

COMMUNICATION IN THE WORKPLACE:

COMPLEX CONVERSATIONS, COMPLEX SYSTEMS

UK & IRELAND RESEARCH REPORT

In a world of expanding possibilities for connecting people with information and each other, are corporations fully exploiting the opportunities?

With conversations spanning multiple channels and devices, are technologies adequately helping to manage the complexity?

Alcatel-Lucent commissioned two global research studies to investigate and analysis of UK- and Ireland-based respondents found only 19% of knowledge workers believe they have access to the technology tools they need to perform their jobs successfully.

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Alcatel-Lucent commissioned two global research studies in January 2011 to investigate how communication technologies are being used to improve business performance.

Inviting responses from medium- to large-size organizations, across the UK and Ireland 214 knowledge workers shared their attitudes on employee engagement, productivity and communication technologies, and 90 IT Executives responded to questions about the challenges of implementing and supporting advanced communication technologies. This report details the findings of the two surveys.

SUMMARY OF KEY FINDINGS:

Communication is key

- 89% of knowledge workers surveyed believe that communicating and collaborating with others is becoming increasingly important to their ability to perform their work

Managing it can be difficult

- 35% of workers are frustrated by the difficulty of managing all the communication they receive and generate in their working day, and more than half believe that different channels are 'poorly' integrated to work together

Technology increases productivity & engagement

- 58% of workers believe advanced communication technologies significantly increase productivity & engagement
- 97% of Unified Communication (UC) users say it has improved their productivity. 59% 'significantly' or 'very significantly'
- 79% of UC users believe it has improved their level of engagement with their work
- 63% of respondents use a smartphone

However advanced technologies need to be more widely deployed

- Many workers believe they are provided with inadequate or poorly performing technologies in the workplace — only 19% of knowledge workers believe they have access to the technology tools they need to perform their job successfully

IT& T executives recognise the opportunity

- When considering which IT activities could have the greatest impact on business performance, 38% ranked "Enabling new advanced services for communication & collaboration" as the first or second highest
- More advanced communication technologies have been implemented by a minority, but the pace of implementation is increasing

However IT&T organizations are hampered by existing systems

- Proven technologies are available to improve collaboration, but many IT organizations consider themselves constrained by legacy infrastructure investments and the demands of managing increasingly complex information systems
- Establishing a business case was also a top concern, which is surprising given how certain workers are about productivity gains from these technologies

Consolidation and unification of systems offer remedies

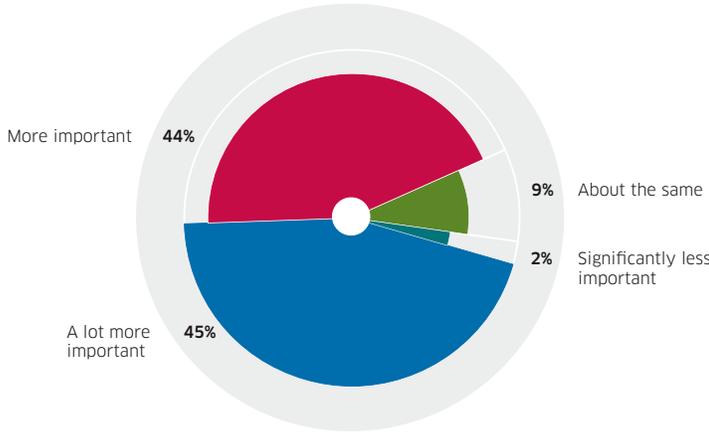
- Organisations are pursuing virtualization solutions on multiple levels
- 53% believe SIP technology is valuable for enabling platform federation, and 53% also see it is valuable for facilitating seamless application delivery across platforms and devices
- 39% believe there would be significant savings from using a single user management platform that allows communications to be provided as a service

ANALYSIS OF THE SURVEY FINDINGS

Communication is key — managing it can be difficult

Eighty-nine per cent of knowledge workers surveyed believe that communicating and collaborating with others is becoming increasingly important to their ability to perform their work.

...communicating & collaborating — more or less important to your ability to perform



However as the volume of communication seems to increase — across different channels like e-mail, telephone calls, instant messaging, SMS, conferencing — it’s not surprising that almost half reported that it is ‘difficult’ to manage all the communication they receive and create in a typical working day.

With collaboration becoming more important, the risk for organizations is that worker performance can be hampered by not being able to reach others who have information they need, or by difficulties in collaborating and sharing information effectively through disconnected channels and devices.

Knowledge workers highlighted the degree of frustration they experience with these issues:

How much frustration do you experience with these potential communication challenges?

	A lot	Some	None	N/A
Difficulty in reaching people	7%	76%	17%	-
Difficulty in accessing the information I need	14%	60%	26%	-
Inefficient conference calls	19%	44%	32%	5%
Difficulty in remotely sharing information with people or groups	15%	63%	21%	1%

Respondents’ comments in the survey also expressed frustration with using virtual meeting tools that were considered inadequate for the task; highlighting the need for more intuitive collaboration tools that enable workers to share knowledge more efficiently.

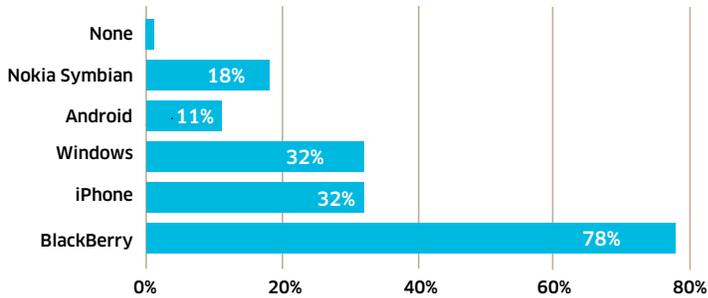
Conversations across multiple channels

Another key challenge is the way conversations can span multiple channels and devices — from an SMS, to an e-mail, to a phone conversation, to a conference call — sometimes migrating from one to another in real time. Ideally this would be a seamless transition across channels and devices, but respondents highlighted the shortcomings, with almost half believing different communication channels are poorly integrated to work cohesively.

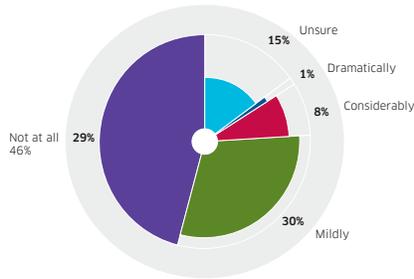
Technology begets more technology

The growing popularity and acceptance of advanced communication technologies was highlighted by 63% of workers indicating they use a smartphone, and 99% of IT organizations supporting smartphone platforms:

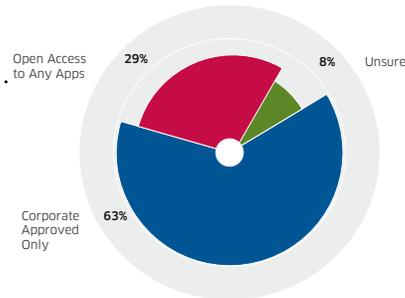
Supported smartphone platforms



How much were security standards relaxed to support smartphones?



Open or restricted access to smartphone apps?



These ‘always-on’ mobile devices have made people generally more accessible, but they have also possibly raised expectations for more immediate access to people and information. At the same time, they’ve made people busier and therefore less available.

Workers believe more technology is the answer

More people are using advanced technologies more frequently in their personal life and also at work. While there has been a perceived gap between use of advanced technology at home versus at work, it seems that medium- to large-size organisations have made significant advances in supporting the latest communications technologies more rapidly.

% using technologies at least weekly, at home and at work

	Home	Work
Internet or e-mail from mobile phone	68%	63%
Instant Message	42%	43%
Social Media	62%	14%
Video calls or video conferencing from PC	21%	19%
Phone calls from PC	18%	24%

Organisations stand to gain from implementing more advanced technologies, given how much knowledge workers believe technologies increase their productivity & engagement:

% experiencing or expecting an increase in productivity and engagement from using technology at work

Applications indicating people 'presence'	85%
Internet or e-mail from mobile phone	76%
Phone calls from PC	52%
Video calls or video conferencing from PC	76%
Instant messaging	59%
Social media	36%

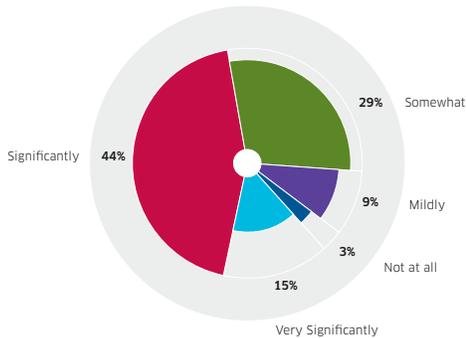
Respondents also expressed a strong desire for more video communication when asked to rate the effectiveness and efficiency of different communication modes. While in-person meetings and regular telephone calls rated the highest, video calls were considered the next most effective and efficient communication channel, ahead of e-mail, instant messaging and conference calls.

Integrated communication technologies increase productivity and employee engagement

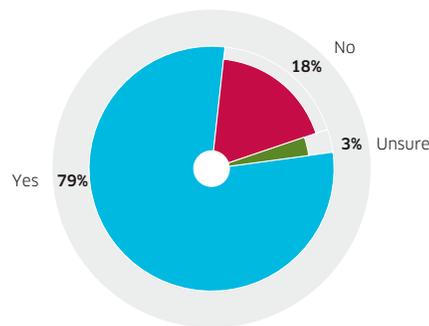
Fifty-eight per cent believe if they 'had access to new technologies that made it easier and more efficient to communicate and collaborate it would "significantly" or "very significantly" improve their engagement and productivity".

Unified Communications has long been touted as delivering this capability, and while it may fall short in some areas, and more advanced collaboration solutions offer greater business benefits, the 31% of respondents who have used UC technology consider it highly effective:

How significantly has UC technology improved your productivity



Has UC technology improved the level of engagement with your work?



And of the 69% of respondents who haven't used UC, 100% believe having the technology would increase their productivity, and 70% believe it would improve their level of engagement with their work.

However workers want more than integrated messaging

Knowledge workers' responses highlight the importance of more seamless integration between channels and devices, and also a strong desire for more advanced technologies like Unified Presence and video conference calls. While some IT organizations have made progress in meeting the demands of users, others find themselves limited by their existing operating environments.

Surveying 90 IT&T executives from medium- to large-size organisations found the following for technology implementation:

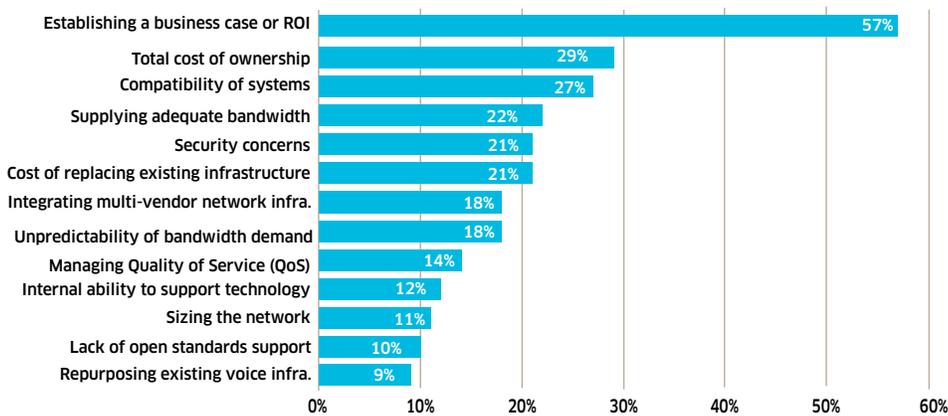
	Implemented or Implementing
IP Phones	72%
Video Conferencing - meeting room	63%
Instant Messaging	45%
Video Conferencing - PC-based	45%
Softphones	46%
Internal social network applications	19%
Unified Presence	21%

% of organizations where business units express high to very-high demand for technologies:

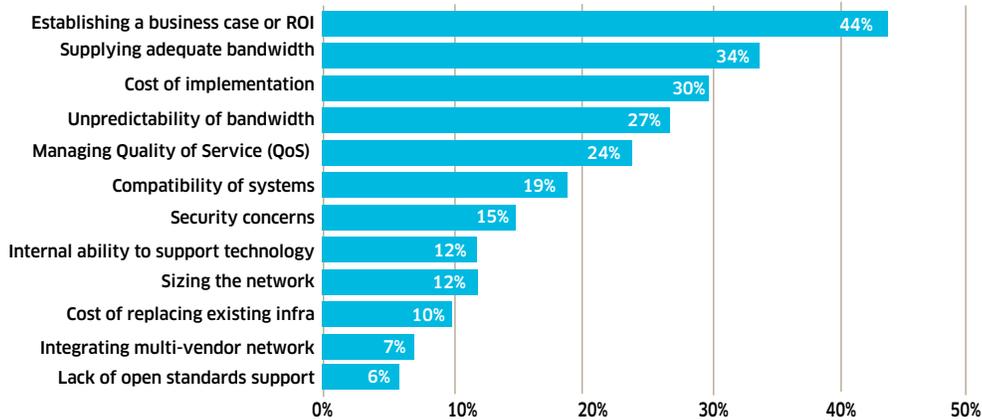
	High to Very-high Demand
Video Conferencing - meeting room	43%
IP Phones	56%
Instant Messaging	30%
Video Conferencing - PC-based	29%
Softphones	30%
Internal social network applications	22%
Unified Presence	25%

When considering the inhibitors to implementing advanced technologies like IP telephony, video conferencing and UC, IT executives highlighted the following:.

Most significant inhibitors to implementing UC company-wide



Most significant inhibitors to implementing PC-based video conferencing



IT systems help, and hinder

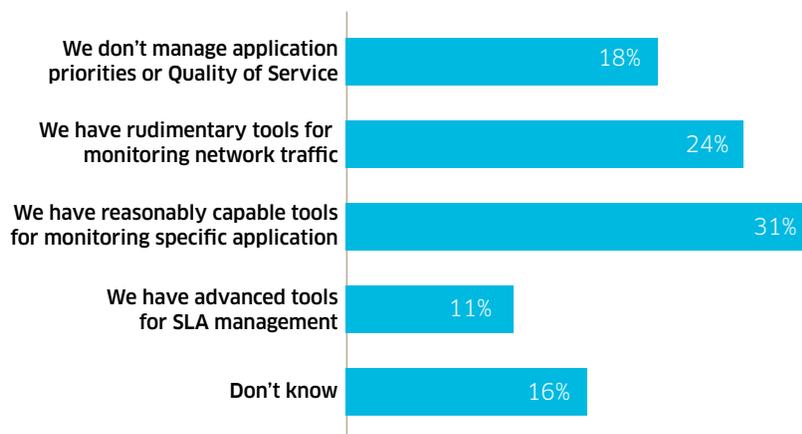
While corporate networks and applications are increasingly offering more advanced possibilities, the complexity of these systems can hamper productivity. Forty-three per cent of knowledge workers believe they waste more than 30 minutes each day experiencing difficulty in accessing the information they need, and 53% experience network delays or poor application performance at least weekly.

Managing increasingly larger and more complex networks is tough

Users want the latest advanced applications and devices, but bandwidth-intensive technologies are overwhelming IT departments and pushing networks beyond capacity.

Managing the erratic bandwidth demands of telephony and video can be difficult with the rudimentary network management tools many are hindered with. Only 42% of surveyed IT executives believe they have reasonably capable tools for managing Quality of Service and application performance.

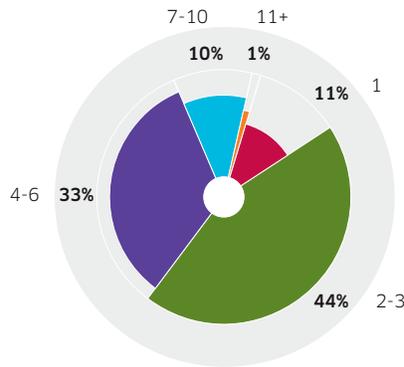
How sophisticated are the tools you have for managing quality of service and application traffic?



The administrative and management overhead for IT organizations is a significant cost contributor as well as a source of much complexity. IT organizations often find themselves managing more than 200 parameters per user, which limits their ability to be adaptable and agile in responding to the needs of business units and users.

The management overhead is further highlighted by considering the effort it takes to configure a new user for all network services, with 44% of IT departments having to use four or more configuration systems.

How many administration systems do you have to use to configure a new user to access all network resources & applications from all of their devices?



In response IT organizations are increasingly seeking unified management tools that span the four domains of users, devices, applications and infrastructure — providing resource provisioning, permissions, and SLA management from one central platform.

The appeal of this was highlighted by 39% of IT executives indicating they would gain significant savings by replacing current IT management systems with a single management tool that allowed them to manage users in a single database and provide communications and applications to them as services through any device.

Being able to offer communication capabilities and customer service applications as services opens up more possibilities for converged architectures and flexible deployment models like cloud computing. With those benefits on offer, it's not surprising that 48% of organizations expect to offer advanced communication capabilities as integrated 'services' within 24months.

Advanced technologies demand an Application Fluent Network

Supporting applications like desktop video conferencing, unified presence and other technologies of the future will create exploding levels of bandwidth demand and fresh challenges for network architecture and management.

Based on the inhibitors highlighted earlier in this survey, the evolution to next-generation communication services will be most viable as a business proposition if organisations are able to leverage the existing network infrastructure. This leads to additional challenges — as the existing infrastructure may not have the proper capacity, Quality-of-Service controls or even the support for some of the new generation devices.

To best achieve the balance of preserving legacy investments while meeting the demands of deploying new technologies, customers need to look for standards-based interoperable systems and management tools. The right tools will allow the creation of an application fluent network architecture that successfully integrates legacy network infrastructure with advanced network technologies. Application fluent networks can enable the dynamic adjustment of bandwidth allocation and traffic priority as demand for critical and non-critical services fluctuates, while also improving network resilience and simplifying the overall architecture.

SIP Technology considered highly valuable

Given the importance of leveraging existing infrastructure and more seamlessly integrating disparate networks, platforms and devices, it's not surprising that 53% of IT Executives believe SIP technology is valuable for both enabling platform federation, and seamless application delivery, while 56% believe it is valuable for reducing communication costs.

CONCLUSIONS

While workers are highlighting the growing importance of communication and collaboration, we are seeing the nature of business interactions evolve from voice-calls and email to multimedia conversations that span multiple channels.

Workers believe more advanced and better integrated technologies can assist them in managing these conversations and make them more productive and engaged with their work. IT organizations are demonstrating a strong desire to enable these for users, however doing so will require the establishment of converged networks that can seamlessly integrate multiple devices and multiple media, for conversations between multiple parties.

The key challenges for this are integrating and managing legacy infrastructure together with new technologies. SIP standards and Unified Management tools offer solutions to address these challenges and create application fluent networks.

Given the value that knowledge workers believe more advanced communication technologies can offer, it appears that organisations which take the initiative with these solutions could stand to gain a distinct competitive advantage.

SURVEY PARAMETERS AND PROFILE

A broad global sample of medium-to-large organisations

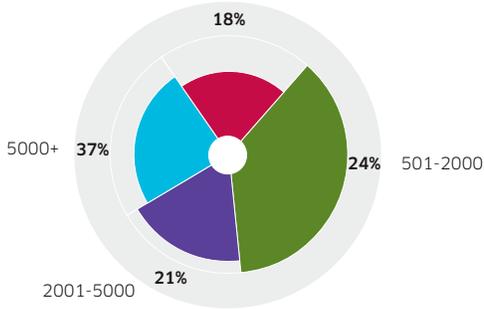
Alcatel-Lucent commissioned two global research studies in January 2011 inviting responses from medium-to-large organizations across 51 countries. From the UK and Ireland 214 knowledge workers shared their attitudes on employee engagement, productivity and communication technologies. Also 90 IT Executives responded to questions about the challenges of implementing and supporting advanced technologies.

Responses by Industry — both surveys

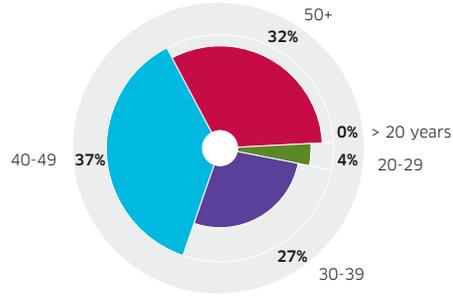
Energy & Utilities	15%
Government	13%
Education	12%
Information Technology	9%
Finance	9%
Manufacturing	8%
Insurance	8%
Transport	6%
Internet & eCommerce	4%
Retail	3%
Consumer Services	3%
Entertainment	3%
Healthcare & Pharmaceuticals	2%
Business Services & Consulting	2%
Hospitality & Travel	2%
OTHER	1%

Knowledge Worker Survey

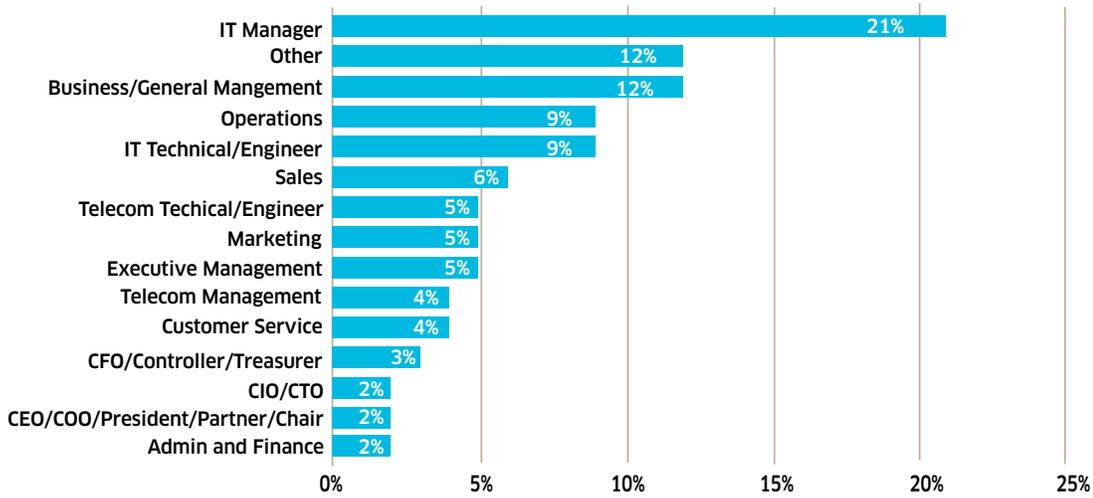
Number of Employees



Age (years)

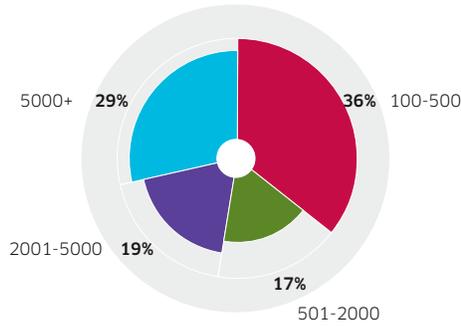


Job Function

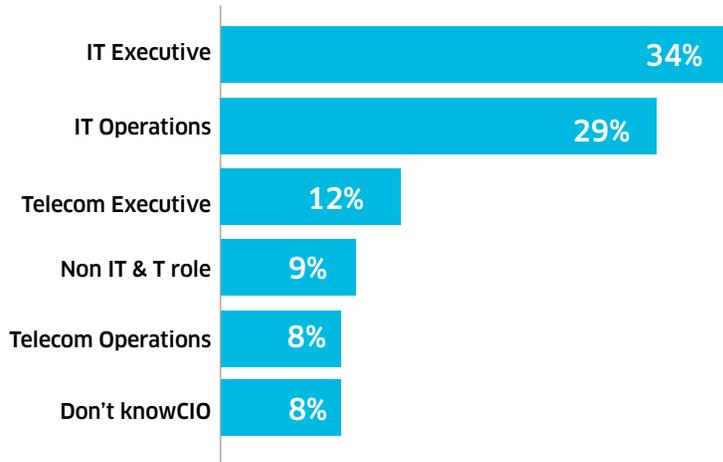


IT&T Survey

Number of Employees



Job Function



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