 4, 71% of companies
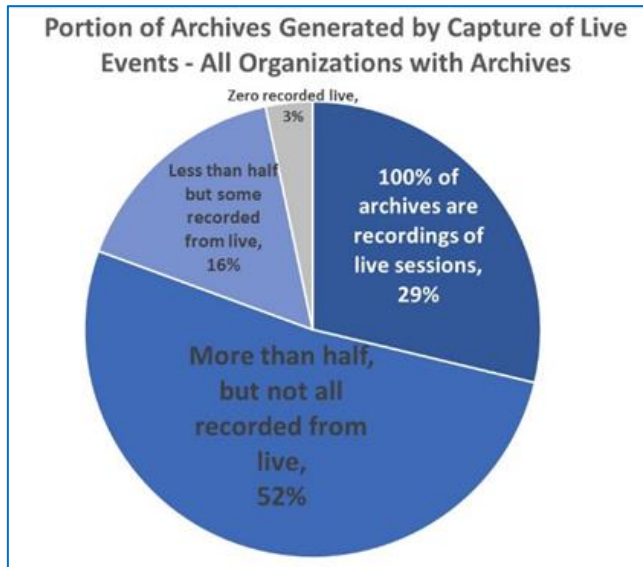
Figure 4: Proportion of Archives Generated by Capture of Live Events - All Organizations with Archives

that have archived video say that the majority of their libraries are generated from recordings of live events, with 29% reporting that every piece of archived content is captured from a live session.

In practice, much of the live video content captured for business archives today emanate from traditional group video conferencing systems. Integrations between streaming platforms and these video conferencing devices simply are the most prevalent in today's market. Organizations that make the effort to integrate streaming platforms with hosted collaboration services have the potential to greatly expand their archives and the number of people authoring video by using conferencing tools already broadly available to workers at their desktop.

Maximizing Your Organization's Convergence Potential

Taking video and making it available universally through your organization – live or on-demand – is no trivial task. While web collaboration solutions excel in helping presenters share information, a whole different class of technologies are needed to make that content viable for widespread distribution within an organization. Here are three streaming truths for your organization to consider as you identify prospective solutions that simplify the process of sharing web conferencing content more broadly.

Streaming Truth #1: Scale is Critical

As is the case on the viewership side of the equation, those most active in using web collaboration typically work at organizations that are among the most prolific produces of streaming video content.

As illustrated in Figure 5, more than one-third of respondents (37%) that use web collaboration work in organizations that produce 50 or more on-demand videos annually. Only 7% of those not using web collaboration see comparable frequency of streaming production. In short, those using web collaboration already work in an environment strongly inclined to use video, as well – with an appetite for video that is only likely to grow in wake of better integration of streaming and collaboration solutions. High volumes of video production at an organization implies a need for technology platforms that can handle video at scale. Enterprise-grade solutions are vital to successful
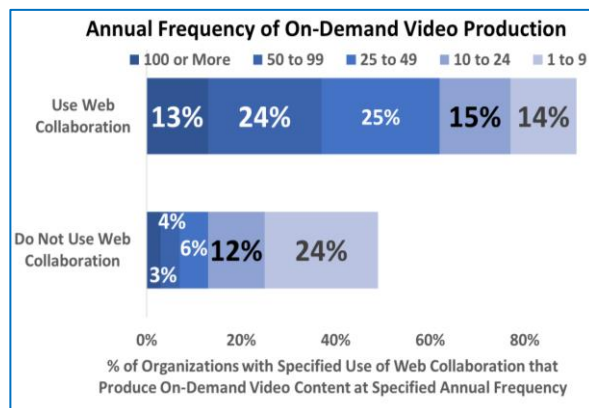

Figure 5: Frequency of On-Demand Video Production - Segmented by Status of Usage of Web Collaboration

streaming implementations. In addition to the archive management and viewership analytics, most streaming platforms also offer enhanced security features designed to protect organizations from outside threats to their corporate network while also protecting content from those not authorized to view it. Any administrator aiming to broaden the reach of video within the enterprise must pay attention to security issues that are best addressed by solutions designed to scale to meet the needs of large organizations.

Streaming Truth #2: Flexibility is Vital

A streaming solution cannot afford to be a one-trick pony. Certainly, value can be generated from solutions that expand the reach of content created using web collaboration services. But even greater benefits can be realized if streaming platforms position themselves as the hub for processing video from the wide array of communications solutions used within an enterprise. Embrace the mindset that your streaming solution should be the equivalent of a video engine capable of processing content from a range of sources – whether it be video conferencing devices, web collaboration services or enterprise communications platforms, such as Microsoft's Skype for Business application.

In each instance, the solutions can be used to create video-enriched content. Streaming platforms can be positioned as common infrastructure that ingests content no matter where it comes from and makes it available to viewers via a standardized web-style interface. Growing adoption of hosted software services is making this type of integration more viable than ever before, accelerating the momentum behind implementation of these streaming platforms that can serve as the enterprise's Swiss Army Knife of video management and processing.

Streaming Truth #3: Don't Stop Thinking About Tomorrow

As decision maker, you have to think not only of what video does today, but what its role will be in business operations over the long term. If you view video as a "type of data" that can be managed with software, its strategic value to an organization increases immensely. No longer a medium of communications, it evolves into playing a central strategic role in business operations.

Over time, for instance, emerging machine intelligence applications will shine a spotlight on video and its role in building competitive advantage. Video captured from more and more executive presentations, product launches, employee training sessions, town hall and other meetings will help build knowledge bases brick-by-brick, and data culled from these interactions that can be used to guide proprietary machine intelligence-infused decision systems, learning programs, sales and marketing plans, and many other tools and processes. Organizations that capture more video now will have more insight archived in their video libraries later that can be used to fuel their machine intelligence initiatives.

Today, one can take the first step on the road to building differentiated advantage based on machine intelligence. It comes in implementing streaming solutions with the capability to convert audio input embedded in videos into text formats suitable for search and machine-learning applications. WR Survey results suggest that awareness of the value of such "speech-to-text" applications is already substantial:

- 70% of survey respondents agree that "my organization would pay a premium for speech to text solutions that make it easier to search video content

- 82% of respondents say they agree that "speech-to-text features that make it possible for me to search for - and jump directly to - specific video passages would encourage me to more frequently use on-demand libraries for reference."
- 88% of survey respondents agree that "closed captioned embedded into live business video significantly enhances the value of video as a business communications tool. "

Conclusion

Video's role in business communications is evolving. Having graduated from its novelty phase, video now fits squarely in the business mainstream. As a result, organizations must become more savvy in implementing technologies that make today's islands of video technologies work together in a way that delivers a true business impact. Selecting the right streaming platform can serve as a linchpin in harnessing value from disparate video solutions in the enterprise today while setting the stage for promoting video as a commonplace data source that can be mined to build competitive advantage. Whether video is used as a tool to enhance business communications or implemented to boost a company's knowledge base, it has become more essential than ever before for organizations to get their video strategy right.

About the Author / About Wainhouse Research / About IBM Cloud Video

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About Wainhouse Research: Wainhouse Research is an independent analyst firm that focuses on critical issues in the unified communications and collaboration market. The company provides 6 different vendor subscriptions covering unified communications, group videoconferencing, personal & web-based collaboration, audio conferencing, streaming & webcasting, and distance education & e-Learning solutions, as well as a single all-inclusive subscription for enterprise users. The company acts as a trusted advisor providing strategic advice and direction for both the UC&C industry and its enterprise users. For further details contact sales@wainhouse.com or see http://www.wainhouse.com.

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