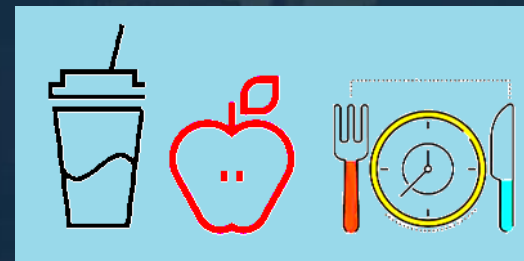




Welcome To Collaboration Week New York



Today's Breakfast Courtesy Of



Enjoy the refreshments. We will begin shortly.



Where Are The Battle Lines Today

In our un-unified state of UC, how do the players compare?

Dr. S. Ann Earon

Telemanagement Resources Int'l Inc.

AnnEaron@aol.com



Collaboration Week

**New York
2020**



@TheIMCCA @UCWeek #CWNY20

What Is The IMCCA?

Interactive Multimedia and Collaborative Communications Alliance

- Non-profit, technology neutral
- Focus on all multimedia & collaboration
- Increase awareness & branding
- Unification of organizations & interests
- Further learning objectives
- Industry Alliances
- Networking Opportunities
- Monthly Newsletter
- Educational Opportunities
- Special Interest Groups



www.IMCCA.org

*Free Membership For End Users
Many Benefits for Vendor Members
Contact Carol Zelkin, Executive Director
Czelkin@imcca.org*



@TheIMCCA @UCWeek
#CWNY20

Join Us This Afternoon

FREE REGISTRATION! www.CollaborationWeekNY.org

**IMCCA**
20+ Years Strong And Still Growing!



Hear from & speak with industry experts & industry peers!



Day 2, Session 4 Highlights:

- Collaboration Trends Explained
- Sorting Through The Bleeding-Edge Of Technology
- The Gateway facility explained

Speakers Include:



Nemertes' Irwin Lazar



Harpervision's Greg Harper

Attendees will be entered into a random drawing to win:



ClickShare CSE-200+

- Up to 2 users on-screen
- Share from laptop, tablet or smartphone

Clickshare CSE 200 – courtesy of Barco



20+ Years
Strong And
Still
Growing!

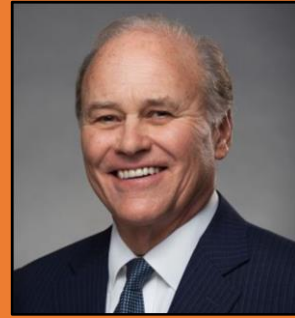
Join Us For Dinner Tonight

February 25th at Gala Dinner

www.CollaborationWeekNY.org

Tuesday's Gala Dinner, Discussion & Awards Includes:

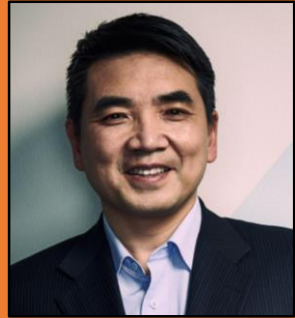
Honoring Industry Legends



Randy Klein
President & CEO
Crestron



Eric Yuan
Founder & CEO
Zoom



*Dinner, drinks
& networking
with industry
experts &
industry peers!*



Our State Of The Industry Panel Discussion Featuring:



Attendees will be entered into a random drawing to win:



Microsoft Surface Go and
Sennheiser SP30T Bundle
Courtesy of :





Join Us Tomorrow

February 26th

www.CollaborationWeekNY.org



Hear from & speak with industry experts & industry peers!



Day 3, Session 6 Highlights:

- The Workplace of the Future – What is an Office
- How Generation Z Uses Technology
- Keeping The Workplace Informed

Speakers Include:



SMW's Mark Peterson



Rutgers' Mark Beal



Planar's Lainie Mataras

Attendees will be entered into a random drawing to win:



Luxul AV Series 12-Port/8 PoE+ Gigabit Managed Switch
Courtesy of Legrand AV



Join Us Tomorrow

February 26th

www.CollaborationWeekNY.org



Hear from &
speak with
industry
experts &
industry peers!



Day 3, Session 7 Highlights:

- Team Chat Applications (MS Teams, Slack, Webex Teams)
- The New Workflows
- CWNY20 Locknote – Discussing What We Heard

Speakers
Include:



CDA's Michael Goldman



Synergy Sky's Sean Lessman

Attendees will be entered into a random drawing to win:



Apple Homepod & Synergy Sky Free Demo
Courtesy of Synergy Sky



Collaboration Week Closing Cocktail Party

#CWNY20 Wednesday Evening February 26th Closeout

Join your Collaboration industry peers and the IMCCA as we close out the second annual Collaboration Week New York. We'll share what we've learned, and toast to the excitement the future promises.



*Cocktails, Hors-D'oeuvres,
Networking, Discussion*



Visit with the sponsoring Mersive team while enjoying the party. They'll be discussing their latest products and announcements.

FREE Registration:
WWW.CollaborationWeekNY.org



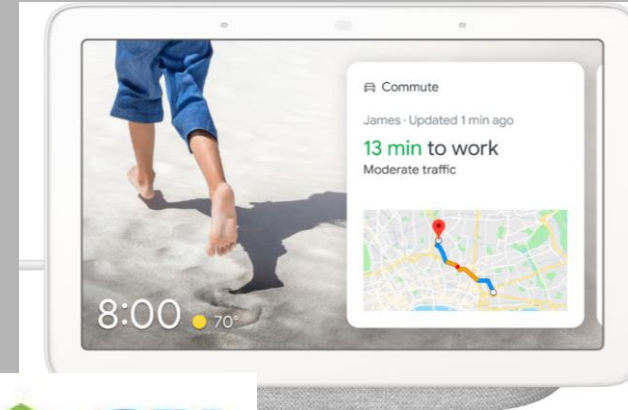
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Today's Attendee Raffle Prize

After the last segment



Attendees will be entered into a random drawing to win:



Google Nest Hub – Courtesy of AVI-SPL



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Dr. S. Ann Earon

Collaboration Week Programming Chair



- **Founding Chairperson, IMCCA**
- **Program Chairperson, IMCCA**
- **President, Telemangement Resources International Inc.**
- **Industry Godmother, not Grandmother!**

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www.TRInc.com

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As We Heard Yesterday

Competitive Atmosphere

Unified Communications and Collaboration From 1997 to 2020

23 years later, and we're anything but unified.

“Coopetition”

- Firms want to be seen as working together, but in reality would rather see each other go up in flames

UC&C View Today
as provided by:



Unified Communications vendors and their new competitors

Traditional UC Vendors



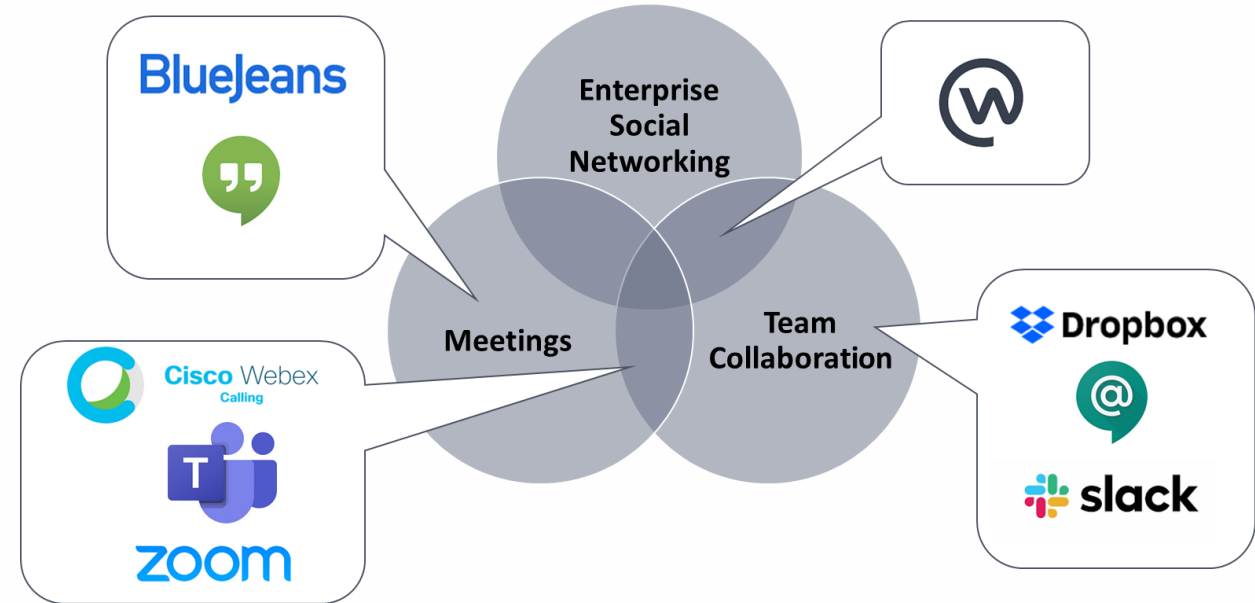
UCaaS Vendors



AT&T Business



Market Adjacencies



Endpoint & Peripheral Vendors



Market Summary

We are at a turning point

- Traditional vendors will face a crisis of prioritization: invest in a declining, premises-based portfolio or invest in new cloud-based platforms.
- Vendors that don't significantly invest in cloud will fail to attract new prospects and, over time, lose their install base through competitive churn.
 - Software subscriptions offer a flexible pricing model & carry little upfront expense; business risk is reduced as switching costs are minimized.
- Vendors will need to replace end-of-life underperforming legacy platforms or risk being outpaced by cloud-based rivals.

Market Summary

What is driving the change?

- A changing workplace and change in customer demands (new ways of working, new digital channels to utilize)
- Freemium model means no/low risk, try before you buy.
- Ease of use drives user adoption and circumvents IT
- Consolidated and integrated suites favored to “best of breed” mixes

Unified Communications and Collaboration Market

Threat of new entrants (High)

- Low barriers to entry: standards-based SIP, WebRTC, CPaaS, containerization all democratizing the market.
- UC is attractive to new competitors from market adjacencies.

Threat of substitutes (High)

- Buyers now segmenting by use-case (personas)
- Numerous substitute services available in the market
- Easy to substitute- little capital expense, subscription model

Competitive rivalry (High)

- Low levels of differentiation especially when evaluating UC.
- Service Providers now in direct competition with vendors (MSFT, RING etc.)
- Diversity of rivals in market adjacencies making industry unstable
- Slowing growth rate and saturated UC market indicating a further shake-out

Bargaining power of suppliers (Low)

- Channels reluctant to adapt to services model/create their own IP
- Low cost handset alternatives and USB devices
- Multiple channel partners facing diminishing margins

Bargaining power of customers (High)

- Low switching costs- some desk phones/devices can be re-used.
- Extensive range of substitute solutions with low risk trials.
- Propensity to buy suites rather than best of breed. (Price sensitive)

Market Summary

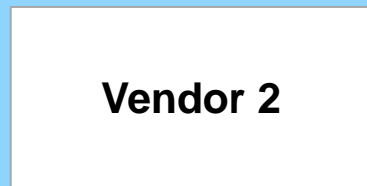
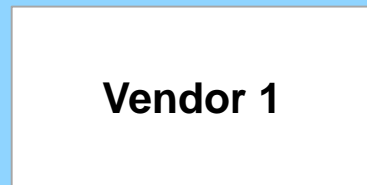
Why is this happening?

- Customers leapfrogging technology
- Legacy vendors facing a crisis of prioritization (UC? UCC? UCaaS?)
 - Consolidation is not enough to survive
 - few vendors are yet willing to make strategic compromises by saying no to some customers (e.g., premises-based) in order to better serve others.
- Long-term winners: Cloud-based vendors with all-in-one suites

Market Summary

Or, shown more simply:

PROPRIETARY PLATFORM



DEVICES

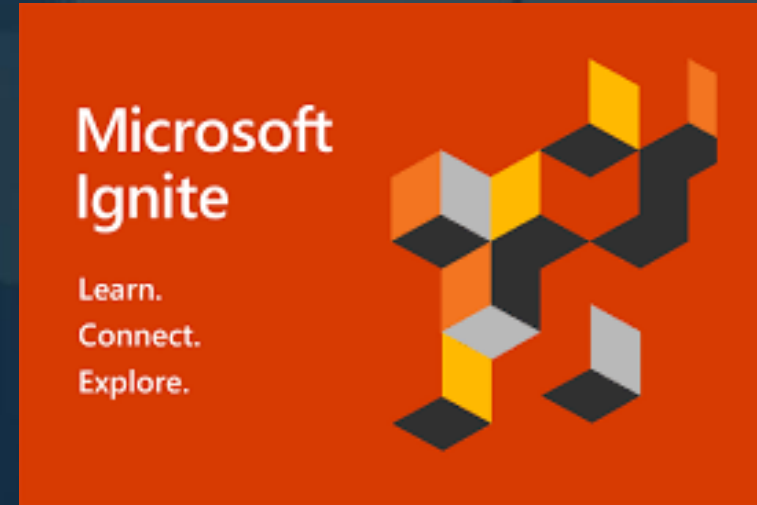


PLATFORMS, PARTNERS & ALLIANCES



The Battle For Mindshare

Convincing users of the benefits of their platform is the key for vendors



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The Messaging

Cisco:



Cisco Webex is “hassle free” conferencing and collaboration that just works. It is a suite of cloud, software and hardware all intended to work together.

Cisco Talking Points:

- Most reliable, enterprise grade system available, with a big user base
- Available as a collaboration platform, and as room hardware that can be on-prem or cloud
- Systems are optimized for video and optimized to work with each other
- Cognitive Collaboration allows endpoints and the cloud to use AI features to make for a better experience

Cautions:

- Webex has had so many band-aids and changes put on it over the years that it's unrecognizable
- Cisco has pivoted on strategy and naming to the point people are confused (Project Squared, Spark, Webex Teams)
- Cisco has multiple competing products in the space today (HCS, Broadsoft, Webex, “Flex” plan, etc.
- Most of the highly regarded members of the Cisco collaboration team have left the organization

The Messaging

Microsoft:

Microsoft Teams 

Meet the hub for teamwork in Office 365.

Microsoft Teams is a chat and collaboration platform for Microsoft Office 365 customers designed to simplify group work.

MS Talking Points:

- Integrates voice, video, team chat and file share into one platform
- Collaboration is more than calling, no one helps desktop collaboration more
- Democratizes the room collaboration experience with inexpensive small PCs and software controlled peripherals
- Great quality experience provided by Microsoft Certified hardware ensuring everything works well together

Cautions:

- Teams Room systems (MTRs) haven't allowed for easy access to other services – 3rd party interop schemes were required up-until recent announcement. Not a great room solution for users that have multiple services.
- Some organizations find managing in-room PCs easier, some find it harder – depending upon who owns the room
- Works really well in all Microsoft environment, not as well in mixed environments

The Messaging

Zoom:



Zoom provides remote conferencing services using the cloud. They combine video conferencing, online meetings, chat, telephone and webinars with advanced features and very high levels of user satisfaction.

Zoom Talking Points:

- Try Zoom for free – first 41 minutes of a meeting is at no charge.
- “It Just Works” and “Meet Happy” are their slogans.
- As the newest entrant into the space Zoom is not held back by legacy issues. They offer unmatched speed in releasing new features and functions.
- ZoomRooms are available from multiple manufacturers in multiple configurations.

Cautions:

- Connecting to Zoom from legacy videoconference systems requires an extra charge.
- Most ZoomRooms have been glorified DIY kits – this is only changing now with new 2020 market introductions.
- Zoom development is so rapid they may have made mistakes (as a recent feature to ease meeting start was widely derided as a security issue.)

The Messaging

Google:

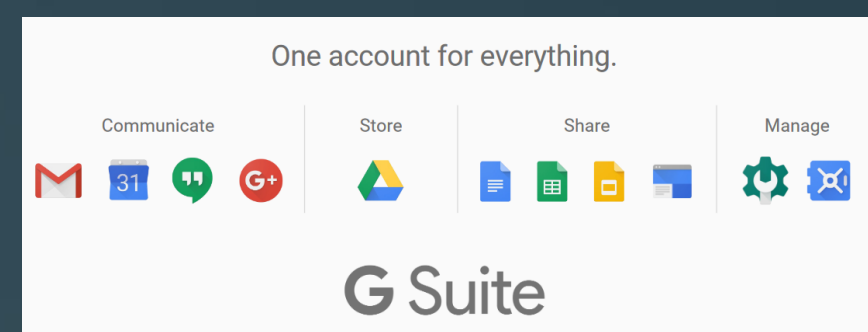
Google's G Suite includes Gmail, Google Drive, Google Docs, Sheets, Slides, Calendar, Keep, Hangouts, and other Google apps that you probably already use and love.

Google Talking Points:

- Using G Suite allows you to save money on maintaining software licenses, installations, running an IT department, and more.
- No one does cloud better or at bigger scale
- Room systems based upon Chromebox are easier to maintain, have less exposure to malware, are faster and less expensive

Cautions:

- Collaboration is a flea compared to Google's main source of revenue. Things get added and killed by them all the time with no seeming strategy.
- Hangouts Meet is incompatible with all other video collaboration services and hardware (and browsers other than Chrome) and Google allows only one external firm to provide interoperability.
- Organizations with a lot of external party contacts may find it difficult to constantly have to translate the more common Microsoft files with G Suite files.



The Messaging

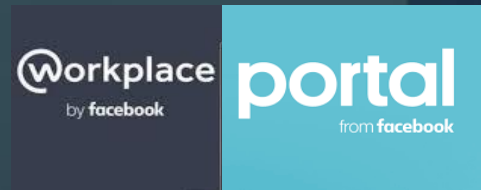
Others:



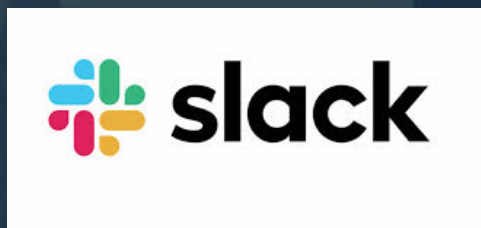
Still a very significant user base despite an legacy player connotation



Making in-roads into growing user numbers without a huge push to gain market share



Suffering from significant trust and backlash issues in its general perception



Dominant team chat platform with technology / developer roles – fighting it out with Microsoft Teams

Who Is Telling The Truth

All of them / None of them

- Organizations will optimize their story of course
- Platforms want you in their walled garden to drive recurring revenue
- Users need to speak with other users to get a comprehensive list of pros and cons
- Hiring consultants with experience as a guide can't hurt
- We predict hardware lock-in going away, so services can be evaluated based on service



Where Are The Battle Lines Today

In our un-unified state of UC, how do the players compare?

Questions?

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These are our panelists for today



Thomas Early
Ford Foundation



Kevin Hyatt
Disney



Josh Klempner
Citi

Panel Discussion

Feel free to raise your hand and ask your own questions.

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New York
2020



10 Minute Break