

NETSCOUT®

Communication, Collaboration & IT: **Growing Pains and IT Strains**



Executive Summary

At the start of the pandemic, enterprises turned to Unified Communication & Collaboration (UC&C) platforms like Zoom, Cisco Webex, Microsoft Teams, Google Meet, and Slack to keep employees connected and the business running amid government stay-at-home orders. These tools gave some of the world's largest organizations the ability to adapt to fast-changing market conditions and to new imperatives for digital transformation. Now, they remain central to employees' preferences for a more fluid and flexible environment that supports hybrid work arrangements.

Still, the consequences of the massive adoption and use of UC&C platforms has yet to be fully understood. As 2020 drew to a close, NETSCOUT commissioned a survey of 300 IT leaders to examine the impact of these platforms on the changing nature of work -- and on enterprise networks. We found organizations in the midst of a massive investment to improve the workforce experience related to UC&C tools, while at the same time struggling to manage an array of privacy, cybersecurity, and bandwidth concerns. This report builds on that effort. One year later, surveying a similar group of IT decision-makers at companies with more than \$1 billion in revenue, it's clear that UC&C software remains central to companies' hybrid work capabilities. Yet many companies that rushed to roll out new UC&C tools during the pandemic are now taking stock of their investments.

Notably, 43% of respondents in the most recent survey report that UC&C issues are the most frequent source of helpdesk tickets, and one in four said their organizations are called upon to troubleshoot UC&C-related tickets multiple times per day. While the vast majority of issues are resolved relatively quickly, the accumulated impact to productivity is hard to ignore: countless hours and wasted meetings lost to poor video quality, mismanaged device configurations, difficulty sharing screens, and a host of other common challenges.

Likewise, the survey found significant investment in tools and techniques that help IT teams detect and analyze the source of UC&C challenges. The number of respondents relying on these tools underscore the importance of network assurance solutions that leverage data collection, analytics, and automation to ensure a high-quality user-experience and to quickly resolve challenges related to this suite of mission-critical tools.

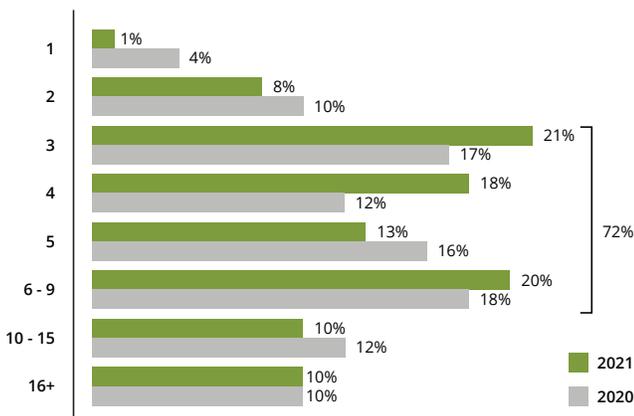
Explosive Growth, But Will It Last?



The pandemic and the onset of hybrid work have been the largest drivers of UC&C adoption, with 93% of respondents saying collaboration tools are important to their hybrid work policy. The same percentage of companies added new UC&C tools and apps in the past 18 months.

For evidence of the value of UC&C tools to the enterprise, look no further than the number of tools in use. In our survey, 72% of organizations supported between three and nine UC&C collaboration tools, while one in five companies report using more than 10 collaboration tools. For companies that have revenue of more than \$10 billion, that figure more than doubled to 42%. Meanwhile, 86% of overall respondents said they plan to consolidate the number of UC&C platforms used by employees in the next year.

72% of enterprises currently support between three and nine UC&C tools – an increase of 9% since 2020. Meanwhile, one-in-five companies use 10 or more tools.

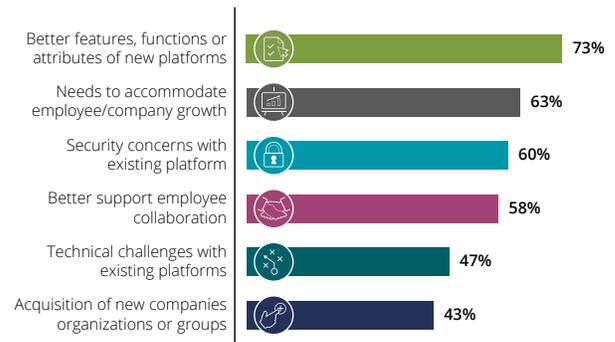


The question, of course, is why enterprises are using so many UC&C platforms. The answer boils down to a range of factors. On the one hand, it appears to be that they're looking for — and testing — what works best for their companies. Better features, accommodating employee growth, and improved security all topped the list of reasons in the survey. But organizations may also use different tools in silos, i.e., one tool may be preferred by marketing and creating teams and another is used primarily by their financial or administrative professionals. Finally, acquisitions of new companies are contributing to increased use, according to 43% of respondents.

Despite the growth in platforms, the majority of IT decision-makers said they planned on consolidating the number of UC&C tools over the next year. Interestingly, respondents in the C-suite were 14% more likely to predict a consolidation.

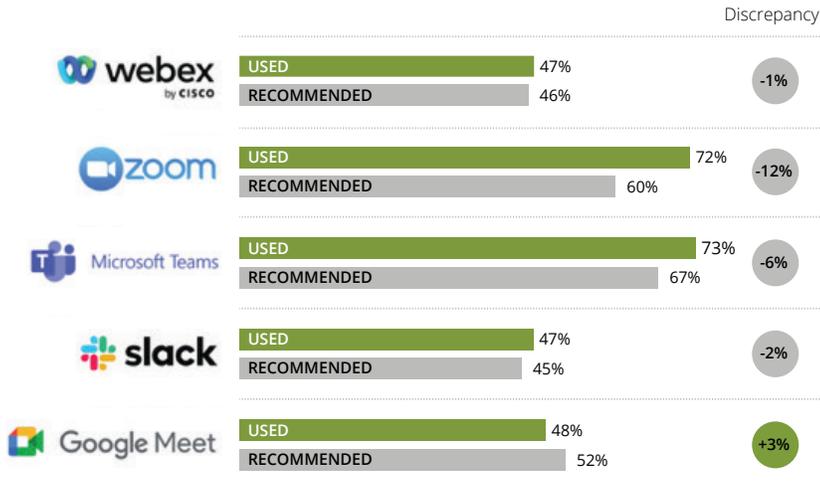


Companies had multiple reasons for adding new platforms – but better features, employee growth and security concerns drove most additions.



Leading Platforms

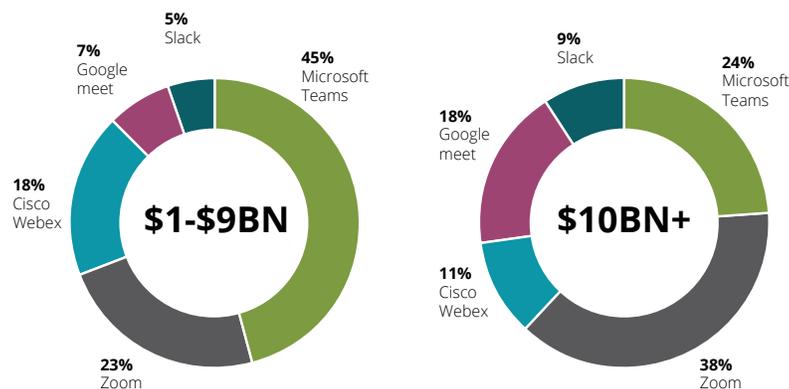
Q Which service do you use, and which service do you recommend?



Two platforms, Zoom and Microsoft Teams, were used far more often than others in the survey. But the results suggest that users don't necessarily love the platforms they use most frequently.

We asked respondents which platforms they used, and which they would recommend to others. Microsoft Teams had the highest penetration among enterprises. Zoom saw the biggest drop-off between users and recommenders, namely 72% to 60%. Google Meet was used by 49% of organizations, but a higher share of respondents, 52%, said they would recommend it to others, the only platform with a net-positive score.

Large companies have a preference for Zoom.



EDUCATION IN ACTION

Nearly every organization found themselves rapidly adopting UC&C tools at the outset of the pandemic. But perhaps no sector was more reliant on them than the education sector, where Microsoft Teams, Google Meet and Zoom became essential to continuity. School districts and universities with tens of thousands of students, multiple data centers, and extremely complex networks spanning campuses and geographies suddenly found themselves transitioning to remote learning. The challenges were immense. Districts distributed iPads and Chromebooks to students that did not have them. IT staff trained teachers on using UC&C tools, while contending with massive spikes in traffic.

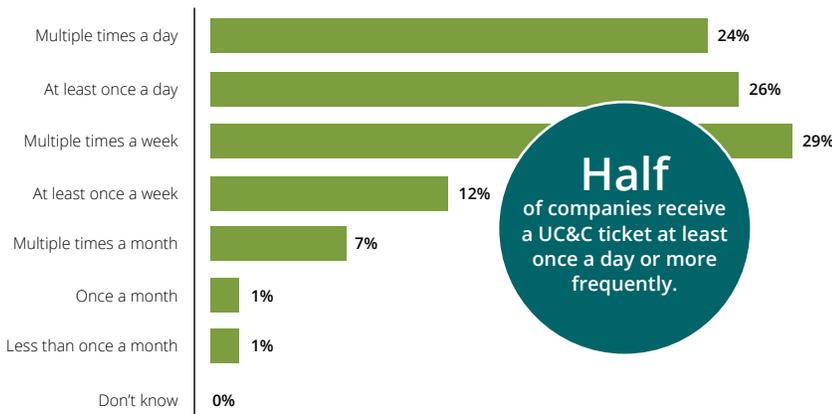
NETSCOUT® was selected by several major institutions and school districts to provide visibility and service assurance of learning applications and UC&C platforms. For the IT teams involved, delivering quality services and supporting a smooth transition to online learning was absolutely critical. NETSCOUT solutions helped IT teams reduce the meantime to remediation for issues impacting learning services by pinpointing the true source of degradations, outages, and errors throughout the transaction path, including the datacenter servers, the network itself and any associated VPNs.

At one large public school district with tens of thousands of students and more than 100 buildings, the IT team was able to use nGeniusONE® with ISNG appliances to uncover a DNS issue that impacted use of all their cloud application services accessed via URL including their UCaaS platform. At one university with more than 20,000 undergraduates, NETSCOUT was able to demonstrate how a communications issue that took nearly half a day to resolve using legacy tools could have been identified in less than one minute using NETSCOUT tools.

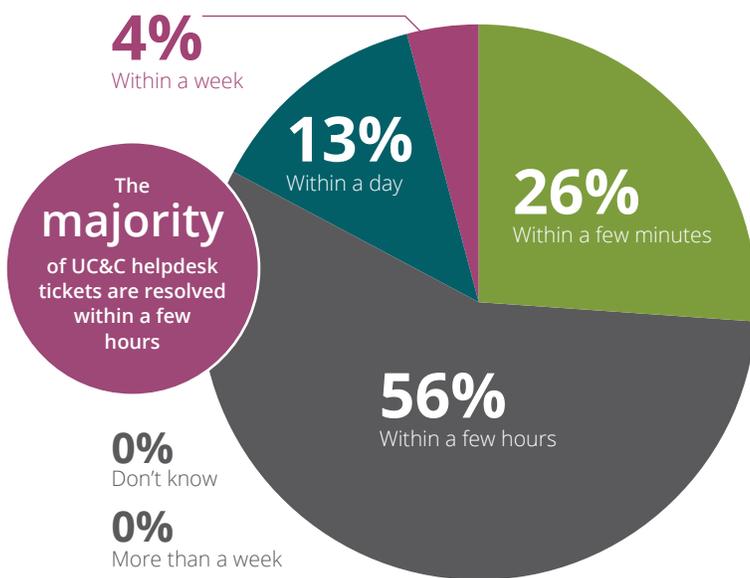
A Growing Strain

As use of UC&C platforms grew, IT departments saw a significant increase in the number of IT helpdesk tickets. More than 90% of respondents attribute that increase to the pandemic. Over one-third (37%) say that between 50% and 75% of all helpdesk requests are related to a UC&C issue.

Q How frequently does your organization receive helpdesk tickets related to UC&C software?



Q How quickly is your IT organization able to resolve UC&C requests on average?



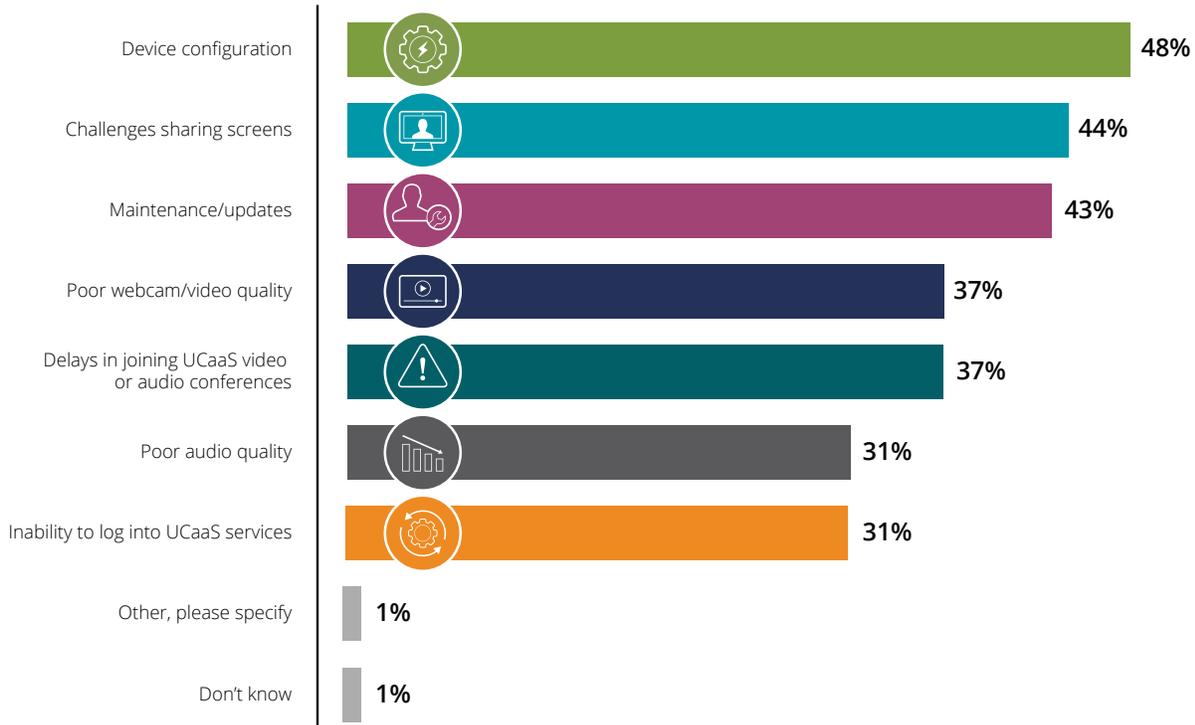
VISIBILITY IN PRACTICE

Business is always in motion. That maxim has become doubly true in the pandemic. A U.S.-based pharmaceutical company entered the pandemic in the midst of an effort to consolidate the number of vendors associated with UC&C platforms. During the transition, the company's unified communications and voice IT teams encountered visibility and monitoring gaps in a UC solution the team used for end-to-end service management across the voice network. After rounds of troubleshooting, the IT operations and UC teams determined that the source of the problem was a change in network architecture.

Unfortunately, the UC team's existing solution had no way to capture this traffic. Quite simply, there was no way for the UC and Voice teams to assure UC&C performance or troubleshooting affecting their hybrid workforce without full visibility into call set-up, audio, and video traffic. They leveraged an existing relationship with NETSCOUT to resolve the issue. Because there are so many moving parts involved with UC&C services, there's a greater potential for performance problems to arise and impede the end-user experience. If CIOs want to optimize UC&C, they should keep a couple of things in mind. The real challenge of effectively managing the UC&C experience stems from an inability to create a holistic view of network performance.

Without such visibility, it becomes difficult to ensure that proper quality-of-service (QoS) policies are in place, and that real-time, latency-sensitive traffic, such as voice and video, get priority over all other data. The key to building an end-to-end view across such a complex environment? Packet data, which provides evidence on how everything communicates across the call path and dependencies. Using hardware, software, or virtual appliances, companies can achieve pervasive visibility into packet traffic and application workloads. By processing and analyzing this packet data in real time, companies can analyze key performance metrics that deliver a centralized view into the performance characteristics of infrastructure and application components and dependencies.

Q What UC&C challenges are most commonly reported to your organization's IT department?

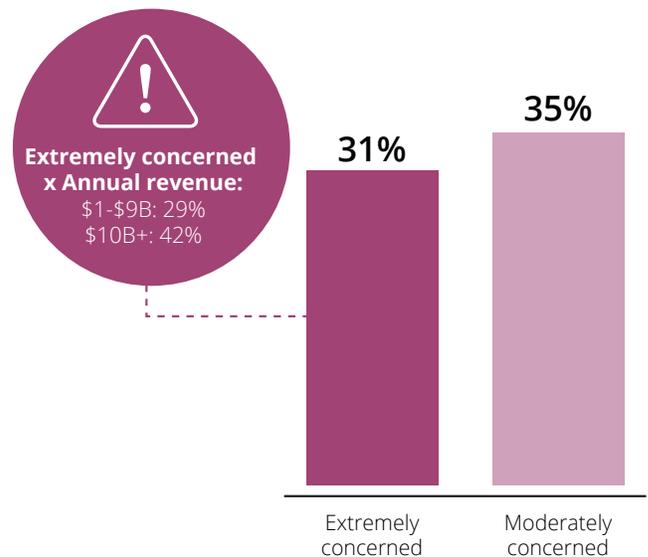


The majority of UC&C tickets are resolved within a few hours. And while 87% of respondents said most UC&C tickets were either easy or somewhat easy, the volume adds up to a significant amount of time. Even before the pandemic, 36% of organizations reported more than 2,500 service desk tickets per month, and 12% reported more than 5,000. And on average, organizations spend approximately \$15 per service desk ticket. Those figures may represent significant costs attributable to UC&C tickets.

Added together, the sheer volume of requests represents a massive anchor on employee productivity. About one-third of respondents are extremely concerned about the impact of UC&C-related challenges on productivity, with that number rising to 42% for companies with revenue above \$10 billion.

The end-user experience is directly connected to employee productivity. Unfortunately, the volume of complaints is driven by issues that impact job performance. When users contact the IT service desk for UC&C problems, the most frequent causes include device configuration, screen sharing challenges, and maintenance/updates.

Q How concerned are you that UC&C related challenges may temporarily hinder productivity within your organization?



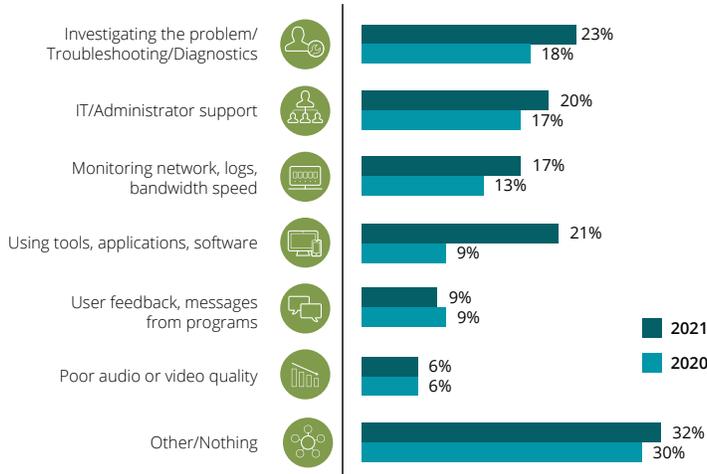
Can IT Teams Identify Root Causes?

Q How do you pinpoint potential network issues or security problems impacting your Unified Communication and Collaboration applications?

When we add it up — a few minutes here, a botched meeting there — the impact of UC&C challenges amounts to a massive cost. Which begs the question: Do IT leaders have the tools they need?

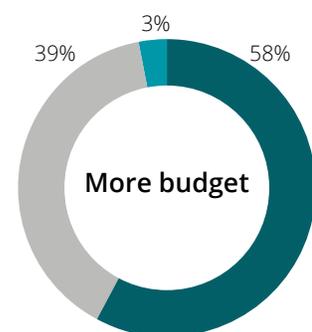
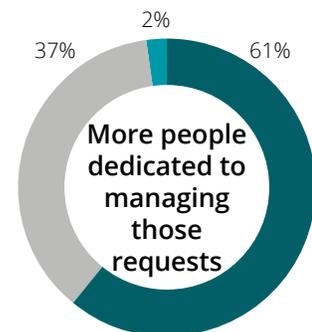
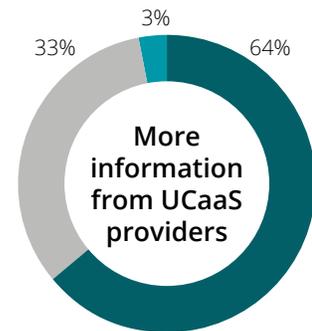
Given the mission critical nature of collaboration tools — 98% said they are important to their firm’s hybrid work policy to some degree — we asked respondents whether they were confident in their ability to identify root causes of UC&C issues. A majority, 54% of respondents, reported that they were very confident in their ability to identify root causes. But 43% were only “somewhat confident.”

At the same time, respondents reported that they are using tools, applications, and software to monitor UC&C issues twice as often as they were in 2020. Overall, nearly every strategy or technique to identify root causes we asked about saw an uptick in usage, a reflection of the large numbers of helpdesk tickets that UC&C platforms are attributed to.



Lastly, though a majority of respondents reported a high level of confidence in their ability to identify root causes, we shouldn’t confuse confidence for perfection. When asked what kind of resources would help them manage UC&C related issues, IT leaders were more likely to say that more information, more people, or more budget would be “extremely helpful.”

Q When respondents were asked to rank the extent to which each of the following would help them manage UC&C-related challenges, they were more likely to want more information from UC&C service providers.



■ Very helpful
■ Somewhat helpful
■ Not too helpful

A New Normal

The findings of NETSCOUT's latest survey show that the increased usage of UC&C tools had significant impacts on the lives of users and IT teams alike. We see this in the broader society as well, where terms like "Zoom fatigue" and "Zoombombing" have entered the popular lexicon.

Namely, the transition to hybrid work has not been without hiccups. Companies are managing multiple platforms in complex environments and contending with a massive uptick in service desk tickets. While IT leaders believe they have the tools they need to handle the volume of UC&C-related challenges, they continue to worry about the risks to productivity that these issues can create.

The results hint that the past year has been a prolonged testing period of UC&C platforms, in which companies adopted large numbers of tools, trying to figure out which ones worked well for them and their network environments.

The question at the top of every IT decision-makers' mind is quite simple: how can they provide a seamless user experience, foster productivity, streamline processes, and improve business outcomes while minimizing the impact on their IT help desks. Oh, and one more thing: ensuring a firm security posture that protects the company.

Today's multi-vendor unified communications environment is often bundled with other business services, including email, calendar and authentication systems, operating over converged IP networks. Even sporadic packet drops can make troubleshooting difficult.

But the answer to the question is quite simple: visibility.

METHODOLOGY

This survey was fielded online. It reached a total sample size of n=300 IT decision-makers including 250 in the US and 50 in Canada. All participants described themselves as being responsible for the unified communication and collaboration experience among their end users. Field time was between September 27th and October 21st, 2021.



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