

Reality Check On Unified Communications

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Key Questions

- **What does UC actually mean? What elements compose a UC solution?**
- **What new value do vendors propose to deliver via UC?**
- **What vendors will play in this marketplace?**
- **Where—and when—will enterprises apply UC?**
- **How will UC change today's approach to enterprise communications technology and services?**
- **What current apps/systems are prerequisites for migrating to UC?**

UC Definitions

- **UC integrates real-time and non-real time communications with business processes and requirements based on presence capabilities, presenting a consistent unified user interface and experience across multiple devices and media types.**
- **UC ties in presence, a unified or common user interface across devices, and integrates with back offices applications, systems, and business processes.**
- **UC manages business transactions and projects across populations of users, providing an integrated, consistent communication experience for users, resulting in optimized business processes and results.**

“Communications integrated to optimize business processes”



UC Elements

- **Presence**
- **Messaging - IM, email, voice, video**
- **Communications - Voice, data, video, IP/SIP, CTI**
- **Conferencing - web, audio, video**
- **Information sharing - web chat, file sharing, document sharing**
- **Business processes, applications, databases, directories**
 - **With connectors and toolkits**
- **Common user experience**
 - **Portal, desktop, mobility, speech**
- **Rules engine**
 - **Business rules, priorities, and permissions for routing, notification, and other tasks**

UC - Tying It All Together

Linking to the Right Resource at the Right Time



Devices

Fax Voice Video IM SMS Email Voice Mail

Communication Mode

Messaging	Mobility	Real Time Comms	Personal Asst	Collaboration & Conferencing
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Solutions

Voice mail, email, fax, video

Multiple devices
Cross-modal

Call Control
IM

Speech Access
Navigation Control

Web, audio, video conferencing

Presence
Rules, Permissions, Priorities

Integration to Business Processes

Supply Chain Mgt
ERP, CRM



Value Proposition

- **Enhanced collaboration**
- **Simplification**
 - **Makes collaboration and communications easier**
 - **ie, click to call/ conference**
- **Improved productivity – worker and workgroup**
- **Improved customer service**
- **Streamlined Business Processes**
 - **Significantly lower process workflow costs & overall business costs**
 - **Business process improvement, targeted at operational efficiencies**

Who Are the Players?

- **Switch vendors**

- All are becoming software vendors
- All offer UC suites
- Started with voice, added conferencing/collab, presence

- **Microsoft**

- Adding communications to Office and Exchange, via OCS
- Working with switch and gateway partners

- **IBM**

- Delivering UC apps via SameTime, Websphere, Eclipse
- Using partners for telephony

- **Application Providers**

- Integrating communications into business apps, portals



UC Players

Telephony	IM/ Email/ Presence/ Search	Business Process Apps	Voice Messaging	Conf'ng/ Collab	SI/Other	Mobility
Aastra Alcatel- Lucent Avaya Cisco Inter. Intell. Mitel/Inter- Tel NEC Nortel Shoretel Siemens	AOL IBM/Lotus Google Jabber Microsoft On-State Tello Yahoo	Oracle/ Siebel SAP Salesforce. com Vertical apps	AVST Active Voice Adomo Esna plus all telephony providers	Interwise (AT&T) Polycom Sonexis WebEx (Cisco) Skype	Accenture HP eLoyalty Spanlink	Ericsson Motorola Nokia RIM/ Blackberr y

Telephony Vendor Overview

Vendor	Product	Features/Comments
Aastra	Clearspan	OCS integration; SIP based
Alcatel-Lucent	OmniTouch UC Suite Genesys GETS	My Phone, My Messaging, My Teamwork, My Assistant, My Instant Communicator
Avaya	Converged Communication Server Services: App Enablement, SIP, Speech, Mobility, Orchestration Access: one-X	4 UC bundles Also: CEBP One-X versions: Desktop, Deskphone,
Cisco	Unified Presence Server/ Unified Personal Communicator	Put intelligence onto the network.
Inter-Tel	Unified Communicator Software	Call routing control
Mitel	3300 Live Business Gateway	“Presence Everywhere” – contact center, UM
NEC	Univerge UC, UCC UC for Business	Also mobile capabilities and clients
Nortel	Converged Office MCS 5100	ICA with Microsoft
Siemens	Openscape	Natural speech-enabled Voice Portal. Embedded Sametime client
ShoreTel	ShoreTel System	ShoreWare Personal Call Manager ShoreTel Converged Conferencing

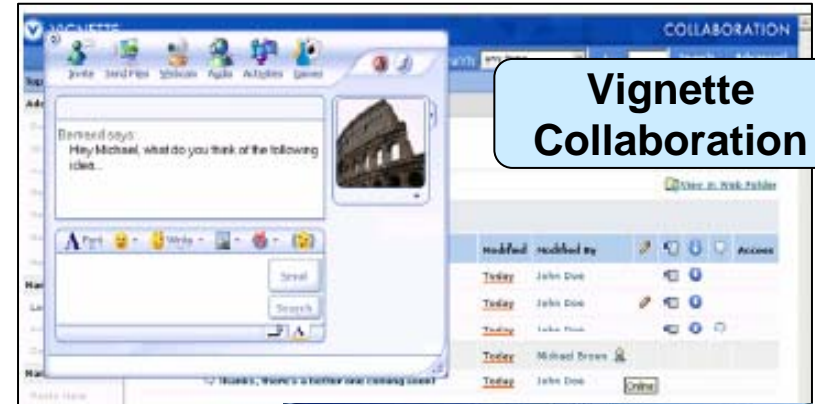
Microsoft

- **Focusing on communication-enabling tools**
 - Leveraging presence, IM, IP voice, IP video, web collaboration, and groupware products
- **Live Communication Server (LCS), Office Communications Server (OCS) and Microsoft Office Communicator (MOC)**
- **Embedding telephony into OCS – OCS capabilities:**
 - Voice and Video IP Telephony: Using Gateway to integrate with other parts of enterprise, but could operate without PBXs
 - Enterprise-wide presence, secure enterprise IM
 - On-premise audio, video, web conferencing
 - Advanced call routing
 - Integration with Exchange Server 2007 UM
- **Microsoft controls the majority of the desktop OSs and shipped over 400 million seats of Microsoft Office Suite**
- **But, needs partners for advanced telephony capabilities**

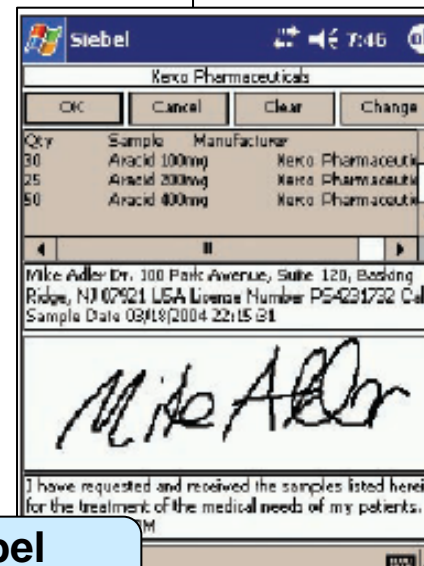
- **Unified Communications and Collaboration - UC2 solutions**
- **Extend ability to display presence in applications**
- **Emphasis on SameTime**
 - Presence and Conferencing
 - Telephony Integration with PBX suppliers
 - Click to Dial
- **Business Processes via WebSphere**
 - Portlets created for specific jobs, tasks
 - Connectors to SAP, Lotus, PeopleSoft, Siebel
 - WebSphere Everyplace delivers mobility

Application Vendors

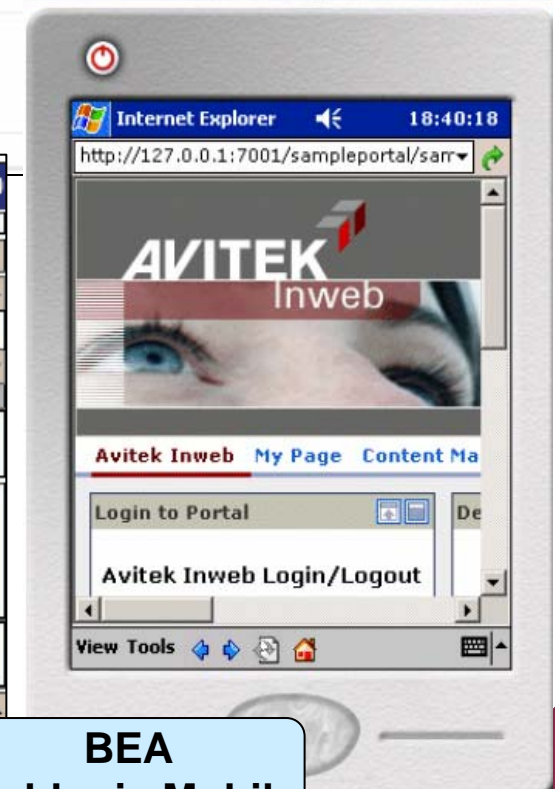
- Most major application software firms offering mobile interfaces for info and transactions
 - Oracle Siebel Mobile
 - SAP
 - Portal Producers
 - BEA
 - Vignette



Vignette Collaboration



Siebel Mobile



BEA Weblogic Mobile

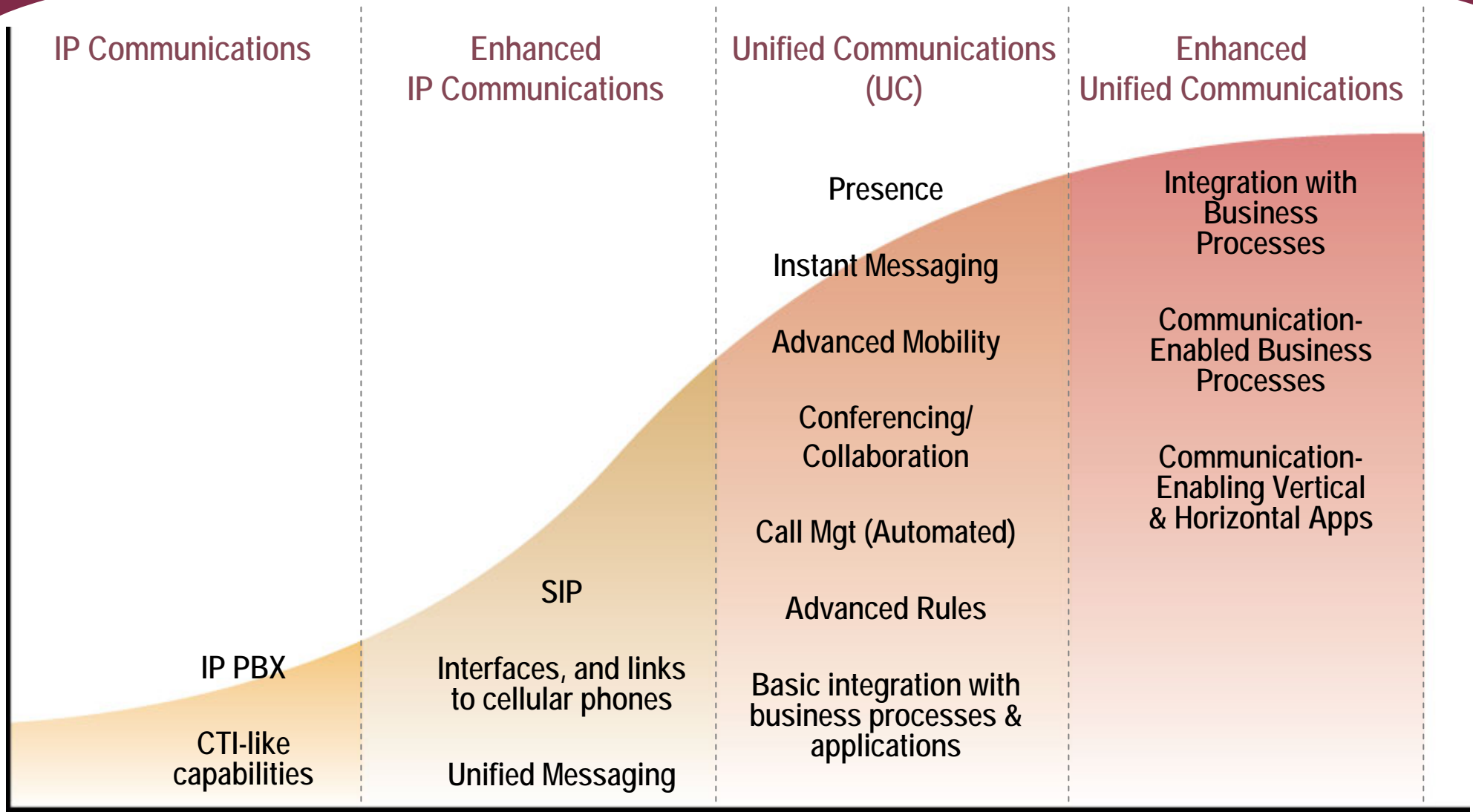


Public Portal/IM Vendors

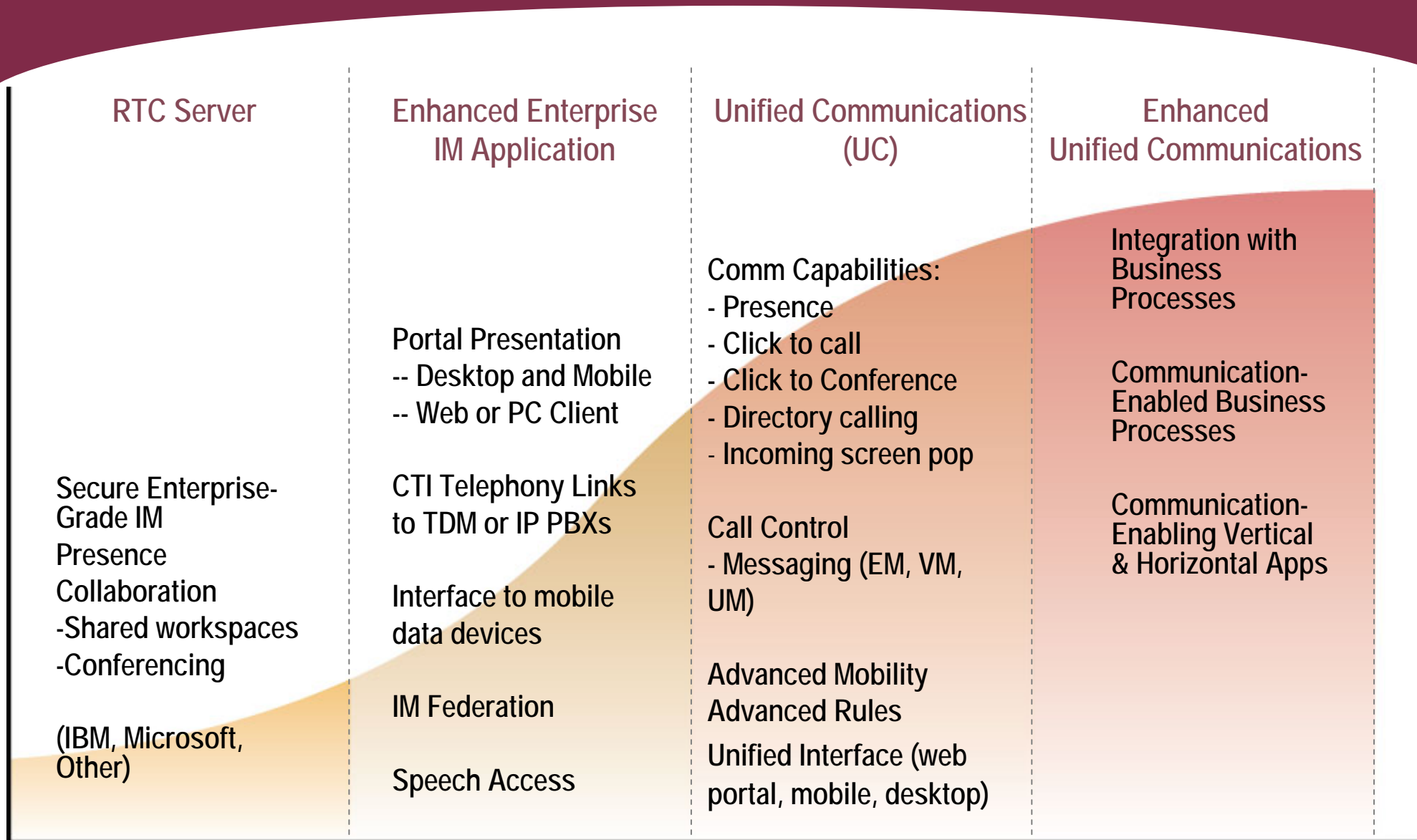
- **Most of the Internet Portal Operators have initiatives to capture business usage**
 - **Yahoo! Go: seamless office/mobile services**
 - **Windows Live MSN: IM-based unified communication**
 - **AOL: Continues to add to communication suite**
 - **Skype: Moving to business quality**
 - **Google: GoogleTalk, GoogleMail, Grand Central**
- **A breakthrough in federation between providers could radically change business process options**

UC Planning and Forecast

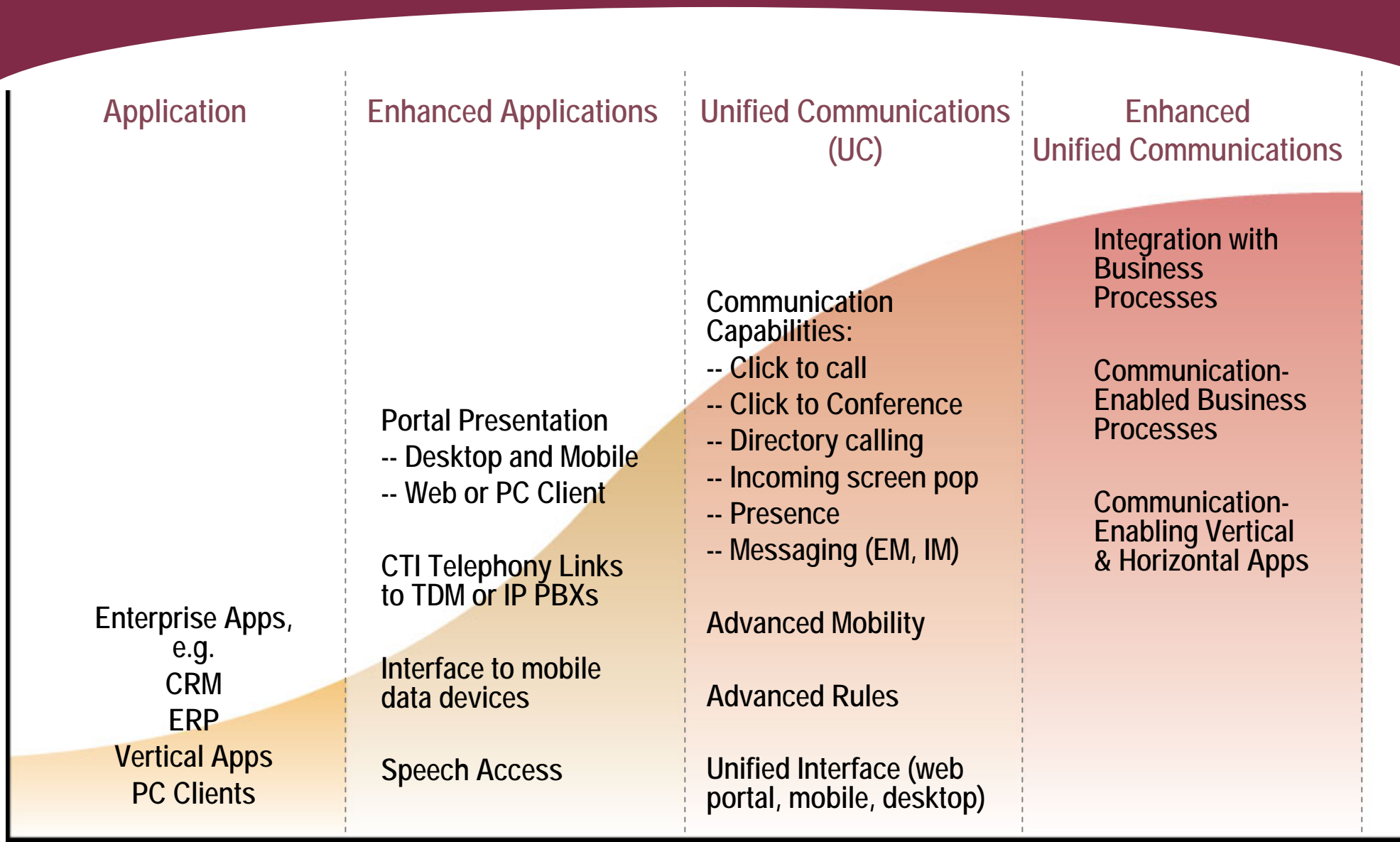
UC Continuum – Telephony Model



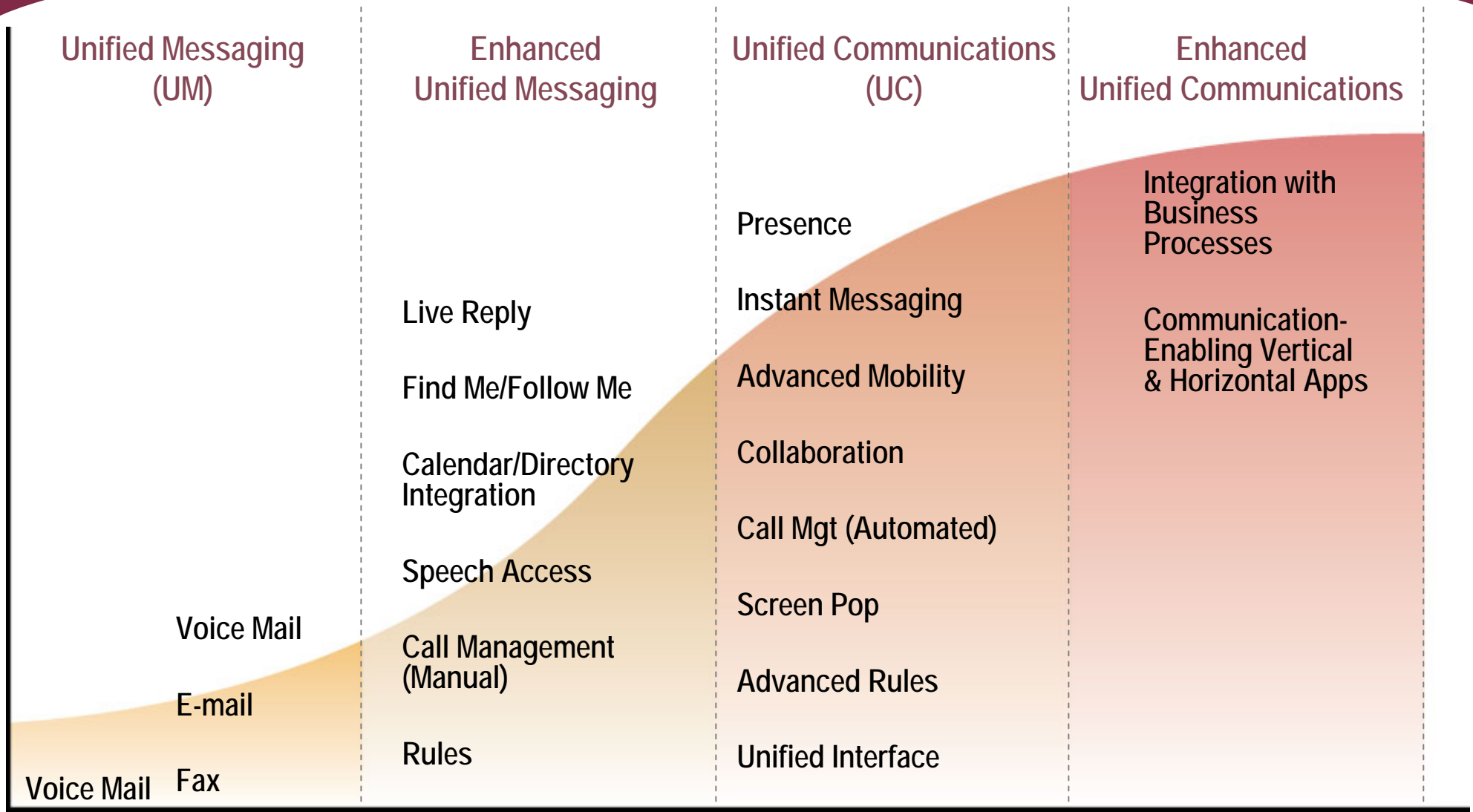
UC Continuum – Real Time Communication Model



UC Continuum – Enterprise Application Model



UC Continuum – Messaging Model



UC Adoption – Short Term



**Road warriors
Telecommuter**



**Semi-Mobile/
Corridor Warriors**

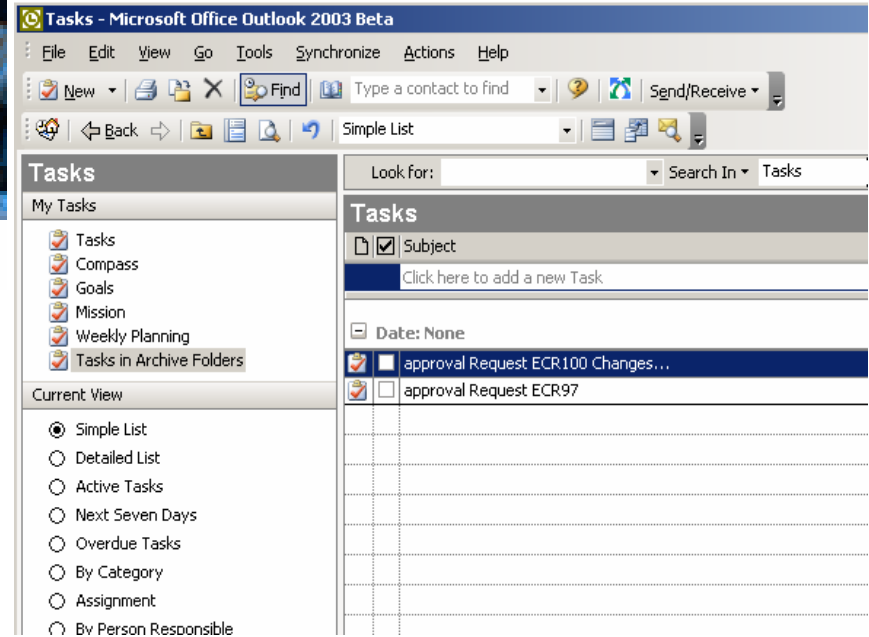
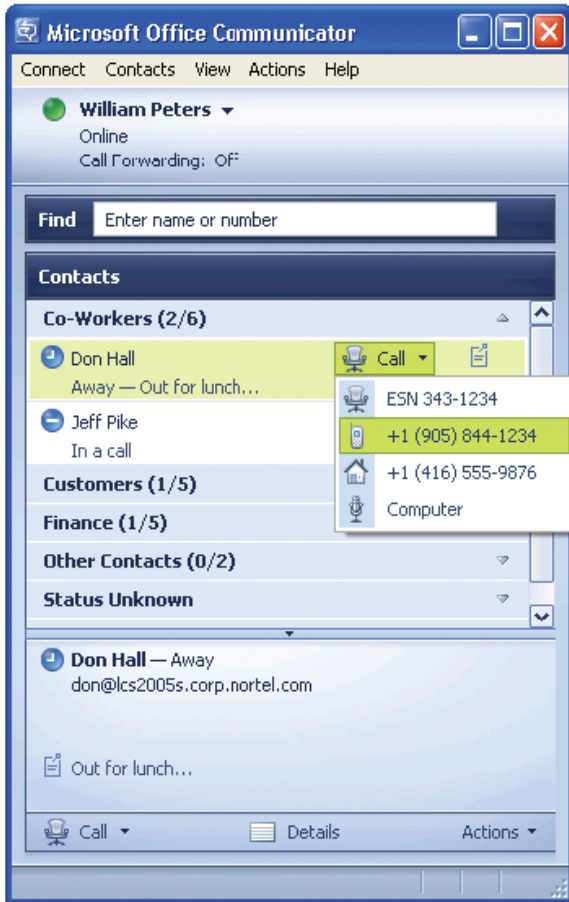


Workgroups



**-Need for Collaboration
-Business Process Integration
for specific groups or workers**

UC Adoption – Longer Term



Business Process Integration/
CEBP

UC Adoption

- **Balance of 2007: (innovators, early adopters)**
 - Enterprises will shop and run pilot projects
 - Trials in leading-edge companies leading to early implementations; Small pockets of users within enterprises
 - Will start with general business processes & apps (collaboration, MS Office)
- **2008-2010: (early majority)**
 - New entrants to market – i.e., business process and app vendors
 - Viral impact: workers will see others using UC
 - More trials and implementations, expanding to difft groups
 - Comms will increasingly be linked to processes and transactions
- **2010-2012: (late majority)**
 - UC as a competitive weapon
 - Moves to mainstream
 - Hockey stick growth???

Forecast

- **Voice will be integrated into enterprise business processes and applications**
- **UC can and will “Optimize Business Processes”**
 - **The next big wave of improvements**
 - Increasing transaction speed
 - Reducing labor content per transaction
 - Changing team work/collaboration methods
- **UC will become a key competitive advantage – those who wait to figure out their UC strategies will be at a competitive loss**
- **Communication vendors will not only be the traditional switch vendors – new entrants will dramatically change the game**
- **Microsoft will shake up the market**

Final Thoughts

UC is a vision or philosophy
that leads to solutions –
it is not a product!