

A Forrester Consulting  
Thought Leadership Paper  
Commissioned By Windstream  
Enterprise

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# Agility And Efficiency: Keys To Future-Proof Communications Technology

Securely Equip Your Distributed Workforce  
with UCaaS + SD-WAN

# Table Of Contents

- 3** Executive Summary
- 4** Virtual Connection Takes Center Stage
- 6** Communication Disruption Can Stop Work In Its Tracks
- 9** UCaaS Offers A Path Forward
- 12** Key Recommendations
- 13** Appendix

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Firms with UCaaS make decisions faster than those without.

## Executive Summary

Even before current conditions necessitated enormous growth in remote work, technology to support effective communications had become a critical centerpiece of helping employees to get their jobs done. The challenges for IT professionals have only grown during the COVID-19 pandemic, as they must provide high-quality and secure service for a workforce that needs to message, call, and meet virtually. To add to the headache, IT pros may lack visibility into remote access, and they do not control the last mile of connection into an employee's home. Firms must adopt a unified approach that integrates with their cloud-based workplaces to address these challenges while keeping costs low and keeping employee adoption high. Adopting unified communications as a service (UCaaS) with SD-WAN and network security can remove obstacles in communication and give firms a competitive edge.

Windstream Enterprise commissioned Forrester Consulting to evaluate UCaaS adoption, challenges, and opportunities in the market. Forrester conducted an online survey with 153 US-based IT and business decision-makers for communications technology at midsize and large companies to explore this topic. This research was conducted several months into the pandemic, and well into what Forrester has identified as the Phase Three (management) period of the pandemic response.<sup>1</sup> We found that UCaaS improves secure and reliable collaboration between employees, vendors, and customers.

### KEY FINDINGS

- › **Network performance is critical, as challenges with communications technology impact business operations.** Today more than ever, employees must use videoconferencing to do their jobs. As a result, it's the communication tool that IT decision-makers identify as the most critical. This makes network performance critical to daily business operations. However, 62% percent of respondents agree that they have experienced network downtime in the past year that negatively impacted customer experience (CX). A similar proportion witness impact to employees and business operations.
- › **Firms prefer to use a single network operator to provide unified communications.** While only 35% of respondents say their firm uses a network operator or telco as its UC service providers, 44% of respondents say they would prefer to do the same. Additionally, firms seek to truly unify their strategies, with 80% of respondents indicating their firm would prefer to use a single vendor.
- › **UCaaS improves productivity.** Firms with UCaaS make decisions faster than firms without it; they are 2.6 times as likely to have experienced shortened cycles for decision-making. In fact, UCaaS users are 1.9 times as likely to realize significantly faster problem resolution compared to firms without UCaaS.

### TERMINOLOGY

- › **UCaaS** is a multitenant cloud solution delivering calling, meeting, and messaging applications that support a wide range of mobile, video, and desktop devices including phones and conferencing room systems.

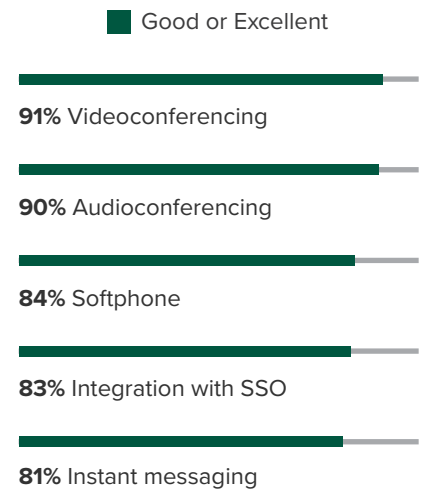
# Virtual Connection Takes Center Stage

The shift to virtual communication is nothing new, but the events of 2020 demanded sudden and dramatic increases in how firms offer these capabilities to employees. With remote work now essential for firms' workforces, employees need critical communication tools to do their jobs. In surveying 153 US communications technology decision-makers across industries, Forrester found that:

- Firms are largely confident in their communications capabilities.** More than eight in 10 respondents rank key communication offerings to employees as good or excellent (see Figure 1). But their confidence in offerings may not tell the whole story of how well firms have rolled out communications technology (for reasons covered in the next section). About 40% of respondents say their firm is not taking further action to upgrade or expand its existing IM or voice services. At the same time, firms are expanding their existing capabilities for videoconferencing and audioconferencing.
- UCaaS and SD-WAN are growth areas.** Forty-three percent of respondents say their firm is implementing or expanding its UCaaS solution in the next 12 months, and 51% say their firm is doing the same for SD-WAN. About one-third of respondents say their firm has UCaaS and is not making changes in the next 12 months. The same is true for SD-WAN (see Figure 2).

Figure 1

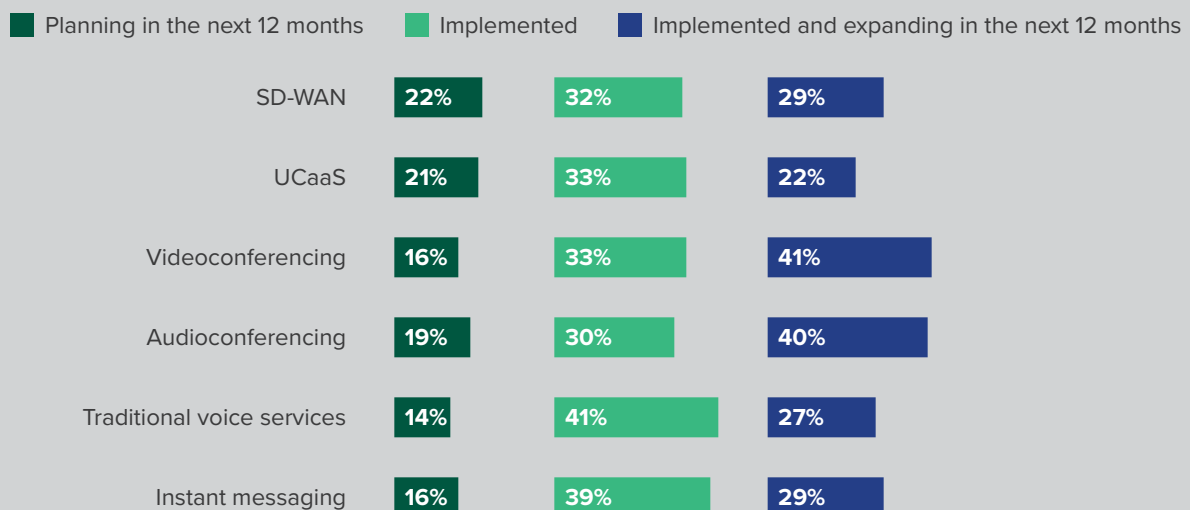
“How would you rate your organization’s unified communications offering across the following features or capabilities?”



Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

Figure 2

“What are your organization’s plans for adopting the following technologies for employee collaboration?”

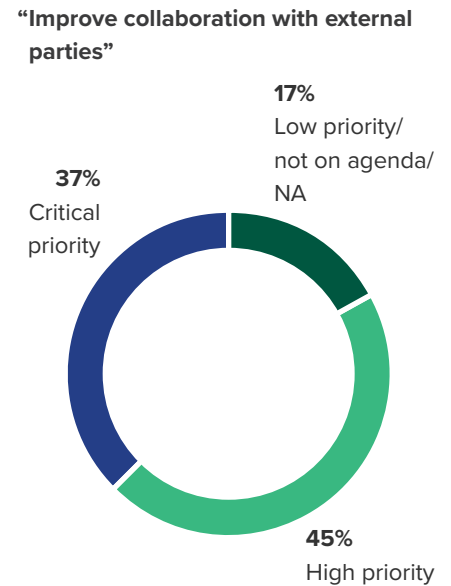


Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

- › **With more employees using videoconferencing tools than ever before, network performance is critical.** Magnified by the large increase in remote work due to the pandemic, more and more employees must use videoconferencing to communicate with their colleagues, customers, and vendors. As a result, 44% of IT decision-makers rate videoconferencing as critical for employees to do their jobs. They rank it as the most critical of all communication tools (see Figure 3). Given the shift to distributed work and virtual meetings, it is no surprise that more than eight in 10 respondents say they rely on their network to perform critical daily business operations.
- › **IT decision-makers prioritize collaboration with trusted partners.** More than one-third of respondents say improving collaboration with external parties like vendors, suppliers, or partners is critical in the next 12 months (see Figure 4). Another 45% say it is a high priority. An organization's employees do not solve problems in a vacuum; they do it with their trusted partners. So they need secure and reliable collaboration tools to provide space for this work.

With the shift to distributed work and virtual meetings, firms rely on their network to perform critical daily business operations.

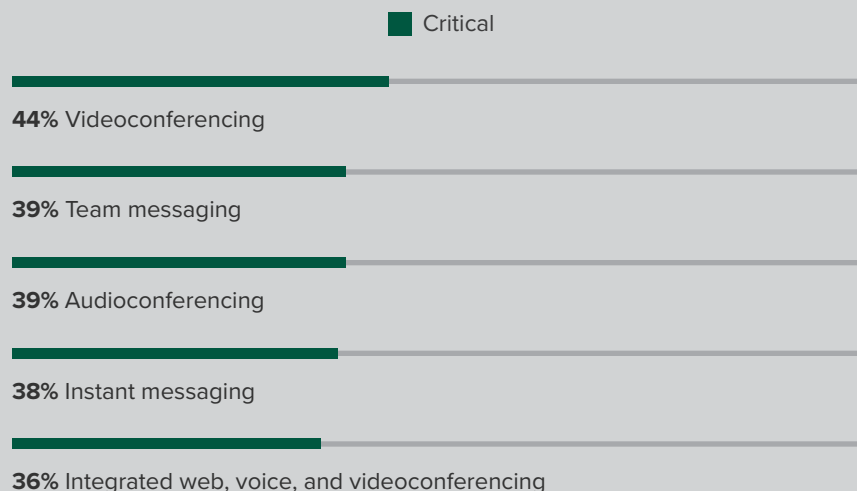
**Figure 4: Business Priorities Over The Next 12 Months**



Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

**Figure 3**

**"How important would you rate the following features or capabilities for your employees to get their job done?"**



Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020



**83% agree "we rely on our network to perform critical daily business operations."**

# Communication Disruption Can Stop Work In Its Tracks

## COMMUNICATION TECH CHALLENGES HAVE BROAD IMPACT

Despite respondents rating their firm's communications capabilities highly, they say they experience technology challenges that impact their firm's employees, customers, and business operations. With the increase in remote work, decision-makers are particularly concerned about security, but they struggle to implement updates without disrupting their employees' workflows. Forrester found that network and communication challenges impact (see Figure 5):

- › **Customers.** Sixty-two percent of respondents say their firm has experienced network downtime that negatively impacted CX in the past year. With the explosion of remote work, more employees rely on virtual meetings to communicate with clients and customers.
- › **Employees.** Sixty-one percent of respondents say that poor network/performance for remote employees reflects negatively on their company. Another 60% say their firm often struggles to deliver network performance that meets business expectations. While the problem may not always lie with the organization, IT professionals struggle to gain visibility into the last mile going into an employee's home to understand if they are having a network problem or if it's the organization experiencing a problem. Dropped video calls are a major source of friction as employees try to get their jobs done (see Figure 6).
- › **Business operations.** Sixty-seven percent of respondents say their firm has experienced network downtime that affected ongoing business operations in the past year. Sixty-six percent say that controlling the flow of traffic on their firm's network is challenging to predict and that their network might not be able to keep pace with their firm's products and services.

## ROOT CAUSES RANGE FROM USERS TO PERFORMANCE MONITORING

Behind these symptoms, Forrester discovered a few key areas that offer insight into why firms experience network and communication challenges in the first place. Root causes include (see Figure 5):

- › **Remote work everywhere.** Sixty-five percent of respondents say the number of physical locations on their firm's network creates a strain on its network support team. With most employees suddenly working remotely in early 2020, this proliferation of locations has only accelerated as firms must also deal with connectivity into the remote workspaces of individual employees. On top of network challenges, employees are more dependent on unified communications than ever before, yet 49% of respondents say employees at their organization lack the communication technology tools they need to get their work done.
- › **Lack of user training.** Firms struggle to train users on UC tools, and that prevents them from getting the most out of their investment. After technical implementation, respondents say user training and onboarding is a top challenge. The adoption problem is key: Firms often cut training for costs or employees do not want to attend training even if it is offered.



"As a result of shelter-in-place orders and widespread remote work, we have had more employees using web conferencing services. This has led to more issues with connectivity and dropped calls."

*Operations director, US education organization*



"Shelter-in-place orders and widespread remote work have made it difficult for people to work together. Employees have different setups at home compared to when they were in the office using hardware and software that our IT department supplied to them."

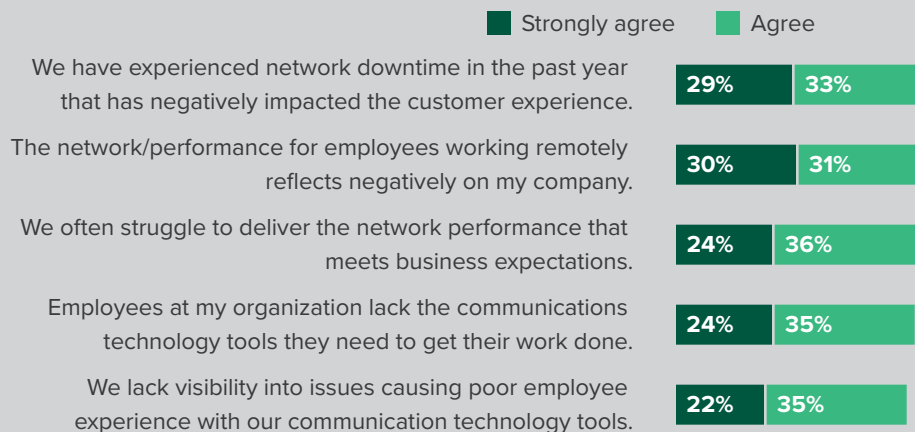
*IT manager, technology company*



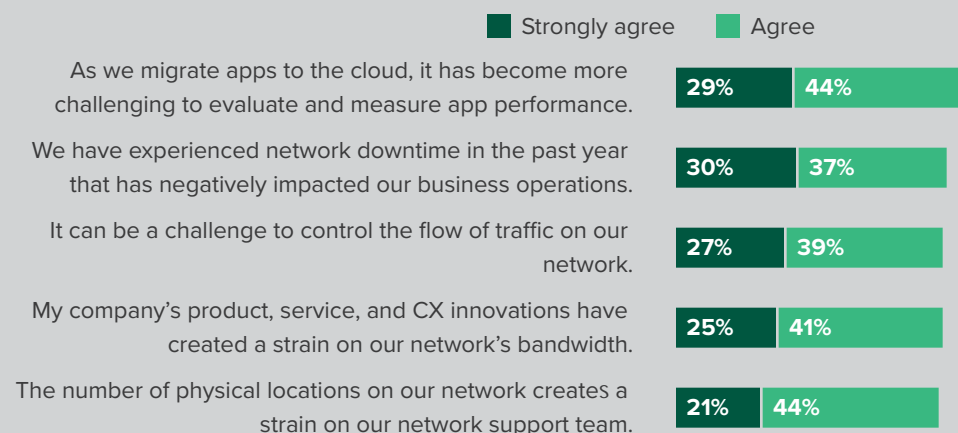
- › **Difficulty monitoring performance.** Seventy-three percent of respondents say that as their firm migrates to the cloud, it is more difficult to evaluate and measure app performance. To fully take advantage of investment in cloud infrastructure, firms must also explore cloud business applications.

**Figure 5**

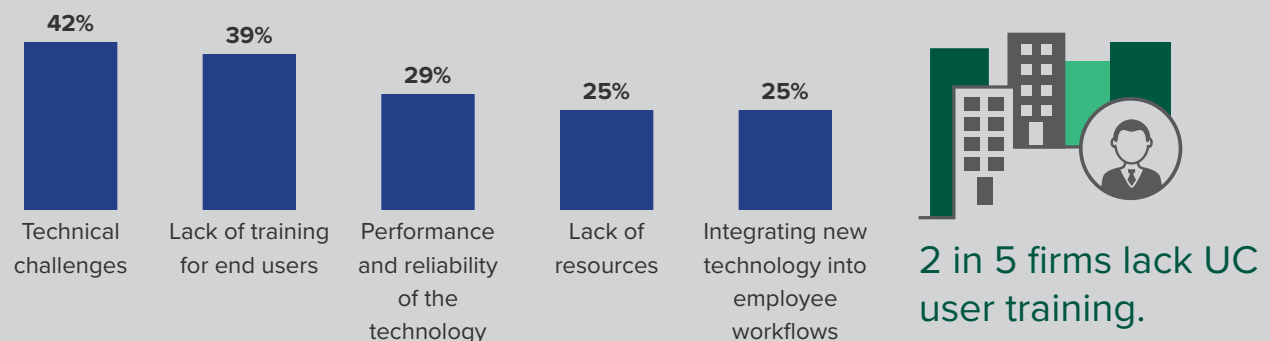
#### CUSTOMER AND EMPLOYEE EXPERIENCE CHALLENGES



#### OPERATIONS CHALLENGES



#### TOP 5 UNIFIED COMMUNICATIONS IMPLEMENTATION HURDLES



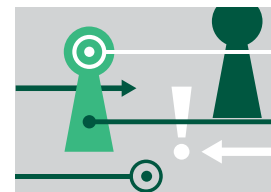
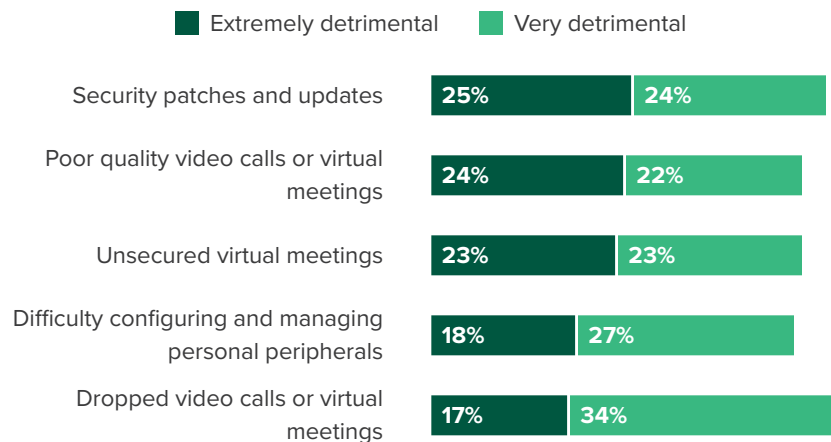
Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

## VIRTUAL COMMUNICATION DEMANDS SECURITY

The sudden increase in remote work also exposed a gap in endpoint security: Four out of five IT decision-makers agree that they are more concerned about endpoint security for remote workers today than they were before the pandemic (see Figure 6). This finding has long-ranging impacts as remote work becomes the norm and not the exception. Firms must grapple with this vulnerability for the long term.

While decision-makers are concerned about security, they struggle to implement updates without disrupting employee workflow. About half of IT decision-makers rank updates as extremely detrimental to employee experience. Updates that hijack a device and render it temporarily unusable circumvent employees while they try to get their jobs done (see Figure 6).

**Figure 6: Top 5 Most Detrimental Communication Technology Issues Impacting EX**



**80%** agree “I am more concerned about security for remote worker endpoints than I was before the pandemic began.”

Base: 153 US-based IT and business decision-makers for communications at midsize and large companies

Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020



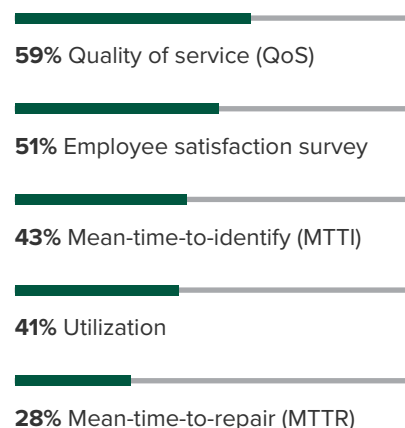
# UCaaS Offers A Path Forward

## TECH INVESTMENT SETS THE STAGE

As firms look forward to supporting the accelerated nature of remote work, tech investment matters. Firms are exploring updates ranging from IT infrastructure and supporting cloud apps to improving front-end user adoption. Our survey shows:

- › **Accelerating cloud migration sets the stage for additional as-a-service updates.** More than one-third of respondents indicate that moving applications to software-as-a-service (SaaS) or cloud providers is critical in the next 12 months. This finding suggests that decision-makers are looking to marry their firm's increasingly cloud-based infrastructure with cloud applications like UCaaS.
- › **Firms are investing in UCaaS and SD-WAN.** Thirty-two percent of respondents say their firm is implementing or refreshing SD-WAN in the next year. Forty-three percent say their firm is adopting UCaaS for the first time or upgrading its solutions over the same time period (see Figure 2).
- › **Firms are refreshing network security options.** The need to enable remote workers — and to do so securely — has brought security to the forefront of communications and network planning. One-third of respondents say their firm is looking to implement or refresh security options and architectures.
- › **Firms seek truly unified solutions.** When it comes to evaluating UCaaS vendors, firms look for solutions that are unified, consistent, and cost-effective (see Figure 7). The primary metric for success with UCaaS solutions is quality of service (QoS) (see Figure 8). QoS can be enhanced with SD-WAN for integrated network security.
- › **Firms prefer to use a single network operator to provide unified communications.** While only 35% of respondents say their firm uses a network operator or telco as its UC service providers, 44% say they would prefer to do the same (see Figure 9). Additionally, decision-makers seek to truly unify their firm's strategy, with 80% of respondents indicating they would prefer to use a single vendor.

**Figure 8: How Firms Measure UC Success**



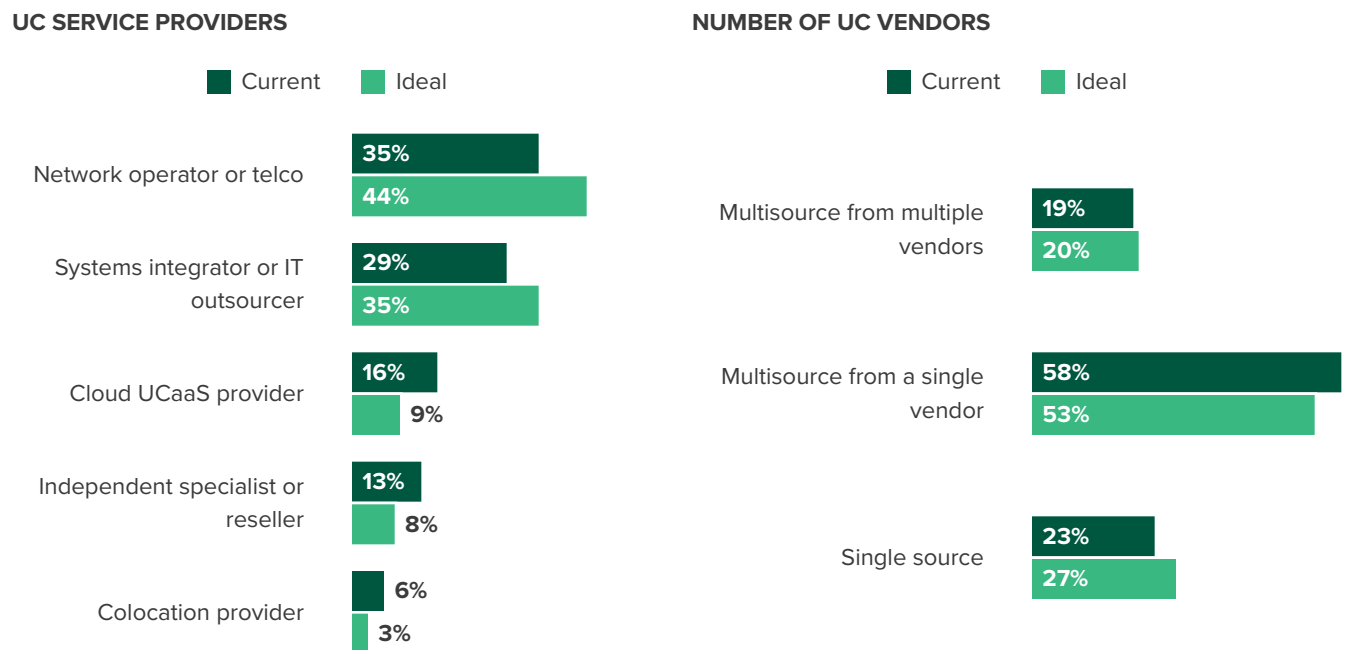
Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

**Figure 7: Top Attributes Organizations Consider When Selecting A Unified Communications Vendor**



Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

Figure 9: Organizations' Preferred UC Vendor Relationships



Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

## UCAAS SUPPORTS BETTER WORK

As decision-makers consider what communications tech their firms might need moving forward, UCaaS offers a viable path. Forrester found that (see Figure 10):

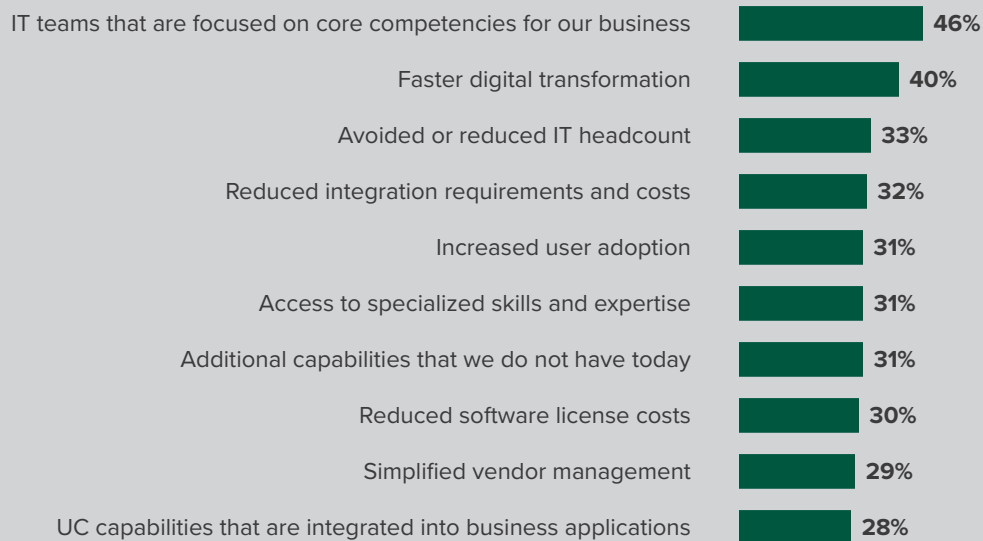
- › **UCaaS solutions let IT employees focus on the work that matters.** The most highly realized or expected UCaaS benefit is that it lets IT teams focus on core competencies for the business. Additionally, 40% of respondents say they expect UCaaS to lead to faster digital transformation.
- › **UCaaS increases user adoption.** About one-third (31%) of respondents say they expect increased user adoption, which is always a challenge with tools that firms cannot mandate. When it comes to expense reimbursement, employees must use the company tool or they risk not getting paid. By comparison, there is no similar disincentive for not using the provided communications tool.
- › **UCaaS improves employee work and experience.** Close to half of respondents say they expect a UCaaS solution to improve employee productivity. Another 46% say it can improve employee experience. Firms that have UCaaS solutions are 2.6 times as likely to have experienced shortened cycles for decision-making as compared to firms without UCaaS solutions.
- › **UCaaS improves customer engagement.** Forty-four percent of respondents expect UCaaS to deliver customer outcomes. For example, a frontline contact center might use UC tools to collaborate on a particularly challenging customer inquiry. In fact, UCaaS users are 1.9 times more likely to have realized significantly faster problem resolution compared to users at firms without UCaaS.



Firms with UCaaS are 2.6x as likely to have experienced shorter decision-making as a result of their communications tech compared to other firms.

**Figure 10: Benefits Of Unified Communications**

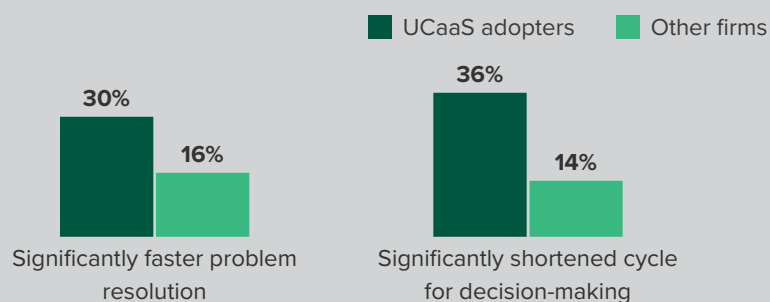
**“What IT benefits has your organization realized/might you expect to realize from a UCaaS solution?”**



**“What business benefits has your organization realized/might you expect to realize from a UCaaS solution?”**



**“Has your firm’s unified communications met expectations for the following benefits?” (Showing “Exceeded expectations” responses.)**



UCaaS users see wide ranging collaboration benefits.

Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

# Key Recommendations

Forrester's in-depth survey of 153 US-based IT and business decision-makers about their communication technology yielded several important recommendations:



**Deploy UCaaS plus SD-WAN to support the explosive growth of remote work.** Remote work is here to stay, and the integrated applications of UCaaS coupled with SD-WAN provide a more flexible approach to delivering a collaborate-from-anywhere solution.



**Look to UCaaS plus SD-WAN and network security to increase the security and reliability of real-time collaboration.** Your workers don't collaborate only among themselves, but they also work with external parties such as partners, suppliers, and customers. By its nature, UC requires excellent quality of service (QoS), especially as your firm dramatically increases its use of video. To successfully solve problems and to get work done, your employees don't just need to collaborate with trusted partners, but they must need to do so securely.



**Prepare your IT team to transition from managing hardware and software to managing a cloud service.** Instead of installing, upgrading, and monitoring on-premises hardware, software, and communications infrastructure, shift the focus of your IT support to monitoring your UCaaS plus SD-WAN.

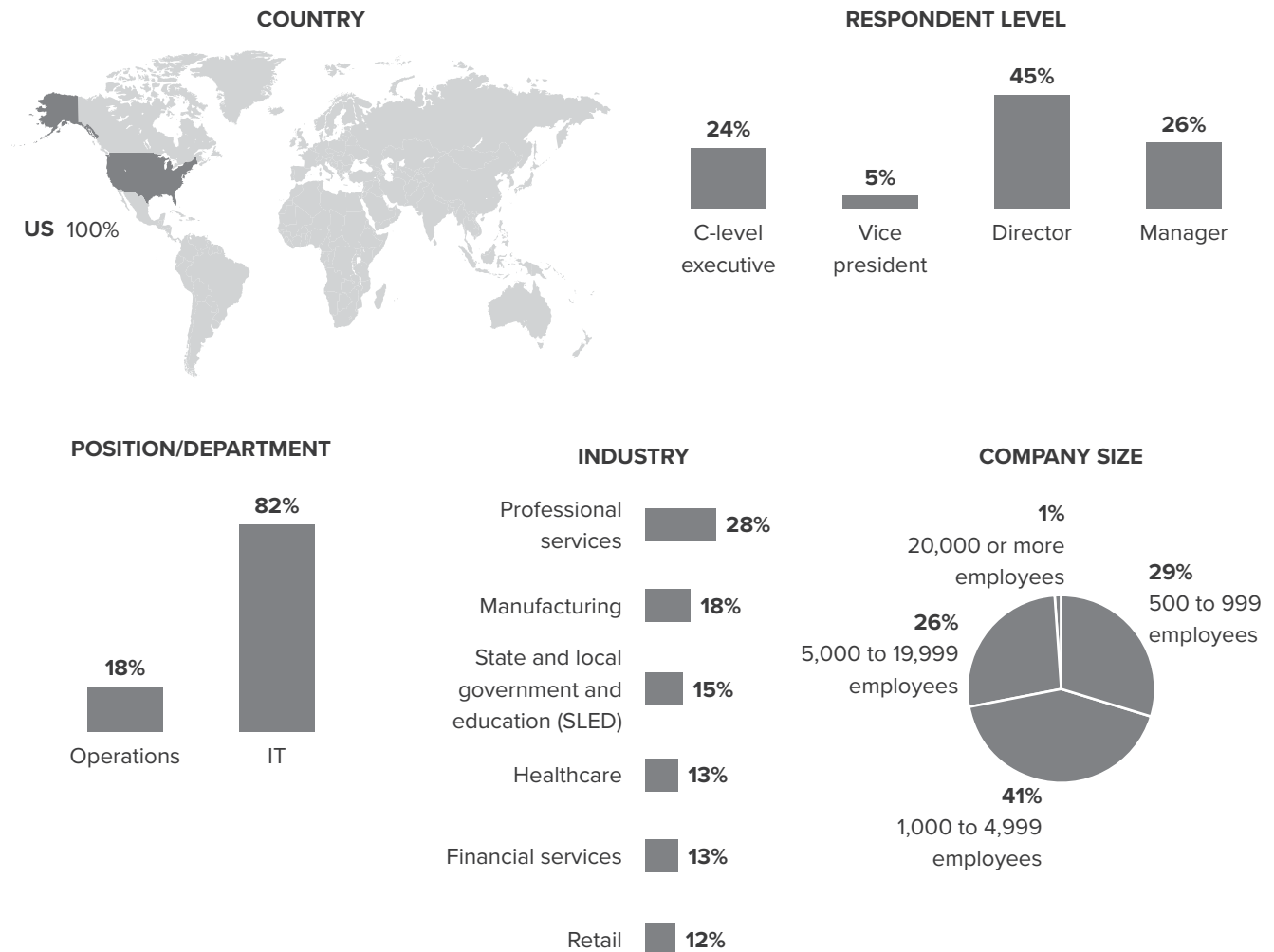


**Support UCaaS investment with user training.** Without user adoption, you cannot realize the full benefits of your UCaaS investment. Depending on the size and tech-savviness of your organization, different training models may be effective. One option is completely self-service, such as prerecorded training videos or documentation accessible in a centralized place. Live training provides a more hands-on approach for each employee. The middle-of-the-road option is to train the trainer, where a select number of champions are empowered to support a wider team.

## Appendix A: Methodology

In this study, Forrester conducted an online survey with 153 US-based IT and business decision-makers for communications technology at midsize and large companies to evaluate UCaaS adoption, challenges, and opportunities in the market. Questions provided to the participants asked about communications technology tool adoption, challenges, and plans for the future. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in August 2020 and was completed in September 2020.

## Appendix B: Demographics



Base: 153 US-based IT and business decision-makers for communications at midsize and large companies  
Source: A commissioned study conducted by Forrester Consulting on behalf of Windstream Enterprise, September 2020

## Appendix C

### RELATED FORRESTER RESEARCH

“Setting The Technology Foundation For Your Enterprise Collaboration Strategy,” Forrester Research, Inc., July 10, 2020

“Gauge Your Enterprise Collaboration Maturity,” Forrester Research, Inc., August 31, 2020

“Gain A Competitive Advantage Through Enterprise Collaboration,” Forrester Research, Inc., September 4, 2020

## Appendix D

### ENDNOTES

<sup>1</sup> Source: “Managing Your Company Through The Coronavirus Pandemic,” Forrester Research, Inc., April 20, 2020.