

Important Issues in Migrating to Unified Communications/Messaging

An Osterman Research White Paper

Published September 2008



Why This White Paper Will Be Worth Your Time

Unified communications is what its name implies: the unification of today's disparate communications silos – email, voicemail, fax, presence-enabled applications and other capabilities – into a single platform that can:

- Be accessed through a single user interface.
- Be managed by a single entity through a common administration system.
- Integrate a variety of business processes and communications platforms.

While this type of communications consolidation has been discussed for more than two decades, a new breed of technologies has made it a reality, creating a paradigm shift in the way that communications will be managed in the future.

The benefits of unified communications are profound: users will be more productive, IT costs will be lower, decisions can be made more quickly, and organizations will become more efficient. However, planning for unified communications is not a trivial undertaking. There are a variety of considerations that must be taken into account, including:

- Legacy voicemail systems must be integrated into the new infrastructure so that investments can be preserved and the overall cost of communications minimized. Because most organizations have existing voicemail solutions already in place, preserving these significant investments must be a key consideration of any new unified communications solution.
- Minimizing the interruption to end users' productivity during the migration.
- Minimizing the impact of the new system on end users, including keeping training requirements as low as possible.
- Allowing a phased migration so that organizations can adopt unified communications technologies at their own pace.
- Integrating the new system into the legacy infrastructure as efficiently as possible with as little impact on technical staff.

The benefits of integrating communications are profound: users will be more productive, IT costs will be lower, decisions can be made more quickly, and organizations become more efficient.

- Allowing granular deployment of the technology so that users receive only the specific features and functions they need.

This white paper discusses how voice and data are converging, the benefits offered by unified communications technologies, the key drivers for the deployment of these technologies, and key issues to consider before migration is undertaken.

Voice and Data Will Converge

Osterman Research has found that there is substantial interest in converging existing voice and data infrastructures. Consider the following from an Osterman Research survey of mid-sized and large organizations conducted during April 2008:

- Forty-two percent of organizations are interested or extremely interested in integrating their email systems with other information/data objects, such as voicemail, fax, instant messaging, VoIP, etc.
- Seventy-six percent of organizations believe that unified systems would make the typical end user “somewhat” or “much more” productive than the conventional messaging systems in place today.
- Forty percent of users and 74% of organizations expect to be using unified systems by 2010.

UNIFIED COMMUNICATIONS OFFERS IMPORTANT BENEFITS

Unified communications offers a number of important benefits for organizations of all sizes, including:

- **Lower costs**
Unified communications systems are inherently less expensive to maintain than today's separate email, voice, fax and other communications systems. Separate systems typically have their own unique interfaces and servers, email and voice are usually managed as separate entities, technical staff must be trained separately on each capability, each system has its own upgrade cycles, and each system has typically been designed as a standalone communications silo. A unified system, on the other hand, can be managed as a single entity by a single technical staff, training costs are typically lower, capabilities are upgraded and managed together, and the various functions are designed to operate synergistically.
- **Easier maintenance**
Because a unified system can be managed as a single entity compared to the separate silos that today are managed separately, management of a unified communications system is inherently easier. This results in faster problem resolution, the involvement of fewer technical personnel to manage communications capabilities and less “finger-pointing” when things go wrong.

- **Greater employee productivity**

In today's non-integrated communications environment, users access their email in an email client (most often Microsoft Outlook), they access their voicemail via a telephone interface, and they receive faxes on a machine down the hall. In a unified environment, users can receive their voicemail and faxes directly in their email client. This allows users to listen to voicemail or emails, to read faxes as easily as they read email. Further, it allows them to forward these messages to others more easily, and it gives them access to their most important communications in one location, making them much more productive than they can be today. This is particularly important for remote workers, such as individuals who are traveling or working from home.

- **Faster decision-making**

Closely related to the productivity boost that unified systems provide is the ability for users of these systems to make decisions more quickly than would otherwise be possible. For example, a manager can forward a voicemail to his team so that all can listen to it simultaneously; a traveling executive can read a fax on her mobile device while waiting for a flight instead of waiting until she gets back to the office; a worker caught in traffic can listen to emails and get things done during time that would otherwise be unproductive.

Closely related to the productivity boost that unified systems provide is the ability for users of these systems to make decisions more quickly than would otherwise be possible.

- **Greater support for mobile workers**

Mobility is an increasingly important consideration for organizations of all sizes. This includes accessing email, voice and fax from mobile devices and remote systems, which is very important for traveling workers and for those who do work from home.

However, unified communications are also becoming more important in the greater context of mobility – giving users access to their communication tools wherever they do their job. Many organizations do not provide their workers with a permanent place to work, instead allowing them to work from home for at least a few days per week and providing them with a shared cubicle when they come into the office. This makes centralized access to all communication modes critical for these workers.

COST IS THE CRITICAL DRIVER

The adoption of unified communications is being driven by the significant benefits inherent in these capabilities, as discussed above. Unifying systems is cheaper, easier to maintain and makes employees more productive than today's non-integrated silos of communications.

In a larger context, however, unified systems are being driven by increasing pressure on organizations to cut costs. In a softening economy in which transportation and other costs

are being driven upwards – dramatically in some cases – the lower cost and greater employee productivity offered by unified communication makes clear business sense.

Further, vendors of leading messaging systems are helping to drive unified communications forward, including Microsoft, IBM, Avaya, Cisco, Nortel, AVST and many others. Exchange 2007, for example, permits organizations to upgrade their email capabilities in a number of significant ways (better security, improved server consolidation, etc.), but also to add unified capabilities through the addition of the unified messaging server role. The role that vendors play in helping their customers to migrate to unified capabilities is an important one that will continue to be a key driver in the adoption of these systems.

Justifying the Convergence is Not Easy, But Necessary

MINIMIZING SUPPORT COSTS

Email has been identified in numerous surveys as the most important communications medium for the majority of users. However, telephony continues to be a critical tool for users, particularly in customer-facing environments. As a result, virtually all organizations maintain conventional voicemail systems as an important part of their communications infrastructure.

The adoption of unified communications often will not replace legacy voicemail systems. Some users who have not been provided with unified capabilities will continue to rely on these systems, requiring the IT or the telephony group to still support the existing platform. However, supporting legacy voicemail systems can be costly, particularly because the same capability must be maintained, but now for a smaller group of users which drives up the per-user cost for legacy voicemail, not to mention per-user licensing fees for many systems. This consumes internal IT resources and often requires the use of outsourced services.

The growing array of capabilities and platforms requires that unified systems be carefully integrated into the existing infrastructure so that compatibility across all systems is maintained.

A MODULAR APPROACH TO PRESERVE LEGACY INVESTMENTS

As organizations migrate from their current silos of communication to a unified model, there are a number of important considerations that they must keep in mind during the migration process and after the system has been fully deployed.

- **Migrating at the right pace**
Depending on a number of factors – including organization size, the number of locations maintained, the geographic distribution of the organization, corporate culture, budget constraints and other factors – an organization should be permitted to migrate to unified capabilities as quickly or as slowly as it requires. An organization might wish to migrate all of their users to the new system in one weekend, or they might want to do so over a period of a year or more. The decision should not be constrained by the limits of the vendor or their technology.
- **Phased replacements of the existing infrastructure**
Closely related to the point above is that the new infrastructure should be phased in at the pace that best fits an organization’s requirements – a “rip-and-replace” of the existing infrastructure should not be a requirement in order to adopt a unified communications capability.
- **Selective migration**
Most employees have communication needs that differ widely. Senior executives and traveling employees, for example, will often have sophisticated requirements to access email, voicemail and faxes from a desktop computer, notebook computer and smartphone from a variety of locations – while on a campus but not at their desk, from customers’ sites, from an airport or from a hotel room. Other employees, such as clerical staff or temporary workers, will often require little more than email that they access from a single platform only during work hours.

As a result, an organization should have the ability to deploy specific, advanced capabilities to certain users but not others. Doing so will minimize the licensing costs of providing these enhanced capabilities and will keep IT administration costs as low as possible.

MINIMIZING THE INTERRUPTION TO EMPLOYEES

Unified communications represents something a paradigm shift for organizations and employees alike. Despite the many benefits of unifying systems, the latter group, in particular, will often experience the most profound changes in the way they work. Even migration from one email system to another can significantly impact users while the new system is being deployed – unified systems will have an even greater impact.

As a result, it is critical to minimize the disruption to users as the new system is being deployed. This involves a number of things, including minimizing downtime as users are cut over to the new system, keeping training requirements to a minimum as users are instructed on how to access voicemail and faxes, and helping users to remain as productive as possible until they are up to speed with the new capabilities.

INTEGRATION INTO THE EXISTING NETWORK INFRASTRUCTURE

Organizations of all sizes, but particularly larger ones, often maintain a variety of backend capabilities, including email, voicemail, instant messaging, fax systems, CRM systems, ERP systems, various Web-based applications and many other capabilities, not to mention the various desktop, mobile and host-based platforms on which these systems are accessed. A

May 2008 Osterman Research survey, for example, found that the average user must access five different systems in the normal course of doing his or her work.

The growing array of capabilities and platforms requires that unified systems be carefully integrated into the existing infrastructure so that compatibility across all systems is maintained, and so that users can rapidly put to use the new features and functions available to them. However, this also complicates the situation for IT, since legacy systems must be supported, sometimes indefinitely.

CHOOSING THE RIGHT TECHNOLOGY

The bottom line, then, is to choose a technology and vendor that can support the legacy infrastructure as completely and as seamlessly as possible. For example, this means that the new technology should provide a wide range of Telephone User Interfaces (TUIs) and compatibility with multiple TUIs on the same system. The technology should be sufficiently flexible to support integration between the new unified communications infrastructure and all of the IP and traditional PBXs that an organization has deployed.

Summary

Unified communications offers major benefits to organizations of all sizes. These benefits include improved employee productivity, faster decision-making, lower maintenance costs, and the ability to support much greater employee mobility. However, migrating to a unified capability is not a trivial exercise. In order to be successful, it requires minimizing the impact of the migration on employees, integrating the new system with the existing legacy infrastructure, and driving the costs of the migration and support as low as possible.

© 2008 Osterman Research, Inc. All rights reserved.

No part of this document may be reproduced in any form by any means, nor may it be distributed without the permission of Osterman Research, Inc., nor may it be resold or distributed by any entity other than Osterman Research, Inc., without prior written authorization of Osterman Research, Inc.

Osterman Research, Inc. does not provide legal advice. Nothing in this document constitutes legal advice, nor shall this document or any software product or other offering referenced herein serve as a substitute for the reader's compliance with any laws (including but not limited to any act, statute, regulation, rule, directive, administrative order, executive order, etc. (collectively, "Laws")) referenced in this document. If necessary, the reader should consult with competent legal counsel regarding any Laws referenced herein. Osterman Research, Inc. makes no representation or warranty regarding the completeness or accuracy of the information contained in this document.

THIS DOCUMENT IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND. ALL EXPRESS OR IMPLIED REPRESENTATIONS, CONDITIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE DETERMINED TO BE ILLEGAL.