

WHY YOU NEED A VIDEO-FIRST POSTURE

Need a more agile culture? Consider your video tools.

A No Jitter Industry Insights Report



Executive Summary

As global businesses seek ways to foster relationships and company culture for innovation and agility, they're increasingly turning to video communications as the optimal solution. This is borne out in results from [No Jitter's 2018 Video Collaboration Survey](#) of enterprise IT professionals responsible, either as individuals or as part of a team, for evaluating technology or making strategic technology decisions. Of 142 enterprise IT professionals surveyed, the majority indicated their organizations already support some form of video communications — and that they expect the number of regular users to grow over the next 12 months. But complexity can hamper video deployments and limit usage. Cloud video platforms are providing a solution, delivering employees the same experience no matter how they're joining a meeting — whether from a mobile device, at a desktop, or within a room.

Creating a Video-First Culture

Doing business in today's fast-paced global economy often requires companies to facilitate conversations among far-flung employees, as well as between employees and a wide range of external collaborators. At many companies, this turns daily calendars into a patchwork of meetings — and all too often, with one conference call after another, productivity suffers. The problem isn't in meetings per se. The problem is when audioconferencing is the medium used for the meeting.

While audio-only conference calls are helpful in bringing disparately located participants into a single meeting, they do little to further the business relationship and foster trust and confidence. Establishing trust can be especially difficult when participants have never met each other and so have no personal context — did Mary, the project lead, really agree with my idea, or was she merely trying to move the conversation along? Is John really at a loss for words because of my proposal, or is he unable to respond because he wasn't paying attention to the conversation? In audio-only meetings, drifting off to read emails, check instant messages, and work on myriad other tasks is all too easy for participants who aren't involved in the conversation at the moment. Having to repeat questions or, worse, whole snippets of a discussion, not only means ineffective communications but lengthens the meeting time and bogs down progress. What's more, confidence quickly erodes when the meeting experience is suboptimal, with participants spending more time figuring out how to join and share content than in collaborative discussion. Fostering a positive business relationship is near impossible when meetings are sprinkled with interruptions like “Who said that?” and “Can you guys hear me?”

The need to help meeting participants navigate through conversations has many businesses seeking an alternative to the audio-only conference call. And, increasingly, video is becoming the go-to choice. You may understand this to be true from your own experience, with video communications popping up more and more in the meeting invites you receive or send out. Results from [No Jitter's 2018 Video Collaboration Survey](#) bear this out, as well. To better understand the use of video communications and collaboration within businesses, No Jitter sought out IT professionals who are responsible, either as individuals or as part of a team, for evaluating technology or making strategic technology decisions for their enterprise organizations. Of the 142 enterprise IT professionals surveyed, a whopping 82% indicated their organizations already support video communications. Not only that, an even higher percentage, 87%, said they expect the number of regular users to grow over the next 12 months — a trend, no doubt, spurred by easier accessibility to video communications outside the formal conference room and diminished need to deploy and manage traditional video infrastructure.

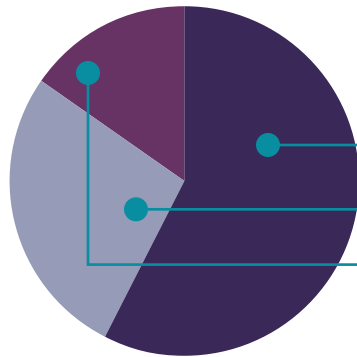
Enterprise Take on Video

Is your organization using video communications today?

82% YES



18% NO

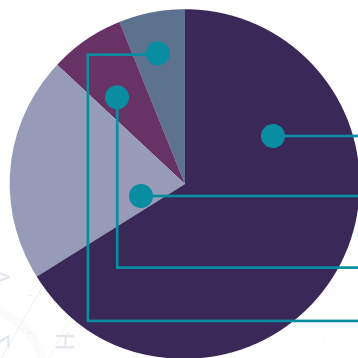


How important or unimportant does your organization consider video communications?

57% — Highly or somewhat highly important

27% — Important

15% — Not at all or somewhat important



How would you characterize your organization's use of video communications?

67% — One of a variety of options

21% — Building up to make a primary mode

7% — Limited to select use cases

6% — Video-first culture

In fact, the No Jitter survey showed that video isn't just becoming a go-to choice but a strategic imperative. The bulk of respondents — 85% — said they already consider video calls to be strategically important, with 57% characterizing video as highly or somewhat highly important. Video, for many, is now and will for the foreseeable future be just one of a variety of communications options available to employees, complementing one-to-one phone calls, group audio conferencing, instant messaging, chat, email, and so on. But one-fifth of respondents have indicated that their organizations are going further with video: building up their infrastructures or adopting cloud services with the aim of making video a primary mode of employee communications. And a smaller — but not insignificant — group said their organizations already have adopted a video-first posture.

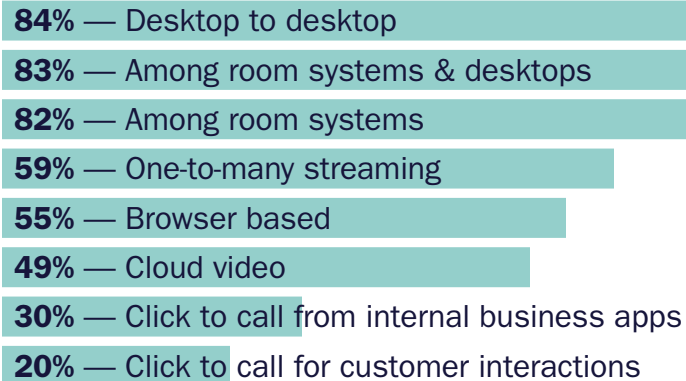
As noted previously, many businesses are turning their eyes to video communications with the goal of improving the conversation among employees and between employees and external collaborators, such as customers and partners. The gambit appears to be paying off, with the ability to foster relationships selected as the biggest benefit of video communications by No Jitter survey respondents. In your own business encounters, you've likely been gratified once or twice by the ability to put a voice and a face together — making that essential human connection. Video, by its very nature, takes away the anonymity that can crop up with non-visual modes of communication. And it provides visual cues, and clues, that can help build consensus, remove confusion, or spur further discussion. These attributes can prove especially beneficial in helping break down global barriers, as many companies have realized. In the No Jitter survey, for example, two-thirds of respondent organizations support video meetings globally. The ability to foster relationships and break down global barriers, in turn, can lead to speedier innovation. When video becomes the norm, employees can easily launch and participate in video meetings to ideate on the fly with colleagues at distant locations. That's a primary goal of many corporate video initiatives, reflected in the No Jitter survey with support for content sharing and collaboration as one of the top five decision factors when selecting video communications technology.

Understanding the Video Estate

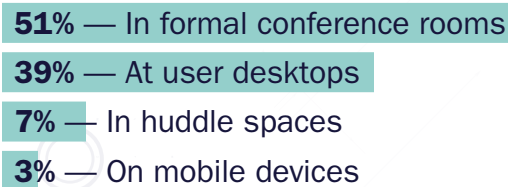
The demand is there, and the benefits are becoming clearer by the day. Video communications is compelling — so compelling, it seems, that companies are doing their best to give employees the chance to meet via video well beyond the confines of the traditional conference room. Yes, room-to-room video conferencing is a fixture at most companies; 82% of No Jitter survey respondents indicated such at their organizations. But slightly more respondents said their organizations also support video among room systems and desktops, and desktop to desktop. Additionally, nearly half or more of companies support video calling from the browser (55%) and video conferencing as a service (49%). And while not as prevalent yet, click to video calling from within business apps and customer interactions got the nod from a decent percentage of respondents, at 30% and 20%, respectively. These latter statistics reflect an emerging trend of embedding communications capabilities within the applications business users or contact center agents spend most of their time in, saving them from having to hop from one application to another. Rather than having to leave an employee management system to launch a video meeting with a new hire, for example, an HR manager would simply click an in-app button to trigger the call — concentration intact with no productivity time lost, and the details of the meeting could be kept as a record in the employee management system.

Video Meetings in Action

What type of video communications does your organization support?



Where Video Meetings Take Place



Video's wide accessibility is also evident in the types of devices on which respondent organizations support video communications. As you'd expect from the high uptake on desktop-to-desktop, desktop-to-room, and room-to-room video conferencing noted above, most companies support video on employee laptops and desktops and have room systems in place. But today's workers are nothing if not mobile, and support for video communications from smartphones is a checklist item for three-quarters of respondent organizations. In addition, employees are being encouraged to be innovative and work collaboratively, and the No Jitter survey showed some support for interactive displays and, to a lesser degree, video walls, for high-end, immersive deployments.

Even with so many choices available, the traditional conference room edges out other options as a meeting venue. No Jitter survey results show that 51% of video meetings take place in conference rooms, and 39% at the desktop. Huddle spaces, suitable for meetings of about two to eight participants, are rising in popularity. Many enterprises are turning their unused offices or other open spaces into video-enabled huddle rooms that allow small teams to get together for collaboration sessions, either on the fly or scheduled in advance. Roughly two-thirds of No Jitter respondent organizations have carved out such huddle spaces, although results also show that this is still early days in terms of usage, with fewer than 10% of users taking full advantage of them yet for video meetings. As the rise of cloud video services with complementary video appliances lowers the barrier to entry, the spread of video from the formal conference room into smaller spaces will certainly become more and more feasible — and desirable.

Addressing the Challenge of Complexity

As great as it is that businesses are building out their video communications, too much variety can be problematic, both for employees and IT. Employees, for example, end up defaulting to voice calls when video conferencing is too difficult to figure out, and IT gets unnecessarily bogged down in managing the disparate pieces of the video infrastructure. This overwhelming variety is a serious issue, as evidenced in three of the top five challenges No Jitter survey respondents identified regarding video communications:

1. Complexity of in-room systems
2. Inconsistency of experience across device types
3. Lack of interoperability among disparate systems

As businesses mature their approach to video communications, they're looking for ease of use — a top decision factor cited by No Jitter survey respondents. They want to facilitate conversation among employees, after all, not drive them mad by forcing them to remember how to start or join a video meeting depending on which conference room they're in or whether they're participating from their desktops or mobile phones. That's why many businesses are embracing video conferencing-as-a-service (VCaaS) offerings such as the Zoom Video Communications platform; with VCaaS, they can remove the complexity and friction of expensive video systems. Among No Jitter survey respondents, nearly half — 46% — said their organizations already have adopted VCaaS, and the majority recognize its strategic value. Slightly more than one-third of respondents said they already consider cloud video service to be a critical enabler for their organizations, and nearly 40% said it's becoming increasingly important for them. The uptake will continue, with another 16% of respondents saying they planned to add VCaaS to their communications portfolios within the next 12 months.

Cloud Video Rising

Only one-quarter of organizations rely on on-premises, in-room systems on the corporate network. The others rely on video conferencing as a service (VCaaS) in one way or another:

41% Hybrid of in-room

24% VCaaS, via desktop/mobile app/browser

10% VCaaS, with in-room

The best cloud video platforms provide employees the same experience no matter how they're joining a meeting — whether from a mobile device, at a desktop, or within a room. With the Zoom platform, for example, an employee can simply walk into a meeting room and click to start a video call — or likewise do so from the smartphone or desktop app. And when video meetings are that easy to launch and join, they create better engagement and improve performance. Participants, whether they're team members who always work together or have never “met,” can more quickly develop and maintain a trusted relationship — that biggest of all benefits, according to No Jitter survey respondents, as noted previously.

Making the Right Choice in Creating a Video-First Culture

Of course, not all cloud platforms are alike. When evaluating video communications platforms, be sure to suss out the answers to these three primary questions:

1. What desktop communications capabilities does the platform support? Look for a platform that, most importantly, is reliable and easy to use.

Also look for a solution that:

- Supports ad-hoc and scheduled video meetings and integrates into your calendar system
- Supports varied use cases, from 1:1 calls, sales calls, interviews, training, or all-hands meetings and webinars
- Has features such as virtual backgrounds or soft filters that encourage people to turn on video
- Allows everyone to participate on video — not just the first few who join the meeting
- Is easy to connect to external participants from any device or room system
- Is built with mobility in mind, allowing easy, fully functional participation from anywhere via features like support for Apple CarPlay or safe-driving mode and virtual backgrounds
- Works well in a variety of bandwidth situations to support people working on mobile devices, from home, or hotels
- Has easy screensharing with annotation capabilities
- Is from an innovative company investing in the future with artificial intelligence capabilities like meeting recording with smart transcripts

2. What features and functionalities does the platform support for conference rooms and other meeting spaces? Look for a platform that makes the room experience seamless. In particular, you want a solution that:

- Is software-based rather than hardware-based, for maximum versatility and scalability
- Integrates with calendar systems with one-touch to join
- Offers simple controls to record meetings or invite others
- Supports wireless screen sharing plus other collaboration features, like breakout rooms, the ability to screen share any iPad/iPhone app, co-annotation on shared screens, whiteboarding, and multishare capability
- Provides integrated audio with VoIP as well as global toll-free options
- Has the ability to support traditional H.323 and SIP devices
- Includes scheduling displays for room availability and meeting details
- Is able to turn video screens into digital signage
- Comes with room kits for plug-and-play simplicity
- Features dashboards and analytics to manage deployment and understand usage

3. What integrations does the platform support, and can I customize the platform with my own, as well? Look for solutions with API tools and mobile/desktop SDKs, as well as an app marketplace with integrations for scheduling, content management, CRM systems, unified login, and more.

Conclusion

Businesses are increasingly turning to video communications to meet critical corporate mandates, such as building a more cohesive workforce, spurring innovation, reducing inefficiencies, and fostering trusted relationships.

Examples among Zoom customers include:

- Delta Air Lines — credits video communications with significant improvements in engagement for employee training, plus accomplishing in three months training that previously took a full year
- 21st Century Fox — relies on video collaboration to support its creative processes, in fact, it's realized 85% adoption among 40,000 plus employees
- Uber — has established a video-first culture to support rapid growth (1,700+ Zoom Rooms in 400+ offices)

The critical success factor is the ability to allow users the same experience no matter whether they're joining a meeting from a mobile device, at their desktop, or within a conference or huddle room. Consistency of experience leads to increased usage.

About Zoom Communications

Zoom is the leader in modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, collaboration, chat, phone system, and webinars across mobile devices, desktops, and room systems. Founded in 2011, Zoom helps businesses and organizations bring their teams together in a frictionless environment to get more done. Zoom Rooms, the leading software-based conference room solution, features video and audio conferencing, wireless content sharing, and calendaring running on off-the-shelf hardware. Zoom Rooms suit any meeting or collaboration space, from huddle rooms to training centers. Zoom is a private company headquartered in San Jose, CA. Visit zoom.us and follow [@zoom_us](https://twitter.com/zoom_us).