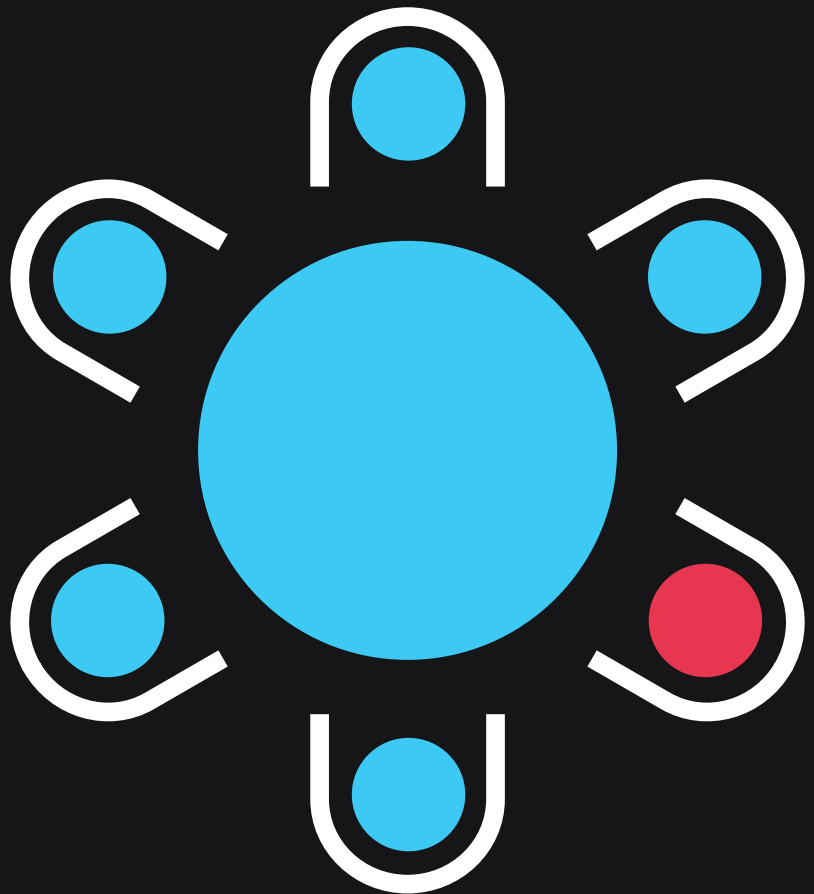## Survey Report

Collaboration or Frustration?

Using Unified Communication and Collaboration (UCC) Applications in the Workplace

Executive Summary

The use of Unified Communication and Collaboration (UCC) applications are widespread in the modern workforce, becoming employees' preferred method of communication with colleagues, customers and partners.

Organizations demand increased efficiency and productivity. Employees demand faster communication, easier collaboration and more flexible working arrangements.

These demands are met in large part by utilizing UCC apps. And there are a no shortage of tech companies developing new apps, all promising to service these demands, each better than the last.

The aim of this study was to understand the actual benefits and challenges that organizations face in the UCC space, as well as the real impact these applications have on employees' productivity and satisfaction.

The key findings uncovered in this report include the following:

- Overall, only 62% of users are satisfied with UCC apps they use at work. There is a significant disparity in satisfaction between seniority levels, with C-Suite indicating a much higher level of satisfaction (82%) as opposed to those in non-manager roles (54%).

- There are a significant number of issues with UCC apps that go unreported by end users. One in four respondents said they do not report 75+% of issues they experience.

- The biggest impacts of poorly performing UCC were identified as reduced productivity (58%) and underutilization of UCC apps (37%).

- The top four issues encountered with UCC apps are all related to performance, as opposed to usability.

- The use of performance management tools to monitor UCC ecosystems leads to an increase in satisfaction with UCC applications.

As the use of UCC apps in the workplace continue to increase in prevalence, enterprises that focus on ensuring these real-time collaboration aids work as they are intended, and measure engagement with them in a meaningful way, are those that stand to emerge as the winners in this new cloud-transitioning, video-enabled, mobile-supported business environment.

This study was conducted independently by market research company GfK.

GfK is an independent market research company, connecting data and science. GfK Australia is a member of the Australian Market and Social Research Organisations (AMSRO) and complies in full with the Market Research Privacy Principles. In addition, all senior researchers at GfK Australia are AMSRS members and are bound by the market research Code of Professional Behaviour. For an audience breakdown and overview of the research approach, see the appendix on page 17 of this report.

01

UCC Usage

Breakdown

End users spoiled for choice in UCC

As organization size grows, so does their usage of UCC applications. Unsurprisingly, the heaviest usage of UCC applications is seen in larger organizations (10000+ people), due to their often geographically dispersed employee base.

The top UCC applications used across all organizational sizes:

Skype for Business

Skype for Business is the most commonly used UCC app in large enterprises

10,000+

Microsoft Teams

Microsoft Teams is becoming more popular, particularly in organizations up to 5000 employees
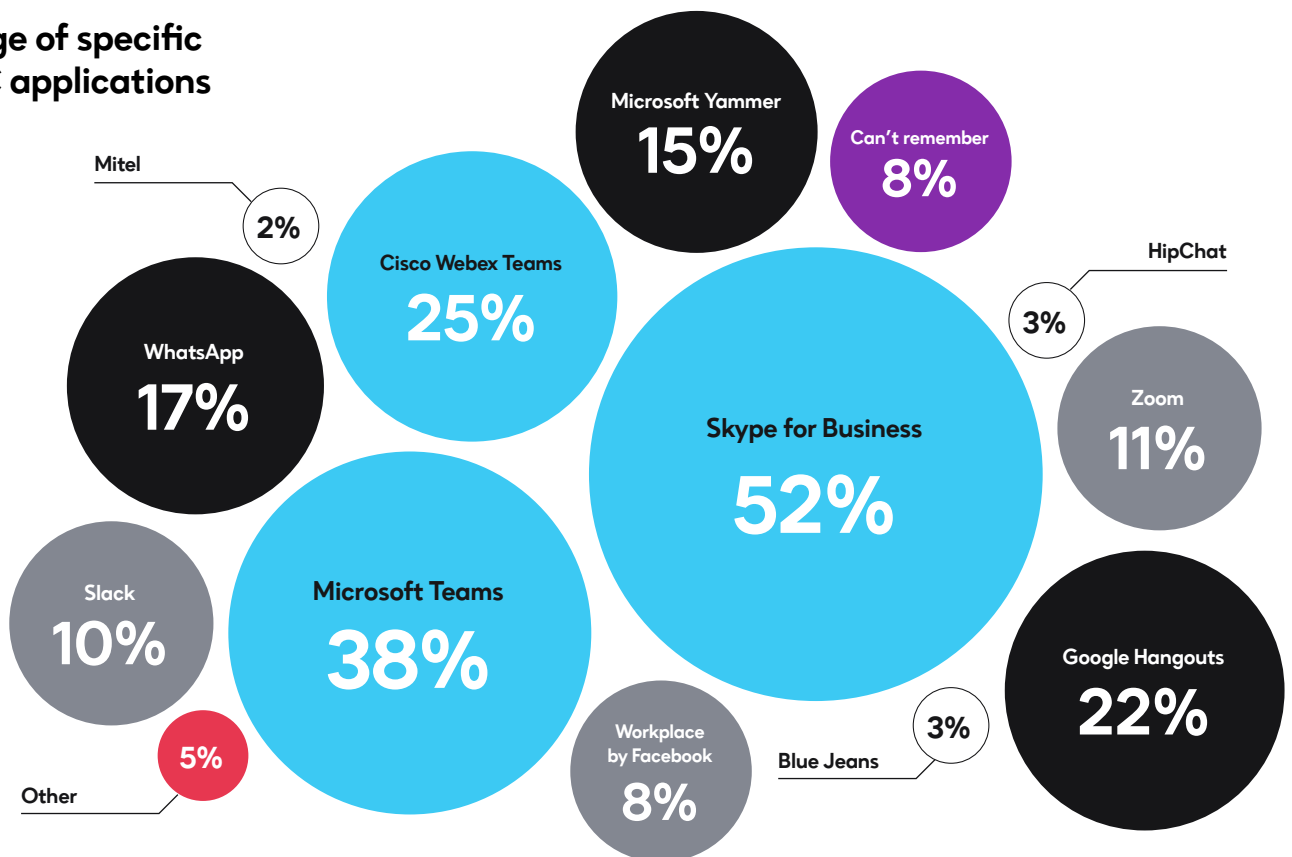
<5000

Up and comers

The smaller end of the market sees a fragmentation, with lots of different "up and coming" apps being used

500 – 2000

Usage of specific UCC applications

Mitel **2%**

Microsoft Yammer 15%

Can't remember **8%**

HipChat **3%**

Cisco Webex Teams 25%

WhatsApp 17%

Zoom 11%

Skype for Business 52%

Slack 10%

Microsoft Teams 38%

Other **5%**

Workplace by Facebook 8%

Blue Jeans **3%**

Google Hangouts 22%

Features

Calls and conferencing vitally important

On a daily basis, the most frequently used features of UCC apps are calendars and scheduling (61%), instant messaging (57%), and voice and telephony (49%).
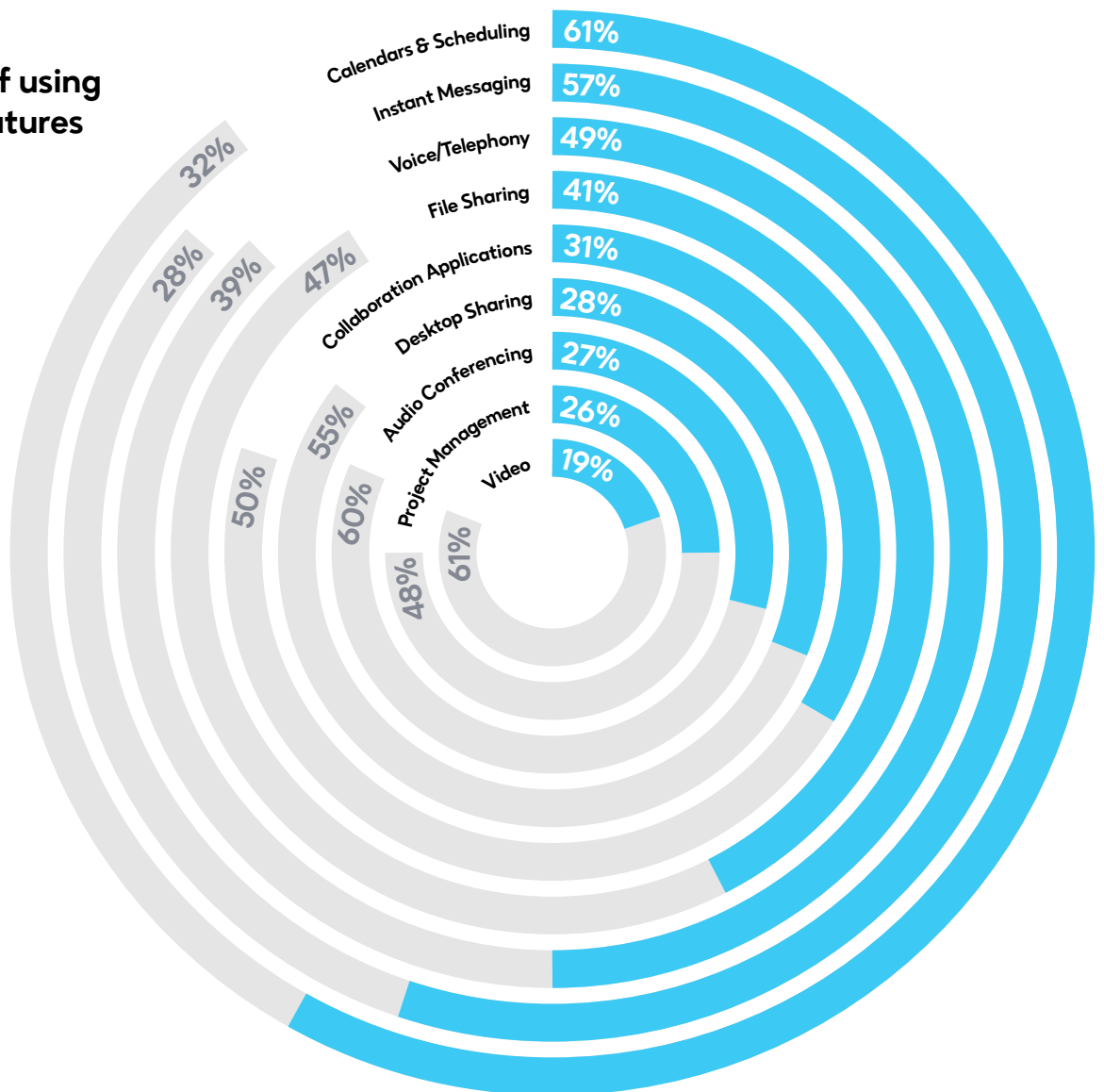
Audio conferencing (60%) and video (61%) are also frequently used, though not necessarily on a daily basis.

While frequency of use varies among features, over 60% of respondents indicated that *all* of the features were very or vitally important to doing their job.

Some of the most important features of UCC apps, as identified by respondents were voice/telephony and audio conferencing, with 78% and 74% respectively, saying these features were very or vitally important.

Frequency of using the UCC features

- ● Use daily
- ● Less than daily

Calendars & Scheduling — 61%
Instant Messaging — 57%
Voice/Telephony — 49%
File Sharing — 41%
Collaboration Applications — 31%
Desktop Sharing — 28%
Audio Conferencing — 27%
Project Management — 26%
Video — 19%

32%
28%
39%
47%
50%
55%
60%
61%
48%

Satisfaction

There is room for improvement

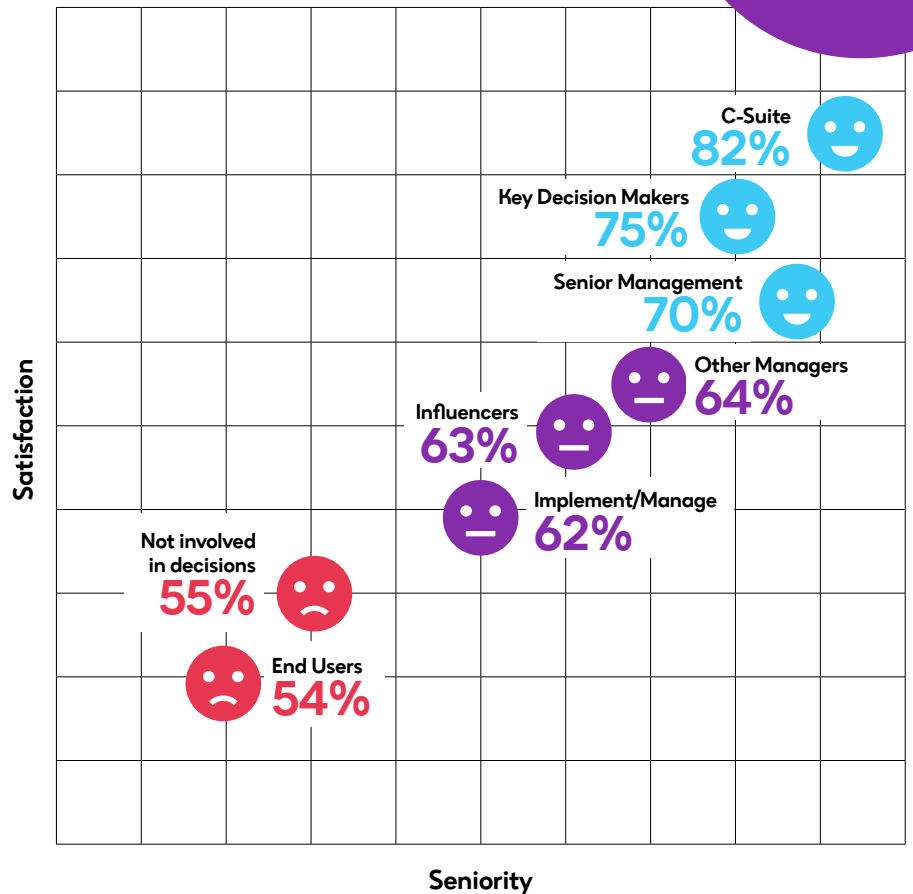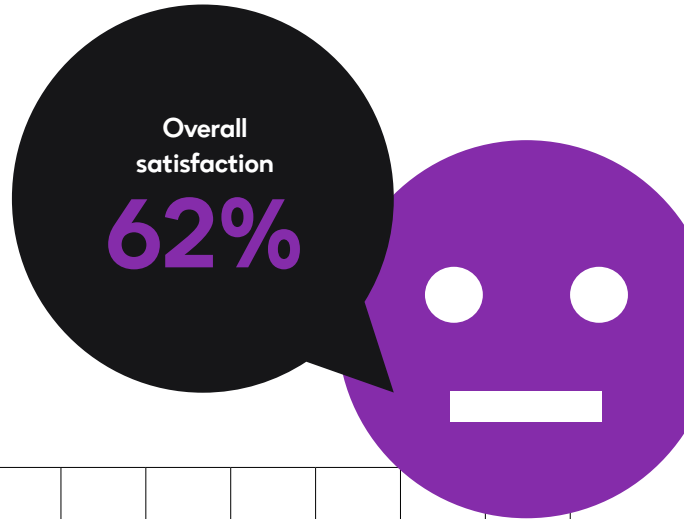Only 62% of UCC users are satisfied with the UCC applications they use at work.

Satisfaction is highest in more senior roles and declines sharply as seniority levels decrease.

This is likely related to frequency and volume of use. Non-manager end users are likely to use UCC applications more in their day-to-day activities. They would therefore have greater exposure to the issues associated with their use, which could lead to a decline in satisfaction.

While those in more senior roles are likely to receive more thorough and prompt attention from IT support when they do encounter issues, resulting in a better experience using the applications.

Satisfaction with UCC applications

% Very /
Completely Satisfied

Overall satisfaction
62%

C-Suite
82%

Key Decision Makers
75%

Senior Management
70%

Other Managers
64%

Influencers
63%

Implement/Manage
62%

Not involved in decisions
55%

End Users
54%

Satisfaction

Seniority

02

Challenges

Issues Encountered

Poor user experience negatively impacts productivity

60+%

of end users had recently encountered issues when using UCC applications in the workplace.

The top issues employees encountered relate to conferencing and collaboration features of UCC applications.

25% of respondents said they had experienced poor audio quality, 23% said they encountered connectivity problems, a further 19% said there was insufficient internet bandwidth to run the application effectively, and 17% experience poor video quality.

These issues are related to an applications' performance, while less frequently encountered issues are related to usability. The most frequently encountered issues were also the most likely to cause a moderate to severe impact on productivity.

	Issues encountered	Impact (moderate / severe)
Poor quality audio	25%	15%
Inability to connect	23%	17%
Insufficient internet connectivity	19%	14%
Poor quality video	17%	9%
Inability to share screen	14%	9%
Couldn't figure out how to use the application	12%	6%
Inability to share file/document	11%	7%
App version too hard to use/ doesn't work as expected	9%	6%
Poor usability	9%	6%
No phone/tablet app version	6%	3%
Other	1%	1%

Issues Reported

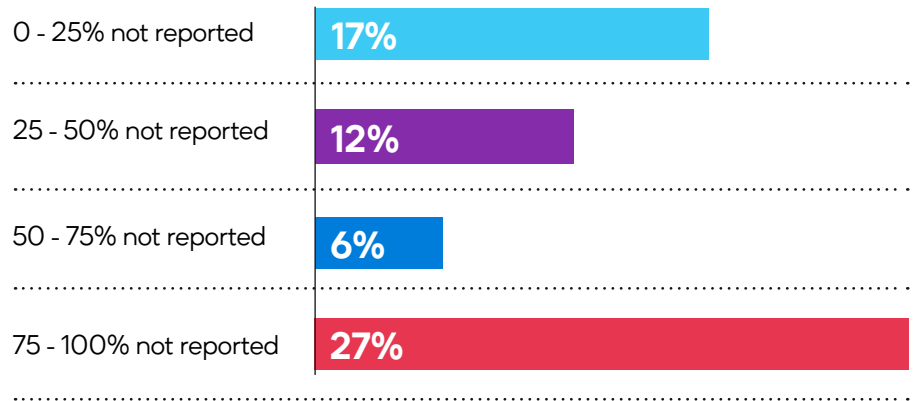**Significant non-reporting of UCC problems**

One in four respondents said they do not report 75% or more of issues when they are encountered.

Employees in smaller organizations tend to be more proactive in reporting issues when they are encountered compared to larger organizations.

This suggests there could be a significant gap between the perceived success and the actual success of UCC app performance and adoption, as a large portion of problems are not being reported to IT departments.

Anecdotal feedback suggests the primary reason for this is a lack of faith in IT departments to resolve the issue in a timely manner.

% unreported UCC issues

0 - 25% not reported **17%**

25 - 50% not reported **12%**

50 - 75% not reported **6%**

75 - 100% not reported **27%**

"Our IT department is over worked and slow to respond"

Over **25%** of users do not report issues

"It takes at least 1-2 days to resolve even the most dire emergency and we needed a solution right then"

"I've complained so many times and there is no resolution so it's a waste of time to keep reporting it"

Work arounds

Reactive solutions are unproductive

In lieu of reporting issues encountered, employees often resorted to for "working around" the issue. The most common methods include asking everyone to dial back in, using an alternative form of audio and using a different device.

Smaller organizations are more agile in finding different ways to work around the issues.

As organization size grows and IT ecosystems increase in scale and complexity, there is less flexibility in finding alternative ways to solve issues.

While reactively "working around" issues may solve them temporarily, the requirement to identify and coordinate an alternative solution is a an unproductive use of time and resource.
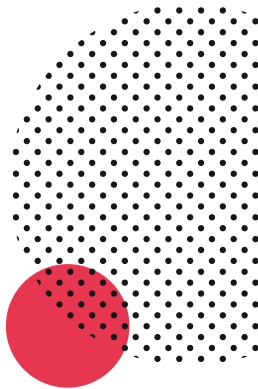
Methods of working around the issue

Asked everyone to dial back in

22%

Used an alternative form of audio

20%

Used a different device

19%

Rescheduled the meeting / call / discussion

16%

Used a different UCC application

11%

Changed meeting rooms

11%

Called meeting participants separately

9%

Gave up / cancelled the meeting

7%

Other

3%
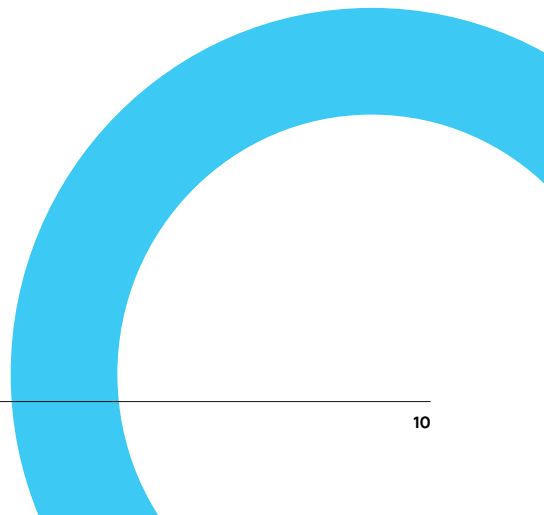
Impact

Poor performance is impacting ROI

Respondents identified that poorly performing UCC apps could have a negative impact on user experience and adoption.

Impact of the recurring issues

58%	**Reduced productivity**
37%	**General underutilization of UCC**
34%	**Workflow problems**
32%	**Data quality issues**
32%	**Loss of engagement**
29%	**Security risks**
29%	**Reduced collaboration**
29%	**Reduced morale**
24%	**Loss of trust in management**
3%	**Don't know**
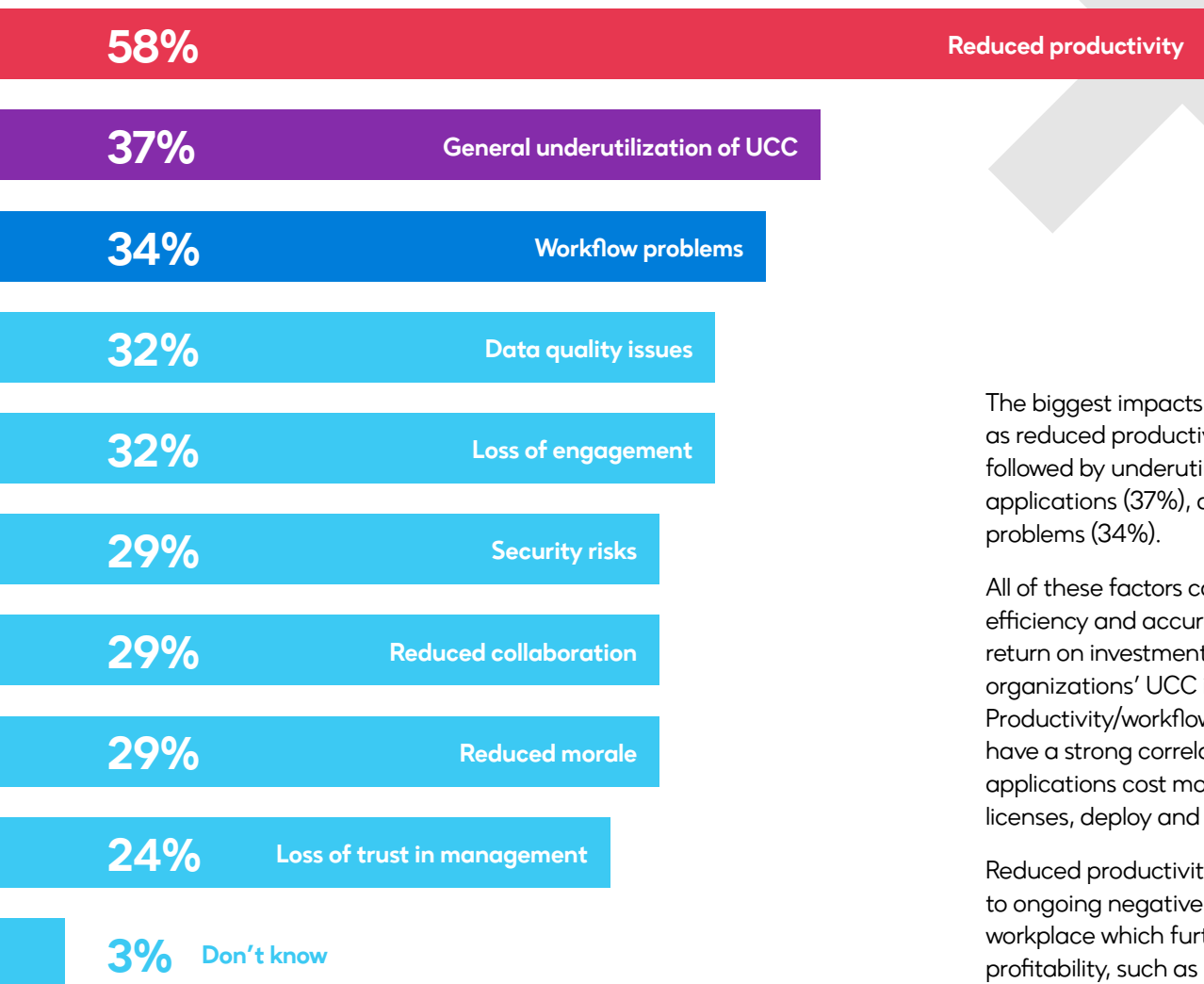
The biggest impacts were identified as reduced productivity (58%), followed by underutilization of UCC applications (37%), and workflow problems (34%).

All of these factors can impact the efficiency and accuracy of the return on investment (ROI) on your organizations' UCC investment. Productivity/workflow and profitability have a strong correlation, while UCC applications cost money to purchase licenses, deploy and maintain.

Reduced productivity can also lead to ongoing negative effects on a workplace which further impact profitability, such as low employee morale and motivation.

Transition to the Cloud

03

Current Landscape

Microsoft and Cisco leading the way to the Cloud

Almost two thirds of organizations have migrated at least some of their UCC applications to cloud-based services.

Unsurprisingly, the most popular of these applications are Microsoft Teams, Skype for Business Online and Cisco Webex Teams. Though there is a huge variety of cloud-based tools and applications that organizations are utilizing.

% of organizations that have migrated to cloud-based UCC applications

500 – 1,999
62%

2,000 – 4,999
75%

5,000 – 10,000
61%

10,000+
61%
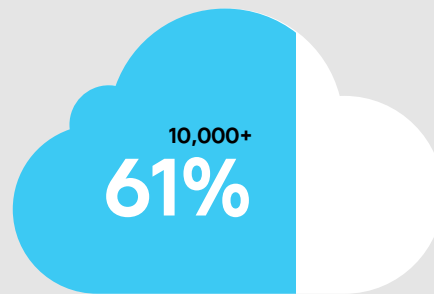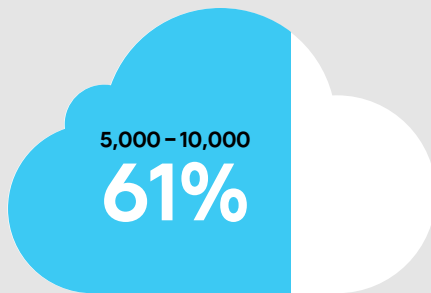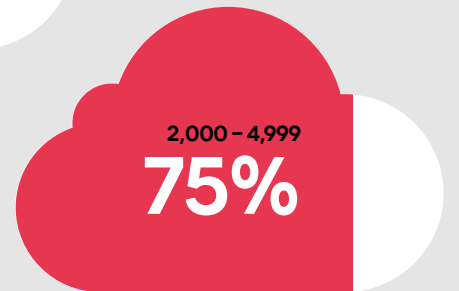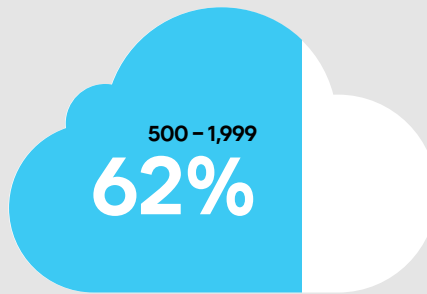
Barriers

Security a major concern

Of the organizations that have migrated some or part of their UCC applications to the cloud, many encountered issues during the transition process, mostly around applications' usability and connectivity.

Of organizations who are not currently using cloud-based UCC applications, the main barrier to migration was security concerns (48%). Interestingly, other organizations reported resisting the transition to cloud-based applications as they didn't see the need for it (24%) or didn't see the value they could provide (24%).

- **Performance is slow and use is inconsistent.**

- **Some workers had trouble using the device upgrades.**

- **Access is controlled by a parent company in another country and this created difficulties.**

- **We had limited ability to connect employees remotely.**

- **Difficult to integrate existing apps.**

Main reasons for not planning to migrate

Security concerns
48%

Don't see the need
24%

Don't see the value they could provide
24%

Too expensive
14%

Never heard of them
10%

Don't know enough
7%

04

Performance Management

Tools

Link between performance management and satisfaction

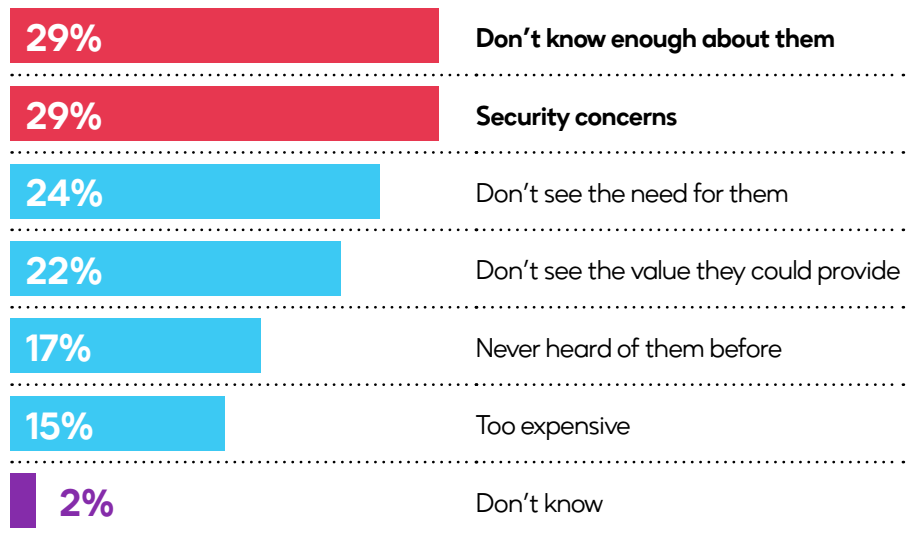**3/5** organizations are currently using PM tools

Only 3 in 5 organizations are currently using performance management (PM) tools to monitor their UCC environments. Of those companies, 78% of users reported being satisfied or extremely satisfied with the performance management tools and benefits they provide.
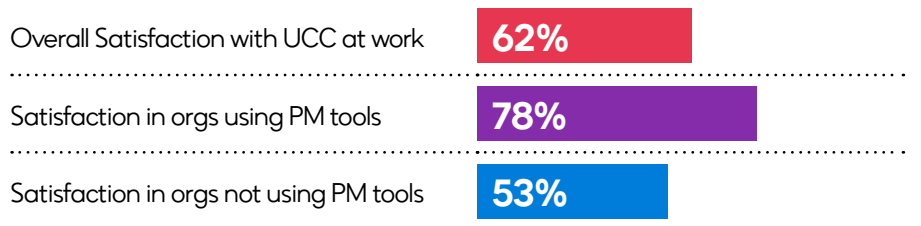
Of the 2 in 5 organizations not using performance management tools, the primary reasons were that they did not know enough about them (29%) and security concerns (29%).

There is a strong correlation between using performance management tools to monitor UCC environments and overall satisfaction with UCC apps. Employees in organizations that use performance management tools reported a 78% satisfaction level, while the satisfaction level of those in organizations that do not use performance management tools was only 53%.

Reasons for not using performance management tools:

29%	**Don't know enough about them**
29%	**Security concerns**
24%	Don't see the need for them
22%	Don't see the value they could provide
17%	Never heard of them before
15%	Too expensive
2%	Don't know

PM tools and UCC Satisfaction

Overall Satisfaction with UCC at work	**62%**
Satisfaction in orgs using PM tools	**78%**
Satisfaction in orgs not using PM tools	**53%**

The Approach

When the research was conducted
21 – 31 May 2019

Length of the survey
12 min online survey

Total sample size
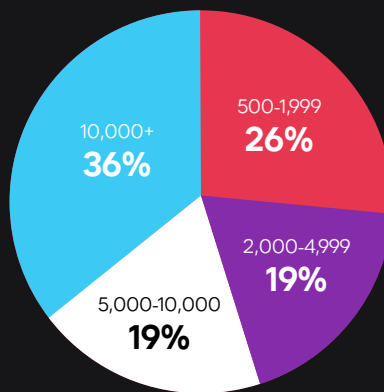**n=503 employees
of US businesses**

Who was included in the research
**Work for an
organization with
500+ employees**
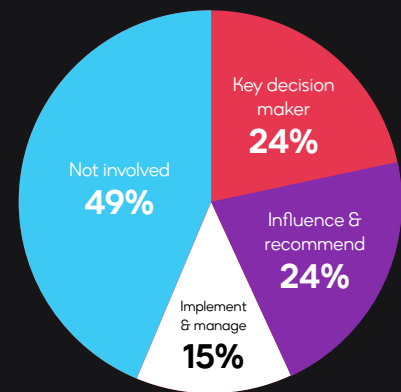
**Seniority across
four levels:**
- Owner / Exec / C-suite
- Senior Management
- Other Managers /
  Associate Directors
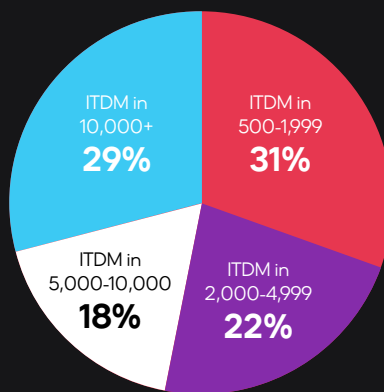- Non-manager

Sample breakdown

By organization size

- 500-1,999 **26%**
- 2,000-4,999 **19%**
- 5,000-10,000 **19%**
- 10,000+ **36%**

By role in IT decision making

- Key decision maker **24%**
- Influence & recommend **24%**
- Implement & manage **15%**
- Not involved **49%**

Decision makers by org size

- ITDM in 500-1,999 **31%**
- ITDM in 2,000-4,999 **22%**
- ITDM in 5,000-10,000 **18%**
- ITDM in 10,000+ **29%**

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