



A New Way to Work

Thought Leadership Series
Part 3: The Engagement Technology Iceberg -
What You Need Under the Surface

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The Engagement Technology Iceberg (What You Need Under the Surface)

Rich levels of engagement among employees, partners and customers are vital to the success of business. In our last paper in this series, we described the leadership challenges and optimal behaviors of teams to build engagement. In this paper, we turn our attention to the advances in technology that enable higher levels of engagement in the mobile and distributed workforce. Beyond simple component technologies - voice, video, web collaboration, etc. - what's needed is a new fabric that brings together communications functions, applications, content, ideas and some new capabilities to enable a new way to work. With input and inspiration from numerous customers, analysts and thought leaders from the worlds of business and technology, we present the core requirements for an engagement platform.

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Introduction: A fabric for engagement

Even if you limit yourself to fixed cost savings, the return on investment is substantial for a communications platform that engages users even when they are communicating from remote locations.

By optimizing communications tools for full engagement of virtual teams, you can enable quality work from home, which reduces office space. Employees can work closely in the field with partners and customers (and loop in people at home offices or other locations). Your organization can cut travel costs (via face-to-face meetings by video conference, rather than airlines and rental cars). You can reduce delays (by many eyes peeled for dropped batons and to suggest improvements in a business process relay). Perhaps most important, you can enjoy the best talent/cost ratio from centers of excellence around the globe.

More than that, what's needed is a system to automate an engaging level of communications. Without it, users spend more time orchestrating work than doing it, and the dynamic process of conversation, debate, collaboration is impeded. An hour or more a day spent scheduling meetings, logging into them, dialing back in after being dropped, tracking down emails, forwarding files, and responding to requests for progress updates is typical for knowledge workers.

Happy, more engaged workers means lower turnover and higher quality output. That means using technologies that build trust and inclusion; enable both synchronous and asynchronous engagement on a body of work; and seamlessly loop in the right resources across time zones and geographies.

Let's explore what achieving these - and the many other benefits of engaging communications - requires from your organization's technology infrastructure. We'll cover the need to:

- Meet and surpass expectations for systems of engagement, as originally defined by Geoffrey Moore
- Aggregate existing communications infrastructure stacks
- Leverage a technical capability called webRTC to enable affordable integration of engaging communications into business processes
- Tap context and intelligence
- Achieve simplicity with a new approach to business user interfaces

The Nitty Gritty of Enabling Engagement

“What is transpiring is momentous, nothing less than the planet wiring itself a new nervous system ... The question is how much productivity gain businesses and governments are leaving on the table by not following the next generation’s lead.”

Geoffrey Moore,
Managing Director
of TCG Advisor

Your infrastructure vendors and the engagement platform have a lot to manage if they are to achieve the full promise of “systems of engagement” first articulated by Geoffrey Moore, noted technology guru and Managing Director of TCG Advisor:

“What is transpiring is momentous, nothing less than the planet wiring itself a new nervous system ... The question is how much productivity gain businesses and governments are leaving on the table by not following the next generation’s lead¹.”

Users shouldn’t be integrators.

The engagement platform needs to federate every form of communication. If each remains in its own silo, people have to attempt to manage the orchestration themselves with keystrokes and manipulation of many windows. Instead, bringing it together intelligently into a single pane of glass creates a fluid user experience and sets the stage for rich and meaningful conversations. **People must spend less time orchestrating information if they are to spend more time creating it and acting on it.**

While it must incorporate the elements of “unified communications”, including text, voice and video, a truly engaging communications environment goes beyond unifying various forms of messages to unifying collaboration tools and—through the conversation of people—ideas. This is a very big idea and

benefit. Ideas, transmitted and shaped via conversations, are often confined to a few people’s heads instead of being shared and leveraged. Transcription and filtering makes those ideas and the details of their development easily searchable.

Need for Vendors that Understand Real-Time Enterprise Complexity.

Certainly a new consideration is the need to manage conversations live, in real-time. While no harm was done if an email or accounting transaction was delayed a few minutes, that’s not true with streaming voice or video where delays of a fraction of a second significantly degrade the experience and can even render content unintelligible. As a result, you need vendors with experience delivering always-on voice and video communications across an enterprise.

Bryon Battles, Principal of The Battles Group consultancy, which focuses on helping enterprises evaluate communications and collaboration software, sounds a note of caution about what’s involved, particularly on the back end. “It’s like the duck looks very calm on top of the water. Underneath, it’s paddling like hell.”

Jim O’Gorman, principle at Communications Engineering, who focuses on helping his customers determine what they need and getting it from the most appropriate mix of vendors, agrees. “Vendors show you

the tip of the technology iceberg: what this thing can do for you.” He says vendors often fail to disclose the scope of infrastructure needed or the amount of business sponsor time and attention they’ll need. A bigger red flag is when they don’t ask for any at all. “You end up getting a better return when business leaders fully explain their business process. Only then does the business side understand just how much the new capabilities can actually benefit them.”

At the end of the day, the dual challenge is to **manage greater complexity on the back end** than ever before **while making easy access to and use of many streams of information so simple** that users need little documentation or training.

Surpass nine and add a tenth characteristic to systems of engagement

Ray Wang, in a Harvard Business Review article, described nine characteristics of what Geoffrey Moore christened systems of engagement: the convergence of standard transaction systems with new technologies that enable remote interaction including mobile devices, social networking, cloud computing, and advanced analytics². Clearly, the need to handle the real-time conversation responsible for transmission of ideas is another must.

We’ll run through Wang’s checklist to suggest what engagement platforms must supply to satisfy and surpass those initial nine characteristics, which should inform your planning and what to demand from vendors.

And we’ll add a tenth: the platform needs to be genuinely engaging. We’ll talk about some of the things that indicate true engagement will be achieved.

1. Ability to contextually sense and respond.

An engagement solution needs to do what Unify’s Project Ansible does: act appropriately based on contextual clues over an ongoing business conversation. Those clues include team members’ location, permissions, crowd-sourced gauge of subject matter expertise on social networks, and current activities. Response can be as simple as passing through an alert at receipt of your boss’ communication during normal business hours, providing a relationship-building point of conversation with a colleague (How’s London?), or suggesting an expert to add to a video conference brainstorm about a particular topic.

To surpass the notion of sensing and responding, the platform adds rich, high-definition audio and video communication to foster better and deeper connections among team members during group interaction and to allow the conversations that are the naturally way people transmit ideas.

2. Address the massive scale of social networks.

An engagement platform should pull in information from your social networks, filtered appropriately for the current context, and as searchable as any other medium. If your cloud can handle the scale, so can your engagement platform.

An engagement platform should surpass that requirement by eliminating the distraction of the thousands of posts that might matter to you but only in another, different business conversation and context.

When something's really critical, we talk.

3. Foster multi-way conversations.

When something's really critical, we talk. Sometimes the requirement is to engage a customer or colleague in virtual two-way conversation on demand. That's easy.

Most business processes actually require the ability to orchestrate high definition, multi-way conversations involving both customers and extended teams in an ad hoc fashion. No matter how many people in conversation, or what tool is used, the ability to record and make the conversation searchable is vital to keeping teams connected and moving forward.

4. Utilize a multitude of media types to optimize user experience.

An engagement platform needs to orchestrate access to multiple media types. It's about more than unifying communications. Information, tools, people, ideas - all are vital elements of conversation that need to be framed for users in streamlined experience, via the engagement platform.

To surpass the requirement means supplying just the appropriate threads of a multi-threaded conversation based on context, held together by an intuitive user experience.

5. Operate at real-world/real-time speed.

An engagement platform needs to eliminate time wasted in orchestrating virtual collaboration conferences by automatically scheduling, establishing and simplifying the process of joining the conversation, all supported by views of real-time text streams.

To surpass that requirement, it needs to apply filtering and transcription and context quickly. When, someone's boss calls during a meeting, they'd like to immediately read the transcription of her voice mail message.

6. Incorporation of multi-channel networks.

An engagement platform must aggregate content from every relevant channel and existing networks that themselves carry multiple channels (as Facebook does).

To surpass the requirement, the platform must achieve the reliable resilience characteristic of carrier-grade dial tone for voice, but for the entire aggregated conversation stream.

7. Seamlessly embrace new, non-structured types of data and information.

An engagement platform should present non-structured data along with structured data from emails, transaction systems and so on.

To surpass the requirement, the platform should use transcription, context data and analytics to filter and structure easy absorption of the relevant info and patterns in unstructured data. And, the platform must enable rapid, independent, economical development of integrated solutions.

8. Apply a richer social orientation.

Engagement systems by definition must be built around social orientation. They should natively incorporate social media tools such as RSS feeds, LinkedIn, Facebook, and Twitter, as well as internal social tools, such as those from IBM, SAP, Sales force and others.

To surpass the requirement, a simple method of customization should allow incorporating custom streams of business conversation while also doing something other communications focused tools don't do: use the context of transactional systems to structure social conversations and recommend team actions.

9. Rely on smarter intelligence.

An engagement platform needs to be smart about what it presents to users, including the ability to filter contextually and to summarize rather than merely present the raw data.

To surpass the requirement, add underlying rules and event processing engines to change the flow of team interaction based on inputs from any stream or by the systems observation of what a user does (for example, shifting to night-mode filtering of communications at 3 p.m. based on a pattern of early morning activity that tapers off completely by mid-afternoon).

10. Communicate richly and bring users delight.

While not part of Ray Wang's gauge, our definition of an engagement platform adds a tenth important characteristic frequently missing in enterprise applications. The promise of systems of engagement is not realized without an application users love to use and remote communications that are rich and simple enough to equal or exceed the impact of meeting in a conference room.

Build on what's there and make it as one

Engagement solutions aggregate multiple communication channels and business process applications into a "single pane of glass" shared in real time by collaborating teams. It's critical that the tool unifies existing voice, video and text communication sources along with data synchronized to the particular point in time of a particular step in a business process workflow.

Look for vendors who don't require a "rip and replace" of back-end infrastructure.

Analyst Zeus Kerravala argued in the past that a precursor to engagement technology, Unified Communications, is anything but unified. But Kerravala wrote that our Project Ansible vision of what an engagement platform should be is successful in aggregating applications, including traditional communications tools, social software, business applications and analytic tools. "From what I've seen, Ansible provides a highly flexible and customizable collaboration tool where workers have access to all of the data and tools they might need."

"The two biggest barriers," says Byron Battles, "are keeping it simple on the back end for first implementing and then maintaining the integration, and simple for end users - because it has to be simple if it's going to be used. The back end maintenance is usually harder than the vendor lets on," Byron says. "It's not like the old PBX, where you didn't touch it for five to ten years at a time." Some complexity in using an engagement platform's user interface might be okay for contact center staff if after clearing the learning curve it improves the customer service metrics they get measured on. "But in the general population, it's pretty much: is it easy enough to become incorporated into their everyday usage without help?"

In any case, avoid "rip and replace" of existing infrastructure. One of the main considerations we had as we prepared our engagement solution was to make sure our existing back end infrastructure, the OpenScape and HiPath communications server families would support our Project Ansible vision as would other major vendors who have adopted our back end as part of the communications and collaborations offerings, including IBM.

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Joe Burton
Chief Technology Officer,
Plantronics

Minimize the cost to add engagement solutions to existing business processes

Joe Burton, Chief Technology Officer of Plantronics, which provides the sometimes forgotten necessity of a headset for doing lots of group collaboration in today's largely open air office environments, thinks the biggest thing to insist on when implementing an engagement platform is support for a new technical standard, WebRTC.

It's not that Burton loves it because it's the latest and greatest technology. The important thing is that WebRTC builds robust handling of communication streams into web browsers, eliminating deployment issues and taking a customization of engagement solutions out of the realm of the few programmers with the rare skill of writing communications drivers in low-level development tools. “Instead, the skill set is what every web developer on the face of the earth already knows,” says Burton. “So the number of developers that can build these integrations jumps from tens of thousands up to, literally, millions.” The effort for adding engagement communications to a business process application shrinks, as does the marginal cost. What does it all mean?

“You can have a faster innovation cycle. You can chase smaller and smaller vertical applications. And it becomes economical to build custom communications applications around specific workflows.” Burton sees WebRTC as an absolute must-have in an engagement platform.

Tap context from both sides of the cloud connection to social

Some of the power of applying intelligence to data that informs team collaboration happens on the social network or search side of the cloud. “For example,” says Dan Levin, CIO of Box, “the kind of thing Google does when you type in something that looks like a stock ticker and it brings up the quote for that stock. Google Mail, similarly, can rank the importance of mail from different individuals based on how quickly you look at it and respond.”

“Likewise, an engagement platform will tap a service like Box to handle the document storage for group collaboration,” he says, “but Box will only apply intelligence to implement things like a document retention policy for legal compliance or to return results filtered based on information passed from the platform.”

The truly application-specific intelligence you need to apply will be applied by the engagement platform. For example, Levin says it might look at Klout scores in deciding which documents that match a search to return first. Or it might look for a subject matter expert on Agile development based on matches in your LinkedIn profiles to the word Agile. “More sophisticated techniques might involve checking speakers' list for conferences and academic papers published in the field for people who happen to be your colleagues,” he says. And then the engagement platform will find that colleague in your directory and invite them to help solve a problem that's come up in a team meeting.

It's an area to explore as you look to assemble the constellation of components linked together by your engagement application to aid in collaboration.

Achieve simplicity with a new approach to business user interfaces

Dave Michels, CEO at TalkingPointz Research, says our Project Ansible articulates a clear vision of why current solutions fail and what will make virtual teams work. Summing it up, Michels says, “The next level of Unified Communications requires a revolutionary approach to the user experience.”

That may be the most important single consideration as you choose an engagement platform. I want to stress that our Project Ansible vision is not just another take on Unified Communications. Otherwise we wouldn't have attracted Frog Design, one of the top players in user experience. Frog's passion is projects that will have a fundamental impact on the human experience. Our partner as the head of Frog's Ansible team, Justin McQuire, says they're only as good as their client. Says McQuire, “we rarely get a client as committed to a big vision and as capable of delivering it.”

An engagement platform that isn't flawlessly aligned with the expectations of today's—and tomorrow's—user will fail. That expectation is rooted in the user's experience as a consumer of mobile devices, the internet and social networks—not merely as they exist today, but as they evolve through subsequent innovation cycles.

One of the great challenges of most unified communications solutions is that, even where collaboration tools were deployed, utilization was far less than ideal. Tales abound of frustrated users that had access to web collaboration, desktop video, presence, rules engines—but didn't know they had them or didn't know how to use them. Perhaps this is why utilization was so often cited as a key performance indicator for teaming solutions. An engagement tool that isn't easy, intuitive—a flat-out joy—to use will very likely be a waste of effort. If the last generation of technology has taught us anything, it's this: design around the user experience first and foremost, or engagement will likely elude you.

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Next in the New Way to Work thought leaders series:

Moving From Distraction to Engagement. What does the engaged user experience look like? How does it differ from today's work environment? In our next paper, we articulate our vision for the next generation engagement platform.

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About Unify

Unify – formerly known as Siemens Enterprise Communications – is one of the world’s leading communications software and services firms. Our solutions unify multiple networks, devices and applications into one easy-to-use platform that allows teams to engage in rich and meaningful conversations. The result is a transformation of how the enterprise communicates and collaborates that amplifies collective effort, energizes the business, and enhances business performance. Born out of the engineering DNA of Siemens AG, Unify builds on this heritage of product reliability, innovation, open standards and security to provide integrated communications solutions for approximately 75 percent of the Global 500. Unify is a joint venture of The Gores Group and Siemens AG.

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