The Collaboration Paradox:

How new collaboration tools enable global executives to get more out of teams and make decisions faster

October 2012
BT Global Services has undertaken a global study of senior business executives working in large enterprises across ten different countries to understand how new unified communications collaboration tools are being adopted. We have also researched the costs to business of poor communication and collaboration.

Today’s unified communications (UC) portfolio include instant and unified messaging, presence, cloud storage and a variety of video communications. Initially UC was used for time saving benefits, but more recently the emphasis has been on internal and external work collaboration for global enterprises and supply networks.

The objectives of the research were to:
- Understand the take-up of UC in large global enterprises
- Capture the perspective of the end-user senior business executives in a range of functions
- Explore differences between cultures, generations, genders and job functions
- Calculate the cost of poor communication and collaboration on the global enterprise

The research was carried out by Davies Hickman Partners and includes:
- A full review of published sources on collaboration and unified communications
- An independent survey of 1,042 senior business executives working predominately in large enterprises across Australia, Brazil, China, Germany, India, Italy, Singapore, Spain, the UK and USA

The research, data and views in this white paper have been prepared in good faith but neither BT nor the authors of the report can be held responsible for any actions or otherwise taken by those reading it.
Global business potential is being thwarted by the Collaboration Paradox. Senior executives are aware of the value to be gained through better collaboration, both internally and externally, but are restricted by poor communications leading to inefficient decision making. This is the result of a global study of 1,042 senior business executives working in large enterprises in Australia, Brazil, China, Germany, India, Italy, Singapore, Spain, the UK and USA.

Collaboration is the future, particularly for Brazilian, Chinese and Indian executives

The majority of executives say they are extroverts (70%) and either work in teams or ‘spend all or much of their day working in teams or collaboratively’ (81%). Urged on by academics and business experts, executives now agree that collaboration with people outside their organisation will:

- Enable us to develop better products and services (60%)
- Increase customer engagement (62%)

However, outdated communications and working practices are causing the following collaboration problems at work:

- Slow decision making by managers and colleagues (56%)
- Lack of consultation (41%)
- Information not at hand (36%)
- Poor team working (33%)

Collaborating with customers and teams in other parts of their business requires a high effort for executives (69%). A range of issues are involved: 47% always or often have to wait too long for colleagues to respond to e-mail. BT’s ‘WorkShift’ research has explored some of the limitations of email’s “black hole for collaboration” and suggests that it is sometimes used and abused for inappropriate tasks.

The invisible cost: time is money

The cost of poor collaboration and communication is hard to quantify because it is principally a loss of time. But our study of 1,042 global executives working across a wide range of functions shows that the self-reported loss of time each day due to poor communications is 134 minutes. This equates to an annual cost per executive of US$25,000 and can run into millions for large global enterprises.

Real Time Collaboration with Colleagues using IM/Chat is/would be very beneficial to me...

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>61%</td>
</tr>
<tr>
<td>USA</td>
<td>35%</td>
</tr>
<tr>
<td>Germany</td>
<td>42%</td>
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<tr>
<td>Italy</td>
<td>48%</td>
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<tr>
<td>Spain</td>
<td>57%</td>
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<td>UK</td>
<td>35%</td>
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<td>Australia</td>
<td>26%</td>
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<tr>
<td>China</td>
<td>75%</td>
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<tr>
<td>India</td>
<td>69%</td>
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<tr>
<td>Singapore</td>
<td>59%</td>
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</table>
Can new collaboration tools resolve the paradox? The Collaboration Index 2012

Our study segmented senior global executives, working in different industries and functions, into 5 groups based on their use of 30 UC tools including unified messaging, IM, video calls and telepresence:

- Uninvolved (8%) – Do not use UC tools
- Inactive (18%) – UC tools are available, but not used
- Adopter (12%) – Started to use the basic Level 1 tools
- Follower (38%) – Use some of Level 1 and the more advanced Level 2 tools
- Leader (24%) – Most advanced segment, using Level 1, 2 and 3 UC tools.

There is a direct link between those who use the most advanced tools and the benefits reported for their employers.

58% of General Managers and Directors say ‘our IT dept doesn’t seem up to date with the latest technology’

54% of global executives say ‘they seem unable to get enough budget to invest in the best technology’

Increasingly, executives are bringing their own devices (BYOD), with 54% of General Managers and Directors wanting to use their own smartphone for work purposes. 25% say they use social media such as Facebook and Twitter to do their work. CIO’s need to protect their organisation’s interests in a competitive and regulated world, and the ‘consumer legacy’ of slick Apple and Android personal technology has raised expectations among executives who are keen to use better communications technology to improve how they work. Additionally, training is identified by 50% of executives as the biggest single barrier to adoption of collaboration technologies.

Tech progressives: the future of Collaboration

Global executives are very keen to adopt a range of UC solutions. The requirements of global working within large enterprises mean solutions are needed to enable collaboration across time zones and geography.

**Most Wanted Collaboration Tools**

- Unified messaging: 64%
- Integrated IM and E-mail: 62%
- Cloud based file storage: 68%
- Secure access to the corporate network from personal smartphone or tablet: 66%
- Desktop sharing: 74%
- Phone to video calls: 57%
- Video at your desktop: 59%
- Telepresence: 45%

**Users of UC See Strongest Benefits in Communication and Collaboration**

<table>
<thead>
<tr>
<th></th>
<th>Adopter</th>
<th>Follower</th>
<th>Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better team work</td>
<td>73%</td>
<td>84%</td>
<td>86%</td>
</tr>
<tr>
<td>Faster decisions</td>
<td>68%</td>
<td>80%</td>
<td>83%</td>
</tr>
<tr>
<td>Better data available</td>
<td>64%</td>
<td>78%</td>
<td>77%</td>
</tr>
<tr>
<td>Home and flexible working</td>
<td>47%</td>
<td>59%</td>
<td>63%</td>
</tr>
<tr>
<td>Improved customer service</td>
<td>61%</td>
<td>68%</td>
<td>76%</td>
</tr>
<tr>
<td>Better talent Acquisition and Retention</td>
<td>43%</td>
<td>54%</td>
<td>73%</td>
</tr>
</tbody>
</table>

The IT Dept Dilemma

Business executives are often uncertain about the ability of their internal IT providers to respond to the opportunities of collaboration and better communication:
Global business has evolved hugely from the days when senior managers had their own offices, communicating face-to-face internally at meetings and over the ‘water-cooler’. Today, the demands of global business combined with the power of social media mean executives are increasingly looking outside their own organisations for innovation. Executives agree that collaboration:

- Enables us to develop better products and services (60%)
- Increases customer engagement (62%)

This trend is strongest among the emerging economies. Over 75% of Chinese, Indian and Brazilian executives agree that ‘outside-in’ collaboration will lower the costs of innovation (against the average of 51%). Further, 75% of Chinese executives, 69% of Indians and 61% of Brazilians say that real time collaboration using instant messaging/chat would be very beneficial (compared to the average of 51%).

41% of Chinese and 48% of Indian executives are still working after 9pm at night, compared to the global average of 27%, so it is not surprising to see that reflected in the numbers agreeing that ‘having the best communication technology is important to where I work’. Across those polled, an average of 44% agree with that statement, compared with 73% for Indians, 50% for Chinese executives and 47% for Brazilians. In regions where external collaborations are valued more highly there are high levels of interest in new collaboration tools as part of the premium placed on good communication.

<table>
<thead>
<tr>
<th>WOULD REALLY ADD VALUE OR BE USEFUL IN MY WORK...</th>
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<tbody>
<tr>
<td>Phone to video calls</td>
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<tr>
<td>Brazil 73%</td>
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<tr>
<td>Integrated IM and E-mail</td>
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<td>Brazil 71%</td>
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<tr>
<td>Cloud based file storage</td>
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<tr>
<td>Brazil 77%</td>
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<tr>
<td>A secure Facebook style platform</td>
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<tr>
<td>Brazil 64%</td>
</tr>
<tr>
<td>Telepresence</td>
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<tr>
<td>Brazil 65%</td>
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The emphasis on collaboration, both within organisations and externally, places a new requirement on the working practices for large global enterprises. Rather than ‘command and control’ management styles, the drivers of success are involvement, consultation and joint working.

The collaboration paradox is that global executives want to collaborate more but find it difficult because poor communication and working practices lead to slow decision making.

Although collaboration is supposed to deliver product and marketing campaigns at a faster turnaround, executives are being frustrated by a range of communication difficulties:

- 43% ignore e-mail and voice-mail (41% say they are ‘too busy’ as a way of dealing with information overload)
- 47% always or often have to wait too long for colleagues to respond to e-mail
- 43% have to wait for meetings to be completed
- 32% have at least four e-mails which they still need to respond to at the end of the day
- 43% check and write e-mails in meetings (24% to organise their social life)

69% say working collaboratively with individuals and teams in other parts of the business and externally requires a high or very high effort on their behalf.

### GLOBAL BUSINESS EXECUTIVES AGREE THEY SUFFER FROM...

<table>
<thead>
<tr>
<th>Slow decision making</th>
<th>Lack of consultation</th>
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<tbody>
<tr>
<td>56%</td>
<td>31%</td>
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<tr>
<td>57%</td>
<td>37%</td>
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<tr>
<td>57%</td>
<td>23%</td>
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<td>39%</td>
<td>29%</td>
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<td>57%</td>
<td>31%</td>
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<td>63%</td>
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<tr>
<td>64%</td>
<td>54%</td>
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<tr>
<td>60%</td>
<td>52%</td>
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</table>
Collaboration requires a high degree of effort, with 65% saying they have to put forth a high degree of effort to work collaboratively with their customers. The position within the organisation is not much better, although there are differences across functions. For technology to help collaboration and be adopted it needs to reduce the amount of effort for users to collaborate - something more fully explored in BT’s WorkShift ‘Networked Watercooler’ paper.

### Collaboration Requires a High Effort for Global Executives

<table>
<thead>
<tr>
<th>Activity</th>
<th>General Management Directors</th>
<th>Sales/Marketing/e-Commerce/Strategic</th>
<th>HR</th>
<th>Auditing/Compliance/Support services</th>
<th>Accounting/Financial</th>
<th>Operational/Performance</th>
<th>IT</th>
<th>R&amp;D/Policy</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep in contact with fellow workers</td>
<td>68%</td>
<td>62%</td>
<td>58%</td>
<td>61%</td>
<td>66%</td>
<td>63%</td>
<td>58%</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Work collaboratively with your team</td>
<td>73%</td>
<td>72%</td>
<td>60%</td>
<td>64%</td>
<td>74%</td>
<td>69%</td>
<td>62%</td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>Work collaboratively with individuals and teams in other parts of the business</td>
<td>74%</td>
<td>75%</td>
<td>66%</td>
<td>71%</td>
<td>73%</td>
<td>75%</td>
<td>70%</td>
<td>60%</td>
<td></td>
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</tbody>
</table>

Collaboration requires a high degree of effort, with 65% saying they have to put forth a high degree of effort to work collaboratively with their customers. The position within the organisation is not much better, although there are differences across functions. For technology to help collaboration and be adopted it needs to reduce the amount of effort for users to collaborate - something more fully explored in BT’s WorkShift ‘Networked Watercooler’ paper.

Overall, poor communication results in wasted time for global executives who are some of the best remunerated and most skilled individuals in the world. We asked global business executives to estimate the time wastage they experience. On average, 134 minutes is lost each day due to communication problems – 25% of a nine-hour day.
The data shows that global business could be losing significant profits. A global FMCG organisation may employ 25,000 executives, at an annual ‘all in’ cost of US$100,000 each. These people claim to be wasting 25% of their 9 hour day on poor communication and collaboration. Therefore, the annual opportunity cost incurred by the FMCG company may be in the region of US$625,000,000, across all 25,000 executives.

Executives recognise the costs of poor communication and collaboration, which they say regularly causes:

- Increased costs for the organisation (35%)
- Damage to customer satisfaction (38%)
The collaboration paradox: the long wait in team working and decision making

Bite-sized comms are squeezing out F2F in the workplace
Looking forward, the communication culture of large enterprises is set to change as executives expect a growth in e-mail, video-calls and streaming and IM, while face to face meetings are set to fall. This may lead to a continuous stream of ‘bite-sized’ communications and fewer longer periods together for executives. This is partly a technologically driven development, but it also represents the preferences of Generation Y.

In a week 58% of executives have two or more conference calls and 65% have two or more face to face meetings

Only 46% of under 25s say, “One of the most rewarding parts of my job is having face to face conversations with my colleagues”, compared to 63% of over 45s.

**HOW WILL COMMS CHANGE IN 3 YEARS FOR YOUR ORGANISATION? % AGREEING IT WILL INCREASE A LOT**

<table>
<thead>
<tr>
<th>One to one</th>
<th>One to many</th>
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<tbody>
<tr>
<td>E-MAIL</td>
<td>VIDEO CALLS</td>
</tr>
<tr>
<td>74%</td>
<td>55%</td>
</tr>
<tr>
<td>VIDEO CALLS</td>
<td>WEBINARS</td>
</tr>
<tr>
<td>55%</td>
<td>43%</td>
</tr>
<tr>
<td>IM</td>
<td>SOCIAL MEDIA</td>
</tr>
<tr>
<td>50%</td>
<td>47%</td>
</tr>
<tr>
<td>PHONE</td>
<td>ONLINE GROUPS</td>
</tr>
<tr>
<td>49%</td>
<td>48%</td>
</tr>
<tr>
<td>F2F</td>
<td>AUDIO CONFERENCE CALLS</td>
</tr>
<tr>
<td>36%</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>TELE-PRESENCE</td>
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<tr>
<td></td>
<td>40%</td>
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</table>
We wanted to understand the current adoption of new collaboration tools so large enterprises can compare themselves to others. Additionally, we wanted to know if these tools actually benefit global executives.

The fastest adopters are General Managers and Directors of large enterprises. One-third travel overseas at least once a month and 74% say that working collaboratively with individuals and teams in other parts of the business requires a great deal of effort on their behalf. Importantly, these people are seeing benefits from their use of UC with...

Our Collaboration Index shows General Managers and Directors are mostly part of the ‘Leader’ and ‘Follower’ groups. We use a classic S-curve for the adoption rate\(^1\). This analysis is based on 30 different UC technologies which are more advanced than the PCs, lap-tops, e-mail systems, fixed and mobile phones which all executives use.

At an absolute level, take up of collaboration tools is happening at last. Current adoption levels for global large enterprises are:

- IM systems (34%)
- Presence (24%)
- Video calls from their desktop (19%)
- Web conferencing (16%)
- Unified messaging – email and voice mail (9%).

Our statistical analysis used a Mokken Scale\(^2\) to identify which of the 30 UC technologies were most difficult to adopt, from level 1 (easiest), to level 3 (hardest). The analysis then segmented each of the 1,042 global executives who completed the study according to their take up of UC\(^3\).

Two in five use few or no collaboration tools
The ‘Uninvolved’ group had no access to the 30 UC technologies because their employer did not make these available. Although the Inactive and Adopter groups have access, very few are used.

Each segment has different characteristics. The Leader group tends to be in a younger age group although more senior within their organisations, and travels more than the other groups. By comparison, the Uninvolved and Inactive are older and travel less frequently. Indian and Chinese executives are over-represented in the Leader group.

\(^{1}\) Many natural processes, including those of complex system learning curves, exhibit a progression from small beginnings that accelerates and approaches a climax over time. When a detailed description is lacking, a sigmoid function is often used [Wikipedia].

\(^{2}\) Mokken scale statistical analysis was used to identify three levels of advancement in UC tool use and to rank executives based on their adoption curve.

\(^{3}\) For more detail of the 30 collaboration tools assessed contact your BT account team.
Can new collaboration tools resolve the paradox?
The Collaboration Index 2012

## Segmenting global executives’ use of collaboration tools for work

### Basic Comms
- PC/Laptop
- Phone/Mobile
- E-mail

### Level 1 UC
- Filtering incoming calls by caller
- Desktop sharing via IM system
- Audio conferencing
- Instant messaging (IM) systems

### Level 2 UC
- Presence online
- Video conferencing room
- Cloud data storage

### Level 3 UC
- Telepresence
- Video calls smartphone
- Video calls desktop
- Polling colleagues online

### IM System for Work
- Smartphone/iPad
- Unified messaging
- Virtual ‘white boarding’
- Listening back to conference calls

### Sharepoint or Other Document Sharing Software
- Corporate contacts on smartphone or iPad
- Docs linked to contacts - appear when contact calls
- Sharing your location with colleagues GPS

### Availability and Advancement of UC

- **Leader - 24%**
  - Use some Level 1, 2 & 3 UC

- **Follower - 38%**
  - Use some Level 1 & Level 2 UC

- **Adopter - 12%**
  - Use some Level 1 UC

- **Inactive - 18%**
  - UC available, not used

See appendix for further details of the Collaboration Index segments.
Can new collaboration tools resolve the paradox?
The Collaboration Index 2012

The benefits of collaboration tools
Adopters of UC are reporting benefits both personally and for their employers. Better team work and faster decision making are cited by one in two of the Leader group while 74% of Followers and 67% of Leaders agree that by using UC they ‘manage their time at work better’. 60% of the Leader group say they need to keep in touch with work at evenings and weekends, down to 16% of the Uninvolved.

Equally, both Followers and Leaders see the value of UC in other ways:

- Having the best communication is an important factor for me in choosing where to work (Follower 46% and Leader 69%)
- Overall, communication technology helps me do my work better (Follower 81% and Leader 82%)

As Leaders use UC, they ‘go up the learning (S) curve’ in terms of appreciating the benefits of video communications, saying:

- You can see their body language (61%)
- You can see what they are doing (58%)
- They can show you a document or product (57%).
Global Business executives want better collaboration to drive innovation but the intention is frustrated by the slow pace of decision making and team working in large enterprises. This is leading to a real dilemma for IT departments: executives are BYOD and using social media, but CIO’s need to ensure security and cost efficiency.

This trend is strongest among younger executives, where there is higher incidence of social media usage.

Business executives are uncertain about the ability of their internal IT departments to respond to the opportunities offered by collaboration and better communication:

- 58% of General Managers and Directors say ‘our IT dept doesn’t seem up to date with the latest technology’
- 54% of global executives say ‘they seem unable to get enough budget to invest in the best technology’

The consequence is that executives have started to BYOD – bring your own device – to work, in an attempt to improve their ability to communicate, collect and access information. Many executives are ‘going behind the back’ of CIO’s:

- 35% want to use their own smartphone at work
- 32% want to use their own iPad or tablet for work
- 24% are using Facebook and Twitter for work purposes
- 54% of General Managers and Directors would like to use their own smartphone for work

Executives say IT departments ‘put too much emphasis on security over ease of use (55%).’ Clearly CIOs and IT departments need to control the access that executives have to protect data, commercial interests and employees from costly legal and regulatory dangers.

The IT Dept Dilemma

<table>
<thead>
<tr>
<th>CURRENT USE OF TECHNOLOGY AT WORK</th>
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<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Using facebook for work purposes</td>
</tr>
<tr>
<td>Using Slideshare for work purposes</td>
</tr>
<tr>
<td>Using Presence systems so you know if a colleague is online and available to chat</td>
</tr>
<tr>
<td>Using webchat like MSN/Google Talk at work</td>
</tr>
<tr>
<td>Google e-mail or Documents or Drive</td>
</tr>
<tr>
<td>IT put too much emphasis on security over ease of use</td>
</tr>
<tr>
<td>Always or often have to wait too long to log onto IT systems at work</td>
</tr>
</tbody>
</table>
The consumer legacy

The issue facing the IT Dept is that executives have become used to intuitive and slick devices and software in their consumer life, through the designs of Apple, Android and others. In practice, BYOD may only realistically extend to ‘bring your own iPad or Android smartphone’ but enterprise IT and networks need to match this consumer legacy with better UC of their own.

Implementation is a significant part of the challenge. When global executives were asked to identify the barriers to using new collaboration technologies in the workplace, the highest proportion of responses cited a lack of training. In a survey of global corporates as part of BT’s WorkShift research, Dr Nicola Millard found that nearly 70% said that IT ‘owned’ collaboration. This was because they provided the tools and platforms through which collaboration could take place. However, once IT implemented these, they then often forgot to train people how to use them (and sometimes even forgot to tell people of their existence at all).

<table>
<thead>
<tr>
<th>WHAT ARE THE BARRIERS TO USING NEW COLLABORATION TECHNOLOGIES IN THE WORKPLACE?</th>
</tr>
</thead>
</table>
| **20%** Ease  
Isn’t easy to use |
| **28%** Suitability  
Doesn’t suit my type of work |
| **32%** Reliability  
Doesn’t work reliably |
| **50%** Training  
Lack of training |
| **47%** Ubiquity  
Too few colleagues use it |
| **41%** Availability  
Often unavailable at right time |
| **35%** Relationship  
Only effective with those I know |
| **32%** Effort  
Require too much effort |
The Collaboration Index 2012 sets out current global adoption of a range of 30 UC technologies. IT departments are facing the challenge of executives who are willing to BYOD, showing the importance of responding to the corporate desire to collaborate both internally and externally.

Global executives are very enthusiastic to adopt a range of UC solutions. As would be expected with the S curve for technology adoption, initial slow take-up can be replaced by fast growth. Additionally, the requirements of global working within large enterprises mean solutions are needed to enable collaboration across time zones and geography.

**Tech progressives: the future of collaboration**

<table>
<thead>
<tr>
<th>Secure access to corporate network from your personal smartphone or tablet</th>
<th>66%</th>
<th>22%</th>
<th>56%</th>
<th>56%</th>
<th>70%</th>
<th>87%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated IM and E-mail</td>
<td>62%</td>
<td>19%</td>
<td>46%</td>
<td>53%</td>
<td>70%</td>
<td>80%</td>
</tr>
<tr>
<td>Video at your desktop</td>
<td>59%</td>
<td>15%</td>
<td>51%</td>
<td>51%</td>
<td>61%</td>
<td>79%</td>
</tr>
<tr>
<td>Virtual ‘white boarding’</td>
<td>61%</td>
<td>20%</td>
<td>45%</td>
<td>57%</td>
<td>66%</td>
<td>79%</td>
</tr>
<tr>
<td>Telepresence</td>
<td>45%</td>
<td>13%</td>
<td>35%</td>
<td>36%</td>
<td>41%</td>
<td>74%</td>
</tr>
<tr>
<td>Cloud based file storage</td>
<td>68%</td>
<td>22%</td>
<td>58%</td>
<td>60%</td>
<td>75%</td>
<td>83%</td>
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**Generational change: Baby Boomers/Gen X playing ‘me too’ with Gen Y/Z**

Younger executives show greater interest in using collaboration technologies in the course of their work. The following differences in behaviour take place in meetings at work:

- Checking and writing e-mails (58% of under 25s compared to 37% of over 55s)
- Checking Twitter (36% of under 35s compared to 15% of over 45s)
- Checking Facebook (35% of under 25s compared to 8% of over 55s)

Additionally, across most of the 19 technologies we tested it is younger executives who say UC technology would be more useful in their work. For example, 62% of under 25s would like Telepresence compared to 26% of over 55s. In terms of open software, 24% of under 25s use Slideshare for work, compared to 9% of those over 55.

However, the differences between the generations are smaller than some experts might predict, with older executives also showing positivity about using technology to collaborate. This may show a willingness to ‘keep up’ with Generations Y and Z, especially with the former now entering leadership positions in large global enterprises.

Firstly, 66% of over 45s compared to 74% of 25-34 year olds agree that ‘Overall, communication technology (IM, e-mail, video, telepresence, etc) helps me do my work better’.

Secondly, 32% of 25-34 year olds, compared to 25% of over 45s, use Presence systems to keep track of colleagues. Thirdly, older executives may use technology more intensely: 29% of under 25s log on to work before 8am, compared to 45% of over 35s.

The wish to keep up is reflected in data showing video calls from the desktop are almost as popular for 45-54 year olds (58%) as they are for 25-34 year olds (62%), and 68% of 25-34 year olds wanting Integrated IM and E-mail, compared to 60% of 45-54 year olds. Overall, Gen X and Baby Boomers are very positive about collaboration in general.

**COLLABORATION WITH PEOPLE OUTSIDE THE ORGANISATION TO SUPPORT INNOVATION THROUGH UC AND SOCIAL MEDIA WILL (% AGREEING)...**

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<th></th>
<th>Under 24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable us to develop better products and services</td>
<td>60%</td>
<td>68%</td>
<td>58%</td>
<td>55%</td>
<td>56%</td>
</tr>
<tr>
<td>Increase customer engagement and customer service through social media</td>
<td>61%</td>
<td>69%</td>
<td>58%</td>
<td>58%</td>
<td>61%</td>
</tr>
<tr>
<td>The risks of losing good ideas to our competitors are too great</td>
<td>35%</td>
<td>39%</td>
<td>37%</td>
<td>36%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Collaboration is finally getting the recognition it deserves

Globally, senior executives are voicing their strong belief that there’s huge value to be gained from better collaboration: smarter and faster decision-making; better use of resources; reduced operational costs; happier customers; and more efficient and responsive innovation. They can see the potential, but are frustrated by the circumstances that place barriers in their way.

And if ever there was a time when organisations need the power of collaboration, it’s now.

Across the globe our customers are facing the same issues: how to prosper in an unbalanced economy as growth shifts to emerging economies; how to get the most from instant globalisation when any aspect of business can happen at any time, anywhere; and how to leverage today’s hyper-connectivity to manage the problems caused by limited resources. We know senior executives are searching for ways to increase flexibility and responsiveness to help their organisations thrive in this uncertain world, and that fostering collaboration lies at the heart of this strategy.

Here’s where the paradox kicks in: senior executives want to collaborate more, but find it difficult because poor communication and working practices lead to slow decision making.

Much of the blame for this situation is targeted at the IT function; senior execs believe technology is the key to reducing the amount of effort users need to put in to bring about effective collaboration, but feel their IT department is not making this happen. Reasons vary — from a lack of investment, through to a prioritisation of security over ease of use (leading to a resistance of bring-your-own-device), or just a general hunch that the IT department is not up-to-speed with the latest technology.

ICT professionals know the issues involved are far more complex, but still they need an answer to this demand for a more collaborative workplace, one that makes the vision of unified communications a reality.

That answer is to simplify the technology and multiply the benefits; bring everything together with one framework that deals with every potential barrier to outstanding collaboration:

- One system for all devices
- One solution for all legacy systems
- One global network for all global users.

It’s about making things easier for users and managers as well as giving them more control. It’s about offering choice, freeing up time, and creating a multitude of opportunities to reduce costs. And it’s about looking to the individual organisation to set the pace and determine the journey.

We call the answer ‘BT One’, and we’d welcome the opportunity to talk through the possibilities with you.

Find out more at www.bt.com/btone/oneforall and join in the conversation.
The BT One portfolio is all about making communications work better for everyone.

It combines end-to-end, legacy-system-friendly solutions for organisations with highly-personalised, high-quality collaborative technologies for users.

Dividing naturally into four solution areas — voice, enterprise, cloud and collaboration — BT One offers everything your organisation needs to:

- Simplify communications
- Control transition to unified communications
- Transform dealings with customers, colleagues, partners and suppliers.

**ONE VOICE. ALL CLEAR.**
Voice capabilities that consolidate disparate technologies and suppliers.

- **Less cost.** Customers who spend more than GBP700k pa ($1M US) on voice can save on average 25 per cent by combining voice and global VPN traffic. Reduce voice, mobile and roaming costs by 45 per cent with One Voice anywhere. We can also use SIP trunking to eliminate voice access network infrastructure costs.
- **Less hassle.** One contract, one SLA, one bill — all in one place.
- **More options.** Supports both TDM and IPT to enable all your estate to work together and migrate from one to the other within tariff.
- **Your way.** Helps customers move from the most basic voice to full unified communications at their own pace.

**ONE ENTERPRISE. ALL TAKEN CARE OF.**
On-premise IP telephony and unified communications solutions.

- **More choice.** Our partnerships with Cisco, Microsoft and Avaya give you access to best-in-class technology, and offer a choice of on-premise solutions to match your needs.
- **More time.** Managed service wrap frees-up time to focus on your core business.
- **Less spend.** Integrates quickly and easily with legacy technologies, allowing you to minimise what you need to spend and managing the transition to UC.
- **End-to-end.** A range of on-premise IP Telephony and Unified Communications solutions to take care of everything, problem-free.

**ONE CLOUD. ALL YOURS.**
Global IP telephony and unified communications solutions

- **Less cost.** A cloud service that reduces capex at set-up and generates lower on-going costs.
- **More control.** Flex up and down as business needs change; pay for what you need, when you need it.
- **More time.** End-to-end hosting and management frees-up precious time.
- **Your time.** Migrate at your own pace and in your own time.

**ONE COLLABORATE. ALL TOGETHER.**
Audio, web and video communications solutions

- **More trust.** Improve teamwork and trust with full-screen HD video meetings, as well as high-quality web and audio solutions.
- **More time.** Speed up decision-making through instant collaboration and call management direct from the desktop or smartphone.
- **More savings.** Replace travel and accompanying costs with audio, web and video meetings.
- **Your choice.** Choose from equipment, to maintenance, to fully-managed services.

BT One - Communications that unify
Find out more at www.bt.com/btone/oneforall
The Collaboration Index segments senior global executives into 5 groups based on their use of 30 UC tools including unified messaging, IM, video calls and telepresence.

- **Uninvolved (8%)** – Do not use UC tools
- **Inactive (18%)** – UC tools are available, but not used
- **Adopter (12%)** – Started to use the basic Level 1 tools
- **Follower (38%)** – Use some of Level 1 and more advanced Level 2 tools
- **Leader (24%)** – Most advanced, using Level 1, 2 and 3 UC tools.

### COLLABORATION TOOL ADOPTION: THE FIVE GROUPS OF GLOBAL EXECUTIVES

<table>
<thead>
<tr>
<th></th>
<th>Uninvolved</th>
<th>Inactive</th>
<th>Adopter</th>
<th>Follower</th>
<th>Leader</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of all global executives</td>
<td>8%</td>
<td>18%</td>
<td>12%</td>
<td>38%</td>
<td>24%</td>
<td>100%</td>
</tr>
<tr>
<td>Male</td>
<td>59%</td>
<td>60%</td>
<td>61%</td>
<td>58%</td>
<td>52%</td>
<td>58%</td>
</tr>
<tr>
<td>Over 45</td>
<td>55%</td>
<td>47%</td>
<td>35%</td>
<td>37%</td>
<td>24%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Personally using</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>IM</td>
<td>0%</td>
<td>0%</td>
<td>27%</td>
<td>43%</td>
<td>62%</td>
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<tr>
<td>Presence</td>
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<td>0%</td>
<td>2%</td>
<td>31%</td>
<td>51%</td>
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<tr>
<td>VOIP calls</td>
<td>0%</td>
<td>0%</td>
<td>14%</td>
<td>32%</td>
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<td>26%</td>
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<tr>
<td>Web conferencing</td>
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<td>0%</td>
<td>5%</td>
<td>17%</td>
<td>39%</td>
<td>16%</td>
</tr>
<tr>
<td>Different ring tones by caller</td>
<td>0%</td>
<td>0%</td>
<td>26%</td>
<td>37%</td>
<td>51%</td>
<td>29%</td>
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<tr>
<td>Audio conferencing</td>
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<td>0%</td>
<td>10%</td>
<td>26%</td>
<td>43%</td>
<td>21%</td>
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<tr>
<td>Use iPad/tablet at work</td>
<td>7%</td>
<td>16%</td>
<td>25%</td>
<td>39%</td>
<td>94%</td>
<td>25%</td>
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