



## A Frost & Sullivan Research Study

Sponsored by Verizon Business and Microsoft

Measuring the State of Collaboration in Business  
United States, Europe, Asia-Pacific

**Microsoft**

**verizon**business



## Today's Presenters



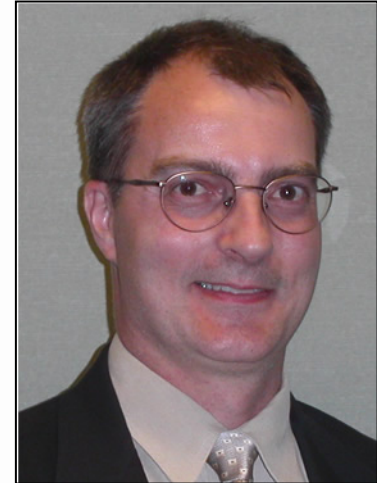
**Nancy Gofus**  
**Verizon Business**



**Susan Conway**  
**Microsoft**



**Jaclyn Kostner**  
**Bridge the Distance**



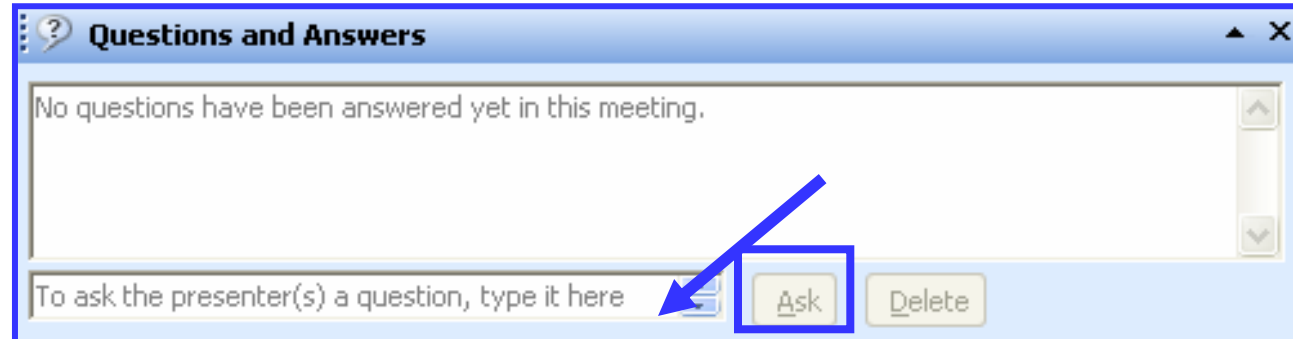
**Brian Cotton**  
**Frost & Sullivan**

**Microsoft**

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# To Ask A Question

- To submit a text question during the presentation
- Type your question in the text box
- Click the [Ask](#) button
- Click on [Delete](#) to delete your question



*We will also take live questions following the presentation*

# Full Screen View

- To view today's presentation with a full screen view, hit ***Ctrl H*** on your keyboard
- Hit ***Ctrl H*** to go back to your original view



meetings around the world

## Key Findings

**Collaboration is a key driver of business performance**

**2 x as significant as strategic orientation**  
**5 x as significant as market turbulence**

## Objectives: Meetings Around the World

- **Assess the state of collaboration in global business**
  - **Create a Collaboration Index**
  - **Examine collaboration across geographic regions and vertical industries**
  - **Determine collaboration attitudes and behaviors of individuals and organizations**

# Meetings Around the World Study

- **946 decision-makers**
- **Presidents, vice-presidents, directors, managers**
- **U.S., Europe, Asia-Pacific**
- **Healthcare/pharmaceutical, government, financial services, manufacturing, professional services, high-tech**
- **Revenues: \$5 million – over \$10 billion**
- **Conducted by Frost & Sullivan, March 2006**

# Meetings Around the World Study

- **Broad and deep exploration of collaboration**
  - **Business disposition and performance**
  - **Nature & degree of collaboration**
  - **Attitudes towards communication & collaboration**
  - **Collaboration technologies**



meetings around the world

## The Collaboration Index

The relationship between  
collaboration and business  
performance

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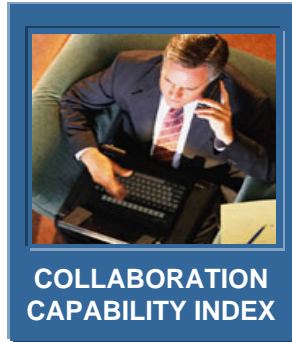
# The Collaboration Index

A Measure of Sustainable and Competitive Collaboration

## COLLABORATION CAPABILITY INDEX

- Collaborative Technology
- Collaborative Culture
- Organizational Structure

Ability to Compete Tomorrow



## COLLABORATION INDEX

*Combination of Collaboration Capability and Quality*

Ability to Compete Today and Tomorrow



## COLLABORATION QUALITY INDEX

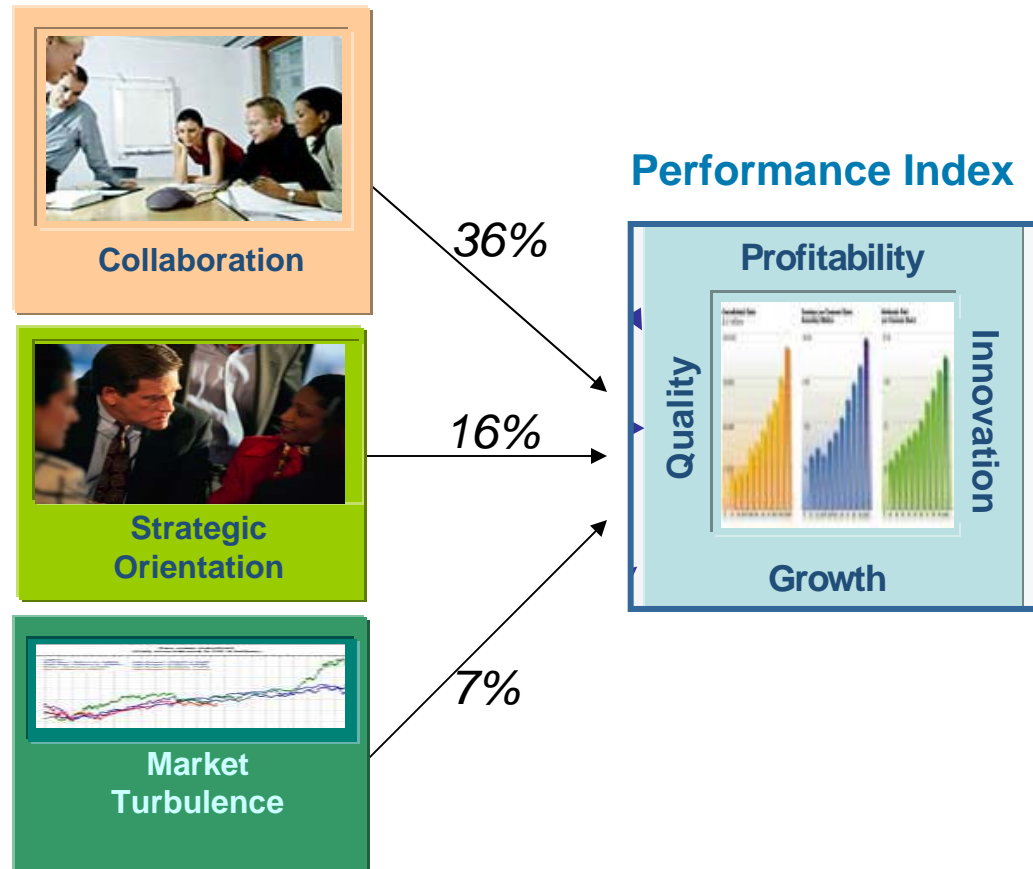
*Use of collaboration capabilities across the organization*

Ability to Compete Today

# Collaboration: Leading Driver of Business Performance

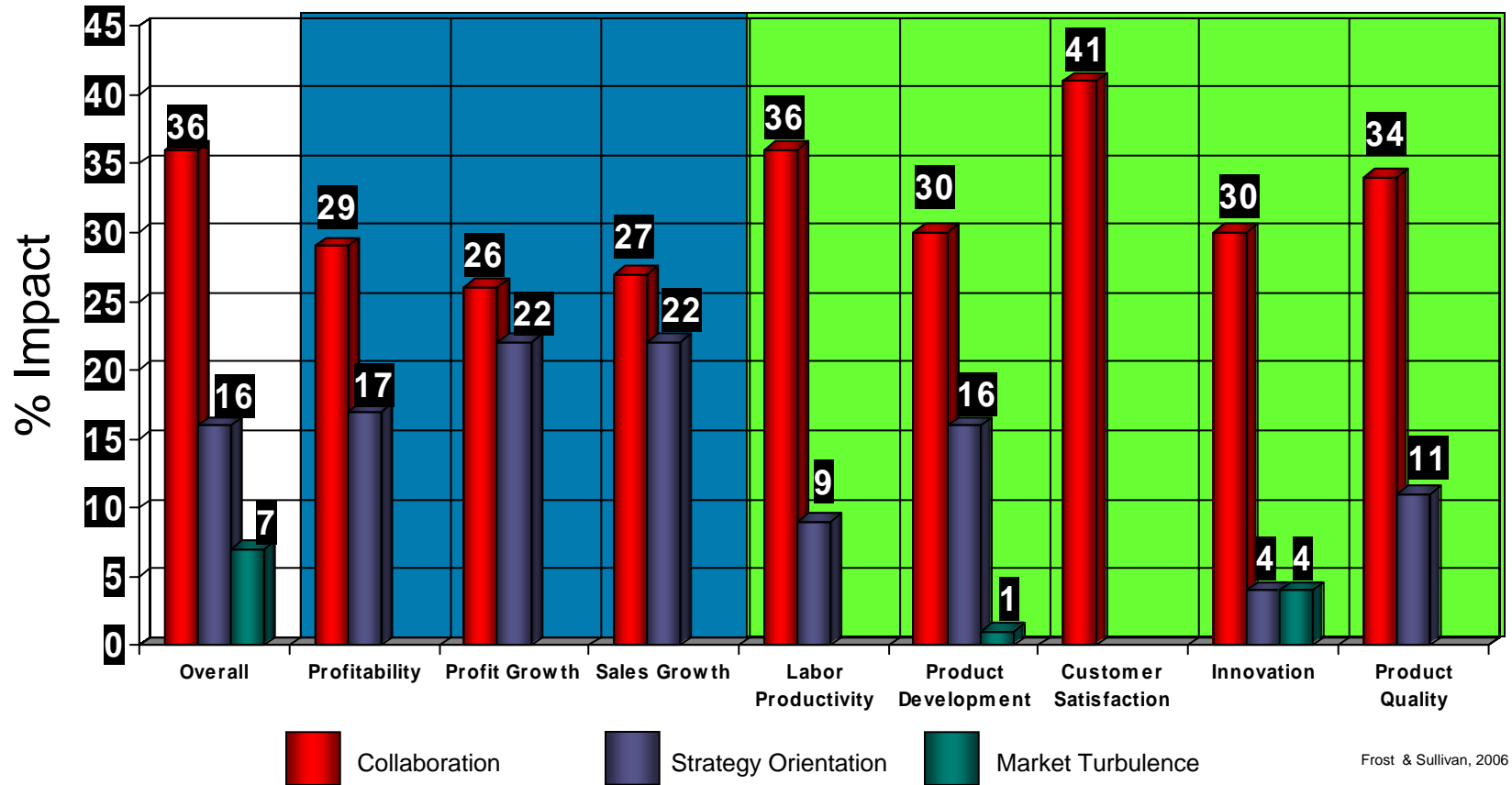
- **Impact of Collaboration**

- 2X the impact of Strategic Orientation
- 5X the impact of Market Turbulence



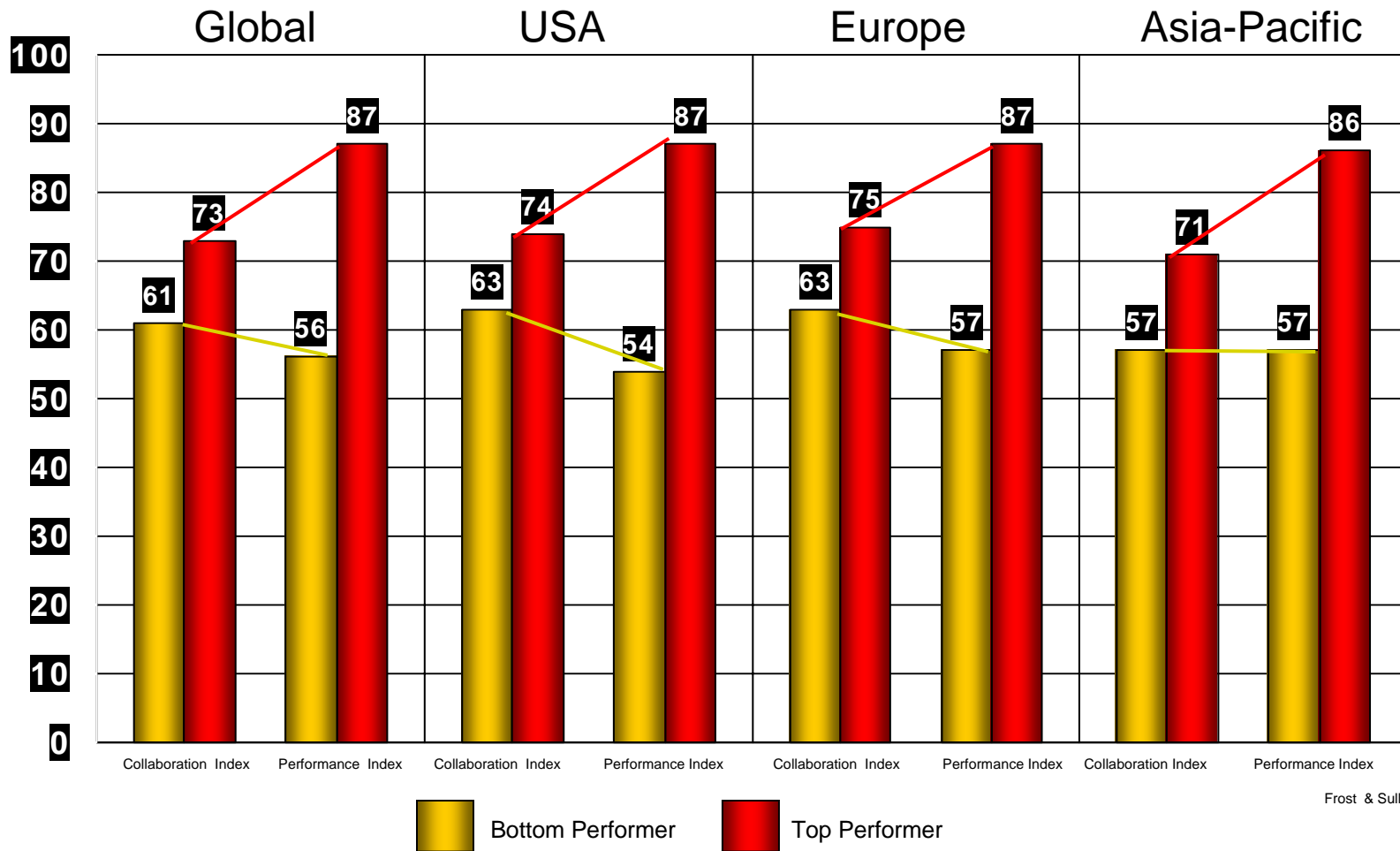
# Collaboration Leading Driver in “Gold Standards” of Performance

Profitability, Profit Growth, Sales Growth



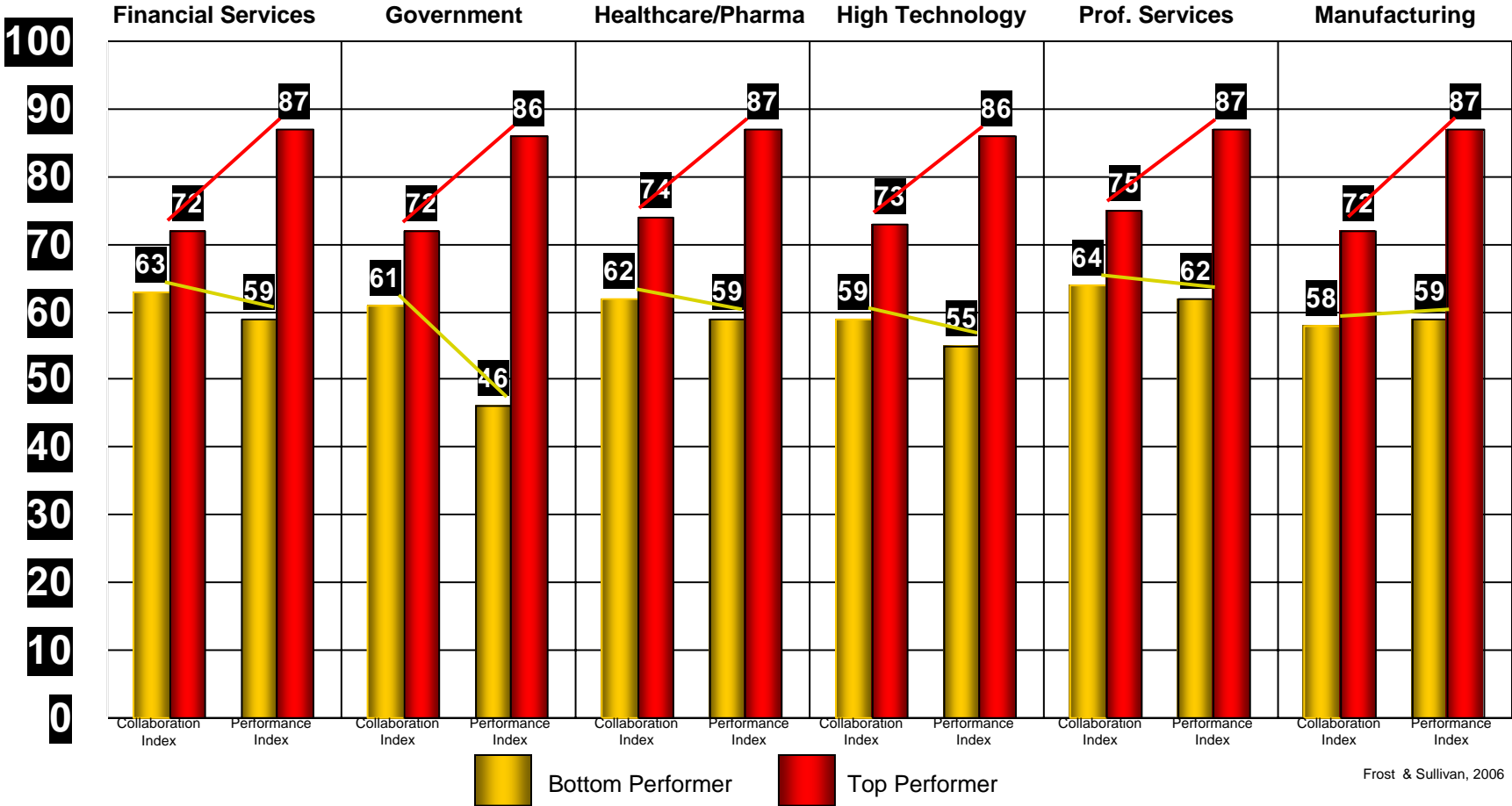
# Comparison of Top vs. Low Performers by Region

Performance correlates to collaboration



# Comparison of Top vs. Low Performers by Industry

Performance correlates to collaboration





# A Global Culture of Collaboration Exists

...yet there are regional differences

# Global Collaboration Attitudes

- **We lead busy professional lives (14:1)**
- **Our collaborative efforts often involve parties in different geographic locations (4:1)**
- **Competition in our product area is cutthroat (3:1)**
- **Technology changes provide big opportunities in our industry (12:1)**

# Global Work Habits

- **Like to work in teams (10:1)**
- **Find conferencing a good alternative to face to face (5:1)**
- **Prefer e-mail to using the phone (3:1)**
- **Like to be reached wherever I am (2:1)**
- **Have times when I don't want to be reached (9:1)**

# Collaboration Sub-Indices By Region

## Global Collaboration Sub-Indices



Regional CI Score	68 USA	68 Europe	63 Asia-Pacific
Culture of Openness Index	70	70	63
Structure of Decentralization Index	53	53	50
Utilization of Technology Index	55	55	60
Breadth of Planning Collaboration Index	56	56	61

\* Encircled figures have statistically significant regional differences

# United States

- **Enjoy working independently**
- **Like to communicate one-way**
- **Are most comfortable with conferencing technologies**
- **Choose conferencing over travel for convenience versus safety**
- **More likely to multi-task on conference calls**

# Europe

- Like working in teams the most
- Avidly adopting new technology
- Prefer real-time communications
- Are most conscious of cultural, language issues
- Telecommute the least, want it most

# Asia-Pacific

- **Embrace telecommuting**
- **Plan their communication**
- **Express strongest preference for IM**
- **Rely heavily on the phone**
- **Quickly adopting web conferencing**
- **Highest percentage who find conferencing a good alternative to travel**



**Collaboration can lead to personal and organizational competitive advantage**

## Collaboration and productivity

- **Fosters teamwork**
- **Encourages more creativity**
- **72% of respondents agree or strongly agree with the following:**

***“ Communications technologies are invaluable tools that help me stay in the loop and keep business moving forward.”***

## Presence of collaboration tools correlates to high performance

- **Of all collaboration technologies, Web conferencing, meeting schedulers, and audio conferencing are more commonly present in high performance companies than in low performance companies**
  - ***Web conferencing: 55% (high) vs. 45% (low)***
  - ***Meeting schedulers: 52% (high) vs. 48% (low)***
  - ***Audio conferencing: 52% (high) vs. 48% (low)***

## Positive attitudes prevail about new technology

- **I like to try new ways to communicate (13:1)**
- **I like having the ability to work from anywhere (home, office, hotel) (10:1)**
- **Talking to colleagues using conferencing helps me feel closer to them (2:1)**
- **A conference (audio/web/video) is a good alternative to visiting face to face (5:1)**
- **People are willing to invest their own \$ in collaborative technology**

## Summary: Meetings Around the World

- **Collaboration is a key driver of performance**
- **A global culture of collaboration exists**
- **Collaboration can lead to competitive advantage**
- **Professionals embrace collaboration technology**

# Question and Answer Session

meetings around the world



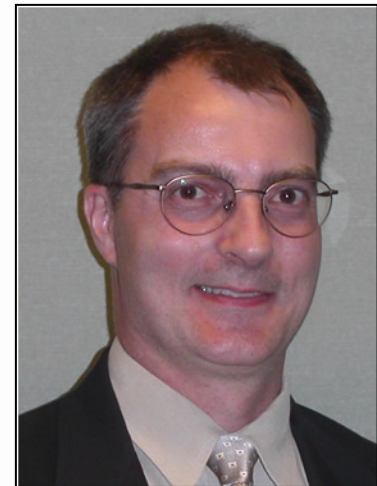
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