

# *Converged Collaboration & Conferencing Services*

*Understanding the Costs,  
Benefits, and Advantages of  
Unified Communication Networks,  
Applications, and Work Processes*



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Conferencing

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## **Executive Summary**

Work today is not discrete. Work is comprised of a huge volume of inter-related items, people, and processes. When each of these items are dislocated from the other and managed discretely, people and organizations are working unproductively. When the elements are smartly connected, enormous efficiencies in both time and cost can be achieved.

While there has been much hype and promotion of communication and workflow convergence over the last 10 years, it is only recently that the idea has contained any substance. It is only now that we have a commonly agreed upon network (IP), communication standard (SIP), and defined protocols to bring together and connect data, messaging, and communications in a way that is easy to access, meaningful, and desirable.

The following is a short and simple business case to assist end users in defining, understanding, and evaluating both the need and value of a converged collaboration strategy.

The goal of this paper is to provide a starting point using Conferencing services as a basis from which to work. In no way is this analysis a comprehensive evaluation or a complete tool – for each organization will have different and specific needs. We encourage you to use the following information to frame an informed discussion with internal management, outside experts, and vendor partners. Most importantly, we encourage you to craft a collaboration strategy and business case – specific to the needs of your organization - that will ease the flow of communication, drive internal productivity, and provide cost advantages.

## **Convergence Defined**

Convergence is the coming together - or coming closer - of two or more different entities. In today's IT world in general, and conferencing world in specific, convergence is increasingly important. The latest buzzword in the high technology industry is Fixed Mobile Convergence (FMC), the integration of wireline and wireless technologies to provide users with a seamless communication environment. FMC is the way to connect the mobile phone to the fixed line infrastructure. With the convergence between the mobile and fixed line networks, telecommunications operators and IT professionals can provide services to users irrespective of their location, access technology, and terminal device. Consumers think convergence when they see cameras integrated into cell phones, music players integrated into PDAs, or Internet access on a television. Business managers and IT professionals think convergence when they consider moving voice-video-data off of three distinct networks and on to one "converged network" or when they are evaluating integrated communications applications that give users total flexibility to use audio, video, and data.

Unified, Integrated, Converged – are terms which are used interchangeably by various people in the media, by analysts, and vendors – and often any one of these words will have a different definition depending on the source. From the perspective of business communications convergence (we'll choose this word) does two things; a) brings together multiple applications that previously operated over different networks – ISDN, PSTN, Frame Relay, IP – to operate on a single network. Specifically we mean an IP network - whether its the commodity Internet or a private IP network (VPN) – so long as it is IP (Internet Protocol). In addition, b) it eliminates the cost, burden, multi-vendor management, and security concerns of multiple networks. As organizations move into this converged world, they must partner with a vendor who can help them seamlessly migrate from old to new world.

## Current Situation

In the conferencing and collaboration industry, convergence is taking place on several levels including networking technology, endpoint advances, and software enhancements which are coming together to produce new solutions and services for the enterprise worker. Examples of recent developments include:

- Service providers can now offer single conferences that combine web conferences and audio conferences, making it easier for meeting hosts to schedule and reserve resources, and, with a single dial-in and meeting code, more convenient for meeting attendees to join such meetings. The technology today can make it transparent to the end users whether the voice is carried over PSTN or IP networks.
- New integrated voice and data sharing applications running over IP can make video (also over IP) a natural enhancement to a point-to-point or multipoint meeting. Such integration was not possible when video was transported over a separate switched network.
- Powerful desktop and laptop PCs today are more than capable of running integrated voice-video-data applications, bringing telephony to the PC in the form of soft phones along with rich media communications via web conferencing and videoconferencing.
- Presence engines that provide users with buddy lists showing the state of their fellow workers and their ability to communicate at the current time are helping business communicators avoid the phone tag problem. In this new paradigm, telephony status and call control are being integrated (or converged) with the computer's presence and instant messaging system. Telephone status information (in a call, in a conference call, etc.) adds significant context about how people are working, and it complements and enhances a user's presence information based on scheduling information or computer keyboard state (online, in a meeting, on vacation, away, etc). By knowing both presence and context, people are able to reach out more effectively to those with whom they wish to communicate.
- Taking convergence one-step further, some software developers are integrating presence and instant messaging capabilities into high-level enterprise workflow applications such as ERP, CRM, finance/accounting and HR software. The workflow application thereby becomes a converged application, with users able to launch audio conferences, data collaboration sessions, and even videoconferences directly from within the application.
- Convergence is also affecting the business strategies of major vendors. In the past few years there have been numerous mergers and acquisitions: Cisco acquired Latitude, Microsoft bought PlaceWare, eBay bought Skype, Alcatel bought eDial; Polycom bought Voyant. In addition, Cisco, Microsoft, and IBM Lotus have all announced major business initiatives under the moniker of "unified communications."
- Convergence is also likely to alter the conferencing service provider (CSP) industry. Savvy CSPs are already planning for the day when customers have adopted convergence and made unified communications central to their business workflow and training programs as well as to their sales and marketing programs. These customers will need service provider partners who can deliver full technical support around the globe, training for users, and totally reliable and secure services. Converged conferencing and collaboration services, while not core to many businesses, will become as vital to the future organization as email, payroll, and web services are today. Customers will look to experts for whom conferencing applications ARE core in order to have these experts provide the required high-reliability rich media services. These experts will need to master core conferencing services while providing network expertise and application integration knowledge.

## **Convergence Benefits**

The benefits of conferencing and collaboration convergence fall into four inter-related categories:

### **Cost Savings**

Conferencing and collaboration have long earned their keep as substitutes for travel and hence as tools to reduce travel costs. New converged tools provide higher quality voice and video than ever before, and are far easier to use with PC-based documents that often serve as the focal point of business meetings. Well-informed end users are applying new collaboration tools, not just as substitutes for travel however, but also as travel accompaniments to help develop deeper relationships with customers and partners. Cost is also a factor in network services. Having one network for voice, one for video, and one for data communications means three networks to deploy, monitor, and manage, and typically three vendors, contracts, and invoices to deal with. A converged network, particularly one with inherent quality of service capabilities, can provide the end user with a single, higher performance and lower cost alternative.

### **Ease-of-Use**

Many web and IP-based applications are in their 3<sup>rd</sup> or 4<sup>th</sup> generation. Typically, 1<sup>st</sup> and 2<sup>nd</sup> generations provide foundational capabilities, however subsequent generations often focus on tighter integration with other programs and networks, as well improving look, feel, and accessibility. WR believes many conferencing and collaboration applications are in later versions and are designed to be more intuitive and hence will be used more frequently and provide faster returns on investment.

### **Personal Productivity Boosts**

Presence-based systems that support voice and video communications help enterprise workers avoid the frustrations of phone tag and email delays. Being able to resolve issues faster leads to higher personal productivity levels, and therefore to higher levels of job satisfaction for many workers. Early studies have indicated that when collaboration tools are integrated directly into the workflow process, that workers are able to resolve problems faster and to process 25-35% more transactions per hour, leading directly to bottom line improvements for the enterprise. A second productivity boost accrues from travel replacement for managers and executives. Too many people are familiar with the one-day trip to attend the one-hour meeting. The intervening seven hours are typically lost downtime for many workers. Eliminating downtime associated with travel saves the enterprise costs, boosts worker output, and reduces worker stress at the same time.

### **Flexible Working**

One of the most important benefits of next-generation collaboration and conferencing solutions is their ability to provide geographic independence. IP telephony, for example, whether based on an IP PBX or on a unified communication portal technology, recognizes people based on their login. Enterprise workers can have full functionality for audio-video-web conferencing whether they are in their office, their home, a hotel room, or their automobile. Flexibility and freedom to connect can help managers and executives communicate at whatever time and place makes the most sense. In addition, with IP and internet connectivity, there is no such thing as long distance, so communications are inevitably less expensive than traditional PSTN calls. Some companies are using collaboration tools to encourage workers to work from home or remote offices, thereby saving on real estate costs associated with HQ office space.

### **Business Continuity**

In today's political climate, more and more IT professionals are concerned with disaster planning, recovery, and business continuity. Whether the threat is a terrorist attack or an outbreak of a flu pandemic, savvy businesses are planning for the day when workers cannot come to work for an extended period. Unified communications solutions can be important tools to assist the enterprise in maintaining some sort of continuity in the face of external disaster. Workers who are experienced in using the new generation of conferencing and collaboration tools will be familiar

with communicating at a distance, with maintaining business relationships via voice and video conferencing, and with data collaboration sessions to reach business consensus and drive decision-making.



Figure 1 Convergence Benefits, Source: Microsoft

## Creating a Strategy & Business Plan for Convergence

End user organizations will be facing a wide variety of options for implementing a convergence strategy. Because each approach has advantages and disadvantages, Wainhouse Research expects many enterprises will opt for a combination of at least two options.

### Selections for Call Initiation

From a media-centric view of collaboration, users have three totally different strategies from which to select:

**IP Telephony:** for companies with an investment in next-generation telephony solutions, using the telephony infrastructure as a foundation for conferencing and collaboration may make a lot of sense. With these tools, a video call or data collaboration session can be launched as an add-on to a voice call – a strategy often dubbed “voice-first.” PBX vendors are rapidly developing or partnering with companies that can provide presence, videoconferencing, and web collaboration functionality. Most companies with an investment in PBX technology will need to ensure their collaboration tools are compatible with their existing investment.

**Collaboration Portal:** the collaboration portal is a PC-centric communications application that provides audio-video-web-presence technologies to PC-based users. For enterprises where PCs are widely deployed and where PC skills are commonplace, the portal provides a rich selection of audio and video capabilities as well as a full range of data sharing and collaboration options. Portals are available from well over a dozen vendors, and several are now supporting direct connections to either Microsoft’s Live Communications Server environment and/or to IBM’s Notes-Sametime-Workplace architecture.

**Productivity Software:** workers who spend most of their day inside a CRM or ERP or some other workflow application may find it most convenient and easiest to launch a collaboration session from within that application. Wainhouse Research believes that the majority of such applications will be Presence-based and will enable voice calls for conflict resolution or group conferencing, with web collaboration possible. Enterprises will need to

upgrade their productivity software and invest in the needed infrastructure components to enable these solutions, but users will find the interface very intuitive and familiar.

All three of these user access approaches may in fact be based on very common technologies, but their presentation to the end user and their user interfaces will be different, and they will likely be marketed and sold by different channels.

## **Selections for Deployment Type**

All three access approaches in turn are likely to be offered in three deployment models:

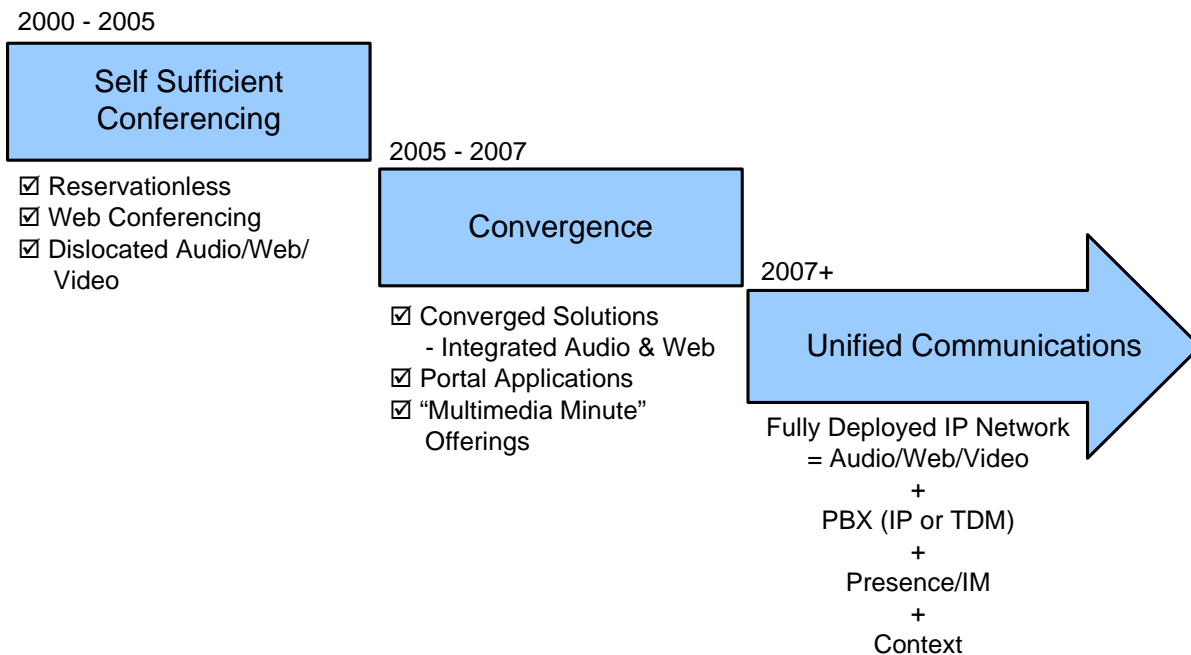
**CPE:** In the customer premises model, the customer acquires all the needed equipment to support conferencing and collaboration and operates that equipment himself. The advantage is security. Disadvantages include capital outlay, requirement to train, educate and communicate with users; train operators/help desk personnel, requirement to staff operations during holidays, sick days, vacations, etc. and need to invest in staying abreast of conferencing and collaboration industry developments as well as changing internal needs to maintain competitive services.

**CSP:** With the conferencing service provider deployment model, the end user outsources conferencing needs to an service provider who owns, maintains, operates, and supports all the equipment needed to satisfy the customers' needs. The customer typically has no upfront costs, no capital investments, and pays on a usage basis for services delivered. The CSP is responsible for providing the scalability and reliability demanded of the customer. The customer in turn must be comfortable using shared resources located at the CSP site.

**MSP:** With a managed services provider approach, there are many options. The equipment can be owned by either the user or the MSP partner. The equipment itself can be located anywhere – at the customer location, at the MSP site, or at a co-location facility run by yet another company. The advantage here is financial flexibility while having access to the resources of conferencing and collaboration experts. The MSP approach can lead to high levels of utilization and maximize the ROI from conferencing and collaboration investments for those customers with heavy call volumes – due in part to reduction in access call charges to public services.

Customers looking at this multitude of deployment options should consider many factors, including:

- Required level of ROI
- Required levels of security for data and meeting content
- Current usage levels and planned future growth
- Need for high quality video
- Need to connect with third parties outside the corporate firewall
- Need for 24x7 support services
- Ability to manage and operate complex resources
- Disaster recovery requirements
- Additional staff needed to support internal deployments
- Ability to train internal staff
- Required service levels
- Need for support for high-touch events such as shareholder or financial analyst meetings
- Interest in running non-core assets such as conferencing bridges
- Capital expense and depreciation budgets
- Operating expense budgets
- Support for mobile workers
- Support for global operations
- Benefits of remote equipment monitoring
- Internal integration skills with Microsoft or IBM technology
- Number of workers using third party productivity software



**Figure 2 Conferencing Convergence Roadmap, Source: BT, 2006**

### **Understanding & Organizational Buy-In**

WR recommends an audit of network, messaging, and communication applications and services. The number and diversity of services that are used - independent of corporate sanctioning - surprise most organizations. No convergence strategy will work when any volume of applications and services are used outside the convergence service wrap. Some of these rogue services will need to be dropped, and others that are spectacularly popular (unbeknownst to IT) will need to be integrated.

Senior management, department heads, and influential users will need to be individually briefed and sold – potentially multiple times – before buying in to a new strategy. Make sure you are prepared with facts about your organization and the solution. Also, be open and prepared to alter and adjust your strategy after input from these stakeholders. Besides having a good perspective of needs, hurdles, and opportunities, involving their ideas will ease the buy-in process.

## **ROI Considerations**

There are many elements of a collaboration strategy that will provide easily identified returns on investment. Some other initiatives, such as training and adoption, will provide softer returns that will be more difficult to calculate, but may prove more valuable over time. Because every organization is unique in its needs and its use of applications and networks, no one standardized ROI analysis will provide an accurate assessment. Below we present ideas to consider when constructing your ROI for convergence.

### **Achieving ROI through Training & Adoption**

One of the quickest initiatives to drive ROI is through training and adoption programs for collaboration and conferencing. Very few organizations run any ROI analysis because it is intuitively obvious that five participants on an audio conference are much more cost effective compared to even one participant traveling to an in-person meeting. However, many organizations and individuals fail to take advantage of the full benefits of many services offered. It has been estimated that most individuals use less than 10% of the features and benefits in Microsoft's Office suite of software, yet they have paid for 100% of the product. The missing link to drive usage is to drive awareness through training and programs. Just by signing on for collaboration and conferencing services, an organization will receive some level of ROI, but real benefits kick in when the full breadth of services are adopted deep and wide within the organization.

Some conferencing service providers (CSPs) have training and adoption services where they work in partnership with their customers to provide a tailored communications, adoption and training plan. Recent statistics indicate this makes a real difference to the ROI clients enjoy. The benefits include:

- Driving faster ROI by engaging a greater number of users;
- Empowering users with knowledge on how to use tools effectively
- Managing the program through a service provider, where no in-house resources required (or training manuals to write);
- Effectively targeting users who need training, not power users;
- Increasing meeting participation - studies indicate that after a training programme participants become more engaged and active in the meeting;
- Customizing to specific client needs;

### **Achieving ROI through Network & Application Convergence**

The more traditional ROI for convergence also includes:

- Network Convergence – reducing or eliminating the network, management, and maintenance costs of operating multiple networks. Many organizations today are moving toward operating a single MPLS / IP network and are realizing significant cost savings. Most of the savings are in two areas:
  - Lower capital expenses associated with installing network infrastructure equipment for one network;

- Lower operating expenses associated with IT and your network service provider supporting a single network.
- Application Convergence – combining applications together to create a process that is easy to use and increases productivity, and bringing together multiple applications operating on multiple networks to operate on one network. Example of this include:
  - Integrating collaboration and conferencing applications with messaging tools such as email, calendaring, and IM to provide easy access, scheduling, and notification to meeting participants;
  - Integrating PSTN audio conferencing, IP web conferencing, and ISDN video conferencing on to an IP network whereby each application is combined into a single meeting with one meeting number and one password.

Based on external costs alone, a simple example to illustrate the cost comparisons would be purchasing PSTN audio conferencing from one vendor and IP web conferencing from another. The worldwide average price for unattended audio is \$0.07 USD per minute and \$0.20 USD for web conferencing. Obviously audio and web are used together, yet most users contract for and manage two separate vendors and pay an average of \$0.27 USD per minute for an audio/web conference (\$0.07 audio + \$0.20 web). A converged solution, which would combine audio and web as one service, on one network, and at one price, is often 1/2 to 1/3 the price – we are seeing bundled pricing at \$0.09 - \$0.14 today. However, real productivity gains increase when these services combine with messaging (IM, calendars, email, mobile) and data (shared documents,

Convergence, and specifically convergence associated with collaboration and conferencing can dramatically decrease both operating and capital costs by reducing the number of infrastructure and application equipment acquired and the number of items to manage – both networks and equipment. Beyond the monetary benefits lies the value of productivity. Most IT staff and management in organizations are stretched in both the volume of responsibilities (doing more) and the time they have to have to complete their work (less available time). For those responsible for managing and maintaining IT systems, convergence can be a blessing by making work easier and by freeing up time.

## Key Criteria for Vendor Selection

We recognize that every organization has different needs and requirements that will drive the selection criteria for a converged collaboration provider. When considering a vendor, in addition to your specific and unique needs, we recommend that you also incorporate the following requirements:

Item	Description
Diversity of Services	While a broad offering of collaboration and conferencing elements – audio, web, video – is important, it also valuable to work with a provider who can either directly or indirectly provide network, applications, and support <i>and</i> be able to control each of these services.
Flexible Roadmap	Even if you are not ready to move towards convergence immediately, you need the confidence of a supplier with a clear roadmap to let you move forward at your own pace. Seamless migration path options are key to allow you to leverage convergence benefits when you are ready – no forklift upgrades.
Strong & Meaningful Partnerships	No single convergence provider can be the original equipment or software manufacturer for all your needs. A strong convergence offering dictates strong partnerships with others. Look for length and quality (certified rating) of relationship with the most critical components that make up your strategy.
Adherence to Standards	Communications has moved into IT away from Telecom. IT has traditionally been stronger on adherence to protocols and standards. With so much at stake – the connection of all your communication and information – it is critical that providers are adhering to standards (SIP) and protocols (ISO/IEC 2000).
Comprehensive Security	Beside the need to keep your data and communications out of reach from foreign third parties, there are also many regulatory compliance requirements for most businesses in finance, healthcare, and consumer services. Make sure managed security services are part of any agreement.
Financial Strength	The service provider community – both third party competitive and incumbent carriers – has been fraught with financial troubles in the recent past. Most are much more disciplined and are now better managed and more secure financially than in the past. Financial strength is both the quality of managing revenue and costs, and the access to cash in order to invest in new services.

Global Presence	With the need to connect to such a diverse and remote set of colleagues, partners, and clients, it becomes imperative to consider a provider who has a wide and deep reach around the globe that matches or exceeds the reach of your organization. Check can they really provide 24/7 support globally? Where do they figure on the global conferencing industry rankings? How successful are they – is their market share dwindling through lack of investment or is their growth above industry average?
Training & Adoption	An indication of a successful convergence strategy will be users rapidly adopting and promoting new processes and services among one another. However, awareness campaigns and a training offering will be critical for adoption. Understand what is being proposed and how it can fit into your organization culture. A credible conferencing vendor should work with you to market within your organization.
Service Innovator	<p>The ability to offer new service arrangements and tailored service solutions for customers is key in this developing market. This could include:</p> <ul style="list-style-type: none"> <li>- Innovative systems: integrated provisioning systems, online billing, portal-based solutions, ROI calculators, customized reporting</li> <li>- Operational excellence: real-time operational, consultative, educational and technical assistance, strict SLAs, management escalation path</li> <li>- Platform expertise, integration &amp; support: partnerships with technology leaders; customization and support of multiple solutions built for customer environment;.</li> </ul>
Account Management	While an account executives role is to sell you something, the most important role they can provide you is information on solutions and connecting you to people and resources. Account executives provide the important role of playing your champion into their organization by communicating, representing, and defending your needs. A good CSP will have expertise to share which will ease implementation.

Technology Investment	The benefit of using a service provider is so your organization does not have to buy, maintain, and update your service infrastructure. You should expect and require that your provider explain their current infrastructure and operations as well as their strategy and plans for IP conferencing, presence, and either convergence or unified communications. Some providers have been sitting on legacy analog audio bridges or have strung together some Intel Dialogic parts and pieces which are not carrier class; these often are likely to “hit the wall” during peak usage and may not accommodate your transition to IP. A carrier class offering will have scalability, redundancy, and security built into an infrastructure that is managed and monitored 24/7/365.
Commitment to Solution Set	WR believes there are three types of offerings available from providers today; 1) those that say what they think the client wants to hear, but in actuality have no offering, 2) those who have a partial solution based on their current offering, but lack the relationships or resources in critical areas and, 3) those that have a strategy and protocol for deployment, and all the relationships and resources to provide a complete solution. A commitment to the solution set is more than marketing; it is a plan with the resources to back it up.
Experience	Because unified collaboration is new, no vendor can claim any long-term experience in this area. However, many of the elements of a unified strategy are not new. Some providers do have long-term experience in networks, integration, conferencing services, and with workflow partners. Experience is the best guarantee for quality, reliability, security, and control.

## Conclusions & Recommendations

Developing a strategy and business plan for converged collaboration is an important first step in bringing together many disconnected communications and processes. A well thought out, written plan, could serve as a guide and monitor for years after it has been researched and completed.

The financial return and organizational benefits will be different for each organization and therefore cannot be prescribed from a common plan. However, it is apparent that when properly selected, deployed, and promoted, a process and procedure for communicating and collaborating over a common network with connected applications will drive organizational efficiencies. Some of these efficiencies can and should be measured and monitored.

However, the largest benefit to both the organization and its individual contributors may be what comes in the pleasure of using systems that are intuitively designed so that all the technology fades from conscious consideration and people connect, share, and move forward with the knowing ease and understanding of a glance.

This paper was sponsored by



### *About BT Conferencing*

With more than 20 years' conferencing experience, an extensive global portfolio in over 50 countries, and key strategic relationships with companies including Microsoft, Cisco and IBM, BT Conferencing is a global market leader in conferencing. The company has won awards including the Frost & Sullivan award for market leadership in European Audio Conferencing in 2005 and the 2006 Frost & Sullivan Award for Market Penetration Leadership in the Audio Conferencing services market globally.

BT Conferencing is your one-stop-shop for conferencing, now and in the future. With a range of audio, video and web conferencing solutions and an attractive ROI proposition, BT Conferencing is ideally positioned to support the drive towards converged conferencing solutions. For more information, refer to [www.bt.com/conferencing](http://www.bt.com/conferencing).

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### *About Wainhouse Research*

Wainhouse Research ([www.wainhouse.com](http://www.wainhouse.com)) is an independent market research firm that measures, models, and monitors critical issues in collaboration and conferencing. The company conducts multi-client as well as custom research studies for industry vendors, provides M&A advice, consults with end users on key implementation issues, publishes a news bulletin, white papers, and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings.