

Instant Messaging: An Immediate Priority

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Instant Messaging: Why Now?

- ⊕ It's Here—There's No Denying It (IM is in use in 76% of enterprises)
- ⊕ It's Useful—And Changing How People Communicate
- ⊕ Big Guns are Behind It (Including Redmond)

IM Has Real, Measurable Benefits

- ⊕ It's Fast
- ⊕ It's Easy
- ⊕ It's Reliable

...And Real, Measurable Flaws

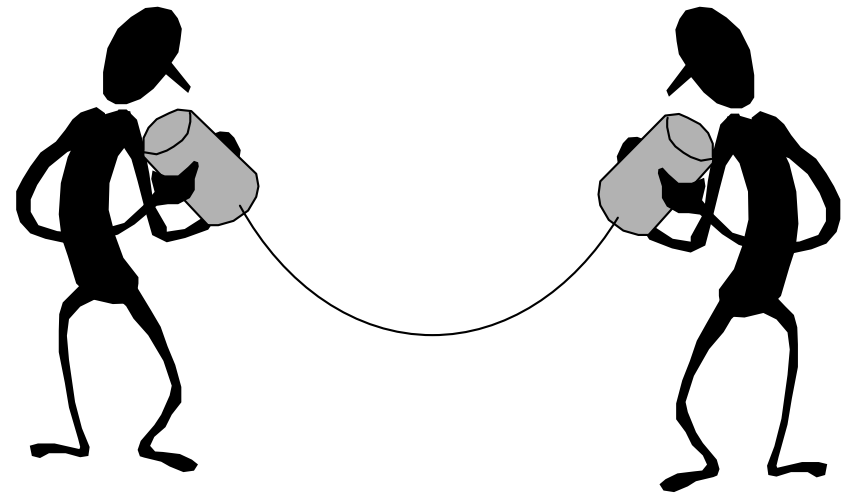
- ⊕ Consumer Services Cannot be Controlled
 - ⊕ Identity Management
 - ⊕ Compliance
- ⊕ Consumer Services Have Serious Security Flaws
 - ⊕ Viruses
 - ⊕ Spam
 - ⊕ Phishing

State of IM in the Enterprise

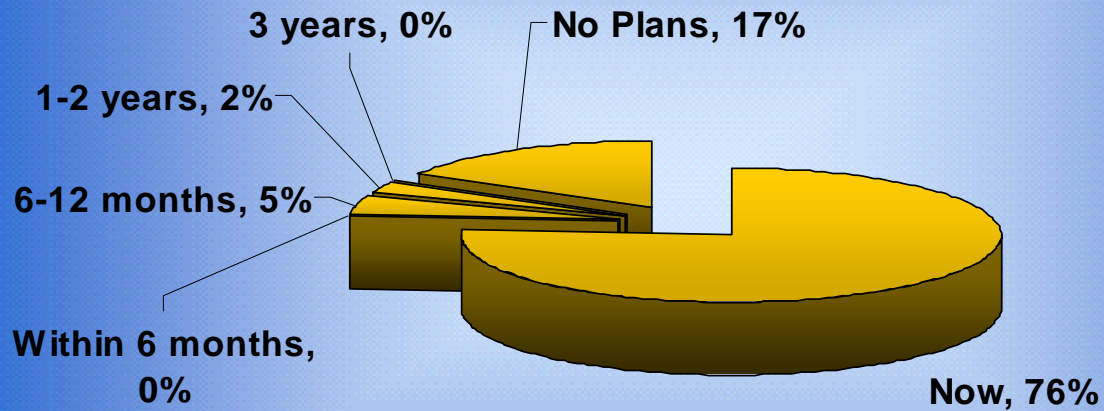
Based on In-Depth (hour-long-plus)
Interviews with IT Executives at a
Variety of Companies (Various
Industries and Sizes)

Focus on Instant Messaging

- ⊕ IM is where many companies start when it comes to real-time communications
- ⊕ IM is in wide use within enterprises
- ⊕ But few companies have as good a handle on it as they should

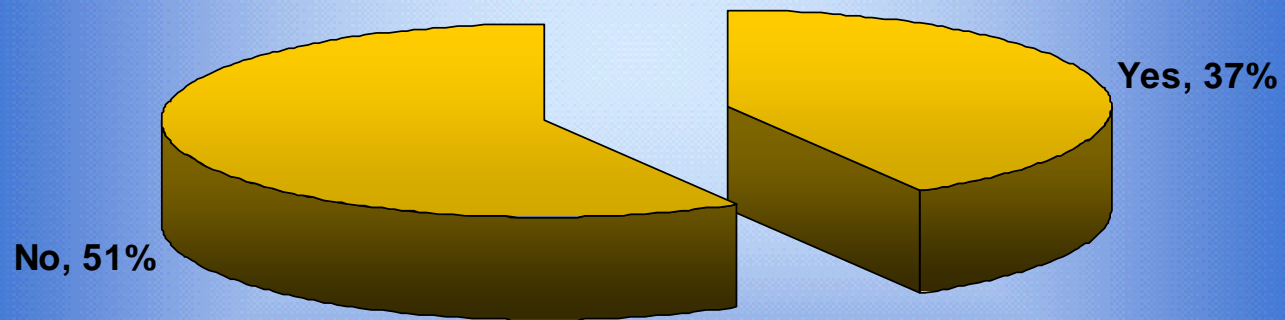


IM In Use



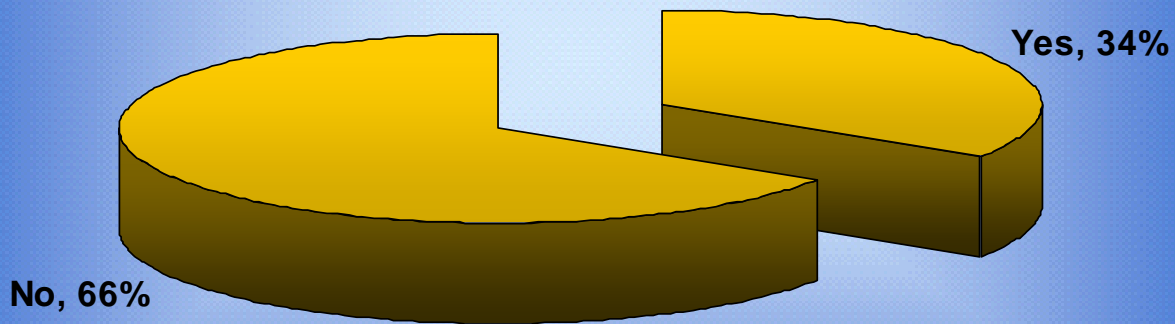
Source: Figure 14 "Virtual Workplace", Nemertes Research, LLC

Are You Standardized on an Enterprise IM Product or Service?



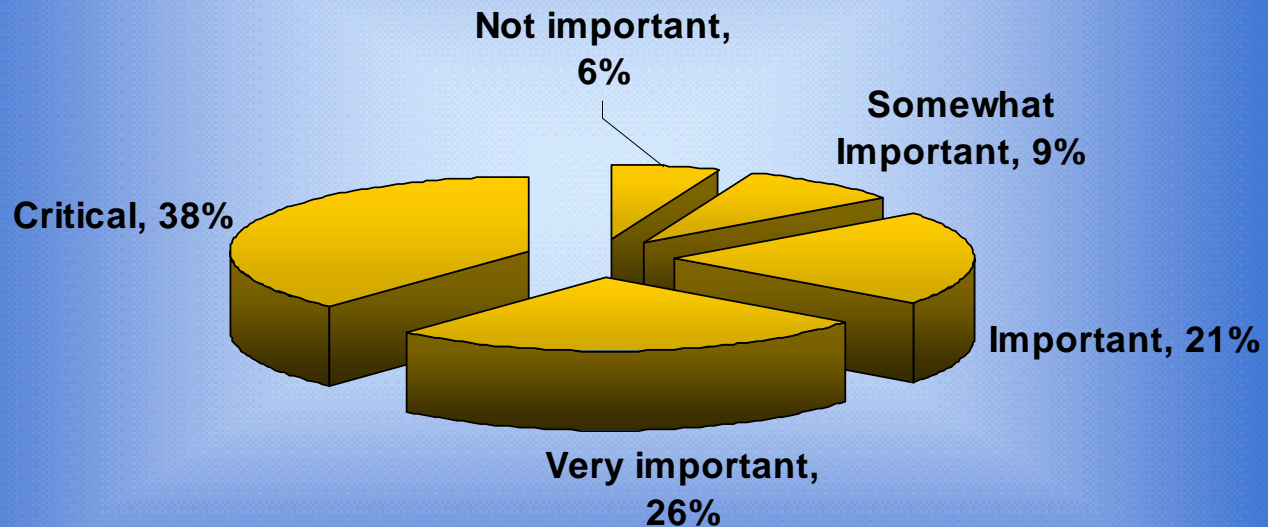
Source: Figure 29 "Virtual Workplace", Nemertes Research, LLC

Do You Place Restrictions on the Use of IM?



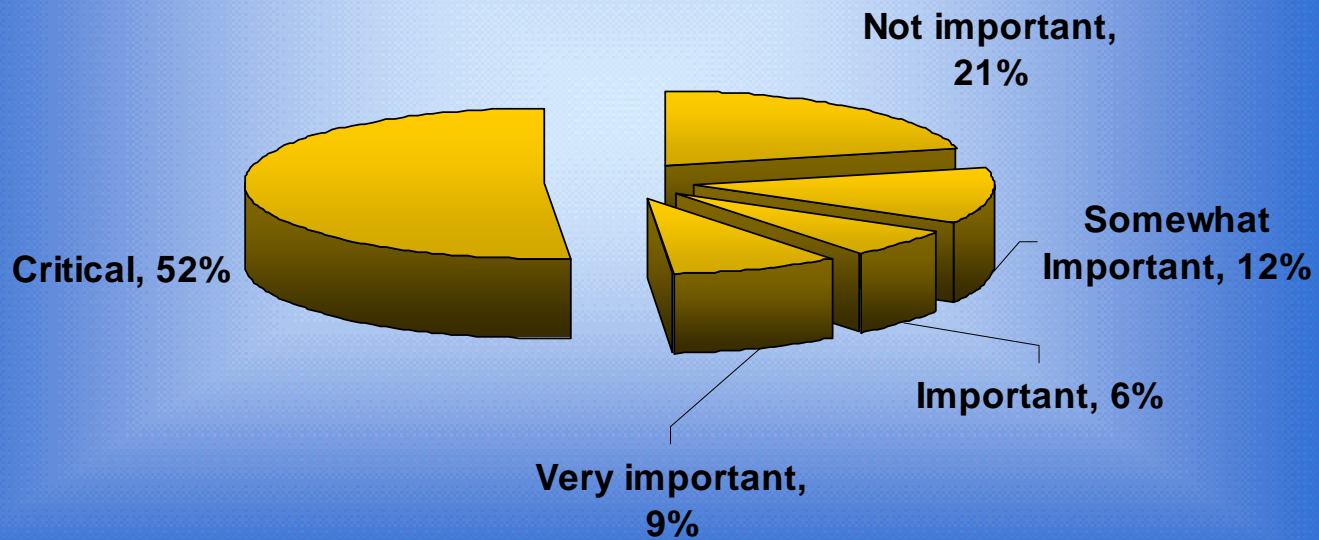
Source: Figure 27 “Virtual Workplace”, Nemertes Research, LLC

How Important is it that IM Systems Work Together?



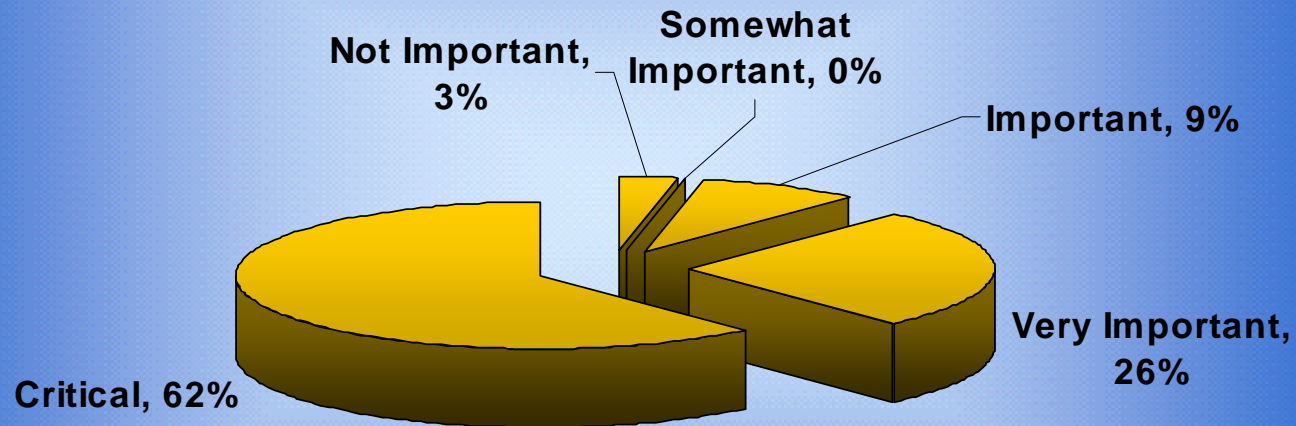
Source: Figure 30 "Virtual Workplace", Nemertes Research, LLC

How Important is it that IM Systems Meet Compliance Regulations?



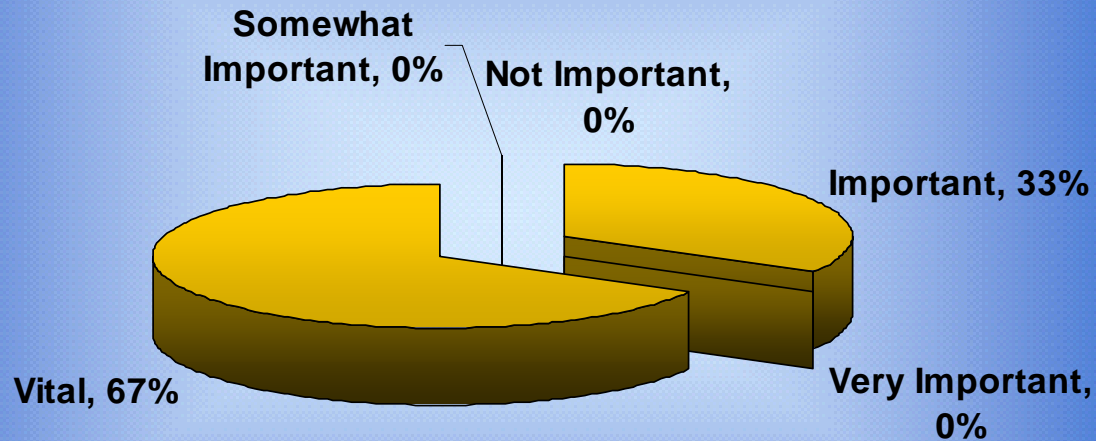
Source: Figure 31 "Virtual Workplace", Nemertes Research, LLC

Are You Worried About the Security Risks Posed by IM?



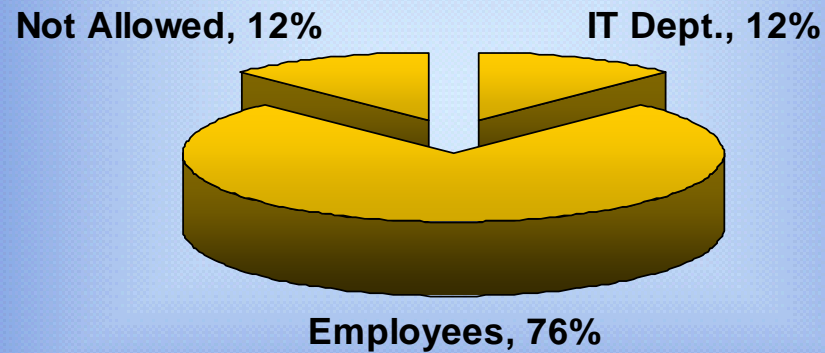
Source: Figure 32 "Virtual Workplace", Nemertes Research, LLC

Security Concerns



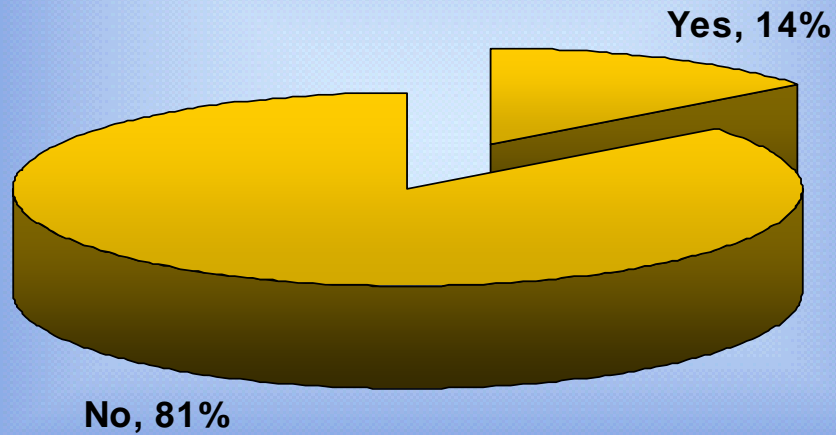
Source: Figure 26 “Virtual Workplace”, Nemertes Research, LLC

Who Brought IM Into the Enterprise?



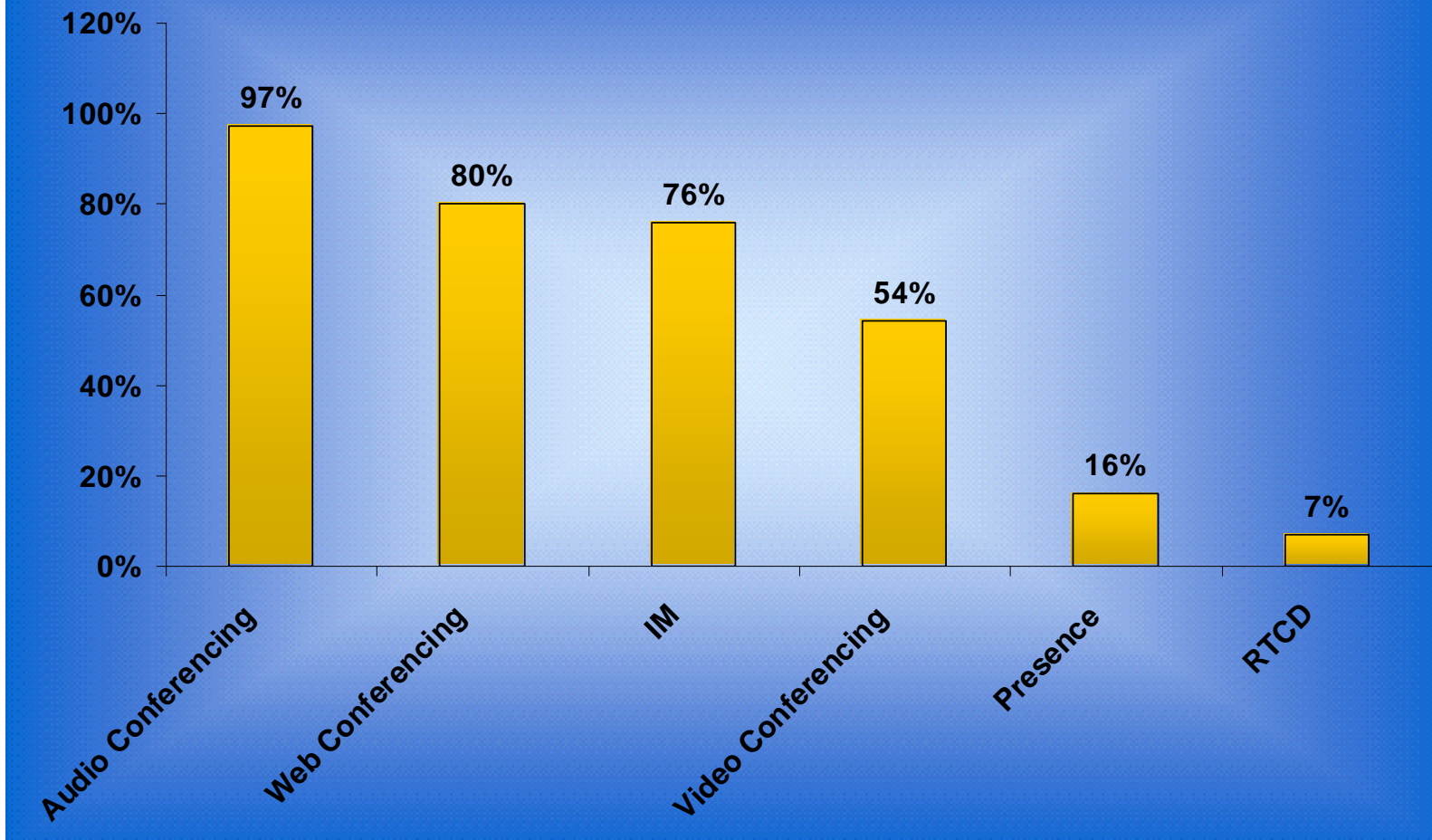
Source: Figure 33 “Virtual Workplace”, Nemertes Research, LLC

Are You Using an IM Gateway Product?



Source: Figure 34 “Virtual Workplace”, Nemertes Research, LLC

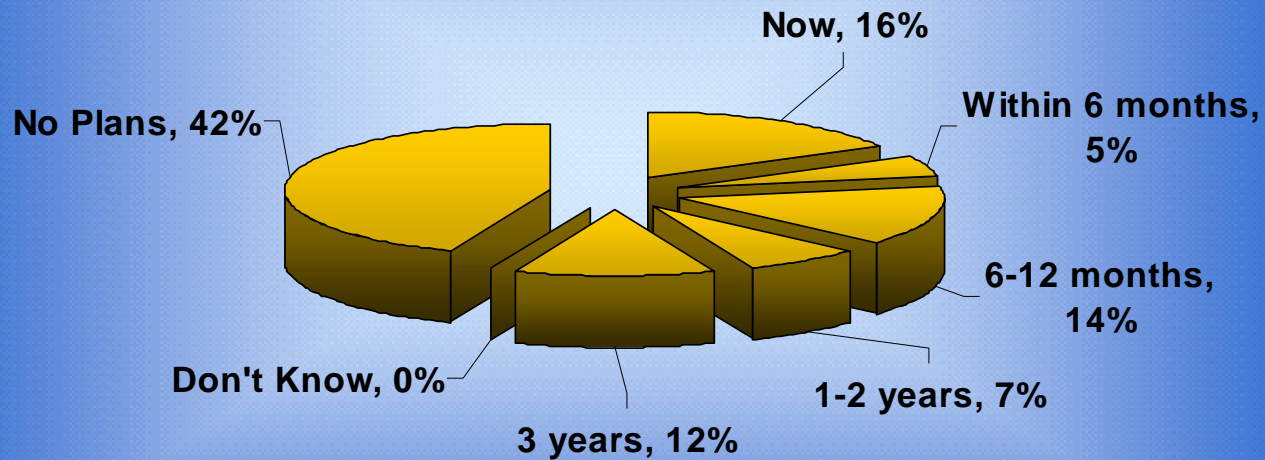
What Real-Time Applications do you use?



Source: Figure 13 "Virtual Workplace", Nemertes Research, LLC

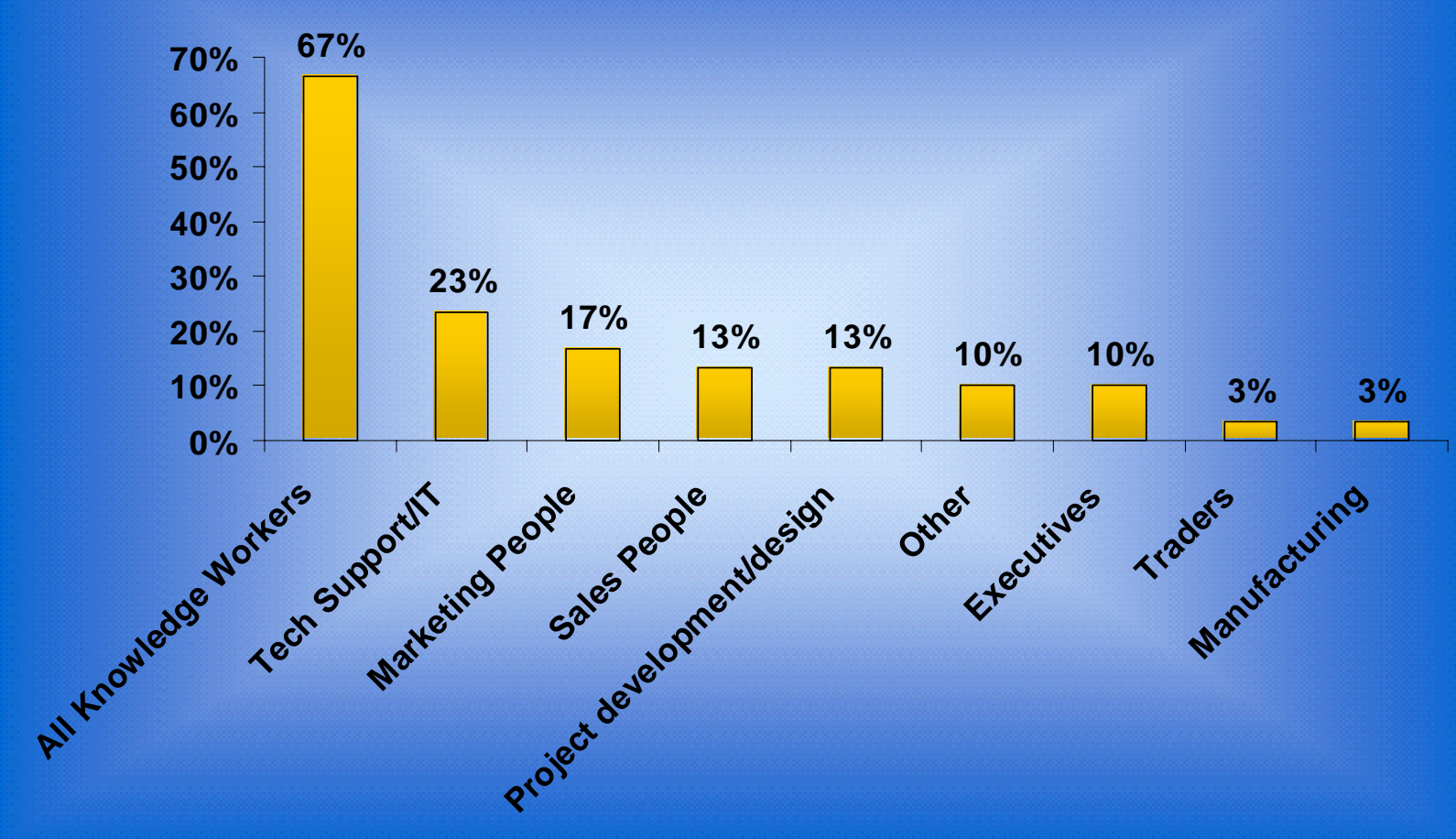


Presence Use



Source: Figure 16 “Virtual Workplace”, Nemertes Research, LLC

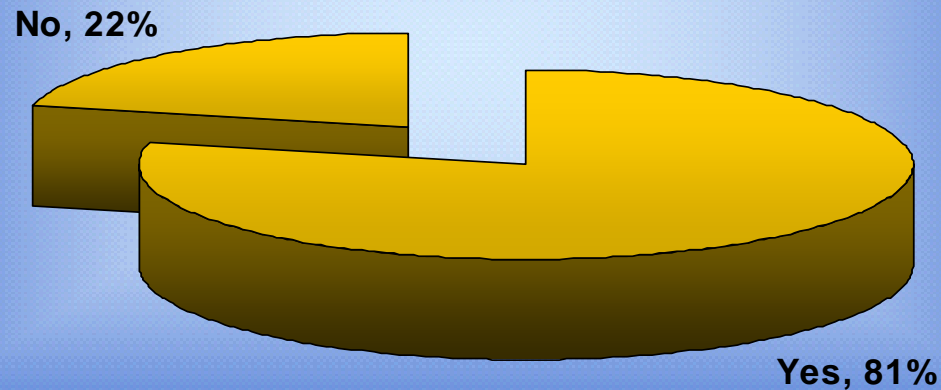
Who's using collaboration tools?



Source: Figure 17 "Virtual Workplace", Nemertes Research, LLC



Do you expect real-time communications technologies to become pervasive within your organization?



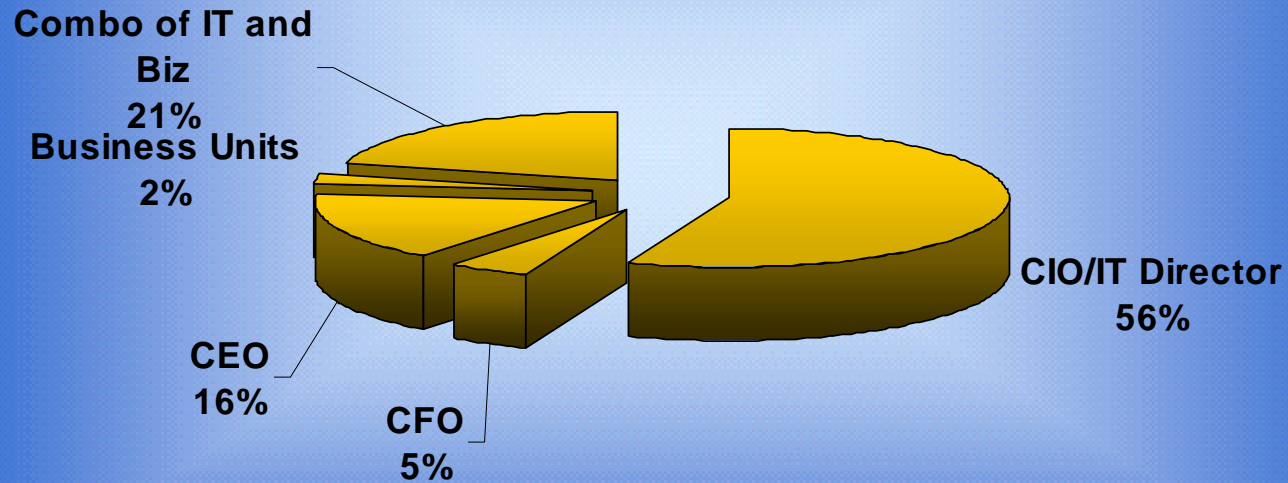
Source: Figure 18 “Virtual Workplace”, Nemertes Research, LLC

Operational State: Who's in Charge?

- ⊕ IT is playing an increasingly visible role in assessing, deploying and paying for real-time communications technologies
- ⊕ This has downstream impacts for IT executives and vendors alike

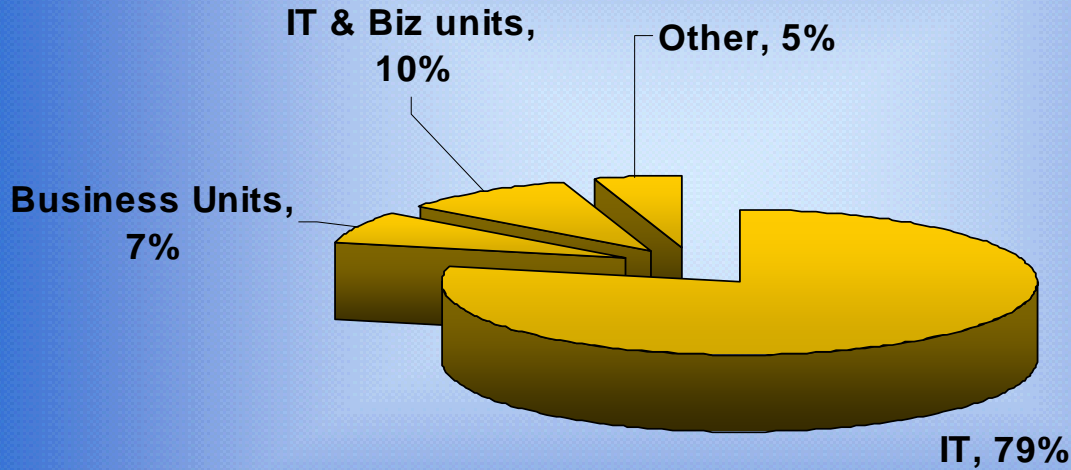


Decision Makers



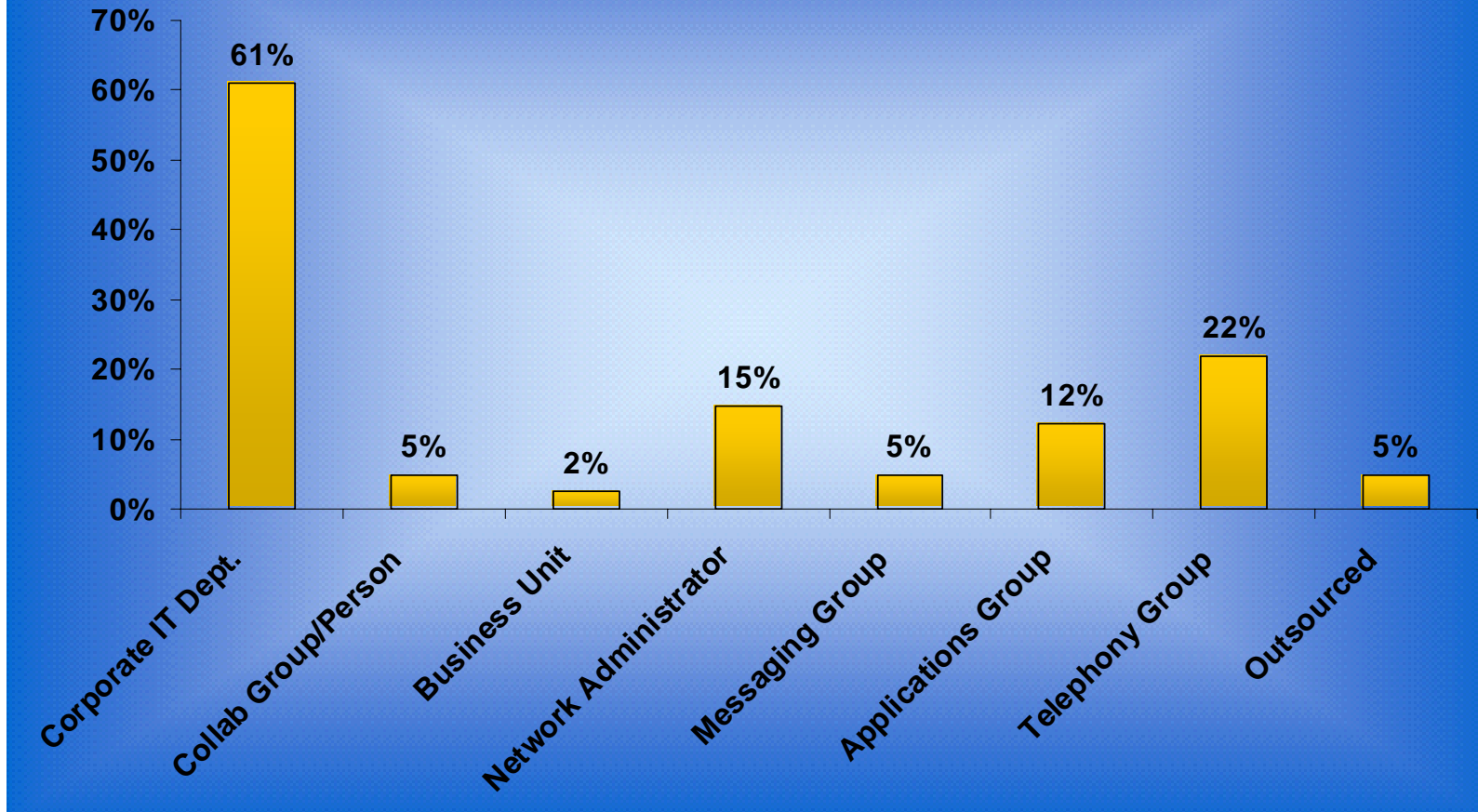
Source: Figure 19 “Virtual Workplace”, Nemertes Research, LLC

Who Pays for Real-Time Communications Technologies

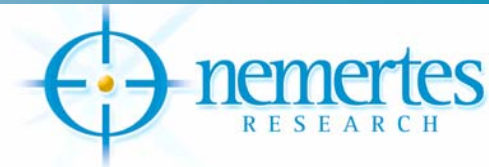


Source: Figure 21 "Virtual Workplace", Nemertes Research, LLC

Oversight of Real-Time Communications



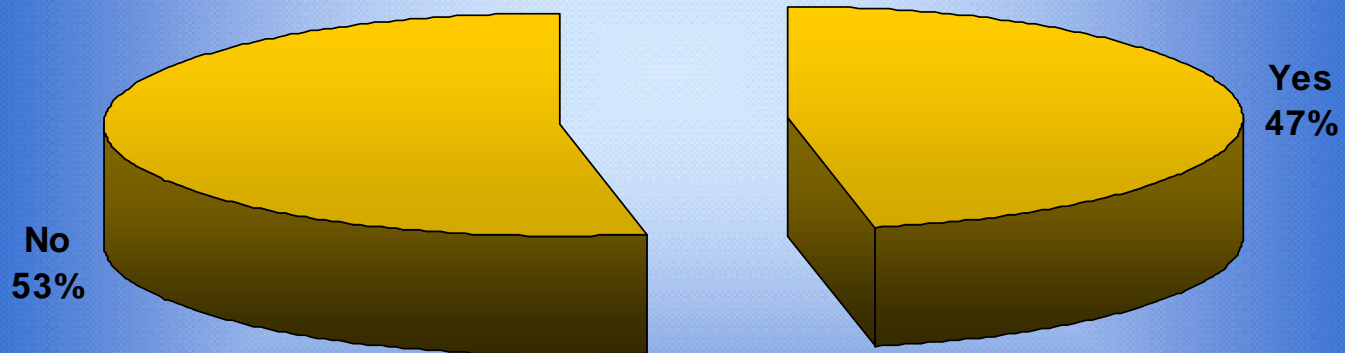
Source: Figure 22 "Virtual Workplace", Nemertes Research, LLC



Architectural Issues: Today and Tomorrow

- ⊕ Hosted vs. In-House
- ⊕ Networks
- ⊕ E-mail: Friend or Foe?
- ⊕ Security: Top Priority

Have Real-Time Communications Tools Affected How You Use E-mail?



Source: Figure 25 "Virtual Workplace", Nemertes Research, LLC

When do Standards Matter?

- ⊕ SIP/SIMPLE are the clear winners in the standards battle...
- ⊕ ...but IT executives don't really care

What they want are open products that play well with others

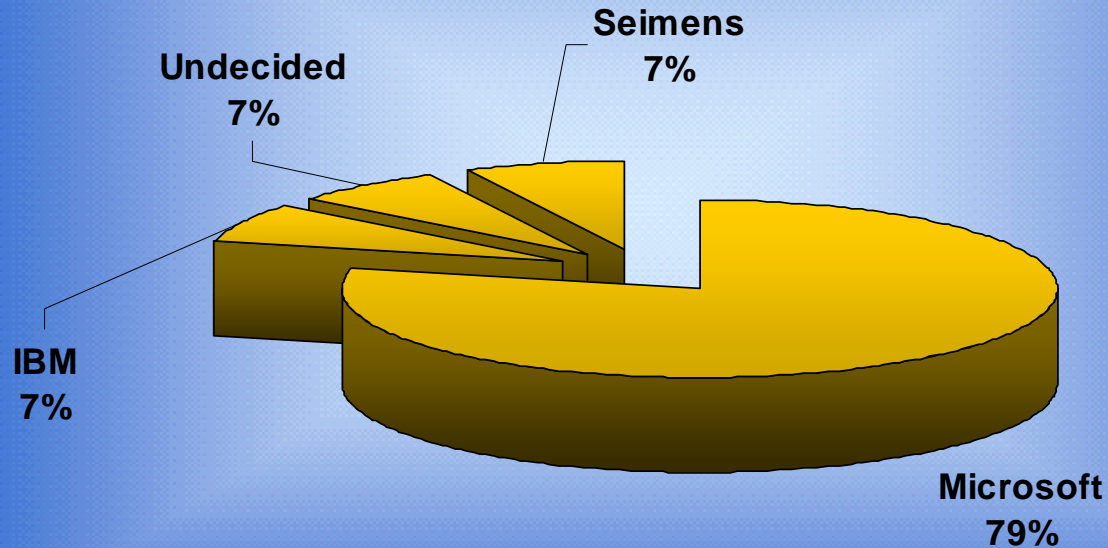


Presence-Driven Communications

- ⊕ Still not high on IT executives' priority lists
- ⊕ Education is Key
- ⊕ Microsoft holds the majority of the space today

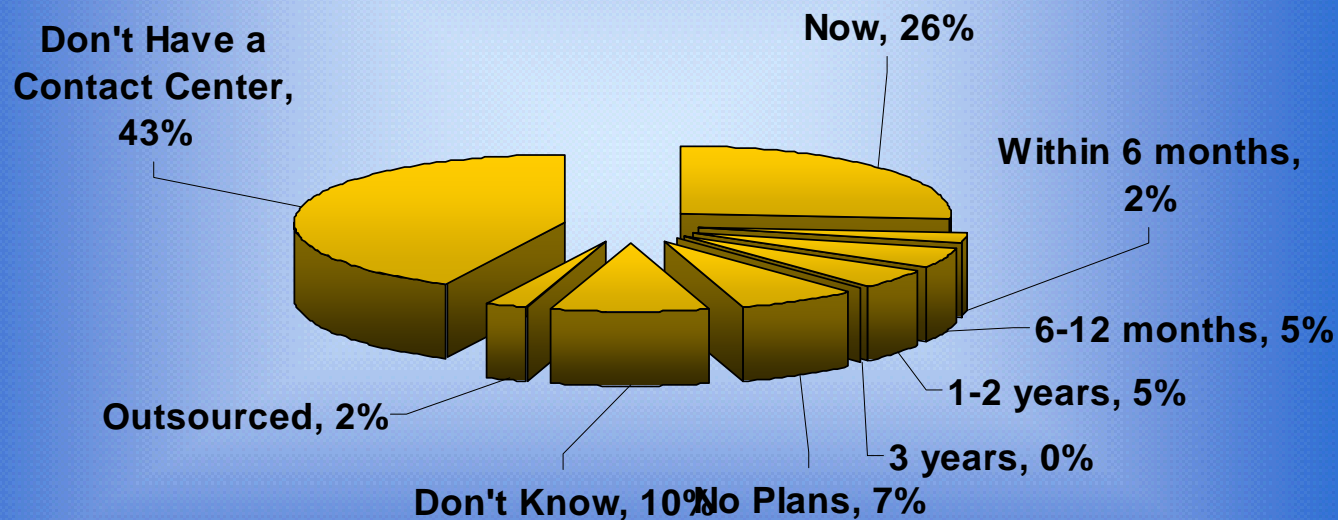


What Vendor do you use for Presence-Enabling Applications?



Source: Figure 35 "Virtual Workplace", Nemertes Research, LLC

Do You Use a Real-Time Application in the Contact Center?

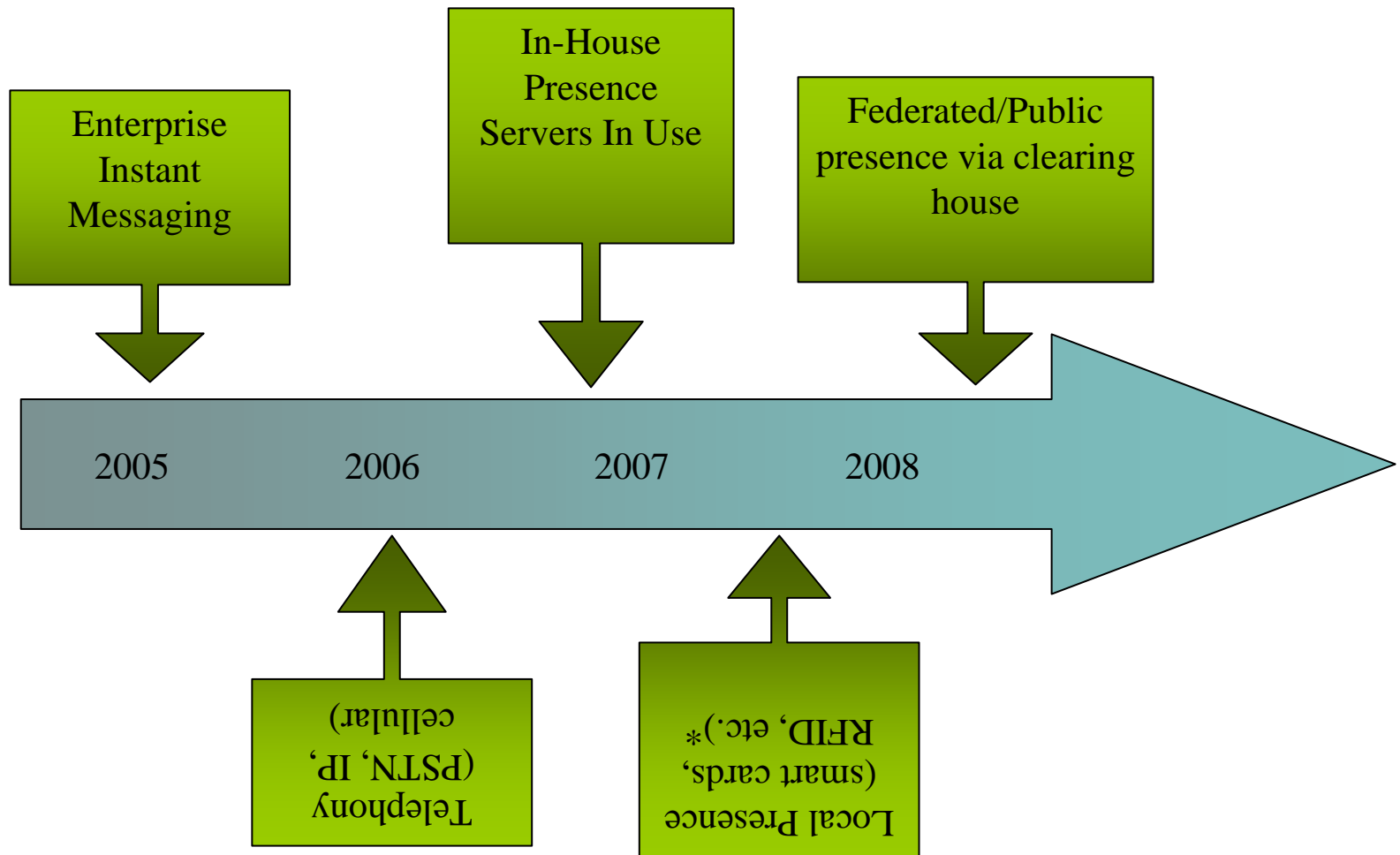


Source: Figure 38 "Virtual Workplace", Nemertes Research, LLC

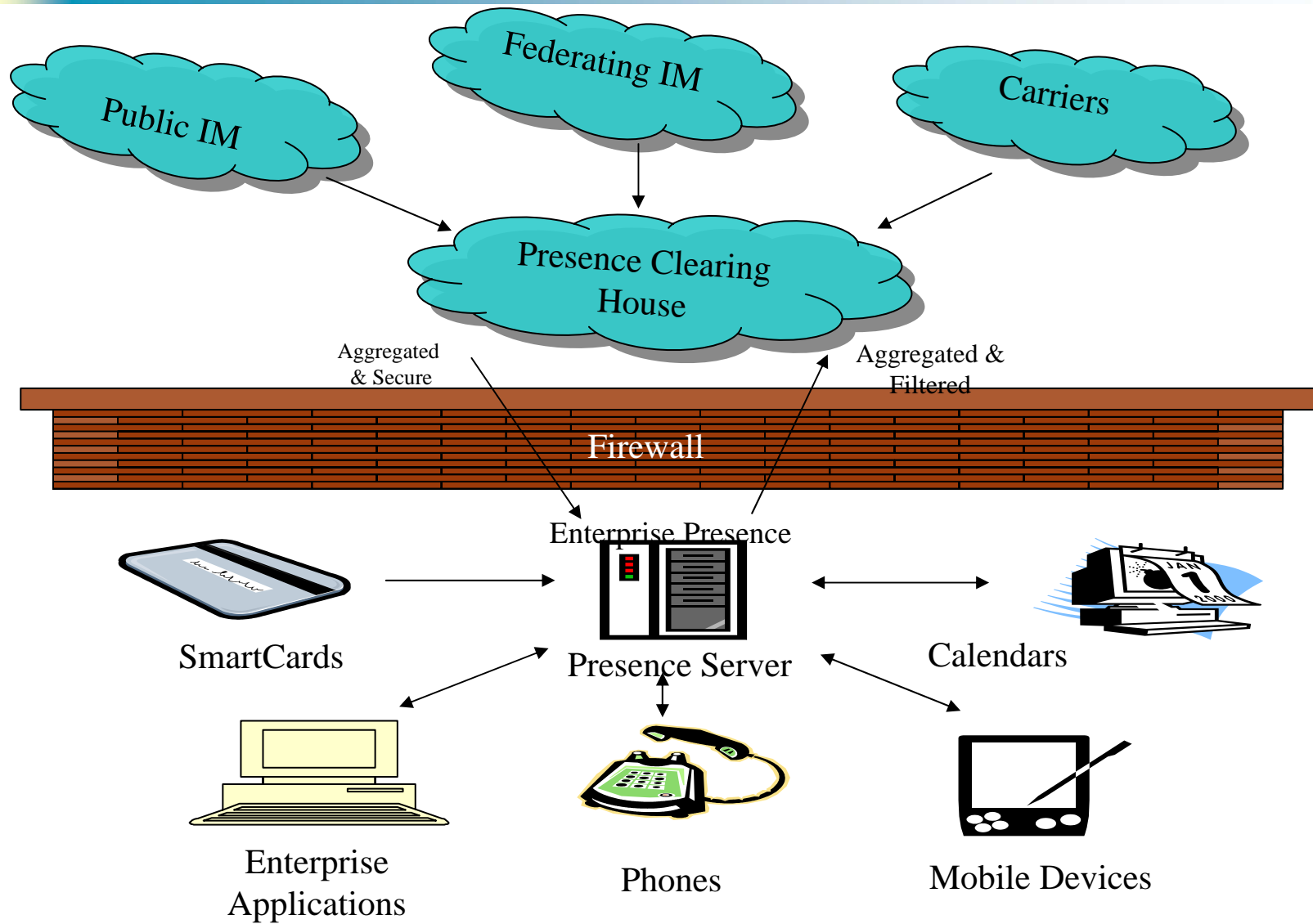
Future Focus

- ⊕ Interoperability: Key to 70% of IT executives
- ⊕ Integration with other Applications: 39%
- ⊕ Security: 30%



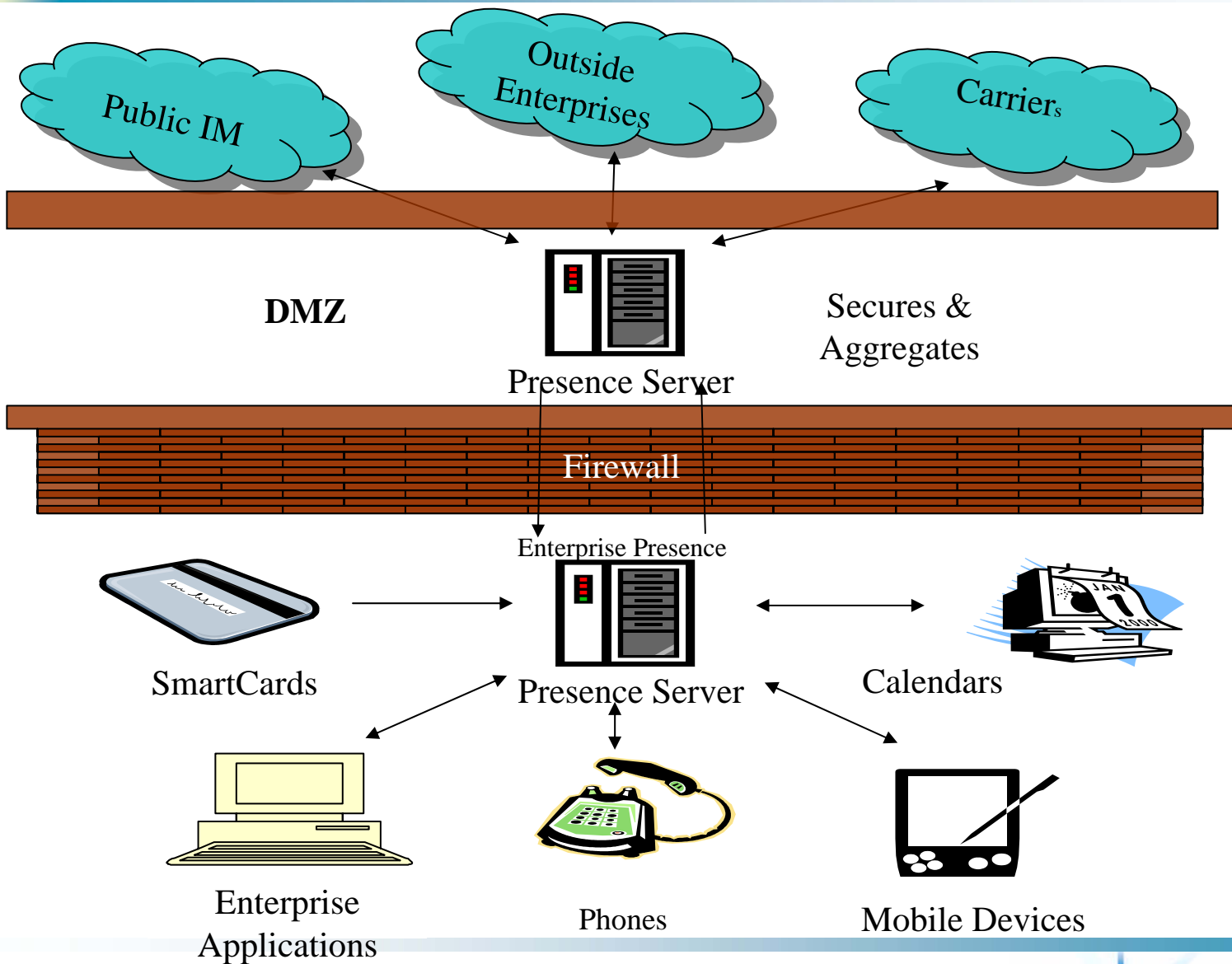


Source: Figure 39 “Virtual Workplace”, Nemertes Research, LLC



Source: Figure 40 “Virtual Workplace”, Nemertes Research, LLC





Source: Figure 41 "Virtual Workplace", Nemertes Research, LLC



Bottom Line for the Use of IM in the Enterprise

- ⊕ It's happening—due to:
 - ⊕ Need for quick communication across geographies
 - ⊕ Increased demand for agility
- ⊕ There are challenges to adopting IM:
 - ⊕ Security
 - ⊕ Control
 - ⊕ Malware Threats
 - ⊕ Interoperability

THANK YOU!

QUESTIONS?

