

Forrester Opportunity Snapshot: A Custom Study Commissioned By Intel | January 2018

Beating The Meeting Blues With Better Technology

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Beating The Meeting Blues With Better Technology

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Collaboration Drives Business Success

Workplace collaboration is perennially crucial to business success, yet many enterprises still struggle with wasted time in meetings, technical issues, and friction in the meeting experience for remote and in-person participants. As collaboration becomes more global, workforces become more distributed, and technology ends up playing a bigger role in every business interaction. Enterprises are eager to find meeting space technologies that make real-time, global collaboration a reality. Enterprise investment in collaboration and meeting tools is increasing, but decision makers are still searching for a more effective and better integrated collaboration solution.

PROJECT BACKGROUND

In December 2017, Intel commissioned Forrester Consulting to explore enterprise priorities, pain points, and needs for technologies that support collaborative meetings. Forrester reviewed existing data and conducted an online survey of enterprises in four countries to understand current challenges and goals for meeting technologies in the future.



Countries

- › US: **25%**
- › UK: **25%**
- › Germany: **25%**
- › France: **25%**



Company sizes (employees)

- › 20,000 or more: **25%**
- › 5,000 to 19,999: **34%**
- › 1,000 to 4,999: **42%**



Respondent Levels

- › C-level executive: **26%**
- › Vice president: **12%**
- › Director: **30%**
- › Manager: **30%**



Respondent Roles

- Decision makers for meeting facilities and meeting space or collaboration technologies in:
- › IT: **92%**
 - › Facilities management: **8%**

Note: Percentages may not total 100 because of rounding.

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Information Workers Need A Lot From Their Collaboration Tools

Information workers today spend a great deal of time in meetings. In fact, according to Forrester Data, two-thirds of information workers spend two or more hours of their day in meetings. Of these meetings, 61% take place in-person, 23% are virtual, and 16% are a combination of both. But regardless of the format, workers need to be able to collaborate with their peers without technology slowing them down or compromising their security. They want tools that allow them to securely collaborate on documents in real time while in different locations, or while using various devices.



Sixty-six percent of information workers spend two or more hours per day in meetings.

Time spent in various types of meetings:



61% In-person



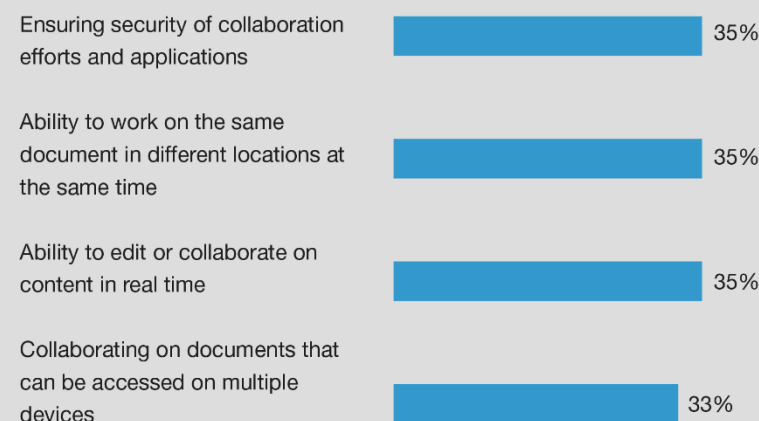
23% Virtual



16% Combination of both

Base: 3,401 information workers at enterprises with 1,000+ employees in the US, UK, France, and Germany
Source: Forrester Data Global Business Technographics Workforce Benchmark, Survey, 2017

Most important for efficient collaboration with peers:



Base: 7,021 information workers at enterprises with 1,000+ employees in the US, UK, France, and Germany
Source: Forrester Data Global Business Technographics Workforce Benchmark and Recontact Surveys, 2017

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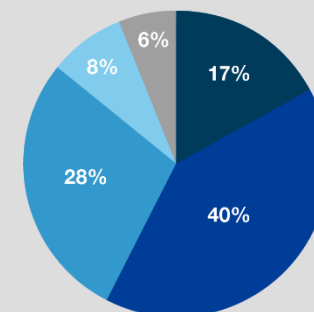
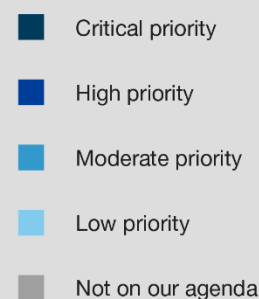
Enterprises Are Responding To Employee Needs With Investments In Work Spaces

As employee needs in collaboration and mobility increase, the enterprise is responding with increased investment in better collaboration tools and technology. According to Forrester Data, 57% of enterprises have made reorganizing physical workspaces to foster collaboration a high or critical priority for the next year. The ability for employees to work together in a real-time and seamless fashion — even when on different devices or in different locations — is rapidly becoming more of a necessity than a luxury. Companies that are not able to keep up with these collaboration imperatives will struggle to attract and retain employees who expect their employer to meet their technology needs.

Fifty-seven percent of enterprises are investing in reorganizing physical work spaces to foster employee collaboration and mobility.



Over the next 12 months, how important will it be to reorganize physical workspace to foster collaboration and mobility of your firm's workforce?



Base: 443 IT and facilities managers at enterprises with 1,000+ employees in the US, UK, Germany, and France
Source: Forrester Data Global Business Technographics Mobility Survey, 2017

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Meeting Space Technologies Are Fragmented

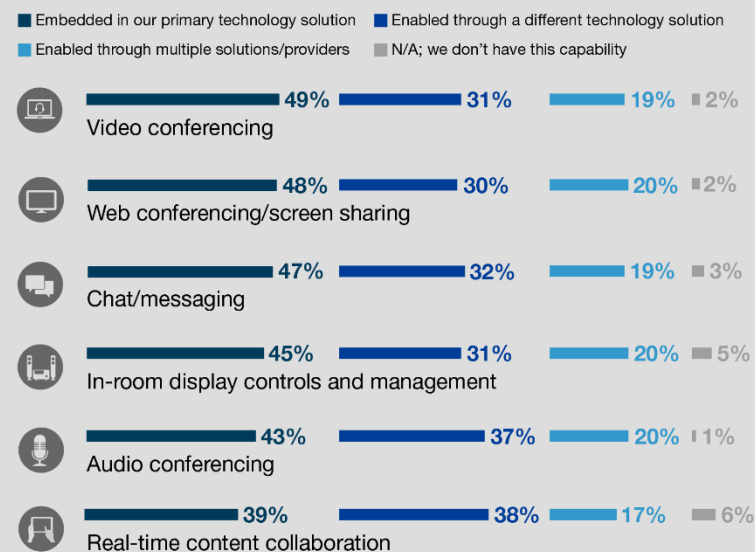
While modern enterprises clearly understand the importance of fostering collaborative meetings across the globe, their solutions are not yet unified. Companies have invested heavily in collaboration tools, but these tools are fragmented across multiple solutions and providers. Whether it be for video, audio or web conferencing, chat, in-room display or content collaboration; while nearly all enterprises have these capabilities, the majority do not have them embedded in their primary technology solution. They use secondary providers or even multiple providers to enable these capabilities.

Although real-time content collaboration is critical to employees, only 39% of enterprises have this capability embedded as part of their primary technology solution. This signals a need for meeting space technologies that enable real-time content collaboration natively in the solution.

Less than half of enterprises have a unified solution for delivering important meeting and collaboration capabilities.



For each of the following meeting capabilities, are your current tool(s) part of one primary technology solution or are they separate capabilities?



Base: 200 US and EU collaboration/conference room technology decision makers of respondents who did not select "Don't know"
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel Unite, December 2017

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Current Meeting Technologies Fall Short On Integration And User Experience

Fragmentation in meeting place technologies creates challenges for enterprises in the areas of:

- › **Integration.** Four in five respondents (82%) cited various integration challenges with current technologies that support collaborative meetings. Integrating conferencing functionality with business and collaboration apps is the biggest hurdle, which is consistent with the fact that 61% of enterprises lack unified tools in these areas. Enterprises also struggle to find tools that can reliably support various operating systems and device types.
- › **User experience.** Navigating meeting space technologies can be confusing and overwhelming. Employees most commonly struggle with setting up meetings and using in-room resources. This leads to organizational inefficiencies by delaying meetings, reducing productivity, and creating a high volume of IT support requests.

BARRIERS TO IMPROVEMENT STILL REMAIN

Despite these challenges, 88% of enterprises reported barriers preventing them from improving meeting experiences. Although most decision makers seek to improve current capabilities, competing priorities and budget concerns often win out and impede progress.

Eighty-two percent cited integration challenges with collaboration in meeting spaces.

TOP INTEGRATION CHALLENGES:



Integrating conferencing functionality with business and collaboration apps



Limited support for mobile or tablet devices



Functionality gaps across various operating systems

Eighty-eight percent cited user experience challenges with collaboration in meeting spaces.

TOP USER EXPERIENCE CHALLENGES:



Lost time or productivity due to technical challenges



High volume of IT support requests



Difficulty setting up meetings



Difficulty using in-room resources

Base: 200 US & EU collaboration/conference room technology decision makers
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel Unite, December 2017

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Decision Makers Are On A Quest For The Ideal Meeting Collaboration Solution

When considering an ideal technology solution to support collaborative meetings, decision makers have priorities consistent with their content collaboration needs and pain points. Respondents rated the absolute and relative importance of various features, and three themes arose:

- › **Ease of use.** Ease of use was the most important feature for decision makers in meeting technology. Three in four (76%) indicated that an easy, intuitive interface is very important to them. Poor ease of use, leads to lost time and operational inefficiency.
- › **Integration.** Workers also need their technology solution to be integrated across multiple devices. Demand for the ability to work on a variety of devices is rapidly increasing and enterprises need their conferencing and collaboration tools to keep up with this demand. Collaboration tools must also be integrated with other conferencing technology.
- › **Security.** Strong and reliable data security is crucial for collaboration tools. Seventy-one percent of decision makers rated security as a very-important feature of meeting technology, and 95% rated it as at least moderately important. Without the ability to trust that data is secure, it is really not wise to share it at all.

In thinking of your ideal technology solution to support collaborative meetings, how important are the following features and capabilities? (Showing percent very important or critical)

76% Easy and intuitive interface to set up and manage meetings

74% Integrates with a wide range of devices, operating systems, and collaboration tools

71% Secure, end-to-end data encryption

70% Allows in-person and remote participants to share and collaborate on content in real time

69% Ability to wirelessly share content via the in-room display

67% Lower total cost of ownership (e.g., lower equipment fees, low/no license fees)

62% Data and analytics on meeting space and collaboration software utilization

62% Building management integration with conference room technology

Base: 7,021 information workers at enterprises with 1,000+ employees in the US, UK, France, and Germany
Source: Forrester Data Global Business Technographics Workforce Benchmark and Recontact Surveys, 2017

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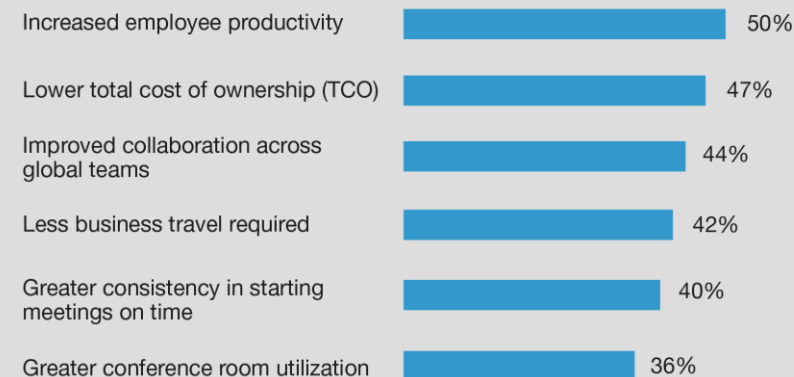
Enterprises Envision Many Business Benefits From Meeting Tools That Prioritize Integration, Collaboration, And Ease Of Use

Having considered what features an ideal integrated solution might require, the question becomes, what benefits would adopting such a solution bring? In considering a meeting space technology solution that meets their integration, content sharing, and collaboration needs, decision makers envision many benefits. By eliminating friction in the user experience, enterprises anticipate increased employee productivity and improved collaboration. Improved integration and smoother experiences mean fewer headaches for IT, which 47% of decision makers believe will lower their total cost of ownership. In short, a better collaboration solution can benefit the top and bottom line.

Decision makers believe that a better technology solution will support collaborative meetings, increase productivity, and reduce costs.



What benefits do you expect from a meeting collaboration/conferencing technology that integrates with a wide range of devices, allows hosts to share content wireless via the in-room display, and allows participants to collaborate on content in real-time?



Base: 200 US and EU collaboration/conference room technology decision makers
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel Unite, December 2017

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Conclusions

Conferencing and collaboration tools are increasingly essential in the modern enterprise to foster more meaningful and productive meetings with team members across the globe. Our study showed that:

- ▶ Information workers are spending a large amount of their time in meetings, both in-person and virtually. They need to be able to collaborate in real time to increase productivity.
- ▶ Enterprises are responding to this demand by prioritizing investments in work space reorganization to improve collaboration and mobility.
- ▶ However, meeting place technologies are fragmented. This leads to challenges in integrating conferencing and collaboration tools. It also creates user experience issues that decrease productivity, increase costs, and burden IT support teams.
- ▶ When it comes to conferencing solutions, IT and facilities decision makers are looking for tools that are easy to use and can enable content collaboration on a wide range of devices in a secure way.
- ▶ Adopting and utilizing a real-time collaborative meeting space technology that integrates with remote and in-room devices would reduce costs, increase productivity, and improve ability to collaborate.

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

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METHODOLOGY

This Opportunity Snapshot was commissioned by Intel.

To create this snapshot, Forrester used data from its Global Business Technographics® Workforce Benchmark Survey, 2017 and its Global Business Technographics Mobility Survey, 2017. Forrester Consulting supplemented this data with a custom survey of 200 IT and facilities decision makers at enterprises with 1,000 or more employees in the US, the UK, Germany, and France.

The custom survey was completed in December 2017. For more information on Forrester's data panel and tech industry consulting services, visit [Forrester.com](https://forrester.com).

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