



*(We were) working with a team
of film and video producers
from Norway...
and seeing their approach
to collaborating on film edits
and marketing materials.
They really use the technology
to build ideas.*

— Consultant

*All of the players were online
and the decision
on the project was made
with consensus from
around the world.*

— Engineering Support, Auto-
motive Manufacturer

Collaboration with Teams and Partners

Achieving Productivity Gains Inside and Outside Your Business

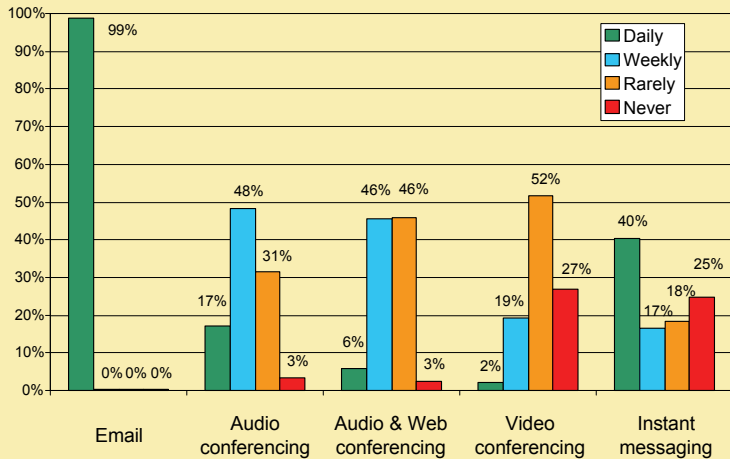
Businesses large and small increasingly require complex partnering and teaming to get things done. As technology has made the world “flat,” the nature of doing business has changed, and those changes apply not only to vendor/customer relationships, but also to the myriad resources necessary to invent, build, and deliver products and services. Organizations are distributed as never before and are turning to new technologies to address the issues of distance and time.

Whether business workers are teaming with internal colleagues or external partners, the essentials are very similar: functional areas can range from research, to product development, to marketing, to sales, to post-sale support. These groups interact internally (with their groups) and externally (with one another). Interactions now go far beyond simple phone calls to include real-time collaboration in which content, typically PC-based, is either displayed or fully shared to achieve a wide variety of goals, such as brainstorming, designing, building consensus, and gaining approval.

Effective teaming over distances can be challenging, however, as it requires a set of tools and a mindset open to teaming. To assess the current “state of the art” in collaboration, Wainhouse Research and Citrix surveyed over 1,500 respondents during July-September 2007 regarding attitudes and use cases for web conferencing to support collaboration inside and outside their businesses. Respondents include workers in IT (16%), management (12%), administration (10%), engineering (9%), sales (9%), finance (8%), and marketing/pr (7%) positions.

*Collaboration with external teams /partners
is at 41% adoption today and shows the highest likely growth
of any application – another 40% – over the next 12 months.*

Which Communications Technologies Do Businesses Use?



Many technologies are in use today, some as pervasive as pencil and paper, some still moving up the adoption curve. While email clearly leads in daily usage, web conferencing falls right behind audio conferencing as a daily or weekly tool. A few things worth noting:

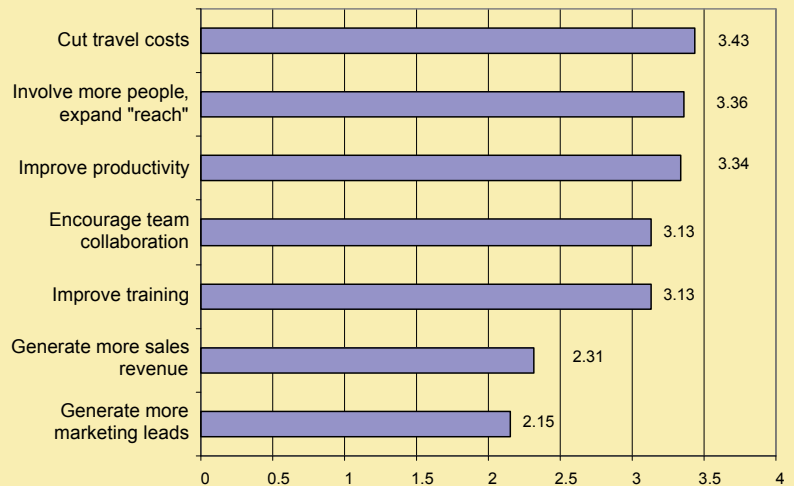
- On a weekly basis, nearly as many people use audio and web conferencing together (46%) as use audio conferencing (48%).
- Wainhouse Research believes that some of the 57% who use IM daily or weekly likely use it to help launch conferencing sessions quickly.

Why Web Conferencing?

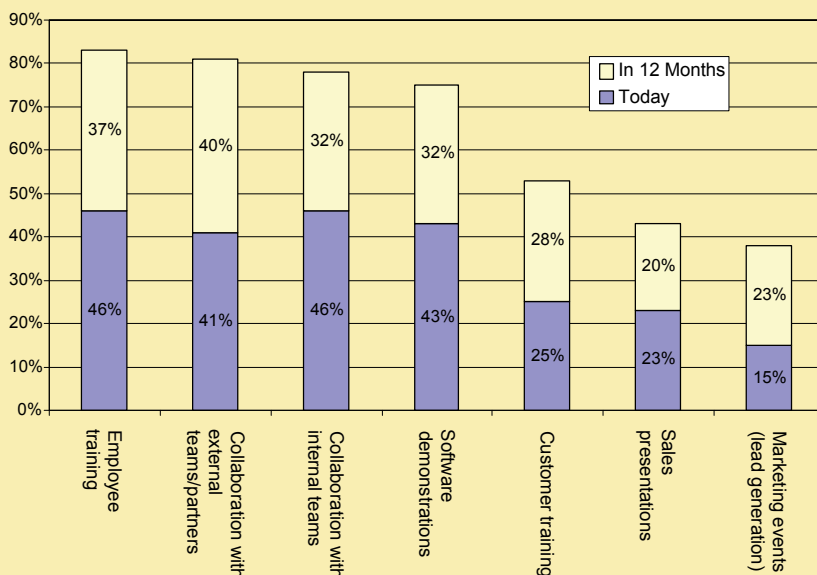
We asked respondents to rate why they use web conferencing on a 1-4 scale (with 4 = very important and 1 = not important).

The top three reasons that were cited for using web conferencing are clustered together: to cut travel costs (3.43), involve more people/expand reach (3.36), and improve productivity (3.34). All three fall mid-way between important and very important.

Encouraging team collaboration and improving training are also important, both scoring 3.13 (slightly higher than "important.")



What Are Your Applications Today? Next Year?



Employee training and collaboration with internal teams are the two most common applications for web conferencing today (both 46%). Within 12 months 78% plan to be collaborating with internal teams using web conferencing.

Collaboration with external teams/partners, at 41% adoption today, shows the highest likely growth over the next 12 months – 40%. That would make it the #2 application in 12 months. This "maps well" to Wainhouse Research's understanding of evolving usage patterns and the growing importance of external teams/partners.

Software demonstrations (43% today, 32% additional in 12 months) are also a strong application area.

Other survey data tells us that when people do not use web conferencing, typically it is because the benefits are not apparent or it requires a cultural change for which they are not ready.

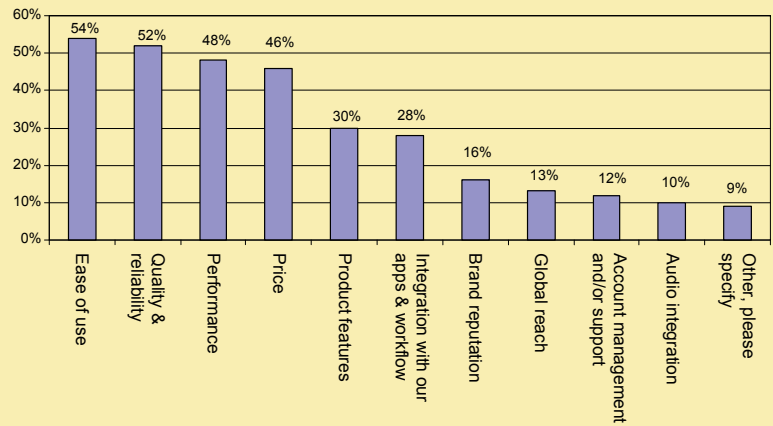
What to Look For ... And What to Avoid

Web conferencing users care more about basic quality and reliability in their tools than anything else.

- Ease of use (54%), quality and reliability (52%), performance (48%), and price (46%) are all grouped together as the top four criteria for selecting a provider. This is consistent with other Wainhouse Research findings.
- Features (30%) and integration with apps and workflow (28%) are important to almost one third of respondents.

Other aspects, like brand reputation or global reach, may be important to a small group.

The key thing to remember is that web conferencing should be easy to use & deploy, reliable, and affordable.



Do Small, Growing Businesses Have Special Needs?

We analyzed the importance of the above selection criteria by company size.

- Ease of use, quality, and price are slightly more important to smaller organizations.
- Performance and features are equally important to all organizations.
- Integration with applications and workflow is more important to large enterprises (over 1,000), though a select small business group (11-50 employees) believe it is important.

Satisfaction and Providers

We asked if users are satisfied with their web conferencing providers. Well over two thirds (71%) are satisfied or very satisfied with their web conferencing provider. Another quarter (26%) is somewhat satisfied; this group holds some reservations about their provider. And only 3% are unsatisfied.

We examined satisfaction rates by vendor on a 1-4 scale (with 4 = very satisfied and 1 = not satisfied). Citrix, the sponsor of this research, is the only vendor with a composite score above 3.0, "satisfied." This clearly shows positive attitudes regarding its user satisfaction.

Other providers received composite scores ranging from 2.68 to 2.85 — respectable numbers that are at the high end of the satisfaction range. But among those surveyed for this project, Citrix is leading the way in customer satisfaction.

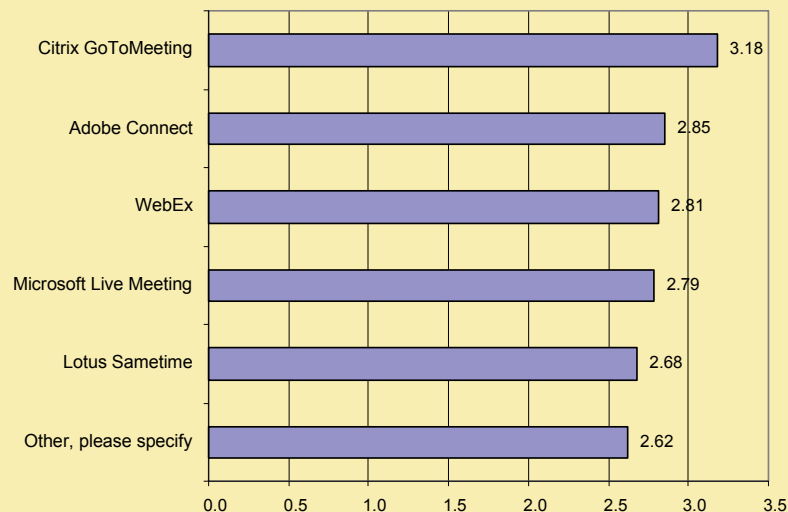
While only a small percentage are unsatisfied with their current web conferencing solution (3%), their #1 complaint is poor performance.

It is standard process, integrated into work methods; it (web conferencing) facilitates remote work teams

— Marketing/PR, Communications Services

(We conducted a) review of financials with external auditors and internal finance staff. It was extremely effective to be able to keep everyone on the same page when reviewing complex calculations.

— Technology Finance Professional



The Impact: Most Memorable Web Conferencing Events

We asked respondents to describe their most memorable web conferencing experience and heard about the impact of the technology in a variety of scenarios. Most respondents made some type of comment and Wainhouse Research grouped responses together by category to shed light on the mix of responses. We recorded responses based on the depth of the answer; if a respondent's answer applied to multiple types of events or attitudes, we tallied them as appropriate. Thus if someone mentioned training and the ability to include participants globally and the ability to team, we recorded their answers three times: once under training, once under geographical reach, and once under teaming. The chart to the left lists the relative rank of the most mentioned types of memorable events or attitudes about web conferencing.

Memorable event / attitude	Rank
Training effectiveness or a specific training session	1
Geographical reach / global reach / elimination of travel	2
Effective collaboration tool / brainstorming session / teaming	3
Effective meeting tool / particular meeting	4
Effective software demonstration / product launch	5
Virtual trade show / webinar / webcast (capability or particular session)	6
First time (positive experience)	7
Effective sales tool / particular big sale or closed business	8
A high quality experience / reliable experience	9
Good content / particular presenter	10
Good support tool	11
Something funny happened / funny presenter or session	12

Effectiveness for Collaboration/Brainstorming

Many comments surround collaborating, brainstorming, and team building. Many of the respondents view web conferencing not simply as a meeting tool, but as a core workflow tool that is integral to product development and improved performance. Many also comment on how it can become a motivating force as their organizations evolve.

Web brainstorming: (web conferencing is) a good fit to brainstorming methodology and could link to online brainstorming tools.

— Management, Technical Design Services

Technical presentation regarding a manufacturing issue: It was clear and very interactive

— Engineer, Manufacturer

Introduction of a new prototype component: I was able to see, up close, certain designs that the people in the room did not see. The camera acted like a magnifying glass.

— Consultant

The last company meeting: We were all extremely happy with the quality of everything with our management being so far away; it felt like (our boss) was right there.

— Administrator, Technology Services

About Wainhouse Research

Wainhouse Research, www.wainhouse.com, is an independent market research firm that focuses on critical issues in rich media communications, video-conferencing, teleconferencing, and streaming media. The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings. Wainhouse Research publishes a variety of reports that cover the all aspects of rich media conferencing, and the free newsletter, The Wainhouse Research Bulletin. This application brief copyright © 2007 Wainhouse Research, LLC.

About Citrix Online

Citrix Online, a division of Citrix Systems, Inc., is a leading provider of easy-to-use, on-demand applications for Web conferencing and collaboration. Its award-winning services include GoToMeeting Corporate, a complete collaboration solution that satisfies all Web conferencing needs ranging from large Webinars to small online meetings. With GoToMeeting Corporate, organizations of any size can use GoToWebinar for do-it-yourself Web events and GoToMeeting for smaller, more interactive online meetings.

GoToMeeting Corporate allows users to easily present, demonstrate and provide training online to anyone, anywhere in the world. GoToMeeting Corporate can make businesses of any size more productive by reducing travel time and costs and enhancing communication, ultimately leading to faster decision making and more efficient workers. For a free evaluation of GoToMeeting Corporate, please visit www.gotomeeting.com/s/WReval.