

Robust videoconferencing capabilities are critical to small and medium-sized businesses (SMBs) as they adapt to the future of work.

More Than a Meeting: Today's Videoconferencing Must-Haves for Small and Medium-Sized Businesses

June 2022

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Introduction

Many companies reacted to the pandemic by provisioning video collaboration tools and services to support the rapid shift to their suddenly distributed workforce. Communicating through video has since become the new voice of the employee. New and innovative videoconferencing features available today foster better collaboration, boost productivity among remote and hybrid workers, and combat screen fatigue and remote work burnout. These more advanced video and collaboration functionalities are enabling new ways of working, driving movement to a hybrid-first work model for many companies, and enticing others to consider that option for workers. Video collaboration has helped remote employees stay connected and fully execute their work regardless of distance or location. It has demonstrated the huge role that technology can play in improving employee (as well as customer) satisfaction. In addition, it has enhanced employee efficiency and productivity while helping mitigate some of the issues driving the Great Resignation by making employees feel more empowered, connected, and included.

According to IDC's June 2021 *SMB Communications Services Survey* of 476 small and medium-sized businesses (SMBs), 47% were using unified communications (UC) services and 28% were planning to use/considering UC services in the future. Additionally, the percentage of SMBs that were not using and had no plans to use UC services declined significantly, from 36% in 2020 to 17% in 2021, as companies increasingly recognized the benefits of UC and video to support remote work, communications, and collaboration across their businesses.

Although collaboration tools such as videoconferencing and messaging systems were prevalent at larger businesses before the pandemic, many smaller companies — especially those without many remote workers — had not previously prioritized such technologies. The post-pandemic world has changed that. According to IDC's February 2022 *Worldwide Small and Medium Business Survey* of 2,600 SMB leaders, 59% listed mobile worker support as a technology priority over the next 12 months. More specifically, 51% listed video collaboration or videoconferencing tools as a technology priority for their company in the next 12 months. Additionally, 44% of SMBs said they will invest in web conferencing tools (real-time sharing of screens, applications, or web content among two or more people from different locations) in the next 12 months, and 27% said they plan to invest in team collaboration platforms.

For SMBs, decisions on purchasing new or enhanced video collaboration tools should be viewed in the scope of a larger strategic imperative and not simply as a reaction to a crisis or a technology refresh decision. This guide not only can help SMBs solidify their thinking regarding video collaboration but also identifies pertinent features and functions and offers key evaluation criteria, benefits, and recommendations to assist with purchase decisions.

Key Video Collaboration Evaluation Criteria for SMBs to Consider

According to IDC survey data, SMBs increasingly accessed company resources (e.g., voicemail, email, instant messaging [IM], and fax applications) from a smartphone in 2021. Use of mobility support in general is also on the rise. Additionally, more SMBs increased their use of tools that enabled them to see the calendars/schedules of coworkers to determine if they were available at specific dates/times to schedule calls. Other popular UC features in both 2020 and 2021 included shared contacts/address book tasks and presence/availability indicators to determine whether coworkers were currently available or online for various forms of communications such as text messaging, IM, and voice/conference calls.

Previously, we mentioned a shift to more advanced videoconferencing and collaboration features and functionality. In this section, we highlight a few of these videoconferencing features/functions in key evaluation criteria and outline how they can help drive successful business experiences and outcomes for SMB employees and management. Key elements of advanced videoconferencing solutions include:

- » **Ease of use.** This is still the number 1 requirement for successful video platforms. Strict attention by many providers to this demand over the past several years has dramatically improved the audio and visual experiences with intuitive, user-friendly solutions. Ease-of-use features include simple generation of meeting and invite announcements to internal and external parties; click-to-join capability; HD quality audio and video sessions; virtual backgrounds; speech assistants; content control/sharing among participants; seamless in-app transitions by end users between video and other technology modalities (voice, text, chat, messaging); and post-meeting follow-up actions. If a solution is not easy to use, it can negatively impact a business. Many employees won't adopt it, and the organization loses out on both the potential benefits of real-time collaboration and the money and time invested in the video platform. An unsuccessful deployment can also put an added burden on already overwhelmed IT staff to train and educate employees.
- » **Increased worker productivity.** The best videoconferencing solutions are designed with machine learning (ML), artificial intelligence (AI), advanced natural language processing (NLP), speech recognition (SR), and speech-to-text capabilities to support employee productivity enhancements. For example, meeting recordings and transcriptions with active speaker tagging, keyword searches, and word clouds make it easy for employees who may have missed the meeting to catch up quickly. Additionally, several video collaboration solutions support real-time translations, which can help overcome language barriers and make meeting content available and understandable for global employees. Other productivity benefits include:
 - Providing HR teams with a more secure and effective tool for communicating with potential hires or new employees in onboarding sessions
 - Enabling executives to leverage an enhanced tool for communicating with large groups of employees in town halls and other events
 - Enabling marketing teams to collaborate and share marketing materials with external customers

- » **Enhanced security for the remote/hybrid work model.** According to IDC's 2022 *Worldwide Small and Medium Business Survey*, SMBs list implementing new technology securely (34.1%) and enabling remote workers to securely connect to business systems (26.7%) as the top 2 challenges to achieving business priorities. This makes sense based on the increasing security threats emerging from hostile nations, cybercriminals, rogue hackers, and other bad actors, especially regarding remote/hybrid work models. Security is a top priority as the shift to cloud and more dispersed workforces has employees accessing business-critical networks from numerous potentially unsecured networks across more personal devices. Solutions that can provide assurances for SMBs driven by technology such as end-to-end encryption (E2EE), zero-trust security, two-factor authentication (2FA), and other enhanced security features are increasingly in demand.
- » **Remote work experiences.** To help workers in unpredictable work-from-home (WFH) environments, noisy offices, and outdoor surroundings, leading technology providers have incorporated features into their videoconferencing solutions that display virtual backgrounds, suppress/eliminate background noise, and optimize the speaker's voice quality, among other important new videoconferencing and collaboration features. Some tools try to simulate the in-person collaboration experiences in a remote or hybrid work environment. For example, in-person whiteboarding is replaced by digital or virtual whiteboarding solutions that simulate the experience of drawing together with someone else in real time. Another example is simulating the experience of an in-person presentation with innovations that allow presenters to make themselves appear in front of their shared content in a meeting.
- » **Intuitive management tools.** Videoconferencing management tools and capabilities can help business managers more easily deploy and manage video collaboration environments, monitor adoption and usage, and proactively send alerts about performance issues, thus reducing manual administrative tasks. Current capabilities typically feature a dashboard where SMBs can provision and manage videoconferencing services and devices, easily configure companywide policies, and leverage real-time analytics and troubleshooting.

Pertinent Videoconferencing Use Cases

There are a wide array of videoconferencing/collaboration use cases in education, banking, retail, law/legal, field services, manufacturing, and financial services. In this section, we describe three popular use cases:

- » **Customer, partner, and vendor meetings.** In addition to facilitating virtual interactions within an organization with other employees, videoconferencing is increasingly being used to interact with customers, partners, and vendors. As such, videoconferencing solutions are improving worker productivity and efficiency, reducing costs associated with traveling to customer or partner sites, improving customer service delivery, driving company innovation, and shortening time to market.

The most advanced solutions leverage technologies such as AI, ML, SR, and NLP to enable companies to put their best foot forward with customers with innovations such as virtual backgrounds, digital assistants, automatic log-in/join for meetings, calendaring/scheduling of meetings, adding attendees, real-time transcriptions and language translations, content searches, and in-meeting navigation and controls. Advanced audio, video, and security functions include background noise suppression; augmenting solutions with leading-edge technology such as biometrics, facial recognition, virtual reality/augmented reality (VR/AR); and intelligent voice/video framing.

- » **Company or departmental meetings.** IDC talks about the importance of promoting an "engaging culture" within companies and organizations to make them better places to work, keep employees happy and better informed, and retain talented people, among other benefits. One way for companies to facilitate this culture is through company or organizational "town halls" or "all hands" internal events to share company updates, celebrate achievements, recognize exceptional employee contributions, and answer questions on the minds of employees. When these meetings/events are organized virtually or have a virtual component to them, they can leverage tools such as closed captioning, real-time translations, chat and polling features, and moderated Q&As that can help build better employee engagement, alignment, understanding, satisfaction, and retention.
- » **Virtual recruiting/onboarding of remote workers.** For many businesses, videoconferencing and collaboration tools are an integral part of the virtual recruiting/onboarding process for new distributed workforces. Virtual recruiting/onboarding not only saves time, increases the productivity of managers and trainers (who can schedule/join sessions when available), reduces travel costs, and bridges physical distances but also can provide a company with access to a wider selection of potential candidates on a global scale, if needed. It can also help businesses target and entice professionals with specific skill sets who SMBs otherwise may not have thought were available or feasible to attract.

Considerations for SMBs

Many SMBs don't have large internal IT teams. Therefore, they should consider suppliers that:

- » Offer videoconferencing customer references and/or a free trial.
- » Have clear pricing and explain how that will change as they grow.
- » Support simple and easy deployments as well as seamless integrations with key apps and business processes.
- » Provide a broad range of videoconferencing technologies and services under one roof to avoid implementation headaches.
- » Offer a guaranteed quality-of-service (QoS) agreement/service-level agreement (SLA).
- » Provide a solution with an easy user interface (UI) that supports a simple, intuitive employee experience and requires minimal training and education.
- » Offer a solution that scales to add video features and functionality as the business grows.
- » Provide a solution that supports the required level of security for the SMB, including end-to-end video/audio/data encryption.
- » Offer an intuitive, easy-to-use portal for customer access to administration, management, and monitoring tools as well as analytics for videoconferencing insights and intelligence gathering.
- » Provide an easy lift to a broader unified communications as a service (UCaaS) offer for SMB customers looking to move up the technology stack.
- » Support APIs for integrating/embedding video technology with other popular apps (e.g., with contact center for enhancing the customer experience via a video channel).

Optimization Strategies for Successful Videoconferencing Implementations

Successfully deployed, utilized, and managed videoconferencing solutions can help SMBs optimize and advance strategic imperatives such as:

- » Reorganizing the overall company structure
- » Enhancing the ability to innovate
- » Increasing security levels
- » Moving the company to the cloud
- » Implementing digital technologies (i.e., digital transformation)
- » Deploying remote/distributed infrastructure
- » Embracing a hybrid-first work model
- » Enhancing the user experience for employees and partners as well as customers

Measuring the Success of a Videoconferencing and Collaboration Solution

Videoconferencing solutions include a portfolio of features that support a range of uses in conference rooms, small huddle rooms and workspaces, and desktop, browser, remote, and mobile video scenarios. A solution that can integrate with or embed business apps and business processes can make a huge impact on productivity at SMBs, increasing the overall value of the solution for companies. SMBs should consider vendors that can offer flexible delivery options as part of their videoconferencing portfolio (i.e., managed, hosted, and cloud) as well as those that can provision a high level of customer support when needed. Benefits and advantages of successful videoconferencing solutions include the following:

- » Improve employee collaboration for faster decision making and time to market
- » Increase employee productivity and efficiency from all work scenarios (office/mobile/WFH/hybrid)
- » Improve external communications and collaboration with partners, suppliers, and customers
- » Drive enhanced levels of company innovation via support for brainstorming, ideation sessions, etc.
- » Help distributed employees feel better connected and engaged
- » Promote inclusiveness and equitable collaboration experiences
- » Aid in mitigating employee turnover and burnout
- » Help ensure legal compliance, enabling SMBs to adhere to rules, policies, and processes that regulate business practices in local areas

This guide and the worksheets that follow are designed to help SMB buyers navigate the process of selecting a videoconferencing solution.

Worksheet Section

Tables 1 and 2 provide two sets of key questions SMBs should ask themselves and potential videoconferencing service providers.

SMBs should use the first worksheet to evaluate their needs in a videoconferencing solution.

TABLE 1: **Internal Questions to Answer About Needed Capabilities**

Please answer the following questions about your company's plans for the next 12 months to the best of your knowledge. Once completed, this worksheet can help you gain a better understanding of your organization's collaboration and communication needs.

Internal Needs Assessment		How Well Does Our Current Solution Address This Need?
How often would our meetings have both office and remote employees?	(Daily, Weekly, Monthly, Rarely)	(Very Well, Somewhat Well, Not Well, Don't Know)
How often would our employees interact with external participants (e.g., customers, partners, vendors)?	(Daily, Weekly, Monthly, Rarely)	(Very Well, Somewhat Well, Not Well, Don't Know)
How often would our meetings require digital whiteboarding for brainstorming, ideation, etc.?	(Daily, Weekly, Monthly, Rarely)	(Very Well, Somewhat Well, Not Well, Don't Know)
Would some of our meetings or internal events benefit from allowing participants to ask questions and provide feedback in real time?	(Yes/No)	(Very Well, Somewhat Well, Not Well, Don't Know)
How often would we have meetings with multilingual participants?	(Daily, Weekly, Monthly, Rarely)	(Very Well, Somewhat Well, Not Well, Don't Know)
How often would we conduct meetings where sensitive or confidential information is discussed?	(Daily, Weekly, Monthly, Rarely)	(Very Well, Somewhat Well, Not Well, Don't Know)

Source: IDC, 2022

SMBs should use the second worksheet to evaluate the strength of a potential vendor solution. The company's employee base and work environments, as well as other factors, combine to create unique requirements in a videoconferencing solution. Understanding the organization's needs and what the vendor candidates offer can help the business make a more informed decision regarding a videoconferencing solution.

TABLE 2: **Vetting the Initial Vendor Fit**

Please answer "Yes" or "No" to the following questions regarding how well a potential vendor meets the set of criteria.

Evaluation Criteria	Yes/No
Does the technology provider offer a demo/free trial?	
Can the provider demonstrate value versus talk about price?	
Is the provider knowledgeable about applicable regulations and laws that affect our company?	
Does the technology provider have SMB references for the same company size, vertical industry, and challenges as our organization?	
Does the provider provide an easy upgrade path to more robust capabilities that can be implemented as our company grows?	
Does the provider offer best-in-class security features to safeguard sensitive or confidential conversations?	
Are training or demos offered to help employees understand how to use the technology and make sure they are taking advantage of all its functionality?	
Is the implementation time frame and work acceptable for our company and its resources and goals?	
Can the videoconferencing solution integrate relatively easily with other systems, applications, business processes, if needed?	
If so, can the provider help with that integration?	
Can the provider demonstrate successful video technology integrations with other SMB organizations?	
Does the provider have a clear product road map for improvements, new features, and functionality geared toward SMBs?	
Will the provider's strategic investment outlook for the next three to five years have direct positive impact on our business outcomes?	
Does the provider use AI/ML and other cutting-edge technology to improve collaboration between office and remote workers?	
Does the provider's technology make it easy to collaborate and communicate with external parties (e.g., vendors, partners, and customers)?	
Does the provider's solution include mobile access to help workers get work done from anywhere?	
Does the provider offer continuous collaboration, including pre- and post-meeting communication, preparation, follow-up, and feedback tools?	
Do the cloud deployment options, security measures, and contract terms satisfy our IT and legal policies?	

Source: IDC, 2022

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