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Organizations Need To Be More Dynamic To Solve Business Imperatives

*Global Survey Finds That Collaboration Tools Can
Leverage Human Communications To Improve
Enterprise Performance*

A commissioned study conducted by Forrester Research on behalf of
Alcatel-Lucent

FORRESTER®



Headquarters

Forrester Research, Inc., 400 Technology Square, Cambridge, MA 02139 USA
Tel: +1 617.613.6000 • Fax: +1 617.613.5000 • www.forrester.com

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Executive Summary

Enterprises are facing a constantly increasing set of challenges as the global marketplace becomes ever more competitive. They must solve new success imperatives focused around three main drivers:

- **People issues affect enterprise performance.** Organizations need to recruit, develop, and retain top quality employees by providing them with a state-of-the-art workplace environment based on unified communications (UC) and collaboration technology. A new generation of workers who use Web 2.0 tools in their personal lives is influencing the adoption of new technologies that are changing nature of work and blurring the boundaries between personal and professional lifestyles. Collaboration, mobility, consumerization, hyper-connectivity, and sustainability must be part of every enterprise's priorities.
- **Business technology improves enterprise performance.** Many independent studies, including this one by Forrester Research, have clearly demonstrated the business benefit of UC and collaboration tools, particularly when integrated into business applications. Enterprises can lower costs, give improved levels of customer service, and, by becoming more dynamic, grow revenue and increase profits by launching products and making sales more quickly.
- **Economic changes require transformed enterprise performance.** Competitiveness is pervasive. Emerging economies are now challenging more mature ones. To increase revenue and profit, enterprises have to reach global markets. Success in the new economic landscape is strongly related to the ability to innovate, and innovation increasingly means using state-of-the-art communications and collaboration technologies to transform business processes.

In short, enterprises must become dynamic to improve the speed with which their networks connect people to people, people to processes, and people to knowledge. To achieve this dynamism, they must harness the power of unified communications (UC) and collaboration tools to empower employees, whoever they are, contact center agent or knowledge worker, in whatever role, team worker, manager, or senior executive, and wherever they're working, at home, on the road, or in the office. But it is not sufficient just to speed up communication. It is also vital to improve the quality of collaboration, which means being able to connect to the right people and the right information at the right time. Enterprises are increasingly looking to Web 2.0 tools to achieve this improvement.

The enterprise Web 2.0 market, which includes the deployment of tools like blogs, wikis, and social networking within the enterprise, was a growing force in enterprise software in 2007. Although still immature, this market will continue to gain importance in 2008 as increasing numbers of firms look to enterprise Web 2.0 tools to help their staff access the right people and information. In recent research carried out by Forrester, 24% of firms surveyed said Web 2.0 tools were a priority for 2008.¹ The technical challenge facing enterprises today is how to build a flexible and secure networking environment that implements UC, collaboration, and Web 2.0 tools on both fixed and mobile devices.

Background And Summary Of Conclusions

UC enables organizations to collaborate more effectively by enabling employees to quickly reach co-workers using only a single telephone number or URL across multiple devices. It integrates telephone features with employees' desktops to enable workers to monitor the availability of co-workers, their "presence," and simply point and click on their PC to reach them via telephone, cell phone, PC, or other communication device. Additionally, employees can launch ad hoc conference sessions, audio, web, or video, easily from their desktop and know their co-workers' availability beforehand by seeing their presence indicator on their PC or mobile device. UC not only increases worker productivity and reduces communication blocks, but also speeds up and improves the quality of existing business processes like sales support, problem resolution, and access to experts.

Collaboration tools support synchronous and asynchronous communication through a variety of software applications, the core elements of which are messaging (email, calendaring, and integrated directories), team collaboration (white-boarding, document sharing, and application sharing), real-time collaboration (instant messaging and Web conferencing), and enterprise social computing features (blogs, wiki tools, and social networking platforms). However, the performance of UC and collaboration tools is critically dependent on the quality and openness of the underlying infrastructure, both hardware and software. LANs and WANs need to prioritize the delivery of UC and collaboration messages. Enterprisewide directory management, authentication, and a complete portfolio of security techniques are vital to a secure, successful implementation in any enterprise.

To quantify how UC, collaboration, and Web 2.0 tools can benefit enterprises, Forrester Consulting surveyed 155 organizations with 1,000 employees or more. Business and technology decision-makers in five countries — the US and Canada (41%), France (22%), the UK (21%), and Germany (16%) — participated in this survey. The survey included organizations across a wide range of vertical sectors (see Appendix 1). The overall survey asked participants how certain UC, collaboration, and Web 2.0 capabilities would affect their operations, but they were not given the names of any specific products or companies. The following section describes the key findings. Although there were some differences by country and industry, the survey confirmed that:

- Enterprises are increasingly challenged to respond quickly to customers, manage rising costs, and attract qualified workers.
- Enterprises agree that UC and collaboration tools enable them to achieve greater operational efficiency by communicating more effectively and improving core business processes.
- Enterprises can use unified communications and collaboration tools to improve responsiveness to customers, decrease time to resolve problems, speed approval processes, and better support mobile workers.
- Enterprises are looking to source UC and collaboration tools from vendors with the expertise not just to deliver these tools, but also to architect, design, and implement a high performance infrastructure and environment. Expertise in security was rated an essential vendor competence by the survey group.
- Based on the survey results, more than half (53%) of enterprises in major Western European countries and North America have made implementation of UC a priority.

Survey Results

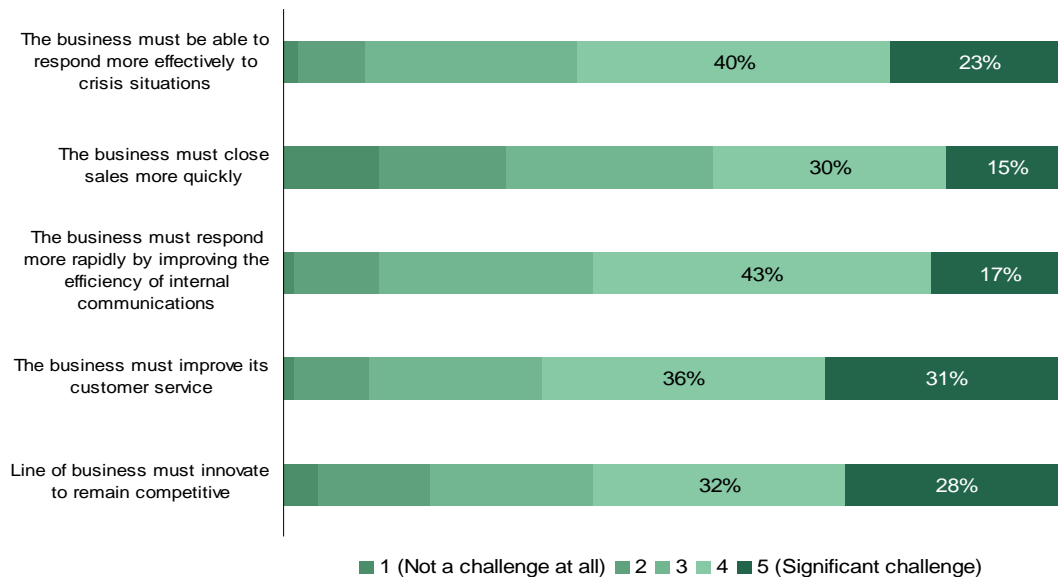
Challenges Faced By Enterprises — And Their Responses

Enterprises across all sectors face many similar problems, particularly with respect to improving the speed and quality of communication among large numbers of staff based in multiple locations, and who are increasingly likely to be working away from the office, whether traveling to internal meetings or to visit clients or suppliers or working from hotels or their home offices. We asked the survey group whether a number of these concerns were a challenge or a significant challenge for their organizations. They responded that:

- **Their business must improve its customer service:** 67% of respondents stated that this was a challenge or a significant challenge for their organizations.
- **Their business must be able to respond more effectively to crisis situations:** 63% of respondents said that this was a challenge or a significant challenge.
- **Their business must innovate to remain competitive:** 60% of respondents confirmed that this was a challenge or a significant challenge for them.

Figure 1: Enterprise Challenges

Survey question: Here is a list of some issues that enterprises face. Please rate the level of challenge for your organization on a scale of 1 to 5, where 1 is not a challenge at all and 5 is a significant challenge.



Base: 155 Senior Business & IT Executives involved in the purchase of communications and collaboration equipment, software, and services in large enterprises. North American and Western European Dynamic Enterprise Online Survey conducted by Forrester Consulting and commissioned by Alcatel-Lucent, May 2008.

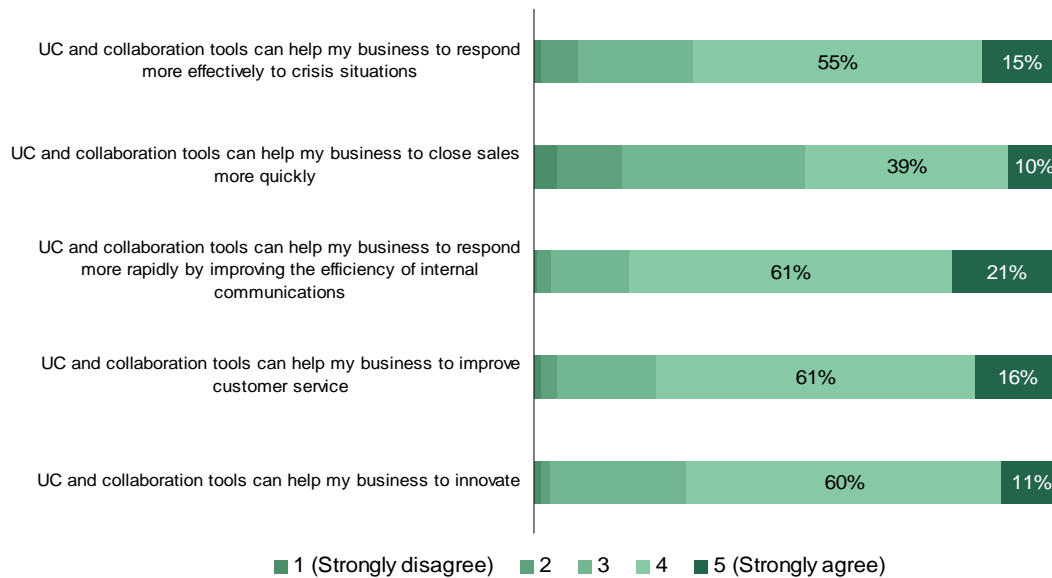
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UC And Collaboration Tools Produce Business Benefits

The survey group was certainly convinced about the value of UC and collaboration tools; 71% strongly agreed or agreed that these tools can help them innovate, 77% that the tools can help them improve customer service, and 82% that the tools can help them respond more rapidly by improving the efficiency of internal communications. There was also general agreement that UC and collaboration tools are valuable in helping businesses respond more effectively to crisis situations (70%). However, the survey group was much less convinced that UC and collaboration tools can help organizations close sales more quickly (49%).

Figure 2: Enterprise Perceptions Of UC And Collaboration Tool Benefits

Survey question: Unified communications (UC) and collaboration tools are designed to speed up processes and make it easier and faster to find information or contact people. Please score the following statements on a scale of 1 to 5, where 1 = strongly disagree, 2= disagree, 3 = neither disagree nor agree, 4 = agree, and 5 = strongly agree.



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More Than 50% Of Enterprises Have Made UC And Collaboration A Priority For 2008

Most of our survey group told us they believe that UC and collaboration tools can help their organizations solve their business problems, so has this belief been turned into action plans? Yes, but not to the same extent. Fifty-three percent of respondents agreed or strongly agreed with the statement "Implementing unified communications is a priority for my company." Slightly more, 55%, said that integrating UC with business applications was a priority. Collaboration tools were given a slightly higher priority, 58%. They were slightly less convinced about the practicality of UC and collaboration tools on mobile devices; 49% put them in the top two priority categories, indicating that vendors have more work to do building demonstration systems and using case studies to convince enterprise decision makers that UC and collaboration tools can be used effectively today on mobile devices.

Business Benefits Of Unified Communications And Collaboration Tools

Thought Leaders Have Adopted Web 2.0 Tools To Improve Business Productivity

We asked the survey group about various UC and collaboration tools and functions to see which ones were seen to be of the greatest potential value and which were regarded as having little or no business value or viewed as "gadgets." We divided the tools up into two groups: "traditional" tools (see Figure 3), and "new generation" tools (see Figure 4). Of the more traditional tools, instant messaging is clearly no longer thought of a gadget; 51% of our group considered it to be either of major value or a vital service, 71% were equally convinced (major value or a vital service) of the value of having a single enterprisewide electronic directory, and, not surprisingly, 77% gave that level of support to audio-conferencing. Web conferencing appears also to have achieved maturity; 69% said it was of major value or vital. White-boarding (37%) has not earned the same level of enthusiasm, but the benefits of application sharing (69%) and collaborative authoring or editing (56%) appear to be clearly understood.

The value of new generation tools like professional social networking tools (36%) is less well supported than more traditional types of tools, but seems to be getting close to the tipping point. However, there is less enthusiasm for wikis (29%) and blogs (14%). Major vendors have made public statements recently that they are totally committed to the productive use of Web 2.0 tools in enterprises, and their early case studies have shown clear business benefit. However, it would seem from the survey that the industry has more work to do to persuade the financial approvers in enterprises that these tools are no longer a "nice to have," but have real business benefit that can be measured and quantified in a business case that justifies the investment.

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Figure 3: “Traditional” Collaboration Tools

Survey question: Please score the following collaboration services according to the added value that they bring or might bring to your workforce on a scale of 1 to 5, where 1 = no value or don't know, 2= minor value / gadget, 3 = "nice to have," 4 = major value, and 5 = vital service.

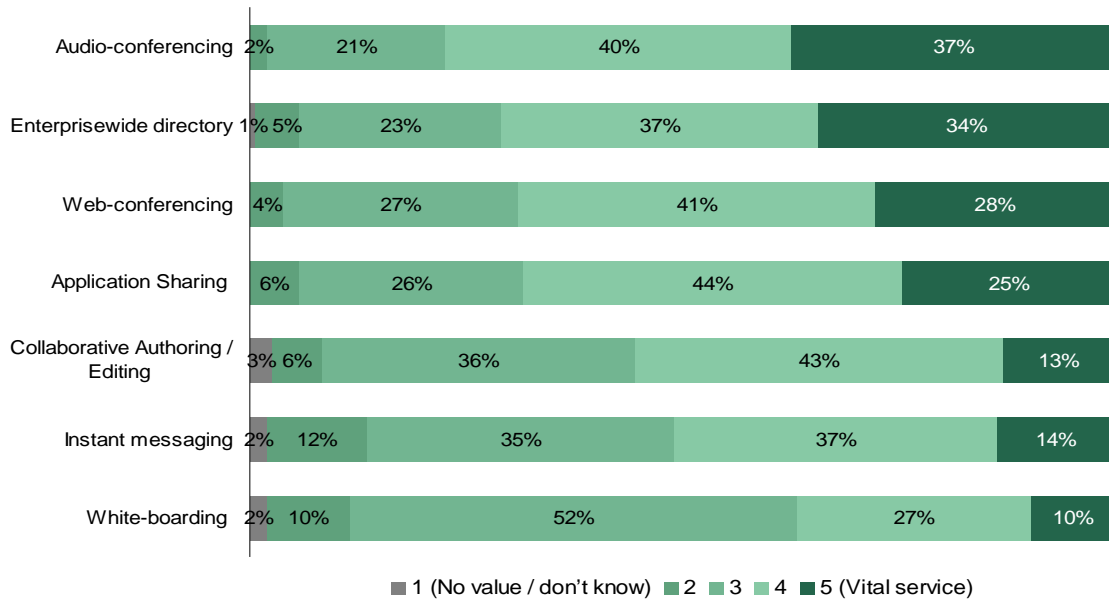
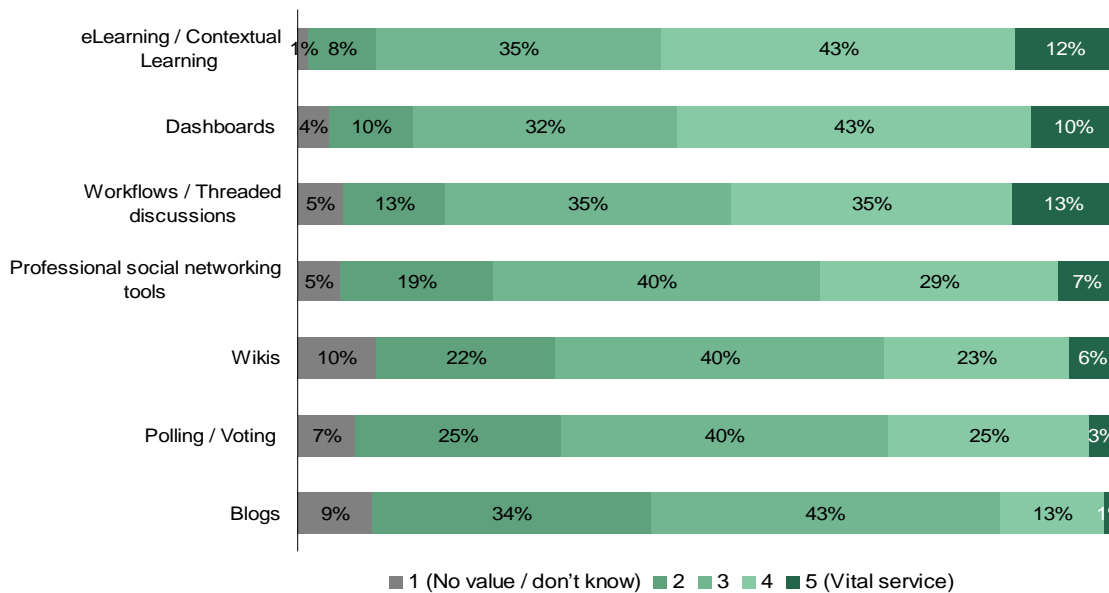


Figure 4: Web 2.0 Collaboration Tools

Survey question: Please score the following collaboration services according to the added value that they bring or might bring to your workforce on a scale of 1 to 5, where 1 = no value or don't know, 2= minor value / gadget, 3 = "nice to have," 4 = major value, and 5 = vital service.



Base: 155 Senior Business & IT Executives involved in the purchase of communications and collaboration equipment, software, and services in large enterprises. North American and Western European Dynamic Enterprise Online Survey conducted by Forrester Consulting and commissioned by Alcatel-Lucent, May 2008.

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Reduced Communications Delays Will Improve Sales Performance

Reducing the time it takes to develop or launch a product will also improve competitiveness. Seventy percent of respondents told us that problems reaching key personnel during a critical stage of the sales process would slow down the response and have some business impact, and 50% said these delays could result in the company missing the deadline for responding, which could result in the sale being lost.

Sixty-four percent of respondents agreed with the statement that reducing the time it takes to develop or launch a product would improve their organization's competitiveness. Fifty-seven percent agreed that it would reduce time to market; 60% said it would improve efficiencies; 37% supported the view that it would lower overall costs.

Personal Communications

Presence Already Has Strong Support

We found strong support for the concept and use of "presence." We asked respondents to give us their views on the impact the automatic updating of presence information would have on team collaboration and account management when a team member was traveling or was out of the office. Fifty-two percent of our survey panel thought that this would improve collaboration and project management, and a further 25% thought the improvement would be significant.

Videoconferencing And Web Conferencing Support Green Agendas

We found strong support for the use of both videoconferencing and web conferencing; 62% of the organizations surveyed were encouraging the use of these tools to reduce travel costs and make more effective use of team members' time. There also seems to be the start of a move toward making use of these facilities mandatory as part of a Green IT or social/environmental responsibility program; 12% of our respondents indicated that their organizations were taking this approach. Other research carried out by Forrester has shown strong growth over the last 12 months in firms adopting this type of policy.²

To make a videoconferencing strategy effective, it is essential to include it as part of an enterprisewide UC and collaboration strategy. Forrester has observed some firms in which departments or subsidiaries have installed videoconferencing systems in isolated silos that cannot interwork with the rest of the organization. This is not the best way to maximize the benefits of an expensive investment in videoconferencing systems.

Contact Centers

Contact Centers Will Improve Customer Satisfaction With The Use of UC

Customer dissatisfaction is often the result when an issue cannot be dealt with by the call center agent who has taken a customer's call. UC tools enable multiple groups of experts to be associated with many different subject areas. Experts can log onto the system and their presence status will indicate whether they are available to take calls. The agent can then conference the expert into the call with the customer, and the expert can solve the customer's problem. Result: the customer experience is improved, and the customer will be more likely to remain loyal and buy more. The organization has also reduced the cost of handling the call, so there is both direct cost savings and, potentially, improved revenues and profits.

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Mobility

We asked our survey group about the use of wireless devices on their office premises and in the world beyond. The first question was about mobile email on smartphones or PDAs. Fifty-five percent reported fairly or very widespread use, confirming that mobile mail is now beyond the tipping point and being widely adopted. Forty-six percent responded similarly on the use of wireless LANs for laptop or PC use, showing that although there is still some resistance, generally speaking, most organizations now accept the utility of wireless LANs. Thirty percent reported that PDAs or smartphones were in fairly or very widespread use to access corporate information, indicating that mobility is now well beyond just push email for leading enterprises, and a further 22% said they have these levels of use for access to corporate applications. Twenty-nine percent were carrying voice on wireless LANs, suggesting a technology moving out of the trial and pilot stages into the early stages of mass deployment.

Mobility Has Immediate Business Benefits

We asked our survey group about the business benefits of mobile devices. The results lagged the deployment levels of mobile devices, but give support to the conclusion that enterprises are seeing business benefits today. Sixty-five percent said that if mobile employees had access from their mobile device to business applications and collaboration software, and could see presence information and use click to call functions, it would enable them to respond more quickly. Forty-four percent said these capabilities would enable mobile staff to collaborate more effectively, and 43% said that their productivity would be improved. Given the early stages of deployment of these types of capabilities in many organizations, it is clear that a growing number of line of business managers, 81% of our respondents, are already convinced of the business benefits of mobile UC and collaboration functionality.

Remote Worker Support Equates With Higher Worker Productivity

Enterprises have a high concentration of remote workers who rely on their cell phone or PDA to stay in touch with their office and co-workers. Although cell phones provide basic connectivity, remote workers are still limited in their ability to launch collaborative work sessions and use business features such as presence. UC enables remote workers to have advanced UC features on their mobile device and to use them to collaborate easily with co-workers anywhere.

Sales Teams Are A Priority For Mobile Applications

We asked our survey group about the benefits of giving sales staff access to details of a customer's order status or trouble ticket status using a mobile device on the way to a meeting with a client. How would this capability affect customer service? Seventy-nine percent said that this functionality would significantly or somewhat improve the customer's experience, and 13% thought it would lead to more sales. If it is this easy to improve the performance of sales teams, we conclude that they should be a priority area for the deployment of mobile functionality beyond push email.

Collaboration And Collective Knowledge

Collaboration Tools Significantly Improve Business Performance

We asked our respondents how it would affect their organizations' performance if team members could use collaboration tools to share information and ideas and discuss issues and share best practices with peers in real-time. The results were extremely positive. Seventy-five percent replied that collaboration tools used this way would improve or significantly improve business

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responsiveness to customers. A further 23% concluded that business responsiveness to customers would be somewhat improved. Only 2% thought it would make no difference.

Collaborative Editing Gains Cautious Support

To establish the value of collaborative editing of documents, we asked how the required time per project for projects or customer deliverables would be affected if participants were able to view and edit documents simultaneously during a teleconference rather than communicate via email. Thirty-one percent indicated that this would significantly reduce the time to complete projects. Fifty percent expected to see a marginal improvement. Interestingly, 16% responded that there would be no impact on project timescales, but that the quality of deliverables would be improved. These results suggest to us that the limited deployment of collaborative editing tools has resulted in an unsurprising "yet to be really convinced" response among business managers. We therefore suggest to organizations trialing these tools that it is essential that they carefully measure the benefits compared with a control group not using the technology.

Executives Think That Corporate Intranets Are Fairly Effective

Web 2.0 tools are designed to improve the efficiency with which staff can locate information and people in their organizations or ecosystems. To understand whether this area was generally seen or can be seen as an area of concern, we asked our group to tell us whether or not they believed that their corporate intranet is effective for locating the right information and the right people. Twenty-three percent replied that it was very effective, and 57% that it was fairly effective. The conclusion? Vendors need to do more to demonstrate how Web 2.0 tools can significantly improve corporate performance in this area. Business managers need to see live demonstrations and be taken through real life case studies so they can appreciate that they are seeing their corporate intranets through rose-tinted spectacles.

Over Half Of Enterprises Say That Web 2.0 Tools Will Improve The Hiring Of Prospects

Fifty-six percent of respondents indicated that providing their knowledge workers with UC advanced communication capabilities and collaboration tools that facilitated communications among employees would be a good or a strong asset in attracting qualified workers. A further 30% thought that this would be somewhat beneficial. The conclusion? Business managers have gotten the message that the generation of new hires that uses social networking tools at home is looking to join organizations that are deploying the state-of-the-art business variants of the same technology.

Security

Organizations Require Their Vendors To Provide Comprehensive Security Solutions

Security is increasingly seen as an integral and essential part of any unified communications and collaboration deployment. We asked our survey group how important it was to them that their UC and collaboration solution vendor can also provide comprehensive security solutions. The results were unequivocal; 51% regard this as essential and 31% as an advantage. Only 10% said it would make no difference, and 6% said that they prefer to buy security solutions from a specialist vendor. The conclusion? Most organizations will choose UC and collaboration vendors that can provide comprehensive security solutions.

Best Practices For Enterprises

Vendors Must Help Firms Overcome Barriers To Deployment

In previous research, Forrester identified a number of barriers to the deployment of UC and collaboration solutions.³ We asked our respondents about six potential obstacles: software licensing costs, user adoption or change management, existing infrastructure limitations, difficulty building a business case, deployment and training, and organizational issues. No one of these stands out in the responses; between 50% and 60% of respondents agreed or strongly agreed that these areas are major obstacles. The conclusion? Vendors will have to help reduce the impact of these obstacles, for example, by helping organizations with their business cases, providing training and migration support, and offering attractive deals to help kick start organizationwide deployments. Otherwise, there is a danger that the obstacles will persist and prevent many organizations from reaping benefits clearly there to be grasped from an early deployment of UC and collaboration solutions.

Users Mandate That Vendors Support Open Standards

We asked our survey group how important it is to them to buy unified communications and collaboration technology that is based on open standards with SOA-based interfaces and development toolkits that allow for simple integration with business applications. Sixty-four percent said it was either essential or very important to them, only 5% that it was not important to them. The conclusion? An open standards approach will become a key differentiator between competing vendors, and the majority of enterprises will make this issue a deal-breaker.

Three Quarters Of Organizations Already Have Or Soon Plan To Have A Strategy

To understand the current state of the market, we asked our group whether their organizations had a companywide strategy in place for unified communications and collaboration technology. Thirty-two percent said they already had a strategy in place, and another 43% were in the planning phase of their strategy. The conclusion? Organizations understand the benefits, and are going to be choosing their strategic vendor partnerships very soon. Vendors will need to demonstrate the breadth and completeness of their UC and collaboration product lines, backed by supporting capabilities like security and professional services, to persuade these discerning decision makers that they have what it takes to support the stringent demands of their user communities.

Recommendations

The survey confirms the findings of other research into the business imperatives for using the power of UC and collaboration technology to improve the efficiency and effectiveness of organizations' internal and external communications. More than half of enterprises have made UC a priority, but implementation lags. Firms are enthusiastic about the tools with which they are already familiar, but are not yet convinced of the business benefits of professional social networking and Web 2.0 tools, despite growing evidence from research and case studies. Many barriers exist to enterprisewide deployment of UC and collaboration technology including licensing costs and business case justifications, organizational issues, training, and limitations of existing infrastructure. How can firms overcome the barriers and where should they start? Forrester recommends that firms should:

- **Build an enterprisewide strategy and architecture that includes business apps.** The strategy must be based on business needs, and the architecture on open standards and the use of SOA-based interfaces and toolkits to integrate UC and collaboration tools into business applications.
- **Start with pilot or departmental implementations.** It is not sensible to attempt an enterprisewide implementation project until budget holders can see the business benefits. Small departmental projects, sponsored by a line of business manager as champion, can produce benefits quickly and establish a base of support on which to build the next steps.
- **Tailor the configurations to match user needs and roles.** Users have different needs depending on their roles in the organization. If instead of adopting a "one-size-fits-all" approach, you give them a set of tools and configuration that will benefit them most, and train them in their use, they are more likely to adopt them with enthusiasm and get early business benefits.
- **Work with vendors with a full range of expertise and track record.** The design and implementation of a UC and collaboration strategy is complex; most firms engage outside help. The survey confirms the importance of working with UC and collaboration vendors with professional services resources as well as a strong capability in security.
- **Include Web 2.0 tools in your plans.** It's easy to dismiss Web 2.0 tools as not relevant to your business needs. The many firms that have tried them are enthusiastic about the benefits that accrue, for example, by building communities that facilitate access to company information that is in people's heads. Innovate by deploying Web 2.0 tools before your competitors.

Appendix 1: Survey Methodology

Forrester Research carried out an on-line survey in May 2008 on behalf of Alcatel-Lucent. The survey was designed to ask senior managers about their organizations' views on how communication and collaboration technology could help them improve business efficiency. The target interview group was business decision makers (81%) and influencers, and senior IT managers (19%) who are involved in the purchase of communications and collaboration equipment, software, and services in large enterprises in the US and Western Europe.

Total number of completed surveys: 155

- 40 total in United States and Canada
- 40 total in UK
- 42 total in France
- 33 total in Germany

Company size and business sector:

Target group: 1,000 employees or more. Of respondents, 26% had 1,000 – 5,000 employees, 26% 5,000 – 20,000, and 48% more than 20,000 employees. The companies were drawn from the following business sectors:

- Finance & Insurance – 12%
- Business Services (e.g., Legal, Marketing, Accounting, Consulting, IT, Transport) –19%
- Retail & Wholesale Trade – 5%
- Media, Entertainment, & Leisure (e.g., Publishing, Advertising, Recreation, Travel) – 6%
- Utilities & Telecommunications – 21%
- Government and Public Sector – 11%
- Manufacturing – 26%

References

¹ Forrester's Enterprise and SMB software survey, carried out in Q3 2007, surveyed 1,017 enterprise decision makers in North America and Europe. Twenty-four percent of respondents stated that it was a priority or critical priority for them to implement Web 2.0 tools such as wikis, blogs, and RSS in the next 12 months; 32% said it was not a priority; 42% said it was not on their agenda. See the January 25, 2008, "Top Enterprise Web 2.0 Predictions For 2008" report. <http://www.forrester.com/Research/Document/0,7211,43882,00.htm>

² As enterprise IT organizations continue to adopt green principles, Forrester's view is that they'll take another look at technologies that reduce energy consumption and carbon emissions, both within the IT shop and across the business. Enterprises going green will give a nudge to technology markets such as collaboration, videoconferencing, thin-client systems, and data center outsourcing. See the March 10, 2008, "Green IT Nudges Tech Adoption" report. <http://www.forrester.com/Research/Document/0,7211,45031,00.html>

³ Unified communications and collaboration projects must be corporatewide, run by the IT department, and integrated with desktop software and other business application projects. To achieve this goal, standards are essential. The use of SIP and SIP video extensions should be a mandatory part of the strategy. Other architectural standards are equally vital, covering key areas like authentication, security, encryption, and firewall traversal. And enterprise users tell us that staff communications, training, and videoconferencing help desks are essential to gain and keep the support of users. Training should go beyond a simple introduction to how the system functions. Staff will need clear guidance on how to maximize the effectiveness of virtual meetings in order to overcome the widespread perception that in-person meetings deliver more value. Network monitoring and automatic diagnostics should also be a part of any strategy. See the August 13, 2007, "Videoconferencing: You Need An Enterprisewide Strategy" report. <http://www.forrester.com/Research/Document/0,7211,43071,00.html>