

# Enterprise Collaboration

## Top 10 Insights from Cisco IBSG Horizons Study

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## Introduction

A growing number of U.S. enterprises are using technology solutions to foster collaboration and drive business value. Cisco's Internet Business Solutions Group (IBSG) and Americas Inclusion Strategy Group have conducted extensive research and analysis to uncover key insights about the use of collaboration solutions in U.S. enterprises. The Cisco IBSG Horizons Enterprise Collaboration study used an online research panel to tap the experience of 816 enterprise executives from more than 20 industries. The sample included 459 line-of-business managers and executives, and 357 IT managers and executives. The findings were supplemented and validated by additional secondary research and consultation with subject-matter experts. This paper offers an overview of the top 10 insights.

The most common use, cited by 63 percent of respondents, is for collaborating with others in the same business unit.

### Insight No. 1: Use of Collaboration Solutions Is Highest Internally and Locally – and Is Growing

- Ninety-five percent of respondents said they use collaboration solutions internally (with other employees), compared to 47 percent who said they use these solutions with customers, partners, or suppliers.
- The most common internal use, cited by 63 percent of respondents, is for collaborating with others in the same business unit, followed by employees in other business units (54 percent), senior management (43 percent), and employees in other locations (33 percent).
- Respondents predicted sharp growth in both internal and external use of collaboration solutions.
- Seventy-seven percent said they expect their internal use of collaboration solutions to increase during the next two years, and 64 percent expect their external use of collaboration solutions to increase during the next two years.

Not surprisingly, 39 percent of respondents cited reduced travel cost as a top benefit.

Thirty-three percent of respondents said they believe the “Share” step to be the most efficient part of the [collaboration] process.

### Insight No. 2: Workforce Effectiveness Is the Killer App for Collaboration

- We asked enterprise managers and executives what they consider to be the most significant benefits of collaboration solutions within their companies. Not surprisingly, 39 percent of respondents cited reduced travel cost as a top benefit.
- More notable, though, is that the next three most important benefits all drive workforce effectiveness: better exchange of ideas (31 percent), employee productivity (28 percent), and greater employee engagement (26 percent).

### Insight No. 3: Execution Gap in the Collaboration Process

- The survey also asked about the efficiency of the collaboration process within respondents' organizations, and where they believe collaboration solutions add the most value. We defined five steps in the collaboration process:
  1. **Find:** Identifying colleagues with the right experiences, feedback, opinions, and ideas needed to solve a business problem
  2. **Connect:** Contacting and meeting with colleagues
  3. **Share:** The actual sharing of experiences, feedback, opinions, and ideas among colleagues
  4. **Capture:** The capture, consolidation, and analysis of the experiences, feedback, opinions, and ideas shared by the team
  5. **Act:** Execution of the change or decision that is identified through collaboration
- Thirty-three percent of respondents said they believe the “Share” step to be the most efficient part of the process, followed by “Find” (26 percent).
- Respondents believe that “Act” is the least-efficient step, and “Capture” is the second least efficient. Similarly, they believe that collaboration solutions add the most value in the “Share” step (37 percent), and these solutions add the least value in the “Act” stage (9 percent).

The most important factor [for encouraging more frequent use of collaboration solutions] would be better training on how to use collaboration solutions to improve business value.

#### **Insight No. 4: Improved Training, the “Network Effect,” and Ease of Use Are Top Drivers of Adoption**

- We asked managers and executives which factors would be most important in encouraging them to use collaboration solutions more often.
- The most important factor (38 percent) would be better training on how to use collaboration solutions to improve business value. The second most important driver (35 percent) would be wider use of these solutions by other employees, creating greater value through the “network effect.”
- Solutions that are easier to use would be the third most important factor driving adoption.

#### **Insight No. 5: Security Concerns and Complexity Inhibit Adoption**

- The single greatest technical barrier preventing greater adoption of collaboration solutions is concern about security, cited by 37 percent of IT managers and executives.
- Respondents want to be sure that use of collaboration technology will not make their networks vulnerable to outside intrusion. In an era of decreasing budgets and resources, they are also concerned about the complexity of implementing and managing these solutions.

The single greatest technical barrier preventing greater adoption of collaboration solutions is concern about security.

#### **Insight No. 6: Lack of Engagement and Poor Relationship-Building Are Top Business Inhibitors to Adoption**

- We asked respondents about the greatest challenges they encounter when using collaboration solutions to meet virtually. We found that the greatest challenges are related to engagement and relationship-building.
- Forty-three percent cited lack of engagement of participants during virtual meetings. For example, virtual-meeting participants may multitask or may not pay attention, and according to respondents, this presents a challenge to effective virtual collaboration.
- The second most important challenge was difficulty “team building” through virtual meetings. In other words, respondents find it is sometimes challenging to build trust and personal relationships in virtual meetings.

The survey found that the trend of “BYOD” – bring your own device – for collaboration purposes is well established in U.S. enterprises.

Ninety-three percent of respondents from companies with inclusive business environments say their company’s investments in collaboration solutions have outperformed expectations in terms of business value.

### **Insight No. 7:** **Collaboration via Multiple Devices Is the Norm in the Enterprise**

- While desktop computers, laptops, and desktop phones continue to be the most-used devices for collaboration (cited by more than 60 percent of respondents), many respondents also use dedicated collaboration devices, such as video conferencing (54 percent) and telepresence (29 percent).
- Mobile devices are becoming increasingly important in collaboration: half of respondents say they currently use mobile phones for collaboration, 28 percent say they use tablet computers for collaboration – and 73 percent say their use of mobile devices for collaboration will increase during the next two years.

### **Insight No. 8:** **There Is Widespread Use of Personal Devices for Collaboration**

- The survey found that the trend of “BYOD” – bring your own device – for collaboration purposes is well established in U.S. enterprises.
- A large proportion of enterprise managers and executives use their own personal devices for collaboration, at least some of the time. As an example, 79 percent of respondents who use a tablet computer for business collaboration have used their own personal device.

### **Insight No. 9:** **Inclusive Enterprises Are More Successful at Realizing Business Value from Their Collaboration Investments**

- Ninety-three percent of respondents from companies with inclusive business environments say their company’s investments in collaboration solutions have outperformed expectations in terms of the business value. By contrast, only 28 percent of respondents from noninclusive companies say their company’s investments in collaboration solutions have outperformed expectations.

### **Insight No. 10:** **Enterprises Want a Single Vendor for Collaboration Solutions**

- The IT managers and executives in our survey showed a strong preference for pursuing a single-vendor approach for their company’s collaboration solutions.
- Seventy-five percent of respondents stated that it is either “important” or “very important” for all of their company’s collaboration solutions to be provided by a single vendor or manufacturer, and only 7 percent said a single vendor was of little or no importance. Of the respondents who stated it is important, the top reason cited was that a single-vendor approach would enable easier implementation of collaboration solutions.

### About Cisco IBSG Horizons

Horizons is a multimodal research and analysis program designed to identify business transformation opportunities fueled by technology innovation. Horizons' multimodal approach focuses on three core areas: (1) primary research such as customer surveys, focus groups, and subject-matter-expert interviews; (2) in-depth secondary research from market leaders and influencers; and (3) the application of predictive analytics to garner insights about technology innovations and quantify their impacts.

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For more information about the Cisco IBSG "Enterprise Collaboration" Horizons study, please contact:

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### More Information

Cisco Internet Business Solution Group (IBSG), the company's global consultancy, helps CXOs from the world's largest public and private organizations solve critical business challenges. By connecting strategy, process, and technology, Cisco IBSG industry experts enable customers to turn visionary ideas into value.

For further information about IBSG, visit <http://www.cisco.com/ibsg>



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