WHITE PAPER

Cisco Prime Collaboration: A Complete Vision for Devices, Apps, Services, Infrastructure

Sponsored by: Cisco

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June 2013

Executive Summary

Today's global business environment requires companies across all industries and segments to be agile, efficient, and customer focused. To meet these requirements, many organizations have designated real-time communications and collaboration as pivotal for transacting internal and external business processes and services and have deployed the technology for this purpose.

Organizations across a range of industries are extremely dependent on the communications and collaboration solutions operating on their networks. Those networks not only support vital employee and customer interactions and internal business processes but also deliver services to staff, partners, suppliers, and customers. As such, the network and supported solutions and applications are critical elements for business enablement and revenue growth.

As collaborative technologies such as IP telephony, audioconferencing, Web conferencing, videoconferencing, and social business collaboration continue to grow, the importance of the network in supporting that growth increases as well. Unfortunately, even today's unified communications and collaboration (UC&C) solutions often continue to operate in separate silos with inconsistent features, policies, tools, and management capabilities. This increases the burden on network administrators and drives up management costs and complexity.

To address a growing area of need today — providing enterprise IT staff with advanced UC&C management tools — Cisco recently introduced a new release of its collaboration management platform, Cisco Prime Collaboration, which specifically manages Cisco voice and video and the underlying infrastructure.

This white paper discusses today's collaboration trends and describes the Cisco Prime Collaboration solution. More importantly, it highlights some of the challenges for IT staff related to managing their networks in support of real-time collaborative applications and describes the benefits of deploying Cisco Prime Collaboration versus third-party solutions.

Situation Overview

The continuing globalization of businesses and the emergence of new, fast-growing markets are increasing the need for more cross-company, cross-border, and cross-culture collaboration — including business-to-business (B2B) and business-to-consumer (B2C) use cases.

◻ IDC estimates that the market for worldwide UC&C technologies — including equipment, products, and applications — will reach approximately $19.5 billion in revenue in 2013 (see Figure 1).

◻ Collaborative applications in particular, including audioconferencing and Web conferencing, are expected to account for about 24.6% of total UC&C revenue in 2013.

FIGURE 1

Worldwide UC&C Revenue Share by Technology Segment, 2013

Total = $19.5B
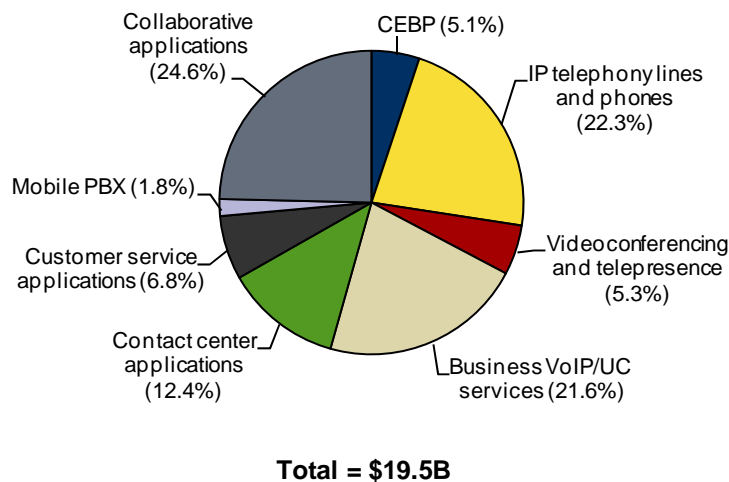
Source: IDC, 2013

Other trending UC&C areas such as videoconferencing, mobility, social business collaboration, and business process integration are also expected to be key drivers of UC&C growth among organizations going forward. In addition, core segments such as IP telephony, presence, and messaging applications (email, instant messaging [IM], unified messaging [UM]) will continue to drive growth in the enterprise UC&C market, albeit at more modest rates.

IDC views the ability of enterprise IT staff to keep pace with the growth in users, locations, devices, and traffic — and be equipped to monitor, provision, and manage their networks and end users at a high level — as a critical requirement today. Unfortunately, many organizations often minimize or overlook this requirement when considering their UC&C deployments.

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Impact of Web and Video Collaboration

As organizational workspaces become increasingly divested from traditional office environments, the ability to access email, IM, Web conferencing, team workspaces, and social business functionality becomes a business imperative. Collaborative applications are the foundation of modern business, providing a means for fundamental worker productivity. As the traditional workspace expands, delivering a seamless experience has become an increasingly important factor of investment in collaborative applications.

IDC expects that as organizations face the increasing need to view, exchange, and create content/information, incumbent vendors will continue to invest in efforts to provide a more seamless experience for end users, as well as for IT staff in supporting and managing collaborative applications.

Videoconferencing continues to receive a great amount of interest from organizations as a means to cut travel costs, scale human capital, and collaborate more efficiently. The technology enhancements in videoconferencing and immersive telepresence over the past several years have been nothing short of remarkable, prompting favorable market responses to the benefits of deploying/using video technology for enterprise as well as mobile collaboration applications.

☑ For 2013, IDC expects worldwide revenue for enterprise videoconferencing and telepresence endpoints and infrastructure to reach about $2.6 billion.

Vendors are also increasing their efforts to further enhance video interoperability between room systems, desktops, and mobile users, as well as enhance the integration of videoconferencing with Web conferencing solutions. As such, IDC expects videoconferencing deployments to continue to interoperate better and reach an expanded range of business users globally.

Videoconferencing and telepresence equipment leveraged for applications such as digital signage, rich media content streaming, and application sharing is also forecast by IDC to be significant in the coming years.

Mobile and Social Collaboration Proliferate

The combination of consumerization trends, such as BYOD, and advances in mobile device technology has created even more synergy for enterprises to capitalize on. Mobile devices and mobile software solutions greatly enhance the value of collaboration solutions by ensuring that the right people can always be included in business decisions from anywhere and at any time. UC&C, content collaboration, and social business are newer areas of opportunity for mobile collaboration solutions:

☑ **Mobile UC&C.** Various components of mobile UC&C have decent adoption rates, such as mobile IM, presence, and mobile PBX extensions, and on tablets, Web conferencing apps are becoming increasingly popular. However, most vendors are just starting to offer mobile clients that enable a truly UC&C experience on mobile devices, so IDC believes adoption of those offerings will start in earnest in 2013.

- ⊡ **Mobile content collaboration.** Adoption of content collaboration products is quite high on consumer (BYOD) devices and even corporate-liable devices that have not been locked down. However, adoption of enterprise solutions that focus on the needs of IT is more of an emerging space. Nevertheless, there is a real need to provide access to enterprise content (and the ability to collaborate on that content) in a secure, manageable way, and IDC believes these solutions are already seeing a high rate of interest and uptake.

- ⊡ **Social.** According to IDC's *Social Business Survey,* worldwide adoption of enterprise social software was about 43% in 2011 and was forecast to increase to about 67% in 2012. IDC expects the mobile opportunity for these solutions will also increase at a rapid rate as long as the solutions are not only being deployed but also being leveraged as a core component of business workflows and processes.

As with many mobile enterprise applications, mobile collaboration solutions must also provide IT staff with a proper level of management capability over who gets access to what information on which devices.

IP Telephony Remains a Core Component

Some enterprise telephony/UC upgrade and/or replacement projects were delayed in 2012 because of economic uncertainty and a general IT spending pullback, stemming primarily from the tough economic conditions in Europe and fiscal uncertainty in the United States. IDC expects these factors to similarly impact spending in the first half of 2013 and possibly for the full year. As a result, IDC has moderated its 2012–2017 IP PBX revenue forecast down from last year's forecast.

- ⊡ IDC now expects low single-digit IP PBX revenue growth for 2012–2017, with a projected IP PBX revenue compound annual growth rate (CAGR) of 2.7% for that forecast period.

The growth we do see in the IP PBX equipment market during the 2012–2017 forecast period will be driven by UC adoption, voice and data application integration through UC development platforms, vendor collaboration and integration efforts with partners in the UC market, and growing interest in enterprise videoconferencing, collaboration, and mobility solutions. The ability of IT staff to manage all of this technology adoption and growth in more effective ways has evolving requirements.

IT Change Management Requirements

To help meet these requirements, some organizations may shift to lower-cost software-as-a-service (SaaS) support solutions or opt for change/configuration management functionality that is bundled as part of converged hardware-based systems or included as part of hosted or public cloud service offerings. At the same time, IDC expects the management software market to benefit from the rapid growth in corporate use of mobile devices and increasing enterprise requirements to consistently manage information, user profiles, and system configurations across multiple devices and platforms.

According to IDC's initial estimates based on forecast data, worldwide revenue in 2012 for change and configuration management software totaled $4.5 billion, reflecting growth of 4.2% from 2011. IDC expects that worldwide change and configuration management software revenue will total $4.8 billion in 2013 and will increase to $6.3 billion in 2017. (Note: The worldwide change and configuration management software market covers change and configuration management software for system, client, desktop, mobile device, and peripheral hardware and software assets but *not* network devices.)

Beyond general macroeconomic concerns and the impact of SaaS and mobile, IDC expects that ongoing demand for solutions to manage and distribute patches and software licenses across virtualized infrastructure and cloud environments will also benefit the overall management software market.

Challenges Created in the Management of Collaboration Networks

New collaborative capabilities are being augmented by the consumerization of IT, which is increasing the number of users and types of mobile devices requiring high-level support from the enterprise network. In addition, social business tools and video capabilities are increasingly being integrated with mobile collaboration applications. Some of the challenges organizations are dealing with today in attempting to manage this uptick of collaboration are as follows:

☑ Siloed, nonintegrated, and complex management products from different vendors

☑ Network operators under increasing pressure to reduce operating expenses

☑ Inadequate tools and minimal IT staff to rapidly provision new users accurately

☑ Expensive and time-consuming system and service outages and service degradation

☑ Enhancing the experiences of end users

In many cases, IT staff are using conventional LAN/WAN monitoring tools — good tools but more suited for asynchronous data traffic and applications. These applications typically are general-purpose network management tools that do not provide the "unified view" of the collaborative components in operation or may not provide all of the advanced functionality required for real-time voice and video traffic management today — provisioning, monitoring, analyzing, and reporting capabilities.

Given that network voice and video are very susceptible to traffic contention and quality-of-service (QoS) issues or fluctuations in bandwidth availability, among other disruptions, the need for a more comprehensive and efficient view of the network is clear.

All too often, the choice of a management tool is an afterthought for many organizations. IDC thinks that choice should be an integral part of the up-front network assessment and overall UC&C selection and deployment process. With the rapid increase in work sites, applications, real-time traffic, devices, and end users today, the correct network management tool choice should be a primary consideration for many midsize to large organizations.

Introduction to Cisco Prime Collaboration

Cisco Prime Collaboration is a collaboration management solution that was designed from the ground up by Cisco for its own UC&C platform. It provides system management capabilities from Cisco endpoints down to the Cisco network level — including workspaces (Jabber), collaboration services (voice, video, conferencing, IM, presence, etc.), and collaboration infrastructure (UCM, VCS, TMS, etc.). Cisco Prime Collaboration provides automated voice and video network management for Cisco collaborative environments in a single, integrated product via three modules:

☑ **Provisioning.** This module is for simplified deployment and configuration. It accelerates UC site rollouts and reduces time to perform end-user moves, adds, changes, and deletions (MACDs). It can also remove complexity to speed delegation to help desk personnel (and away from engineers), lowering operating expenses.

☑ **Assurance.** This module is for continuous monitoring and diagnostics. It helps ensure reliable service delivery through proactive fault detection and rapid isolation using purpose-built diagnostic tools. It can also expedite operator resolution of service quality issues before they impact end users. The Dashboard Summary in the Assurance module includes a graphical display of the top 5 issues impacting the network at a specific time.

☑ **Analytics.** This module is for advanced reporting and long-term trending and analysis. It enables administrators to analyze trends for capacity planning, resource optimization, and quality of service. It can also help determine the success of advanced collaboration technology adoption, influencing future investment decisions.

The Analytics module is a new feature of the Cisco Prime Collaboration platform, and the benefits of this additional resource are numerous. Analytics features five dashboards — Technology Adoption, Capacity Analysis, Service Experience, Asset Usage, and Traffic Analysis (each with multiple dashlets) — that support voice and video for Cisco UCM and Cisco TelePresence VCS deployments. The module allows for increased customization — each dashboard and dashlet can be customized by selecting parameters on the screen — and sophisticated reports to enable quick, informed decision making. IDC finds added ease with simplified Prime Collaboration Analytics features and benefits, including the following:

☑ Advanced report exporting in PDF or CSV formats

☑ Technology adoption with weekly progress reports of collaboration deployments

☑ Service History reporting tool that identifies long-term trends, utilization, and patterns

☑ Tracking usage and patterns by groups of users or endpoints

☑ Long-term planning with trend and pattern identification

☑ Deployment analysis tracking

⊡ Optimum collaboration performance and identification of underutilized resources
to improve return on investment (ROI)

Figure 2 provides a visual look and feel for the new Cisco Prime Collaboration
graphical user interface (GUI).

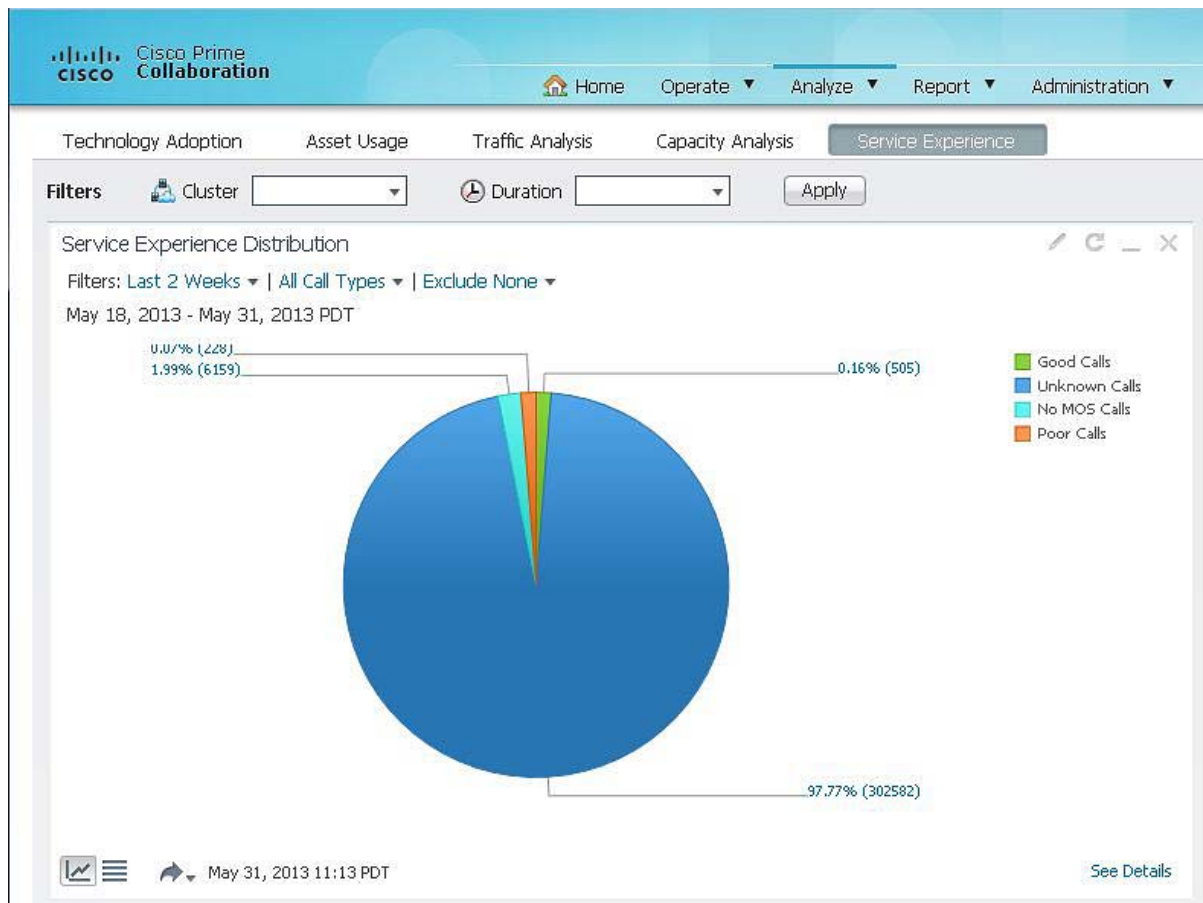**F I G U R E   2**

Cisco Prime Collaboration
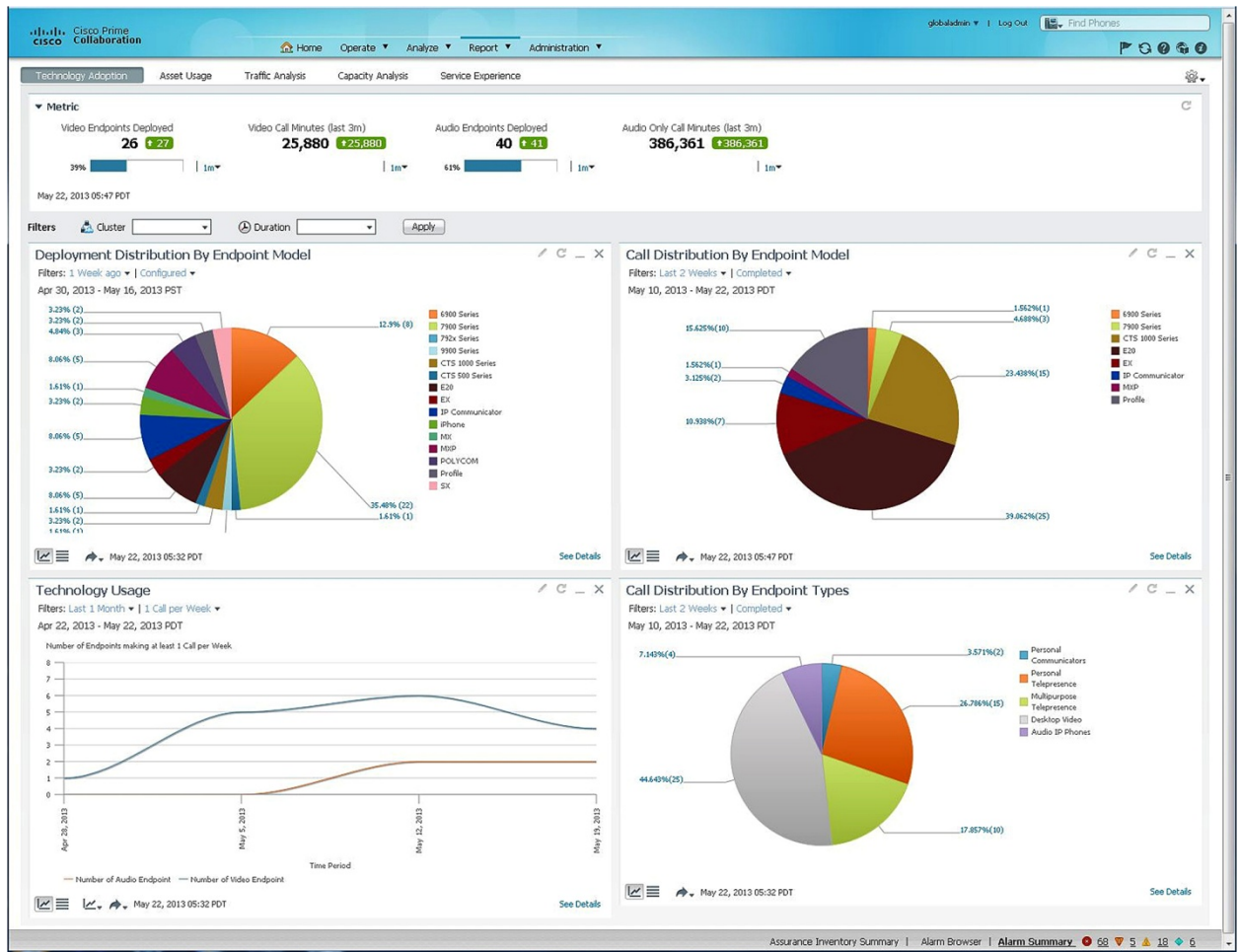
Source: Cisco, 2013

Figures 3 and 4 show two Cisco Prime Collaboration Analytics dashboard examples.
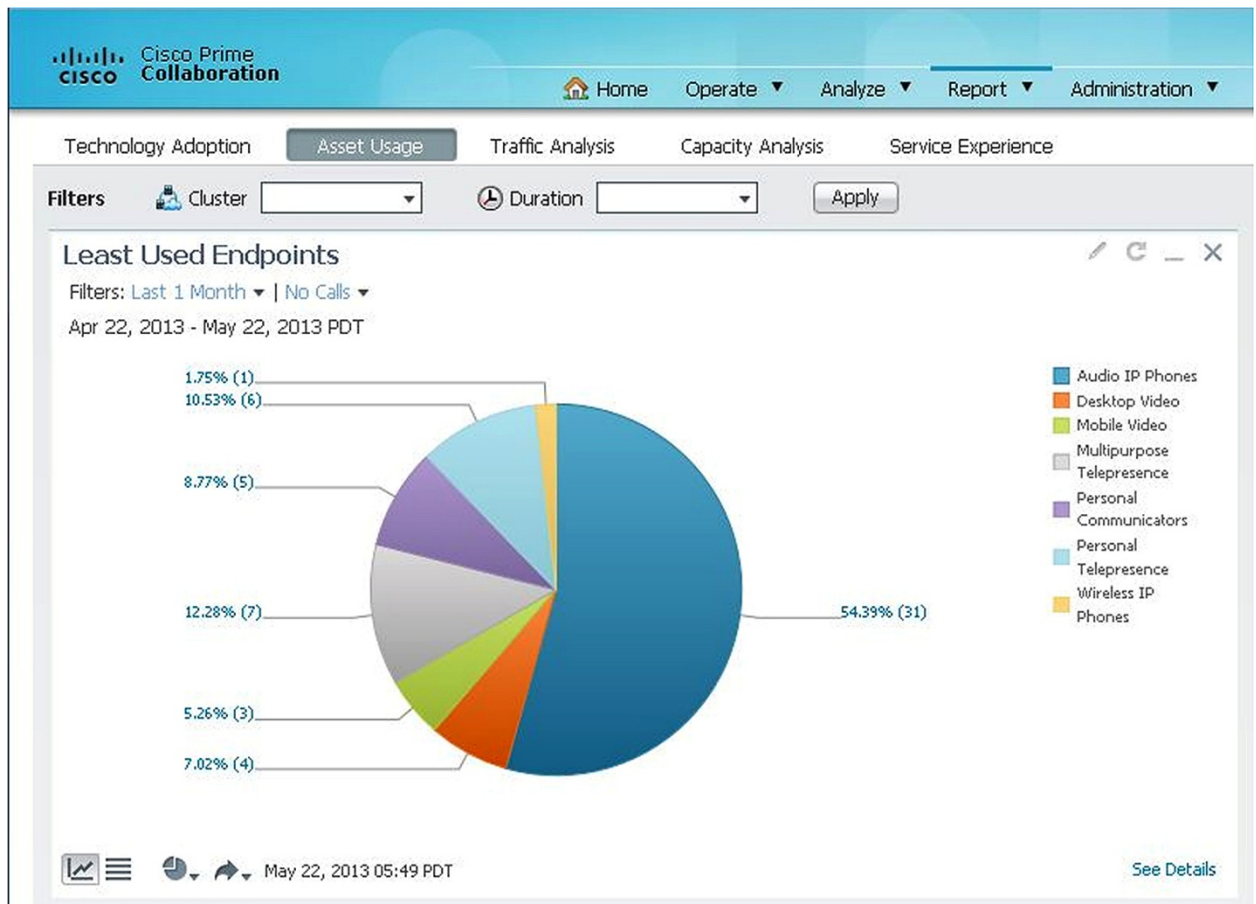

F I G U R E   3

Cisco Prime Collaboration Analytics — Service Experience Dashboard

Source: Cisco, 2013

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FIGURE 4

Cisco Prime Collaboration Analytics — Asset Usage Dashboard

Source: Cisco, 2013

Cisco Prime Collaboration Value Proposition

Considering all the new features and functions available to customers in the latest release of Cisco Prime Collaboration (9.5), IDC has compiled the following list of benefits/advantages that we feel significantly strengthen the value proposition for customers moving to Cisco Prime Collaboration:

☑ Cisco Prime Collaboration provides a "unified" management capability across the entire Cisco collaboration portfolio, supporting Cisco devices, applications, services, and network infrastructure. It does not require extensive training to use or understand and is exponentially more intuitive and user-friendly than the Cisco command-line management interfaces of the past.

☑ Cisco Prime Collaboration can support enterprise network transformations as investment in next-generation collaboration technologies with integrated voice and video deployments grows.

☑ For management solutions, the Cisco Cloud and Systems Management Technology Group (CSMTG) works with the Cisco teams that build the network, UC&C infrastructure, applications, and phones. Third-party vendors cannot provide that specific level of synergy.

☑ Cisco Prime Collaboration provides a one-stop shop for customers. It is a Cisco management solution for a set of Cisco collaborative products that all work together, down to the network level.

☑ The Cisco Prime Collaboration management solution enables IT departments to focus on more strategic initiatives, such as rolling out advanced collaboration technology and applications. It can enable organizations to delegate more tactical responsibilities to less skilled techs (such as help desk personnel).

☑ Consistency across Cisco technologies is supported. Built on a service-centered foundation, the Cisco Prime portfolio of products and solutions supports integrated life-cycle management through a common intuitive workflow-oriented user experience and a set of common operational attributes.

☑ The operational benefits IDC sees in Cisco Prime Collaboration include enhanced end-user experience, lower operating costs, operational control and consistency, and increased productivity. Examples include:

❑ A simple and intuitive Cisco GUI significantly reduces the number of clicks for IT staff and end users.

❑ No log-in to collaboration devices is required for IT staff to update the system.

❑ A global, single-pane-of-glass view of the network provides Cisco voice and video management capabilities for up to 150,000 Cisco IP phones/devices across Cisco clusters (more than double the maximum of Cisco Prime UCMS).

❑ Graphical charts can be superimposed to isolate and troubleshoot voice network occurrences.

❑ Video session troubleshooting uses Cisco Medianet to isolate quality problems before, during, or after TelePresence sessions.

❑ Scheduled voice circuit testing uses Cisco IP SLA to isolate quality problems.

❑ The Analytics module provides the ability to measure the service usage by individual endpoint or group of endpoints and can determine the top locations generating collaboration traffic for identifying call volume trends.

☑ IDC noted that a subset of the Cisco Prime for IT product portfolio is also utilized as the management application for Cisco HCS, Cisco's cloud-based UC&C solution that is offered through the company's service provider partners.

Cisco Prime Collaboration Versus Third-Party Management Solutions

An important decision for Cisco UC customers is whether to utilize the Cisco Prime Collaboration management solution or opt for a third-party management approach. Key considerations IDC has identified regarding Cisco Prime Collaboration versus third-party solutions include the following:

☑ Third-party solutions for voice and video may only manage certain network elements or only monitor specific hardware or software components while not providing a complete end-to-end management capability.

☑ Although third-party management solutions are slowly evolving to support UC&C, they are not the optimal fit for Cisco collaboration environments. Some are considered just "good enough" to meet the IT and end-user requirements of organizations.

☑ Organizations should consider Cisco Prime Collaboration's better "out of the box" capabilities versus dealing with the challenges of trying to adapt a third-party management solution to Cisco collaboration.

☑ A level of vendor/partner integration expertise may be needed to ensure that a third-party solution can interoperate effectively across a range of Cisco collaborative applications. Thus, a third-party approach can introduce more time, cost, and complexity when integrating with Cisco collaboration environments.

☑ Third-party management solutions do not support the full set of features and functions that Cisco Prime Collaboration provides for Cisco collaboration. Third-party solutions may compromise areas such as policy and security, for example, and most likely do not provide the full end-to-end management capabilities that Cisco Prime Collaboration does.

☑ In general, utilizing a Cisco partner in conjunction with the Cisco UC&C solution represents a single-source solution for all customer support, questions, issues, concerns, etc. This can be a very compelling consideration for many enterprise customers.

Opportunities and Challenges

IDC sees a number of opportunities and challenges for Cisco as enterprises consider new collaboration management tools and applications for IT personnel and end users:

Opportunities include:

☑ **For Cisco: Change/configuration management growth.** IDC expects that change and configuration management, IT asset management, software distribution, and endpoint/mobile device management will continue to be top priorities for IT buyers, even as software package, deployment, and delivery strategies evolve.

◹ **For Cisco: Establishing new differentiated, value-added offerings.** The UC&C market is highly competitive, with vendors competing with innovative new technologies and providing solutions that reduce companies' total cost of ownership (TCO) and drive attractive ROI. By addressing the needs of customers with a unified collaboration management tool, Cisco is again pushing the boundaries of its current offerings and is working to differentiate itself from other vendors in the market.

◹ **For enterprise IT: Driving greater business efficiencies and associated cost savings.** Greater business efficiencies can be delivered through the enhanced simplicity of Cisco Prime Collaboration and the ability to provision, manage, and troubleshoot collaboration endpoints, services, applications, and infrastructure quickly, as well as utilize better data analytics.

◹ **For enterprise IT: Demonstrating innovative value-add to the organization.** Cisco Prime Collaboration provides an opportunity for IT to "look good" and to demonstrate its value to the business by adding much-needed collaboration management tools and by demonstrating that it is taking a more strategic view and proactive position on enterprise network management issues.

Challenges include:

◹ **For Cisco: Demonstrating the ROI of the solution.** Implementing Cisco Prime Collaboration management will require a capital expenditure for many enterprise customers and may also have an effect on ongoing operational expenditures. Cisco will have to demonstrate how the benefits and savings gained from moving to Cisco Prime Collaboration will yield an attractive ROI to make the change worthwhile.

◹ **For Cisco: Changing the perception of its UC management solutions.** One of the limitations most often cited by Cisco UCM customers in the past was the rather clumsy, cobbled-together look and feel of Cisco UC management solutions. With the latest release of Cisco Prime Collaboration, Cisco has addressed a long-standing concern of Cisco telephony and UC customers. IDC feels that the seamless and intuitive Cisco Prime Collaboration solution definitely addresses Cisco's weakness in the UC&C management area. The challenge for Cisco is convincing its customers.

◹ **For enterprise IT: Multivendor support.** Cisco Prime Collaboration management support for multivendor solutions in the network is not part of the Cisco road map. As such, this presents a challenge for Cisco enterprise customers that currently have a mix of voice and collaborative solutions from Cisco and other vendors in their environments.

Conclusion

As key communications and collaboration technologies continue to grow and become more innovative, the importance of the network in supporting that growth also increases. Demand will only continue, and the ability of enterprise IT management to keep pace with this growing environment is a key factor when choosing a UC&C solution. As we've seen, even new UC&C solutions all too often continue to operate in separate silos with inconsistent features, policies, tools, and management capabilities. This increases the burden on network administrators and drives up management costs and complexity.

IDC finds that as organizations investigate UC&C solutions, the Cisco Prime Collaboration approach to simplified, unified management enables IT and network managers to introduce new levels of efficiency, gain greater levels of manageability, reduce costs, and improve user experience in one integrated product.

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