

Real Time Communications:

Who Will You Buy From

Andrew W. Davis
Managing Partner
Wainhouse Research LLC
andrewwd@wainhouse.com



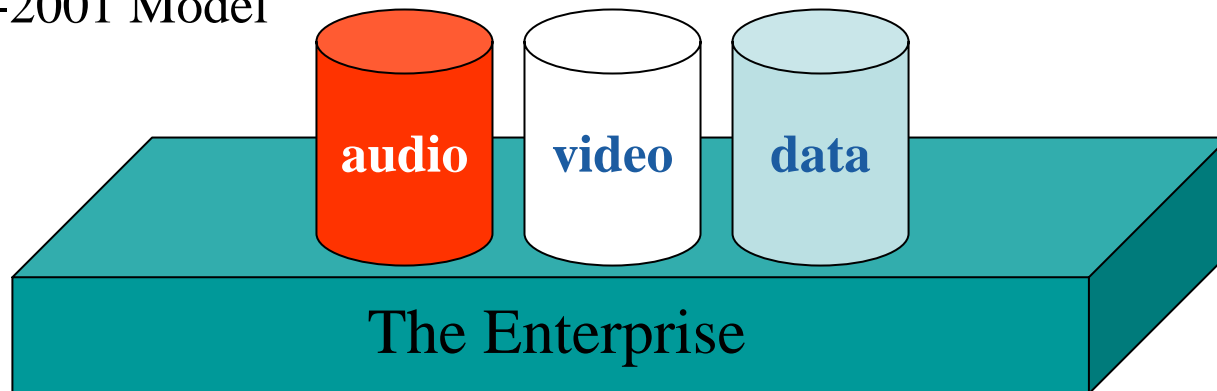
Agenda

- A brief history of enterprise IP communications evolution
- What's real today
- From whom will you buy?

1. *Vertical Pipes*

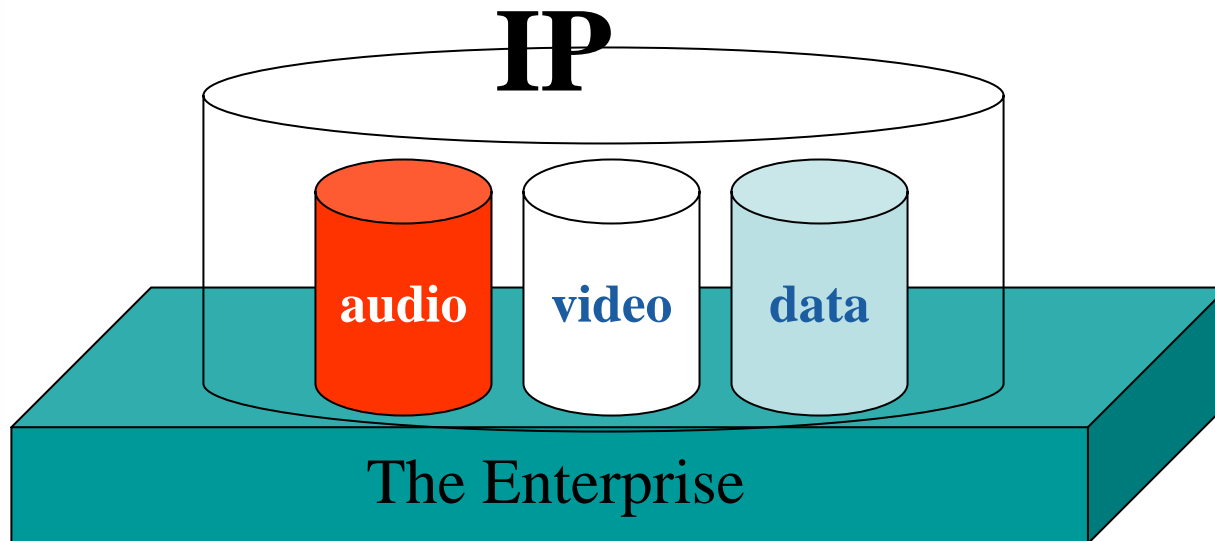
- Separate networks
- Separate endpoints
- Separate purchasing decisions
- Separate support teams, management

1985-2001 Model



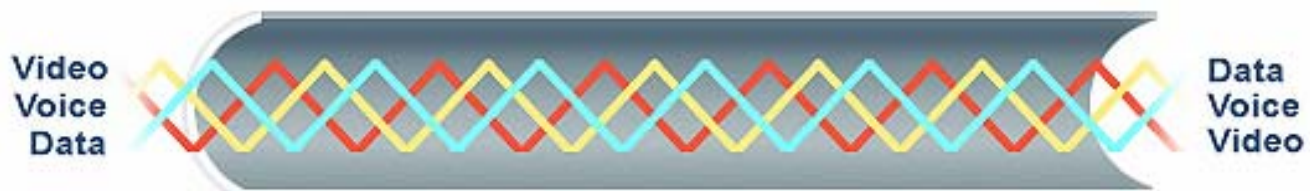
2. Network Convergence

The Internet Bubble



3. *Communications Convergence*

- Deploy a single COMMUNICATIONS application that integrates voice, video, web
 - Enter Instant Messaging and Presence
 - Browser ease of use
 - Integrated Portal concept
 - Integrate with enterprise scheduling, directory services



4. Applications Convergence

- Collaboration becomes a feature of an enterprise application
 - Not a stand-alone solution
 - Presence driven, typically SIP-based

Business Applications



Thinking Evolves

The Big Picture

OLD

- **Travel reduction**
– Saved expenses



NEW

- **Eliminate downtime**
- **Better teamwork**
- **Instantaneous communications**
- **Faster decision making**
- **Shorter time to market**

Hard benefits – easy to measure

Soft benefits – difficult to measure

The Big Picture

OLD

- Stand-alone applications
- Room or group videoconferencing
- ISDN connectivity



NEW

- Workflow integration at the desktop
- Unified collaborative communications
- IP connectivity

The Big Picture (video)

TRADITIONAL

- Aethra
- Polycom
- Sony
- TANDBERG



NEW

- Alcatel
- Avaya
- Cisco
- IBM
- Microsoft
- Nortel
- Siemens

The Big Picture (voice)

TRADITIONAL

- PSTN
- PBX
- Long distance charges
- Stand-alone applications



NEW

- Internet and VoIP
- IP Telephony
- Mobility support
- Integrated applications
- Fixed price usage

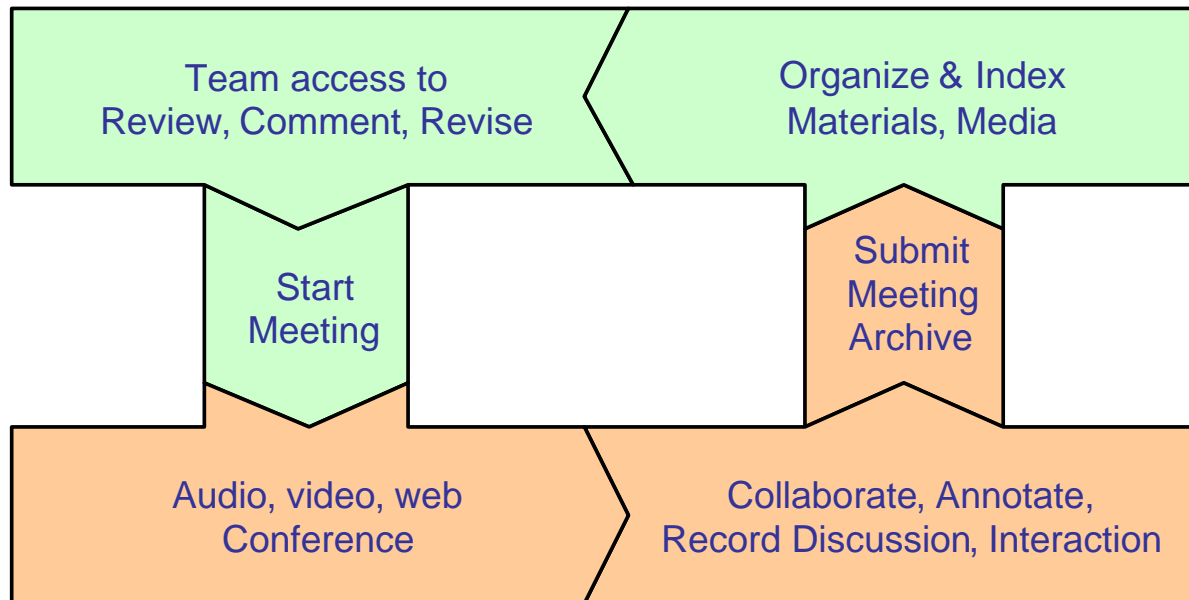
***And Now... Everyone is
Pushing Unified
Conferencing?***

Unified Collaborative Communications

End User				
Non-Real-Time		Real-Time		
Unified Messaging	Content Management & eRooms	IP Telephony	Collaboration Portal	Business Process Software
Integrated Collaboration Environment (ICE) audio – video – web - text				
Infrastructure Services Media Servers, Rights Management, Directories, Presence, Telephony				

Synch-Async Connection

Team Space & Content Repository



Live Team Collaboration

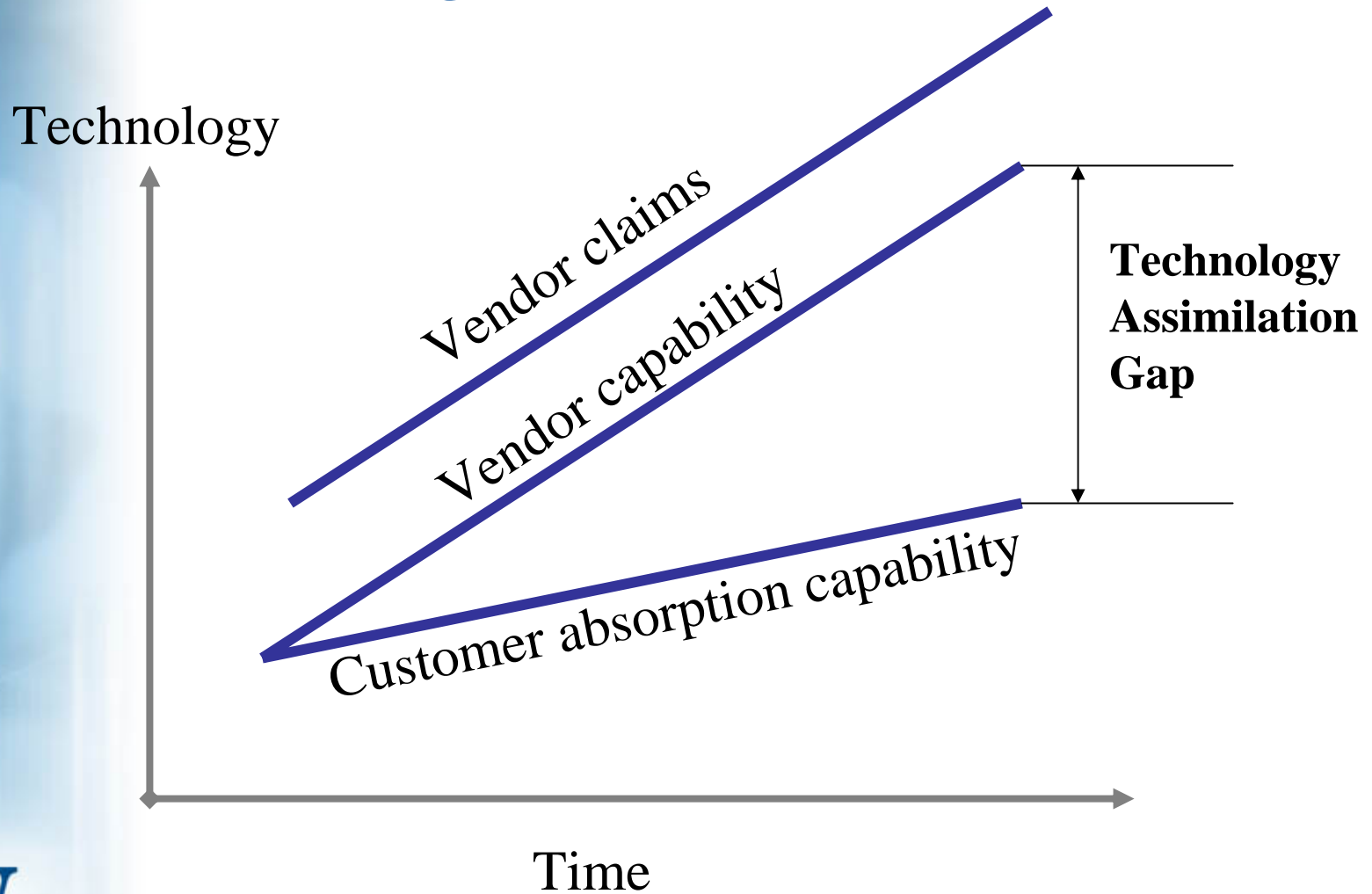
The Situation Today

Vendors' Claims

Integrated Communications



Reality



For the collaboration-aware

- Benefits are clear
- Applications are compelling
- Products and services are available
- But roadblocks remain.....
 - Security
 - Reliability
 - Simplicity
 - ROI is hard to quantify

The Desktop is Mutating

- Culture of anywhere, anytime connectivity is driving the future
- Voice is in transition
 - Computer is now a communications device
- Web conferencing has become mainstream
- Video is evolving from an application to a feature
 - Add-on to telephony, productivity software
- Most of the new IP-based features and services have not yet been invented
 - IP voice will lead the way
 - Synch-asynch, video, mobile, intelligent presence

VoIP and IP Telephony

- Has caught mainstream enterprise IT attention
- Will drive LAN and WAN solutions and strategies
- Has moved focus off of cost-savings to competitive advantage
- VoIP will ride web conferencing wave

Video and the Enterprise

- Video will be PART of a total solution for the conference room & the desktop
- Video will be provisioned by the same people responsible for telephony

Industry Challenges

- How to sell collaborative solutions to global companies
 - Conferencing/collaboration move from tactical to strategic concern for customers
 - Move focus beyond cost cutting to business transformation
 - Establish value of collaboration in improved decision making
- Positioning solutions between Microsoft, Cisco, Avaya, IBM thrusts, etc.

Customer Challenges

- Developing a collaboration strategy
 - How to deploy VoIP, telephony, IM solutions
 - Understanding the role of video
 - Controlling rogue buyers
- Enterprise behavior changes are slow and difficult to bring about
- Video not yet accepted on the desktop
 - Can be enslaving experience; eliminates multitasking
 - Eliminates backchannel (IM) communications
 - Early conference room video has left bad impression

Deployment Challenges

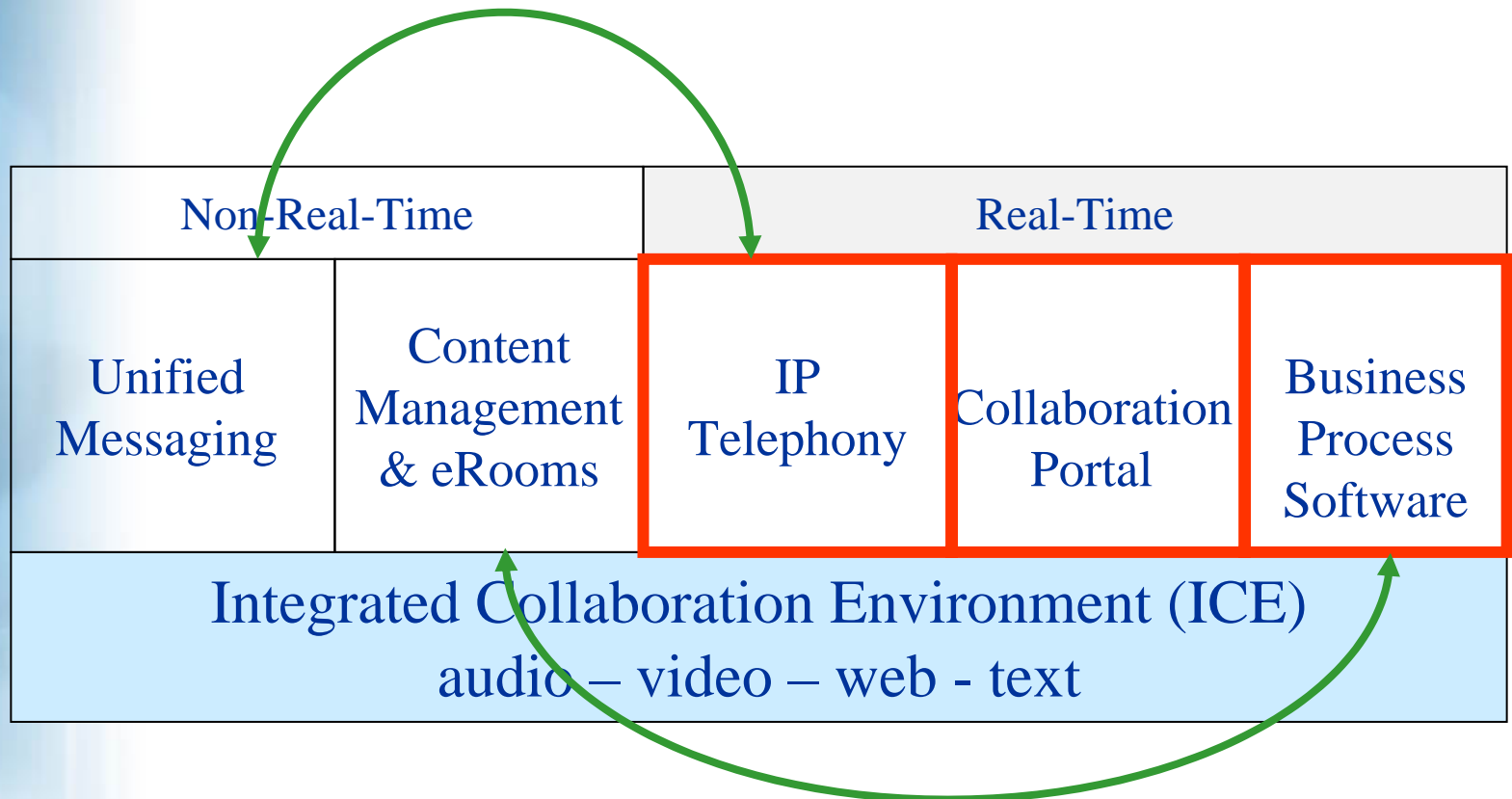
- The technology will be more complex, but the end user experience must be easier to use, more reliable
 - Role of hosted services and managed services will increase
 - Integrity of the network is crucial
 - Shift in management roles is likely (IT)

Keys to Collaboration Success

- New solutions must be less work to use than not-to-use
- New solutions must be ubiquitous and reliable
- Must be intuitive and work the way people expect them to work
- Must know what they need

Who Will You Buy From?

Unified Collaborative Communications



IP Telephony

- **Advantage**
 - Leverages investment in telephony infrastructure
 - Adds rich media on top of existing, satisfactory voice deployment
 - Buy from large vendors
- **Vendors**
 - Cisco, Avaya, Nortel, Siemens, Alcatel, etc
- **Customers**
 - Large enterprises

Collaboration Portal

- **Advantage**
 - Optimized for voice, video, web, IM
 - Highly flexible calling and conferencing
 - Integrates with wide variety of devices
 - Available as product and as a service
 - Suitable for e-learning, training, etc.
- **Vendors**
 - Arel, RADVISION, Macromedia, Marratech, WiredRed, and 25 others
 - Probable future for service providers like WebEx, LiveMeeting
- **Customers**
 - Anybody, including government and EDU

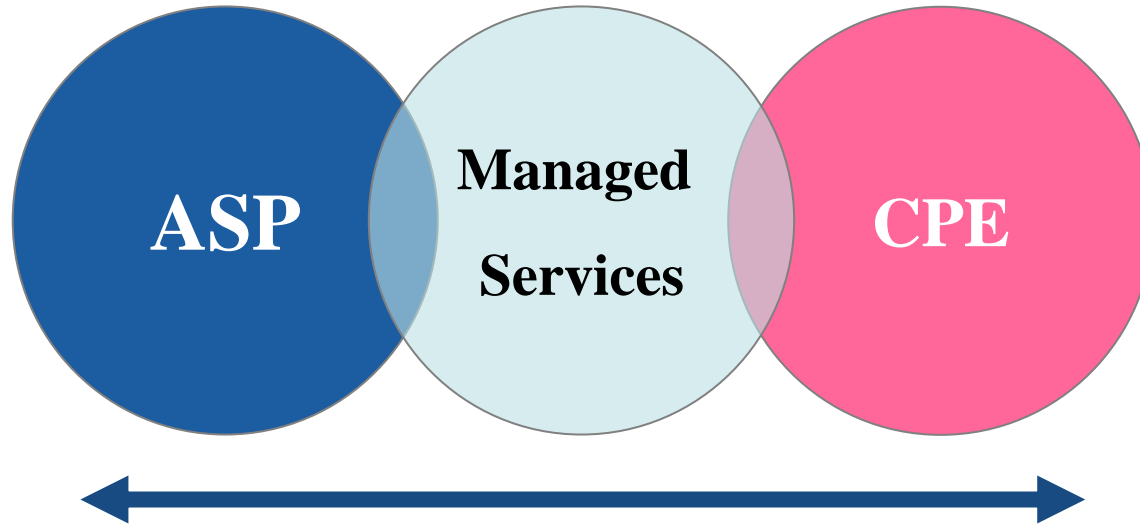
Enterprise Software

- Advantage
 - User interface already mastered, easily integrates collaboration into work flow
 - No new application to launch, just new versions of software and servers
 - Buy from large vendors
- Vendors
 - IBM, Microsoft, Oracle, CA, etc.
- Customers
 - Large enterprises

Life is Complicated



The Service Continuum

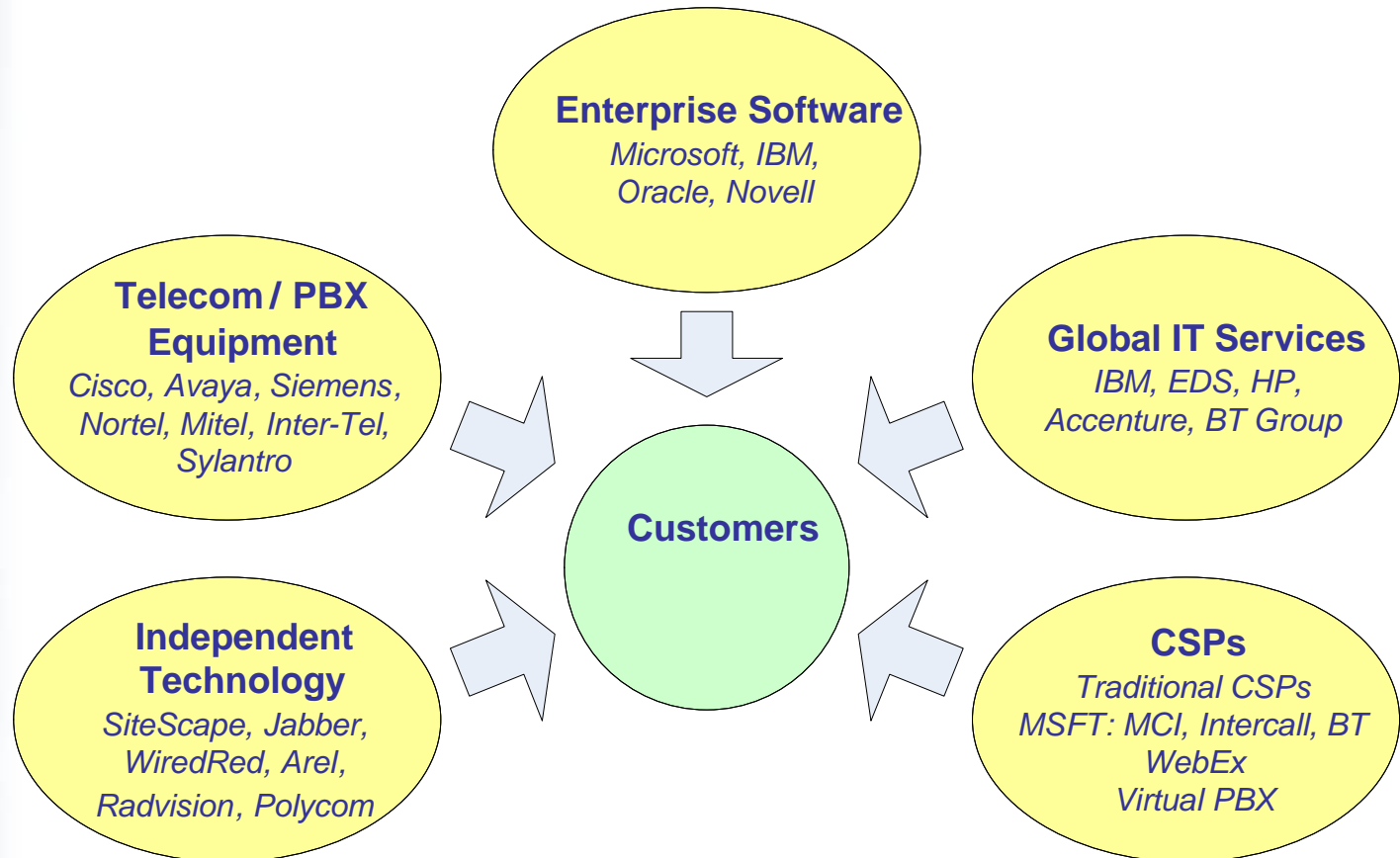


- Cost Effective
- Reliability
- Limited Resources
- Limited Expertise

- Control
- Security
- Economy
- Reliability

Managed Services can deliver the best of both worlds

Who Will You Buy From?



Who Will You Buy From?



Intra-enterprise
communications

Inter-enterprise
communications