



Nemertes

Collaborating Across Company Borders

Collaborative workspaces overcome existing application limitations

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Executive Summary

Enterprises are rapidly deploying team collaboration and cloud-based unified communications and customer-engagement platforms, primarily to support internal collaboration and/or customer-facing interactions. Team and UCaaS platforms, however, are generally not optimized, or primarily designed, for cross-company collaboration. This gap creates management and efficiency challenges for projects that involve complex interactions or ongoing collaborative activities among people from multiple companies. Collaborative workspaces that integrate messaging, file management, meetings, and enterprise applications create the ability to offer a consistent user experience and apply project-wide security and governance controls; some can support creation of templates to speed project setup and management and AI-enabled functions to improve ease of use.

Adopting collaborative workspaces overcomes limitations of team collaboration and unified communications applications by removing barriers to effective internal and external collaboration. This results in better project collaboration, and increased opportunities to deliver measurable business value. Business and IT leaders should

- Identify potential limitations in extending current collaboration capabilities across company boundaries
- Evaluate emerging collaborative workspace platforms for business benefit
- Determine security and governance requirements for cross-company collaboration
- Evaluate providers based on their ability to deliver integrated workspaces, features, and support for AI while meeting security and governance requirements
- Determine metrics for measuring success, focusing on opportunities to reduce cost, achieve revenue gains, and/or increase efficiencies.

The Cross-Company Collaboration Imperative

Today, enterprise collaboration strategies and products are largely focused on internal collaboration and customer interaction. Internal platforms are rapidly converging around the concept of team collaboration to enable team members to exchange messages and share data in the context of persistent group channels. Team collaboration apps are increasingly able to integrate with other collaborative applications like file management, content creation, project management, and CRM. Internal use cases drive team collaboration deployments, with 68% of participants in *Nemertes Workplace Collaboration: 2019-2020 Research Study* citing internal projects, and 66% pointing to internal communications as the primary factors driving team collaboration adoption.

On the customer-facing side, organizations are increasingly investing in Digital Customer Experience (DCX) platforms to enable intelligent customer experiences that leverage AI, omnichannel, and mobility to increase positive outcomes for customer engagements.

Yet much of the collaboration that happens in a modern enterprise is across company borders. Project, consulting, sales, and support activities, supply chain management, development partnerships, and financial due diligence all typically involve the need for two or more organizations to securely collaborate in a variety of ways. Team collaboration and contact center platforms are typically not optimized for persistent cross-company collaboration, limiting the effectiveness and efficiency of such activities.

Today's Collaboration: Evolving to Cloud and Teams

Team collaboration is quickly becoming the core of unified communications applications, especially as organizations shift to Unified Communications-as-a-Service offerings that integrate team collaboration with calling and meeting applications. To date, 19.1% have adopted UCaaS and 17.8% are using hybrid UCaaS/on-premises or UCaaS/hosted platforms. Those using on-premises or hosted platforms plan to move off of them, with 33.2% of those using on-premises platforms and 62.6% of hosted platform customers either evaluating or planning to move to UCaaS by the end of 2020.

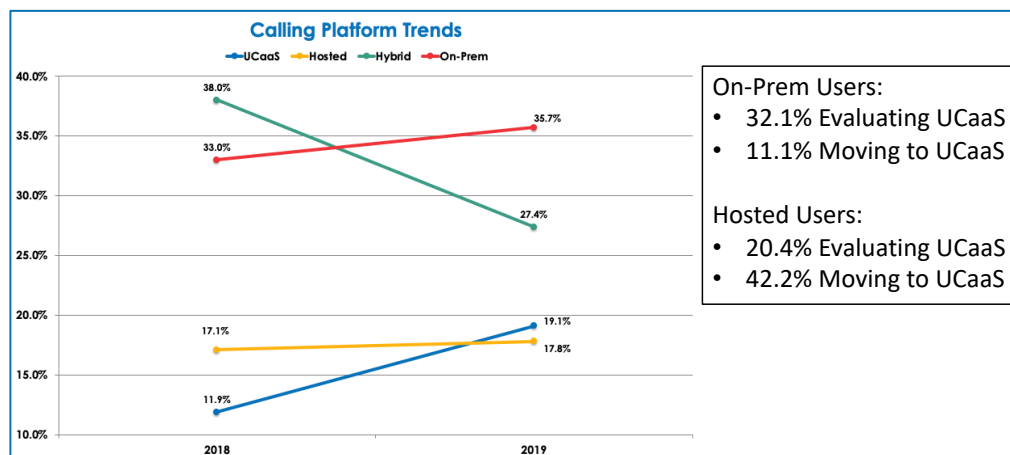


Figure 1 Calling Platform Trends

Already 33.7% of organizations have deployed team collaboration either in individual workgroups or enterprise-wide, while another 30.1% plan to do so in the future. An additional 14.6% are current evaluating team collaboration applications for future deployment. Add it all up, and 78.4% are using, planning to deploy, or evaluating team collaboration applications, a remarkable adoption rate for a technology that has only been on the market for a little more than three years.

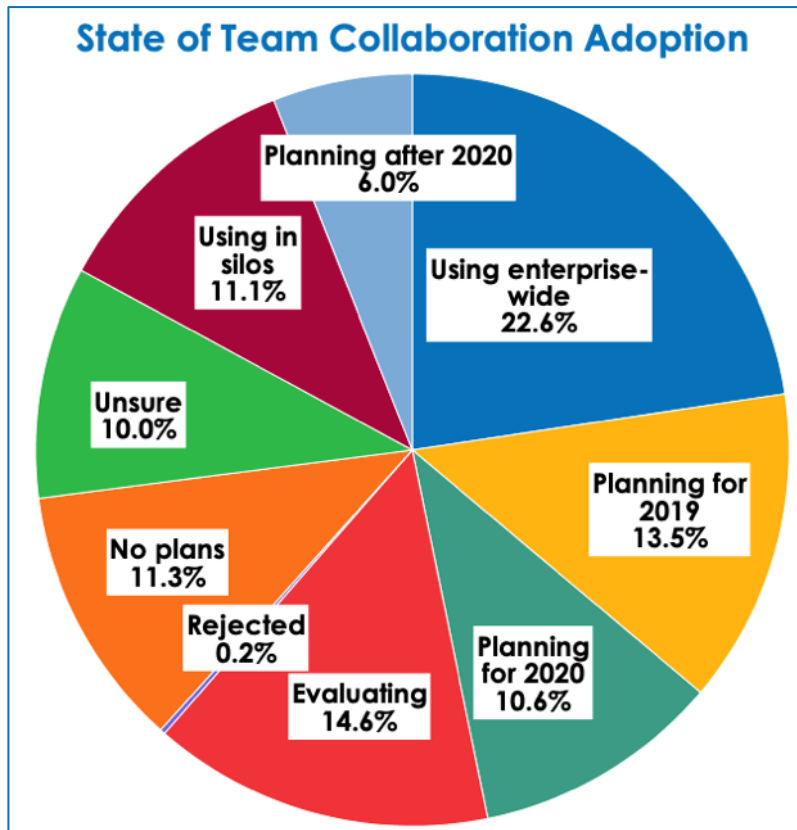


Figure 2: State of Team Collaboration Adoption

Beyond integrating calling, meetings, and messaging, team collaboration is quickly replacing email and instant messaging to become a workplace communications hub. Nearly 29% of adopters already view team collaboration as a workplace hub, providing a centralized point of collaboration for project, operational, or task-oriented teams. The ability of team collaboration applications to provide contextual virtual workspaces drives many adoption decisions, as it reduces or eliminates the need to search for relevant information across a variety of disjointed applications. Within Nemertes' Workplace Collaboration Success Group, those who had identified quantifiable revenue gains, cost savings, or productivity benefits from their team collaboration adoption, nearly half (47.4%) view team collaboration as the hub for all work and collaboration, versus just 23.6% of all others.

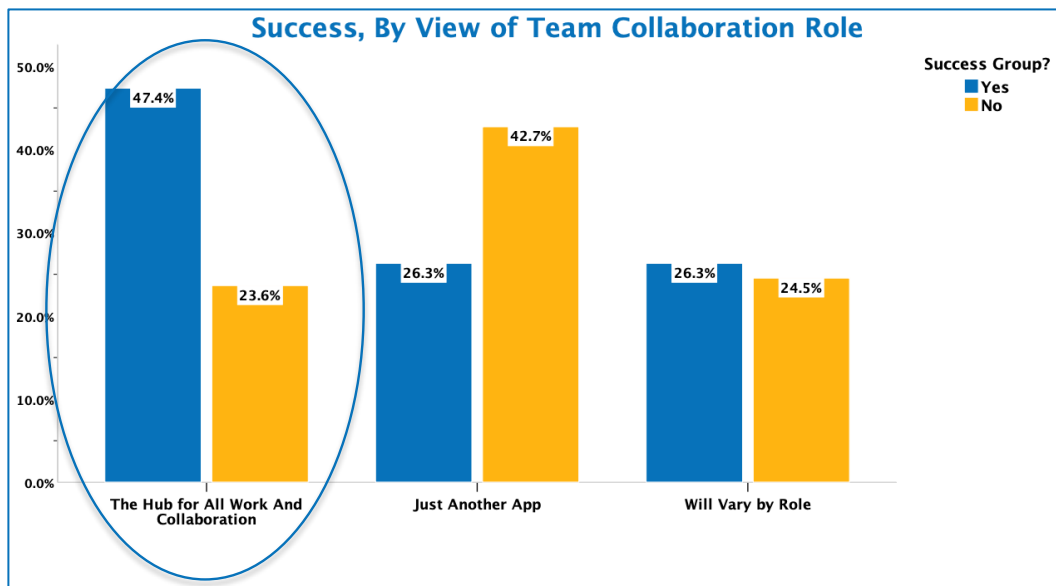


Figure 3: Workplace Collaboration Success, by View of Team Collaboration Role

Extending Collaboration Beyond Company Boundaries

While team collaboration applications and UCaaS offer demonstrated potential to achieve measurable business benefit, they are primarily geared toward internal and customer-facing collaboration. Extending these platforms across company boundaries is limited by several factors, including lack of application integrations, lack of a way to share context, lack of project-focused capabilities, and an inability to ensure consistent security, compliance and governance for all participants.

Disjointed Apps/Lack of Context

Team collaboration applications solve one of the biggest challenges in getting work done—the need to quickly find, share, and interact around relevant information in a contextual setting. However integrated applications still largely operate separately. For example, integrations may allow for launching of a meeting from within a team channel, but if the meeting occurs in an external application, participants lack context of the meeting, integrated access to the team workspace to store notes, transcripts and action items, and an easy ability to chat and share documents within the team space while in the meeting.

Example Applications Required to Support a Project:

- **Team collaboration:** (e.g. Cisco Webex Teams, Google Hangouts Chat, Microsoft Teams, Slack, etc.)
- **Meetings:** Cisco Webex Meetings, Google Hangouts, GoToMeeting, Microsoft Teams Meetings, Zoom, etc.
- **File Repository:** Box, Dropbox, Microsoft OneDrive, etc.
- **Project Management:** Asana, Inspire, Monday, Trello, etc.

The act of setting up a project requires creating workspaces in separate applications. For example, a project may require a team to interact using a team messaging app for chat, a meeting app for audio/video/web conferencing, a file repository for maintaining project-related documents, and a project management tool for orchestrating workflow and managing tasks. While team collaboration applications can serve as a central location for status updates and for team members to chat about project or team related activities, a project manager must still set up and manage each of these different applications separately. Users must jump between different apps and user interfaces. Applications must be licensed individually, usually meaning additional cost. Finally, establishing consistent ownership, governance, and security policies across applications is difficult. Project managers are unable to create templates across tools for repeating project types, nor can they tie together related projects to give managers a single view into multiple projects involving the same team, customer, or partner.

Additionally, each application is evolving at its own speed and may contain overlapping features. For instance, many meeting, project management and file repository apps now feature chat, creating the potential that project-related discussions can live in multiple separate apps. AI capabilities available within one app, for example the ability to transcribe meetings and capture action items, may not extend to others.

Finally, the separate, but integrated model may not allow for unified search. That is, a team member may have to search across multiple separate applications to find the information that they need to accomplish a task.

Cross-Company Collaboration Difficult to Manage

Team collaboration vendors largely support one of two models for cross-company collaboration:

- **Guest Access** that allows people outside the organization to connect into a team space
- **Federation** that enables one company's team collaboration app to directly connect to another's, but only if both entities use the same team collaboration platform. Third-party interoperability providers like Mio and NextPlane provide messaging connectivity between entities, but typically do not support advanced features like application integrations or voice/video calling from within one team app to another.

Guest access introduces security issues. Organizations are unable to control what their own employees do when using an outside company's team collaboration platform via a guest account. They may lack the ability to ensure consistent access and password rules. And, managing guest access requires ensuring that access is removed when no longer needed. As noted previously, projects typically involve multiple applications meaning that guest account access would need to be separately provided for all apps used by a project team. This approach doesn't scale and creates significant management overhead.

Meeting applications easily enable those outside the host organization to participate in a call, but guests may not have access to transcripts, action items, or meeting recordings unless they have an account on the host system.

Compliance

Cross-company projects often require that participants are able to log and preserve records of conversations, data, and activities. Without an integrated workspace, capable of supporting a consistent set of policies for retention, data export, and access, organizations may not be able to support compliance requirements or easily enable audit of their activities. They may not be able to create templates based on standardized policies that ensure that all collaborative efforts meet compliance requirements or support regulatory frameworks like GDPR, HIPAA, or other appropriate laws.

Evolving to Collaborative Workspaces

It's clear that for project-based collaboration, especially for cross-company project teams, workspaces must evolve beyond integrated but disjointed applications to an environment that natively enables control of, and interaction with, all project-related functions. An ideal collaborative workspace includes:

- Integrated messaging, file sharing, project and task management, and potentially the ability to hold meetings within the project space
- Extensibility across company boundaries to partners and customers, enabling easy remote participation in the team space
- Integrated search and AI functions enabling team space participants to easily find information across all project-related functions
- Ability to see interrelations between projects, for example all projects related to a single customer or partner, or sub-projects that are part of a larger engagement
- Governance, compliance, and security controls that enable collaborative workspace owners to implement a consistent set of data governance approaches.

Such an integrated workspace provides a single place to find information, share information, and manage project tasks. It enables consistent security rules and governance for all documents, messages, and other materials, and it would enable project teams to easily escalate from messaging to meetings, all within the context of the project space. Furthermore, a collaborative workspace would enable the creation of templates to reduce the startup time for new projects and would allow for AI capabilities to be applied universally to all functions within the workspace.

Collaborative Workspace Use Cases

A number of repeatable projects serve as ideal scenarios for a collaborative workspace. Examples include:

- **Merger and Acquisition (M&A)** activities that typically require groups from separate entities to come together to review documents, engage in regular meetings, and exchange messages as part of due diligence project. Today, much of this activity is

typically handled via separate email, shared data repositories, project management, and meeting applications. In a collaborative workspace environment, all these functions could live inside of a workspace for the project. Divestitures and spin-offs would similarly benefit from the ability to move from a purely internal project to one that spans two or more resulting companies.

- **Investment Management** enabling financial advisors to set up ongoing workspaces with their clients to share documents, exchange messages, and conduct regular meetings. As with M&A activities, today these tasks are largely carried out via separate email, file repositories, and conferencing or meeting applications, with no ability to create a single location to find all messages, call transcripts, and relevant files. Investment management workspaces could even include real-time securities performance information generated from data feeds, or could enable exporting of performance information to Business Intelligence (BI) platforms.
- **Complex Customer Engagements** including major purchases, healthcare, construction, or other scenarios in which customers must exchange documents with their provider, and engage in multiple communications during the life of the engagement. For example, a home purchase typically takes months and like the previous examples, usually involves collaboration via separate email, file repository, and meeting platforms. Building construction can involve a years-long project with multiple messages, sub-projects, files, and project steps and tasks, all typically managed today via disparate applications.
- **Sales Proposal Management and Engagement** is similar to a complex customer engagement in that it may involve multiple messages, meetings, exchanges of documents, and tasks, all today often handled within separate apps rather than within an integrated collaborative workspace.

Measuring the Value of Collaborative Workspaces

Ultimately the true measure of the impact of improved collaboration is on the bottom line. Successful organizations realize quantifiable benefits in terms of increased revenue, cost reduction, or productivity improvements associated with their collaboration investments.

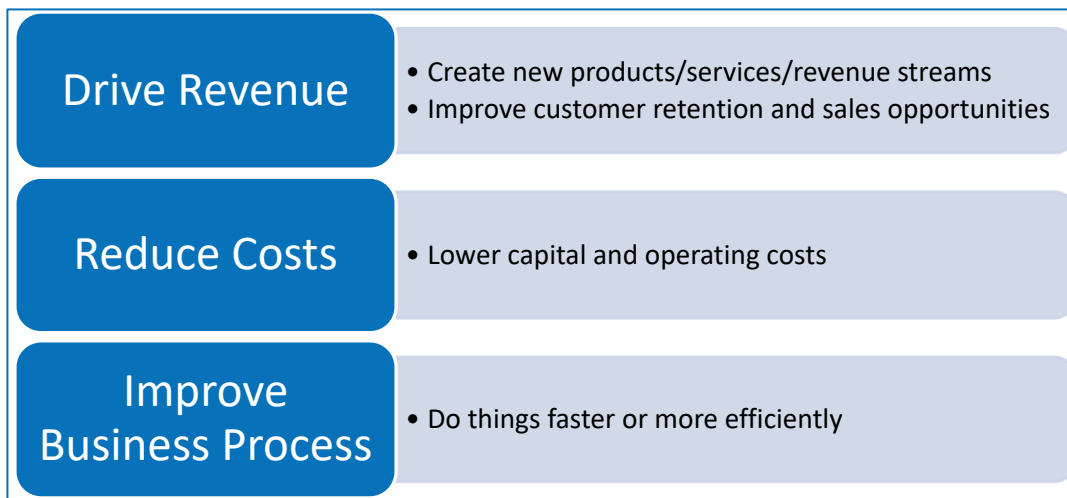


Figure 4: Collaboration Success Measurements

Just 22.6% of organizations reported that they had a workplace collaboration deployment that generated measurable success, with 66.1% identifying gains in efficiency, 45.5% reducing costs, and 24.1% achieving revenue increases. (Please see Figure 5.)

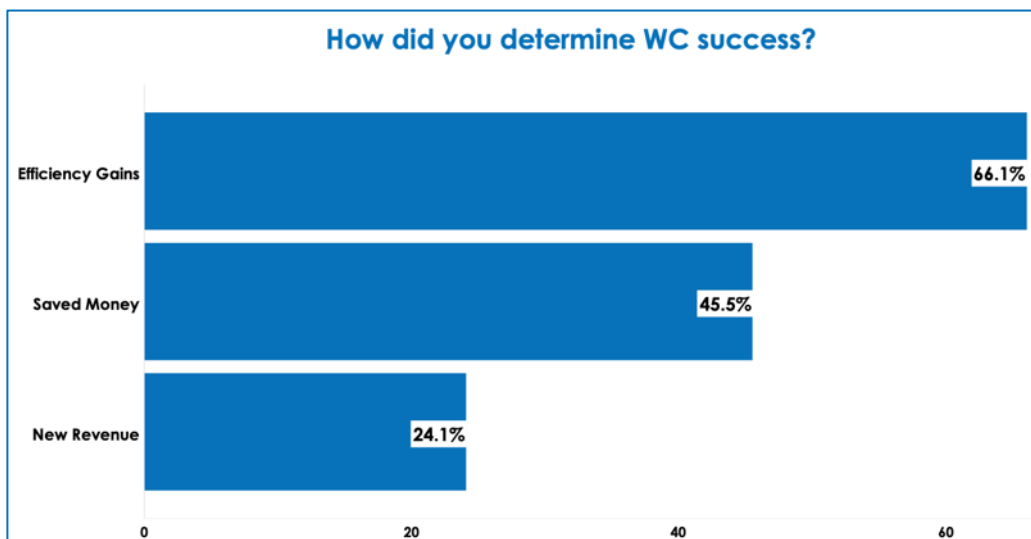


Figure 5: How did you determine WC success?

Collaborative workspaces can potentially enable measurable success in the following ways:

- **Cost savings** via shortening project lifecycles, improved work efficiency, and elimination of licensing costs for separate applications
- **Revenue gains** via increased sales, improved decision-making, and enhanced customer retention by offering a superior collaborative experience. In addition, shortening of project lifecycles and improved collaboration enables greater capacity to take on more projects

- **Efficiency gains** via faster decision-making and centralized access to all aspects of a project, reducing time spent searching for information or the potential of not identifying relevant information necessary for effective project management.

Conclusions and Recommendations

Adopting collaborative workspaces overcomes limitations of team collaboration and unified communications applications by removing barriers to effective internal and external collaboration, better supporting projects, and providing opportunities to deliver measurable business value. Business and IT leaders should

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About Nemertes: Nemertes is a global research-based advisory and consulting firm that analyzes the business value of emerging technologies. Since 2002, we have provided strategic recommendations based on data-backed operational and business metrics to help enterprise organizations deliver successful technology transformation to employees and customers. Simply put: Nemertes' better data helps clients make better decisions.