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Extending the Skype Experience to Every Meeting Room

Implement Organization-wide Video Conferencing with Skype Room Systems

A Frost & Sullivan White Paper

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INTRODUCTION

For meetings to be truly effective, capabilities like video conferencing, screen sharing, and white boarding have become must-haves for all participants. Frost & Sullivan estimates that over 96% of meeting rooms currently are only equipped with traditional projectors or displays and audio communications. As a result, a large percentage of business users are missing out on the rich interactions that lead to more productive meetings and better business outcomes. Traditional barriers to broader video conferencing usage have included complex technology and expensive equipment. Microsoft, in partnership with audio/video technology partners, is breaking down these barriers and bringing HD audio/video experience and rich content sharing to every meeting room, with a user experience that is as simple as touching a screen.

Partnering with leading A/V technology vendors like Logitech, Polycom and Crestron, Microsoft is extending the Skype Meeting experience to any meeting space, including huddle rooms, open spaces, large conference rooms, classrooms and auditoriums. Logitech is the first company to ship a complete solution optimized for Skype Room Systems with certified components that make it possible to launch meetings with one touch of a button and instantly share content, both in-room and remotely. This paper demystifies the capabilities of the new Skype Room System. It also lays down the steps to implement affordable and easy-to-use video conferencing over Skype for Business by leveraging partner devices that bring rich video meetings to everyone in the modern workplace.

STATE OF MODERN MEETINGS

Meetings form a core communication pillar of any organization's collaboration culture and structure. Studies have indicated that most business professionals spend 60 hours per month in meetings, which is almost 40% of their work hours, and only half of this meeting time is considered productive.[1] That adds up to about 30 hours every month per information worker in unproductive or ineffective meeting time.[2] In sum, the estimated cost of unproductive meetings runs into tens of billions of dollars per year in the US alone.[1]

In today's globalized mobile world, amidst the rise of the distributed enterprise, a substantial percent of these meetings involve at least one remote participant. In a Microsoft survey of business users, 78% of the people said they communicate with partners or colleagues that are located somewhere else on a daily basis.[3] However, only 3.6% of the meeting rooms in the world are equipped with any type of video conferencing technology.[4] This means over 96% of today's meetings rely on old-world audio communications, in which remote attendees are relegated to second-class participants. They cannot participate in critical content sharing as well as completely miss the visual cues that lead to better meeting performance and enhanced decision making.

In an era of massive digital transformation, businesses are changing the way they use technology to radically improve their performance and reach. Technology advances, including Artificial Intelligence, cloud computing, analytics, mobility, and social media, are redefining the modern workplace. To better connect people, businesses must invest in delivering collaboration experiences across the spectrum, conveying all forms of human expression — verbal, written, and visual. Modern meetings enable fluid conversations that are centered on intuitive and natural forms of communications; therefore, the outmoded meetings of yesterday that rely solely on audio communications must go.

Video conferencing is becoming a norm for businesses undergoing digital transformation by offering rich and agile collaboration across multiple functional teams within and outside the organization.

VIDEO CONFERENCING: INCREASING EMPHASIS ON STRATEGIC VALUE

The move from traditional business phone systems to multi-modal communication platforms supporting rich audio, video and data applications is well underway. The massive shift is due in part to organizational decision makers requiring that their communications technology investments become a strategic business asset and deliver far more than the simple utility of dial tone and voicemail that was previously acceptable. Organizations are specifically looking at their communications technology as a means to achieve strategic benefits,

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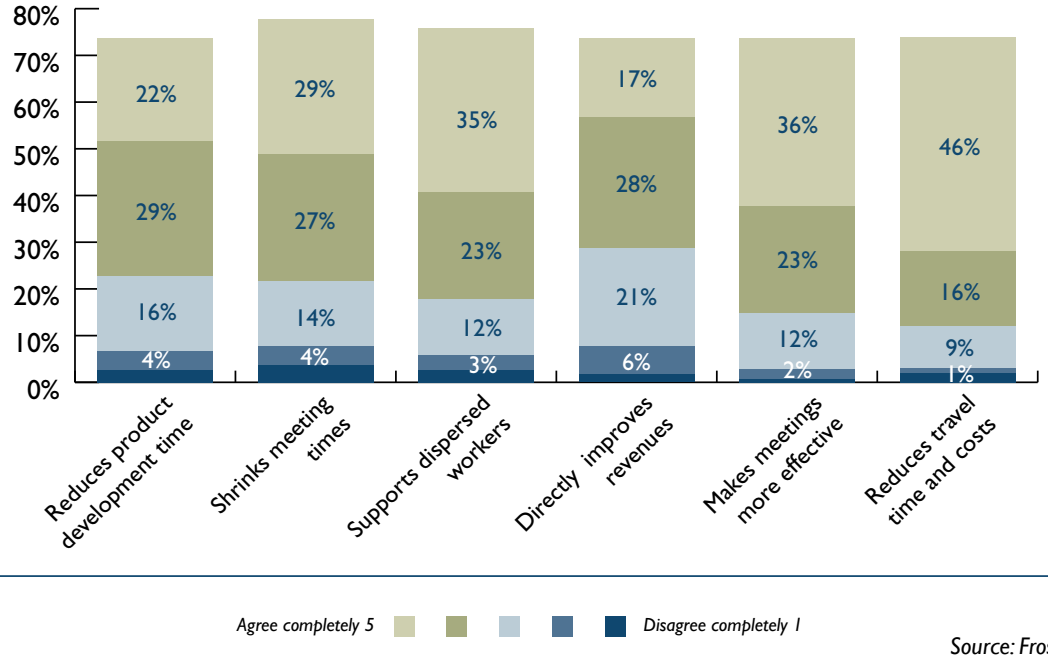
such as expanding into new markets, boosting product innovation, improving marketing effectiveness, enhancing collaboration, gaining competitive advantages, accelerating decision-making, and improving the customer experience.

In a recent Frost & Sullivan survey of C-level executives, video conferencing is seen by a dominant percent of users as critical in reducing meeting times and making meetings more effective, leading to improved productivity and revenues (Exhibit 1).

Exhibit 1: Growing Strategic Value of Video Conferencing



Source: Frost & Sullivan

In June 2016, Frost & Sullivan conducted an extensive analysis of the enterprise video conferencing market in the report, "Growth Opportunities in the Video Conferencing Market: A Holistic Evaluation of Technology Adoption and Growth Trends." The report states, "User demand for video communications has been accelerating. The proliferation of mobile devices combined with an unending appetite to consume video in all its forms has been a major factor in breaking traditional barriers to adoption." The overall video conferencing market is on a high growth trajectory and is forecast to grow at a compound annual growth rate (CAGR) of 13.2% from 2015 to 2020 to reach $11.44 billion by 2020. While video has become the de facto mode for modern communications for consumers globally, usage by business users has remained riddled with challenges. It has primarily remained complex to use and expensive to deploy on a wide scale.

SKYPE ROOM SYSTEMS CHANGE THE STATUS QUO

Microsoft has established itself as a leading provider in today's business communications marketplace. Skype for Business, Microsoft's unified communications (UC) platform, offers a tightly integrated set of real-time synchronous communications applications that allows users to do instant messaging (IM), audio and video calling, content and desktop sharing, and file transfer.

- Skype for Business has more than 140 million licensed users and is continuing on a strong growth trajectory.
- In addition to an already large installed base of on-premises users, Skype for Business adoption is solidifying in the cloud. Office 365 commercial license sales have reached a monthly active user count of 85 million users.
- Microsoft has reported that premium workloads, which include Skype for Business, form a dominant 60% of the Office 365 commercial license. Office

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365 commercial seats were also up 40% year-over-year, and revenue up 54% in constant currency.

- Frost & Sullivan estimates that in 2016, Microsoft held a 50% market share of UC licenses.

In a nutshell, Microsoft is becoming the dominant force in business communications. Skype for Business adoption continues to accelerate due to a number of drivers, including the tactical benefits of UC noted earlier, as well as attributes specific to Skype for Business.

More and more individuals are using Skype for Business meetings on a daily basis to connect with colleagues and enhance collaboration with their partners or clients.

In order to bring the familiar and easy-to-use Skype for Business meeting experience to meeting rooms of any size, Microsoft has launched Skype Room System (formerly codenamed Project Rigel). It allows users to quickly and easily join meetings, make phone calls, and instantly share content in the room and remotely—all from the elegant touch screen of a Surface Pro 4 that has the Skype Room System software pre-installed with a customized configuration of Windows 10. Skype Room System devices are aimed at transforming every meeting room into a rich collaborative meeting space and are available as a bundled solution, along with audio/video peripherals from its technology partners Logitech, Crestron, and Polycom.

Exhibit 2: Transform Your Meeting Rooms with Skype Room System

	User Experience – User experience is prime and sets a compelling growth track for technology adoption. It is estimated that a typical video call today takes anywhere from 8 to 10 minutes to launch and get started. The new Skype Room System devices place a strong emphasis on product design and usability, enabling users with instant meetings with a "one-touch join." Users can see their scheduled meetings prominently displayed and can start them with a tap. If they haven't scheduled a meeting, they can invite attendees from the console or add the room to an existing conference call.		**Leverage Existing Investments –** Skype Room System devices make it possible to upgrade any meeting experience without the need to replace legacy AV equipment. Pre-existing devices include installed audio, displays and projectors. With price points starting at $2,000, Skype Room System provides a cost-effective solution for every meeting space.
	Rich Content – Skype for Business meeting room solutions make sharing content simple. When users want to locally project content, Skype for Business meeting room solutions automatically share the projection with all attendees. SmartDock and Microsoft Surface Pro 4 optimize the Skype for Business collaboration experience in meeting spaces. Users can leave their laptop at their desk, walk into any meeting space, and start an optimized Skype for Business video conference with one touch.		**Consistent experience –** Skype Room System devices offer a consistent user experience that can be applied globally across all meeting spaces. A primary advantage of Skype room solutions is that, as AV hardware standards and capabilities evolve, the software-based user experience remains consistent and users do not need to adapt to different technologies just because one meeting room's equipment was installed at a different time than another's.
	Extensibility – Continued Skype for Business enhancements such as the addition of PSTN calling and conferencing, integration with Teams workspaces, Skype Meeting Broadcast webcasting, and more sets to add to the platform's applicability and appeal.		**Ease of management –** Since Skype Room System devices are run on Windows10, the same policies, operations and management tools used throughout the enterprise can be applied to Skype Room System devices. This simplifies the management of video conferencing room systems since there is no longer a requirement for a stand-alone management tool or specialized IT expertise.

Source: Frost & Sullivan

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EXTENDING MEETINGS TO HUDDLE ROOMS AND SMALL MEETING SPACES

Driven by the needs of the modern mobile worker and the impact of consumerization of IT, today's digital workplace promotes employee agility and engagement by putting easily accessible video collaboration in the hands of all users. The nature of meetings is changing. Meetings are becoming more frequent and spontaneous, less structured and shorter in duration. As a result, rich audio, video and content collaboration is moving beyond the four walls of a conference room down to desktops, huddle rooms and open workspaces. Huddle rooms are smaller work/conference areas typically accommodating up to four people and are more suitable for ad hoc collaboration and interactions. The number of small meeting rooms and huddle spaces in the enterprise is rapidly growing. It is estimated that, globally, there are 30 to 40 million huddle rooms and less than 2% of those are video enabled.[5]

Skype Room System devices are a particularly good fit for extending rich video collaboration and content sharing to huddle rooms due to their ease of use, low price points and centralized management capabilities. Because Skype for Business enables this rich experience at such a low price compared to alternative meeting room systems, the opportunity for customers to deploy a cutting-edge collaboration experience to all digital workers is huge.

Exhibit 3: Growing Collaboration in Huddle Rooms

Source: Frost & Sullivan

LOGITECH – AN ESSENTIAL COMPANION TO SKYPE FOR BUSINESS

Logitech's solution, SmartDock, for Skype Room System combines multiple AV components into a purpose-built, Skype Room System-certified solution, taking the complexity and clutter out of the conference room.

SmartDock is an AV control console that combines Logitech's Group and ConferenceCam Connect cameras with Surface Pro 4 and the Skype Room System software. Logitech is the first company to market a complete solution optimized for Skype Room Systems with certified components.

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Offering ease of use and quality of experience along with a high-quality endpoint can make or break the entire communications experience. Companies like Logitech are playing a critical role in supporting Microsoft's goal of extending rich video and content sharing to every meeting room. Logitech is a long time technology partner of Microsoft and has over 17 million Skype-certified devices deployed globally.

Users can leverage many critical design elements of SmartDock for Skype Room System to bring rich interactions to everyone in the modern workplace:

- The Surface Pro 4 acts as an elegant console and a Skype for Business client. Its associated calendar shows all scheduled meetings, enabling users with a single click to join and instantly share content in-room and remotely. Additionally, users can start an ad-hoc meeting from the Skype Room System interface.

- Logitech offers SmartDock for Skype Room System in two configurations that offer HD-quality video and audio to enhance the Skype meeting experience. For huddle rooms and smaller meeting spaces, it bundles the SmartDock with Logitech ConferenceCam Connect video camera. For larger rooms, it includes the new Logitech Group ConferenceCam, which offers a 1080p 10x optical zoom lens, wireless remote, and high-fidelity acoustic base capable of supporting up to 20 participants. For even larger spaces, such as classrooms or auditoriums, Logitech offers the Logitech PTZPro 1080p 10x zoom camera as a standalone to be used with installed audio solutions.

- A powered and secure tablet mount provides device protection and allows businesses to confidently leave a Surface Pro 4 unattended in any conference room where SmartDock is installed. A unique feature of the mount is that it can swivel 180 degrees so everyone in the room can easily access the screen control.

- SmartDock offers a clutter-free experience by adding all the connectivity users want, including dual HDMI out for 1080p displays, HDMI in for local content sharing, three USB ports, Gigabit Ethernet, and a headset jack. The optional Extender Box addresses cabling in larger conference rooms and keeps conference tables clean and clutter-free.

- When users need to share a presentation, demo, or other content on their laptop, they simply connect through the HDMI input built into SmartDock and begin presenting from their personal device.

- Users can natively save content to the docked Surface Pro or share via cloud file share, i.e., Microsoft OneDrive, or email the content after the meeting.

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- Users can access the familiar Skype for Business UI and applications, including IM/chat in the meeting room, via the SmartDock and Surface Pro 4.

- An embedded motion sensor activates the system when anyone enters the room. When people are not detected in the room and no call is in progress, the SmartDock and Surface Pro 4 are both put into power-saving mode.

CUSTOMER USE CASE–MORGAN FRANKLIN SELECTS LOGITECH SMARTDOCK TO INCREASE VIDEO REACH

MorganFranklin Consulting, headquartered in the Washington, D.C. area, is a strategy and execution-focused business consulting firm and professional advisor. The company provides strategic thinking and hands-on support to help global public companies, fast-growing private companies, and government clients manage growth and maximize performance. The firm delivers strategy, accounting and transaction services; risk and compliance; and information management and technology solutions.

As a Microsoft Technology Adoption Program (TAP) customer, MorganFranklin was an early adopter of Office 365 and Skype for Business. All its employees were on the Office 365 platform six days after its release. MorganFranklin was looking for ways to allow its employees to meet face to face and share rich content with highly dispersed team members, partners and clients, all at low costs, while reducing unproductive travel time.

In an industry where building and maintaining trust is vital, the face-to-face communications experience offered by video conferencing reinforces relationships with clients. However, the IT department sought to avoid running into the usability challenges it faced with the traditional video conferencing solutions. MorganFranklin chose Logitech SmartDock to simplify user meeting experiences and extend video conferencing to more environments.

> *"User adoption is critical for our IT success, and Logitech SmartDock with Skype Room Systems makes it easy to collaborate over video. The fact that it is highly affordable enables us to light up multiple rooms for the price of a single traditional video conference room."*
>
> *-Franzuha Byrd, Director of IT*

CONCLUSION

Effective collaboration and meetings must bring together people, content, and ideas in a fluid way. People need communications tools that allow them to express themselves in the most natural way possible across locations and devices. The next generation of Skype for Business meeting room solutions is doing just that by making the user experience paramount, while the technology itself becomes invisible so users can focus on the relevant business tasks.

SOURCES

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Schedule a meeting with our global team to experience our thought leadership and to integrate your ideas, opportunities and challenges into the discussion.

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SILICON VALLEY
3211 Scott Blvd
Santa Clara, CA 95054
Tel 650.475.4500
Fax 650.475.1571

SAN ANTONIO
7550 West Interstate 10
Suite 400
San Antonio, TX 78229
Tel 210.348.1000
Fax 210.348.1003

LONDON
Floor 3 - Building 5,
Chiswick Business Park
566 Chiswick High Road
London W4 5YF
Tel +44 (0)20 8996 8500
Fax +44 (0)20 8994 1389

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3211 Scott Blvd
Santa Clara CA, 95054