

White Paper:

Top Vendors Impacting the UC Landscape



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Introduction

The Unified Communications (UC) market is made up of multiple vendors, offering an array of communications technologies that comprise a UC implementation. These technologies predominately include: telephony, conferencing, email, voicemail, unified messaging, presence/IM, desktop and mobile UC clients, as well as applications that integrate communications with business processes. This research highlights the strengths of players best positioned to impact the UC market.

Common Multivendor Scenarios

Organizations frequently employ a multivendor strategy when procuring competitive bids for UC projects, which makes interoperability among vendors essential. In addition, judiciously choosing products from disparate vendors enables businesses to benefit from an increased variety of capabilities that can deliver improved performance and a better UC experience for users. A multivendor strategy also provides the flexibility to choose alternatives when specific products are not easily available in different regions of the world. Furthermore, when buying system add-ons and upgrades, a multivendor environment serves to “balance” the negotiating influence between buyers and sellers. Examples of UC solutions that typically combine platforms from disparate vendors include the following:

- For telephony, the mix often includes permutations of Avaya/Nortel, Cisco and Microsoft.
- For data networking, HP, Juniper and Cisco can coexist in the same environment.
- For messaging, AVST satisfies a wide range of requirements whether the telephony environment includes Avaya Aura or IP Office, Alcatel OmniPCX Enterprise, Cisco Unified Communication Manager, Microsoft Lync, Mitel MiVoice and all the major telephony vendors.

Moreover, even when businesses prefer to standardize on a single vendor, it’s not usually realistic because:

- Best-of-breed products enable filling gaps in respective vendors’ portfolios.
- It takes many years to implement.
- Technology, suppliers and adoption trends are likely to change.
- Associated costs could be prohibitive.

A Multivendor Strategy Protects Against Market Consolidation

Consolidation is a natural business process usually driven by the desire for companies to bolster financial results with increased market share, revenue and earnings. Notable examples of consolidation in the communications market include Avaya’s purchase of Nortel Enterprise Systems, and Mitel’s purchase of Aastra. Cisco’s acquisition of Tandberg for video is also an example. However, consolidation often leads to the streamlining of operations and a reduction in headcount, which can diminish maintenance quality, create longer response times, increase costs, and adversely affect business processes. Adopting a multivendor strategy can help mitigate these risks.

Implementing a Multivendor Strategy

Since no two UC vendors offer exactly the same inventory of functionality and services, their inherent product suitability, distribution strategies and market focus offer the most meaningful differentiation. The following snapshots of established and leading UC vendors highlight respective strengths that will help end users best match their requirements in a multivendor environment. However, while there are many good video conferencing solutions that have typically been sourced via third parties, video providers have not been included. This is because the following factors have begun to affect market leadership and buying criteria:

- Traditional third parties such as Polycom and Tandberg (now Cisco) are facing competition from new entrants such as Blue Jeans, Vidyo and Fuze.
- Video infrastructure is shifting from being mainly hardware to software.
- The delivery of video services is moving to web and cloud configurations, often with freemium pricing models.

Alcatel-Lucent Enterprise (ALU-E)

Since being sold to China Huaxin by former parent Alcatel Lucent (ALU), ALU-E enters a new phase of its life unconstrained by the extensive cost cutting and disappointing financial results of ALU. ALU-E's future is buoyed by the ingenuity of its top executives who have been able to keep the company relevant despite ALU's ownership.

- ALU-E focuses on Europe, where it has a large installed base; Asia where its new owner has global operations and international investments; and major metropolitan markets in the United States and other countries, where the OmniPCX and OpenTouch UC portfolio serves small, medium and large customers.
- The company has a reputation for reliable technology that includes native support for analog devices and applications.
- ALU-E offers a wide range of affordable wired and wireless telephones that can be cost effective for deploying in virtually any organization with small and medium size sites, such as retail stores and bank branches.

Avaya

Avaya's Aura and IP Office product portfolios support UC, telephony, messaging and contact center requirements for small, medium and large organizations.

- Avaya Aura is highly scalable and can be deployed in virtual environments or on physical servers.
- IP Office is targeted at small to midsize companies, and is especially suited for distributed requirements, as well as when Avaya customers want to preserve their investments in Avaya desktop phones.
- Both platforms offer failover solutions, native support for analog devices and applications, with Aura able to provide greater scalability and enterprise-wide high availability for mission-critical applications.
- Aura can augment enterprise telephony and contact center capabilities for Microsoft Lync.

- AvayaLive Engage is a web collaboration tool that supports mobile and integrated video conferencing via a web browser.
- Avaya's Engagement Development Platform uses software snap-ins to facilitate communications between people, media, devices, calendaring, business processes and events.
- Global distribution and comprehensive product portfolios can support large-scale deployments that include network gear, video and collaboration.

AVST

AVST is the only vendor in this research with a focus that goes significantly beyond delivering basic messaging capabilities. The company's UC applications integrate with virtually any UC core platform from vendors such as Avaya, Alcatel-Lucent Enterprise, BroadSoft, Cisco, Genband, Microsoft, NEC, Mitel, ShoreTel and Unify, while providing scalability and functionality that satisfies the requirements of small and midsize businesses as well as Fortune 500 companies.

- AVST's CX-E solution supports centralized messaging across a multivendor telephony environment, with features such as unified messaging, personal assistant, speech recognition, mobile client, automated attendant, IVR, call center, fax and other business process applications.
- CX-E provides best-of-breed unified messaging to email – on site or cloud, such as Microsoft Outlook, 365 and Google Gmail.
- Capabilities include multiple levels of redundancy for high availability and disaster recovery scenarios; support for multiple languages and multinational deployments; emulation of multiple telephone user interfaces for accessing voicemail.
- CX-E supports integration using SIP and TDM transport in the same network.
- In sensitive vertical markets, such as healthcare and finance, CX-E supports regulatory compliance.
- AVST's TeamQ option provides a very low cost informal call center solution.

Cisco

Cisco's Unified Communications Manager (Cisco UCM) product family includes a full UC suite that can satisfy requirements for small, medium and large organizations, with functionality supported for desktop devices and popular mobile operating systems.

- In addition to standalone Cisco UCM deployments, the platform has become a leading choice for organizations that want to enhance the enterprise telephony capabilities of Microsoft Lync.
- UCM supports virtualization, centralized and distributed survivability, as well as hybrid deployments with cloud-based Cisco Hosted Collaboration Solution (HCS).
- With its global distribution network and comprehensive product portfolios, Cisco can support solutions that include network gear, contact center, messaging, video and collaboration.

Interactive Intelligence

Interactive Intelligence is a publically traded U.S.-based company that offers Customer Interaction Center (CIC), an all-in-one contact center solution targeted at organizations with midsize and large contact center requirements. CIC also supports a UC suite that includes telephony, unified messaging, audio conferencing, presence and IM. CIC is also compatible with popular web conferencing and video solutions.

- CIC version 4.0 is Microsoft Qualified in the contact center category, with demonstrated interoperability with Microsoft Lync Server 2010 and 2013.
- The platform also integrates contact center functionality with virtually any UC core platform from vendors such as Avaya, Alcatel-Lucent Enterprise, Cisco, NEC, Mitel, ShoreTel and Unify.
- CIC runs on industry standard servers and provides a common set of application development, management and reporting tools.
- Applications include multichannel routing and queuing, interactive voice response, call and screen recording, predictive dialing, workforce management, real-time speech analytics, customer feedback management, and more.
- Configuration options are on-premise, cloud or hybrid.
- Deployments are mainly in the U.S., with steady growth developing in Europe, Australia, Japan and Latin America.

Microsoft

Lync/Skype for Business is an obvious choice for Microsoft customers wanting to augment an enterprise telephony environment with UC functionality.

- Lync/Skype for Business offers a very intuitive UC client that supports IM, presence and web conferencing.
- The platform can integrate communications with business processes and applications.
- Lync/Skype for Business interoperates with desk telephones, unified messaging and call center/contact center solutions from an ecosystem of third-party providers.

Mitel

Mitel has a long history in telecom that dates back to the 1960s when Bell Operating Companies sold Mitel systems as alternatives to AT&T branded platforms that were engineered by Western Electric. More recently, the company was among the first to integrate a telephony platform with Microsoft's UC product portfolio. Mitel has been a leader in deploying software that runs on industry standard servers and solutions that can run in virtual environments.

- Mitel's product families can be deployed across small to large organizations.
- Mitel offers its own MiCollab UC Suite in addition to integration of MiVoice with Microsoft Lync.
- MiCloud is cloud-based and supports telephony, UC and videoconferencing that can complement Mitel's on-premise product portfolios.
- Service providers and Mitel dealers can build and deploy hybrid cloud capabilities for Mitel's on-premise enterprise platforms.

- Acquisition of Aastra has increased Mitel's global penetration with over 2,500 channel partners in more than 100 countries.
- Mitel offers the highly scalable and resilient MiVoice MX-One platform, which has a loyal customer base predominately in Europe.
- Essentially all product portfolios natively support analog devices and applications.

NEC

NEC's communications experience dates back well over 60 years, providing a diversified array of products and solutions for service providers and end users.

- The company has financial strength and a multitude of channel partners in North America, EMEA, Latin America and Asia/Pacific that can support national and multinational organizations.
- NEC has high customer satisfaction coupled with a large installed base.
- Extensive product lines are targeted at SMBs, as well as large enterprises, with sustained strengths in vertical markets such as hospitality, healthcare, government and education.
- NEC's Univerge product families support high availability and multiple levels of redundancy, a migration path to UC and native support for analog devices and applications.

ShoreTel

ShoreTel's technology is well suited for SMBs that have distributed communications requirements, and large organizations that are centralized but also have many branch offices and retail sites. The company sells mainly through partners in North America, but continues to focus on growth in other global regions.

- ShoreTel is known for systems that are easy to install, have very intuitive management and user interfaces, and support UC capabilities using ShoreTel's own UC client, or by integration with Microsoft Lync.
- Architecture supports desktop and mobile devices through a common user interface, as well as natively supporting analog devices and applications.
- The company has a reputation for very high customer satisfaction.
- ShoreTel has its own IP phones and docking station for iPad and iPhone users.
- Straightforward expansion is achieved by simply adding switch modules that can be administered from a centralized interface, regardless of where the modules are physically located.
- Platform survivability is provided via N+1 switch failover capability.
- Simplicity of administration facilitates moves, additions and changes, which can reduce system maintenance costs.
- A UCaaS portfolio supports cloud-based voice services and other applications.
- The new common platform enables businesses to deploy the same set of applications and capabilities for premise-based, cloud or hybrid environments, while enabling ShoreTel on-premise customers to migrate to the cloud at their own pace.

Unify (Formerly Siemens Enterprise Communications)

Unify's brand for its UC portfolio is OpenScape, which includes voice, mobility, conferencing, messaging, and web collaboration functionality.

- Unify provides a migration path to UC for its large installed base of HiPath 4000 systems. Product lines natively support analog devices and applications.
- OpenScape Enterprise scales to 100,000 users in a single node and 500,000 in a network, and can function as an enterprise telephony solution that augments Microsoft and IBM UC platforms.
- The platform supports on-premise deployments, as well as private, hybrid or public cloud deployments, and may be virtualized.
- Unify maintains a strong presence in Europe and Latin America, and to a lesser extent in North America. The platform can support multinational deployments and offers various redundancy options.

Conclusion

Implementing a multivendor UC strategy requires planning. Just because a vendor offers a strong telephony platform doesn't automatically mean its UC client offers the best user experience. Conversely, a vendor might have a very intuitive UC client but not offer the most robust and flexible telephony solution. The bundling of licenses by a single vendor can further complicate the decision-making process because convenience limits choice, which often compromises value. Therefore, before making UC investments, organizations need to develop strategies for UC adoption.

Start by creating an inventory of the main communications platforms already in place, such as for telephony, voicemail, conferencing, etc. Next determine if these systems align with current and future business requirements. Assessment criteria can include suitability of functionality, support costs and pending additional investments.

Use this research as a checklist for identifying desired UC requirements and vendors that have the potential to best support the organization's vision and strategic direction for UC. Once this step is completed, send a high-level request for information (RFI) to vendors. In addition to meeting functional requirements, vendors should be asked to include:

- Description of how solution interoperates in a multivendor environment
- Product road maps for on-site, cloud and hybrid UC implementations
- Budgetary pricing
- Projected Total Cost of Ownership (TCO) for five years, which includes costs for:
 - System amortization
 - Hardware and software support
 - Hardware infrastructure upgrades
 - Software new release upgrades
 - System maintenance

Finally, it's important to keep in mind that business goals should drive the UC procurement process, rather than a sudden need for major hardware and software upgrades, increased capacity or a total platform replacement.

About Jay Lassman

Jay Lassman provides strategic guidance to end user organizations on selecting and deploying Unified Communications (UC). He also supports vendor initiatives that focus on improving marketing and sales effectiveness.

Mr. Lassman has more than 25 years experience in business communications product marketing, supported by a distinguished record of accomplishment selling technology-based systems to Fortune 500 companies. Before becoming an independent consultant he was a Research Director with Gartner Inc., where he spent more than 14 years developing deep awareness and insights on UC and Contact Center technologies and the product portfolios of the major global vendors. Leveraging this industry knowledge, Mr. Lassman has developed significant expertise in providing planning, design, adoption and migration guidance to end users on IP-based communications solutions for premises, cloud and hybrid environments – particularly for businesses in the government, health care and education market segments.

Prior to joining Gartner, Mr. Lassman was with AT&T and Verizon (Bell Atlantic) where he had responsibilities that included product management, competitive sales and marketing strategies and providing field personnel with sales and technical support.

Mr. Lassman is a graduate of the Cooper Union in New York City, and received his B.S. degree in Electrical Engineering.