

# European Outlook: Potential Productivity and Cost Savings Using TelePresence Technology

*Results from a Quantitative Survey*



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## 1.0 Executive Summary

Just as the Internet has turned the media, our daily lives, and the world economy upside down, it is transforming corporate cultures in more dynamic ways. The traditional corporate hierarchy and work process is giving way to a much more peer-driven, interactive, collaborative workplace focused on the optimisation of internal and external human capital networks across the globe.

As a result, organisations are investing in various collaboration technologies—for voice, web, and video-based interactions. In this paper, we specifically delve into the potential benefits and applications of TelePresence—a new video-based solution enabling people in multiple, perhaps even global, locations to interact as if they were face-to-face.

Of course, videoconferencing has been around for years. But organisations using it have often been challenged in making such investments due to, 1) justifying the ROI based on a tangible impact on budgets and productivity; 2) implementing solutions that adequately simulate the face-to-face meeting experience; and 3) ensuring actual usage (due to ease of use perceptions among the end-users).

Today, good reason exists to revisit video-based communications. Indeed, technological advances have resulted in solutions for creating unique, “in-person” experiences over the network that combine innovative video, audio and interactive elements. This new category of communications, TelePresence (see Exhibit 1), delivers the audio and video quality, and collaboration tools, to focus meetings on the conversation, instead of the technology.

**Exhibit 1: TelePresence**



This technology uses “life-size,” fully high-definition video (1080p images), CD-quality audio, interactive technologies and a specially-designed environment to approximate the feeling of actually being in the same room as participants in remote locations. It also has a very simple use model, relying on enterprise calendaring (for example, Microsoft Outlook) for scheduling and the telephone interface to launch calls with the push of a button. Its reliability stems from the highly available network and the five 9s availability of service provider networks. By definition, TelePresence solutions deliver predictable and reliable service levels, which can greatly reduce the time that IT groups currently spend on troubleshooting and resolving network issues associated with traditional

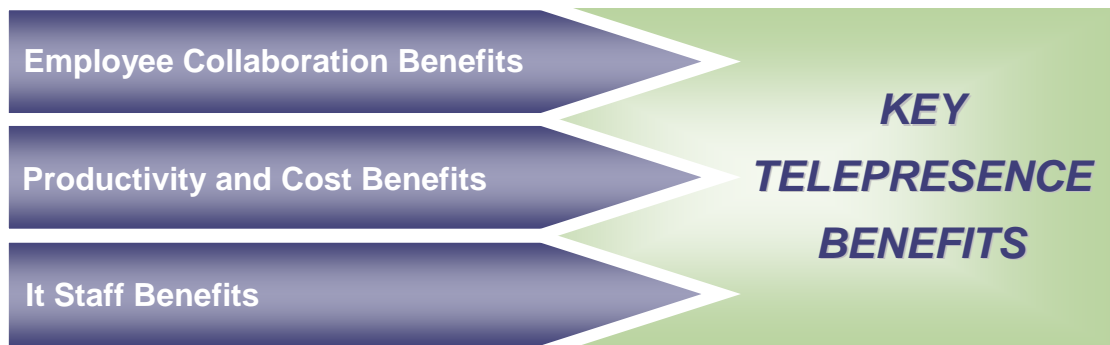
videoconferencing. With TelePresence, employees no longer need to rely on their IT colleagues to connect a conference; employees simply schedule a conference just as they would for a voice conference, using their company's existing calendaring system.

### Core Benefits Expected from TelePresence

A recent online survey of 240 technical and business decision-makers in medium-to large organisations in the UK, France and Germany measured the benefits that companies expect to get from TelePresence solutions.<sup>1</sup> Based on the opinions of European companies evaluating this concept, this could be the technology that does for video what IP telephony has done for voice in the Enterprise.

The most widely-anticipated gains for European companies fall into three general categories: improved employee collaboration, travel-related benefits and IT staff time savings.

**Exhibit 2: Key TelePresence Benefit Themes**



A majority of European decision-makers expect these three areas, which is the same result we saw in a parallel US-based study, also conducted by Chadwick Martin Bailey:

**Employee Collaboration:** Seventy-one percent of our European participants believe TelePresence has the capability to strengthen the internal collaborative work process, which can lead to improved relationships and accelerate decision-making between headquarters and branch offices. This potential benefit is also aligned with a broader strategic initiative reported to us in the same survey: 53% state they are actively seeking ways to improve employee collaboration.

**Travel Related:** Most companies expect multiple travel-related gains from TelePresence. A vast majority (82%) of our research sample expect TelePresence to yield direct cost savings by minimising the need for travel. Travel is time-consuming, expensive and greatly limits travellers' access to customers and colleagues when they are out of the office. Almost three-quarters of European companies believe that this technology will increase employee productivity by making employees available for each other as well as customers, partners and suppliers.

**IT Staff Time:** One of the most highly-anticipated benefits of TelePresence is lowering the IT staff's burden of having to set-up, administer and support traditional videoconference meetings. Well over 50% of the IT

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<sup>1</sup> Research conducted by Chadwick Martin Bailey ([www.cmbinfo.com](http://www.cmbinfo.com)).

professionals in our sample believe they could save valuable IT staff time because they would not have to be physically present before and/or during videoconference calls for support purposes.

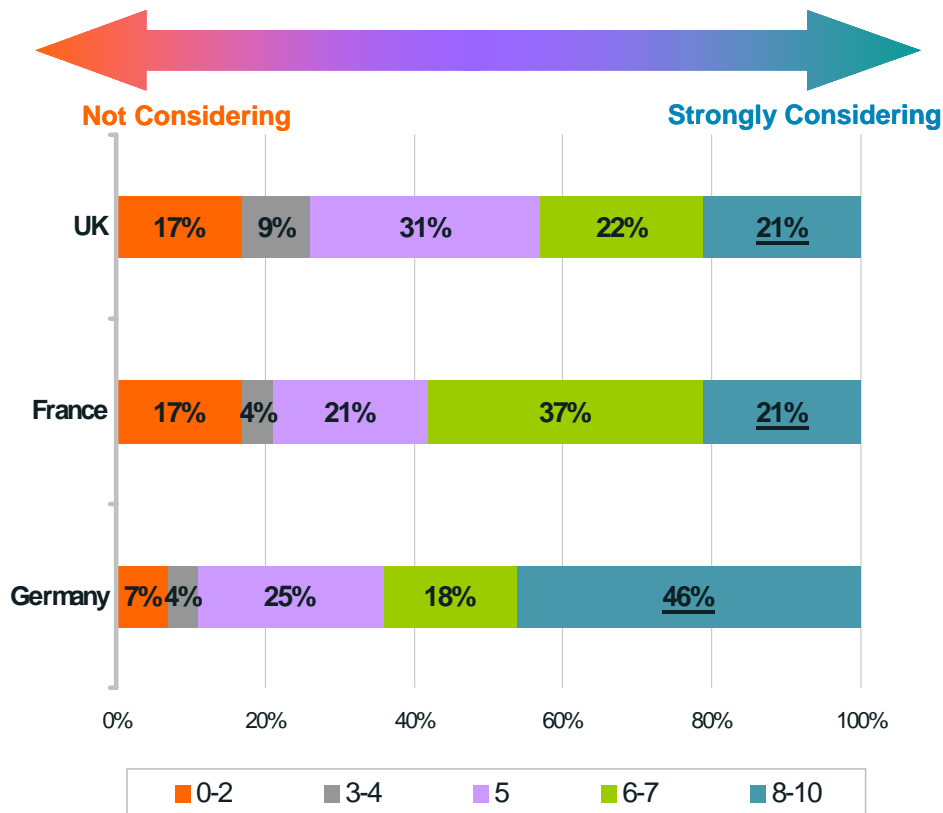
**In considering these three key areas, the striking result is that benefits are expected for both the IT staff as well as the non-IT staff of organizations that apply TelePresence. Further, as data in this paper will illustrate, it appears that an interesting bifurcation exists among potential adopters: while many see benefits around cost savings, a more aggressive subset exists that anticipates leveraging TelePresence to fuel topline growth.**

## Prospects for TelePresence Adoption in Europe

In our research design, we asked participants about their overall interest in room/group videoconferencing systems—before exposing them to the concept of TelePresence. Our goal was simply to determine what percent of organisations are planning to invest in videoconferencing, so we could gauge how many and what types of companies would potentially be most interested in next-generation video solutions.<sup>2</sup> The result? Currently, European organisations seem generally cautious about videoconferencing investments. As Exhibit 3 shows, only our German respondents showed a strong level of investment plans for the upcoming 24 month time period.

### Exhibit 3: Video Adoption – Room/Group Systems

Q: How would you rate your agreement with the following statements about your organisation:  
Our organisation is considering investing in room/group videoconferencing systems over the next 24 months?



Note: Statistically significant differences are underlined.

<sup>2</sup> The questionnaire asked about videoconferencing because not all respondents would have been familiar with the concept of TelePresence. Whenever we research newer categories, we must be careful to gather opinions from a respondents existing context. In this study, we took a two-pronged approach. First, we gather attitudes and planned behaviors for “videoconferencing.” Later, we introduced the TelePresence concept and gathered those reactions as well.

The difference in Germany appears to be due to the fact that German Business Decision Makers (BDMs) are as positive as their Technology Decision Maker (TDM) counterparts regarding the impact of video on productivity.<sup>3</sup> In contrast, we found UK and France-based BDM respondents more conservative. We also found that German firms had stronger results on average for seeking ways to improve employee collaboration.

Later in the study, we gathered reactions to the TelePresence concept and also measured related attitudes about technology investments. By combining these various factors, we conclude that interest in TelePresence will develop over time—and will vary by customer group. As is the case with many research studies about new technology solutions, we do find that some customer groups have stronger early interest than others. As shown in Exhibit 4, such a pattern is also seen in this European study.

**Exhibit 4: Likely TelePresence Adoption Cycle in Europe**



\*Includes Financial Services, Banking, Securities and Insurance.

<sup>3</sup> TDMs are Technology Decision Makers—professional in the IT and telecommunications. Business Decision Makers (BDMs) are Line of Business, Divisional or Executive managers who influence technology investments but are not in the IT department.

Further, the study found no consistent differences by number of employees, geographic scope (national vs. multinational companies) or type of business (B2B vs. B2C companies) that would allow for a similar best/late opportunity categorisation for those subgroups in the sample.

## Summary

As detailed in the following sections, when exposed to the TelePresence concept, our research participants perceived specific potential benefits and were able to report how they would—if at all—expect such benefits to deliver quantifiable results. We find that at minimum, organizations will apply TelePresence to save money. And those with, perhaps, a more strategic view, also report potential for revenue-generation. It is our hypothesis that the reason for such positive reaction is due to the current context facing global business today, specifically the fact that increasingly competitive global market pressures are driving businesses toward more collaborative, innovative technologies. Based on the benefits expected by the research participants, TelePresence is perceived as such a solution, and is thus aligned with the needs of businesses today.



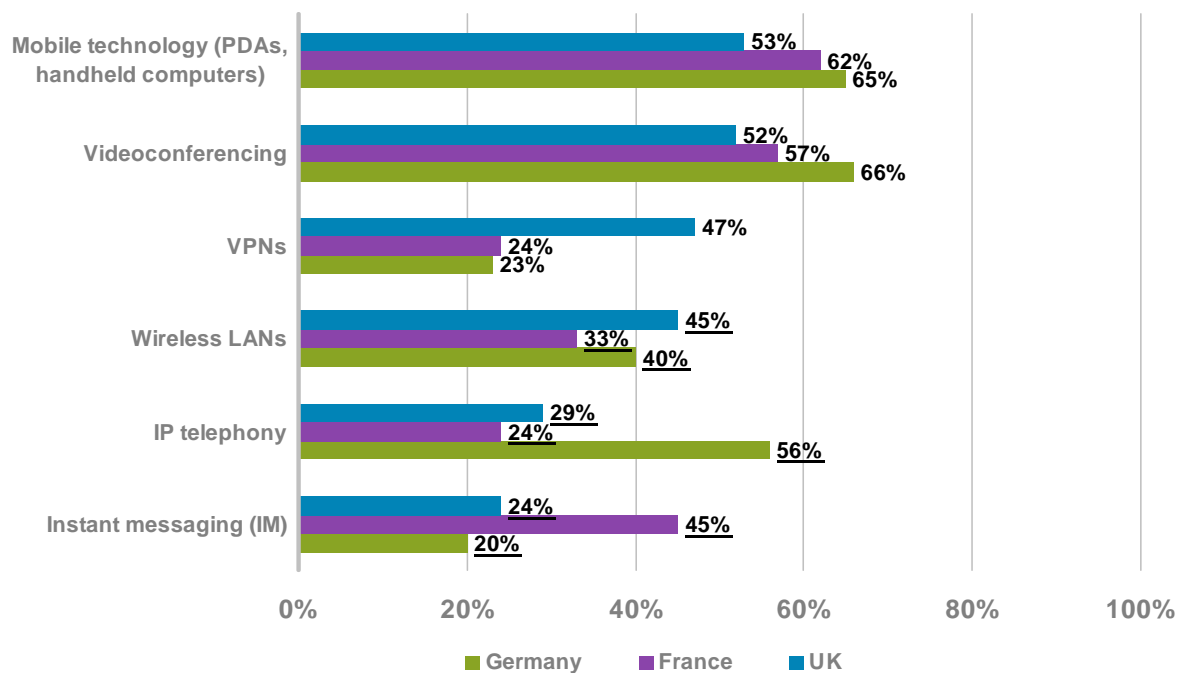
## 2.0 Potential Productivity Benefits

### Company-wide Benefits

More than half of all European companies surveyed generally perceive video as a productivity-enhancing technology. In fact, perceived impact of video is on par with mobile technology and far exceeds that for VPN, wireless LANs, IP telephony and instant messaging. These results help to illustrate how broadly video is perceived as an important part of collaboration.

#### Exhibit 5: Perceived Impact of Video-based Communications on Productivity

*Q: Which of the following technologies have had, or could have, the greatest impact on employee productivity in your organisation?*



Note: Statistically significant differences are underlined.

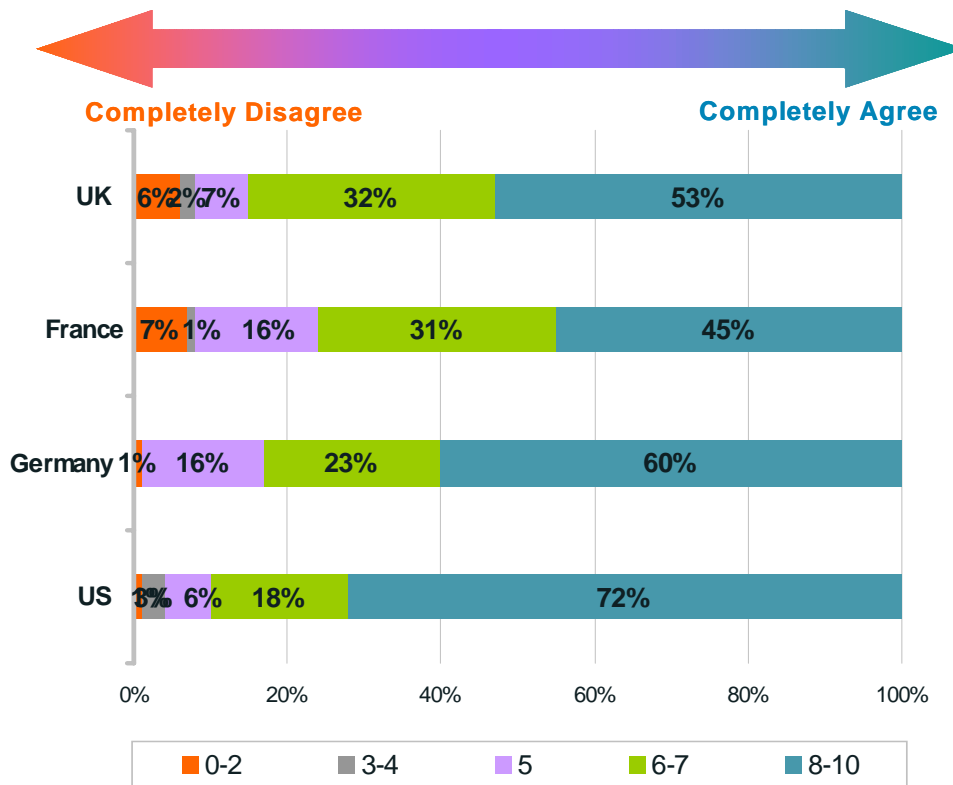
Not surprisingly, most TDMs (68%) agree that video impacts productivity; significantly fewer BDMs (48%) share this attitude. This gap does not exist for mobile technology, suggesting TelePresence messaging targeted to BDMs must clearly illustrate the basic benefits of video since less than 50% are strongly convinced of its potential.

So clearly, video is perceived as important for collaboration...but how important is collaboration itself? To measure this, we asked a number of questions about current strategic initiatives—among them, plans to improve employee collaboration. The results show us that fostering more collaboration—both internally and externally—across broad geographical locations is obviously important to European businesses. As Exhibit 6 shows, a majority of German companies have plans for employee collaboration improvement initiatives, followed closely by

companies from the UK and France. This result is mirrored in the survey results which looked at companies' current initiatives underway to improve how employees interact.

#### Exhibit 6: Plans for Employee Collaboration Improvement

*Q: How would you rate your agreement with the following statements about your organisation:  
Our organisation is actively seeking ways to improve how our employees collaborate?*



So we have evidence that video is perceived as important in general, and that collaboration improvements are a priority for European businesses. Does that also mean that when exposed to the TelePresence concept, European businesses perceive the solution as aligned with their needs for collaboration and employee productivity? As illustrated in Exhibit 7, the result is positive. In fact, responses from decision makers show that Telepresence—even at first exposure—is widely seen as delivering specific benefits.

### Exhibit 7: Company-wide Benefits

*Q: What types of benefits do you expect to get from TelePresence, at a company-wide level?*

	Total Europe	
	% Expecting Benefits	Average Time Saved
Faster troubleshooting of business problems	56%	3-5 hrs/mo
Improved productivity within geographically-dispersed functional groups in the organization	61%	1-3 hrs/mo
Less time needed to schedule/reserve videoconferencing	55%	1-3 hrs/mo
Increased availability of coworkers leads to improved workflow rate	50%	1-3 hrs/mo
Decreased time to market from more effective teamwork	33%	5-6 more products

As these results show, participants widely believe the TelePresence system would significantly benefit intra-company collaboration, and even potentially decrease time-to-market. The next exhibit captures not only the impact of improved internal relationships, but time saved to achieve higher operational productivity. For example, Exhibit 8 shows that most respondents expect to experience faster decision making between headquarters and branch/remote office employees. And of those expecting this benefit, most estimate it to result in 1 to 3 hours of time savings per week per involved employee. That is, of employees' whose work would be directly impacted, they would save 1 to 3 hours a week.

Perhaps one of the most interesting results is also shown in Exhibit 8—that a fair number of decision makers actually perceive TelePresence as a technology that could impact revenue. Specifically, 38% of European respondents report that TelePresence between employees and clients would strengthen relationships and build customer loyalty.

### Exhibit 8: Employee Communication Benefits

Q: What types of benefits do you expect to get from TelePresence from communication between key internal and external groups? <sup>4</sup>

	% Expecting Benefit			Average Time Saved		
	UK	France	Germany	UK	France	Germany
Improved relationships and faster decision-making between headquarters and branch and/or remote offices	<u>69%</u>	<u>59%</u>	<u>86%</u>	1-3 hrs/ employee/ wk (N=44)	1-3 hrs/ employee/ wk (N=42)	1-3 hrs/ employee/ wk (N=61)
Improved relationships and faster decision-making between headquarters and branch and/or remote offices	<u>69%</u>	<u>59%</u>	<u>86%</u>	1-3 hrs/ employee/ wk (N=44)	1-3 hrs/ employee/ wk (N=43)	1-3 hrs/ employee/ wk (N=62)
Improved communications between our employees and external business partners (e.g., suppliers) shortens time to market	<u>32%</u>	<u>50%</u>	<u>68%</u>	**	**	**
Improved communications between our employees and clients strengthens relationships and builds customer loyalty	44%	<u>30%</u>	<u>57%</u>	At least 5% increase in sales vol/client (N=25)*	At least 5% increase in sales vol/client (N=21)*	At least 15% increase in sales vol/client (N=42)

So people readily recognise that TelePresence could deliver quantifiable benefits. But, how widely? That is, do they see it as something that would only be used by a minority of executive employees? Or something that could be applied more broadly across the organisation? We found that of those interested in the concept, on average, they anticipate that 10-39% of their workforce will use TelePresence. Consistent with our parallel US research results, the most common users would include:

- Corporate Executives
- Headquarters-based Employees
- Remote Site Employees
- Mobile Employees
- IT Staff
- Cross Functional Teams
- Marketing

<sup>4</sup> \*Low N results (N=10-30) should be interpreted with caution. \*\*N<10 too low to report results.

## Potential Travel-Related Benefits

Of all the benefits included in this study, those relating to travel reduction are among the most important. The majority of our UK, France and Germany-based decision makers believe that less travel will make employees more productive overall, and more available to co-workers, including executive management. Further, they are able to quantify the potential savings: The average French and German employee who travels today would gain 4-5 meetings per month and in the UK, 2-3 meetings would be gained per employee<sup>5</sup>.

### Exhibit 10: Travel-Related Productivity Benefit Expectations

*Q: What types of benefits do you expect to get from TelePresence, at the user level?*

*Q: How many meetings does the average employee who travels regularly at your organisation currently miss per month due to travel demands?*

*Q: How many more meetings per month would the average executive be able to attend by having reduced travel time?*

	% Expecting Benefit			Average Time Saved		
	UK	France	Germany	UK	France	Germany
Less travel increases employee productivity by making employees more available (and more responsive) for other meetings	68%	68%	75%	2-3 meetings/ mo (N=33)	4-5 meetings/ mo (N=44)	4-5 meetings/ mo (N=53)
Less travel time for executives lets them be more available and attend more meetings	70%	78%	74%	5-6 meetings/ mo (N=52)	5-6 meetings/ mo (N=54)	5-6 meetings/ mo (N=55)

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<sup>5</sup> The question asked how many meetings the average employee who travels regularly would miss per month. The average French and German traveling workers would miss 4-5 meetings per month and the UK traveling employee would miss 2-3 meetings per month on average.

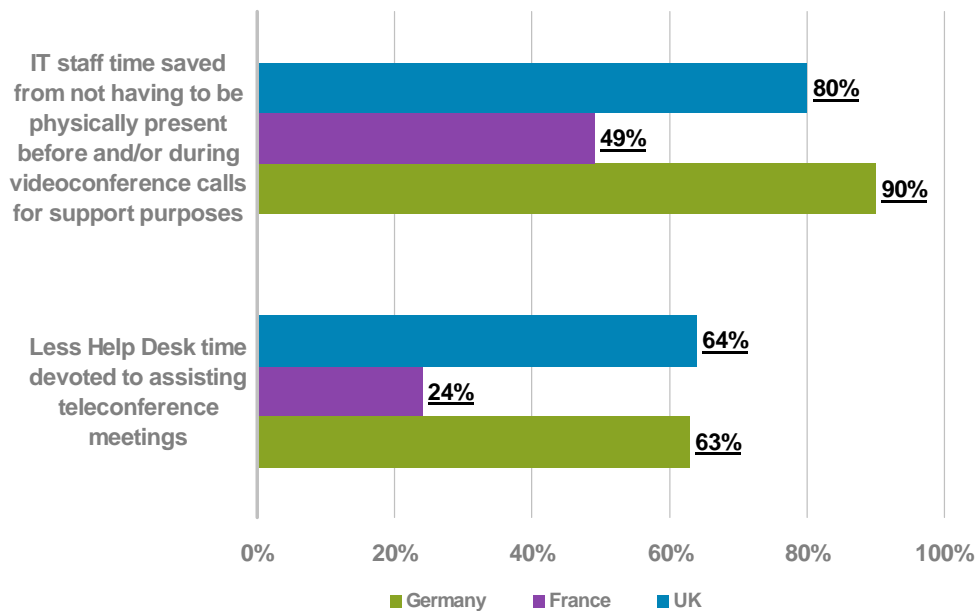
### Potential IT Staff Benefits

It is a telling commentary on the state of traditional video systems that so many (77% in US, 90% in Germany, 80% in UK) expect TelePresence to free their IT technicians from having to physically support live meetings. Clearly, the current need for such hands-on IT support suggests that reliability is a trouble spot for many today. Just as IP telephony has greatly simplified phone system management for both IT staff and end users, TelePresence could bring a similar change to supporting video. In doing so, our decision makers report their IT personnel could save 1-3 hours per week per staff person by no longer being needed at video meetings.

What about end users? Respondents report that by avoiding the technical hang-ups of launching a call, the average meeting could be shortened by a remarkable ten minutes—which means ten minutes saved for each meeting participant as well.

#### Exhibit 11: IT Staff Benefits

Q: What types of benefits do you expect to get from TelePresence, at the user level? (TDMS only)



Note: Statistically significant differences are underlined.

### 3.0 Potential Cost Savings

In addition to improving employee productivity, TelePresence can also lead to direct cost savings. Not surprisingly, the most likely of these will come from reducing travel; however, others also foresee potential savings in conferencing service fees as well as other areas.

#### Travel Savings

European companies most expect to save money with TelePresence the same way they foresee improving employee productivity: through reduced travel. Of all potential cost savings (including lower video/audio/web conference service costs, lower maintenance costs, etc.), travel cost savings are the most highly anticipated by a large margin. Not surprisingly, the potential savings vary by employee category. For example, of those that expect their Executive-level users would leverage the solution, respondents expect it would save anywhere from 800 to 3,200 Euros per month per employee. Obviously, that could be extrapolated out by number of executives for a corporate-wide benefit that would be significant.

#### Exhibit 12: Travel Related Cost Savings

*Q: How much would be saved in travel expenses per month for each of the following types of workers?*

Expected Monthly Travel Savings Per...	Average Benefit		
	UK	France	Germany
Executive-level employee	801-1600 euros (N=49)	1601-2500 euros (N=46)	2501-3200 euros (N=57)
Salesperson	400-800 euros (N=34)	801-1600 euros (N=41)	400-800 euros (N=52)
Headquarters employee	400-800 euros (N=49)	400-800 euros (N=48)	400-800 euros (N=56)
Remote office employee	400-800 euros (N=48)	801-1600 euros (N=50)	801-1600 euros (N=55)
IT worker	Up to 400 euros (N=41)	400-800 euros (N=47)	801-1600 euros (N=53)

### Other Potential Cost Savings

There are other means by which TelePresence is perceived as being able to yield cost savings. For example, as Exhibit 13 shows, 61% expect to reduce training time for new hires—by being able to schedule internal trainers remotely, provide access to more training resources. Further, our participants believe this benefit would save an average of at least 32,000 euros per year. Of course, it is important to note that these are averages—some expect even higher average annual savings. For example, an organization that today spends minimally on new hire training would likely have a lower savings on this—whereas the impact on an organisation that invests more on such training may experience a larger, absolute benefit.

#### Exhibit 13: Other Cost Savings

*Q: What cost savings would you expect to get from using TelePresence?*

*Of those answering the respective savings and benefits, these questions were asked:*

	Total Europe	
	% Expecting Benefits	Average Annual Cost Savings
Faster training (for new hires)	61%	32,001-40,000 euros
Savings on video, web or audio conference services	43%	16,001-24,000 euros
Lower circuit costs from using existing network vs. dedicated circuits (e.g., ISDN)	38%	32,001-40,000 euros



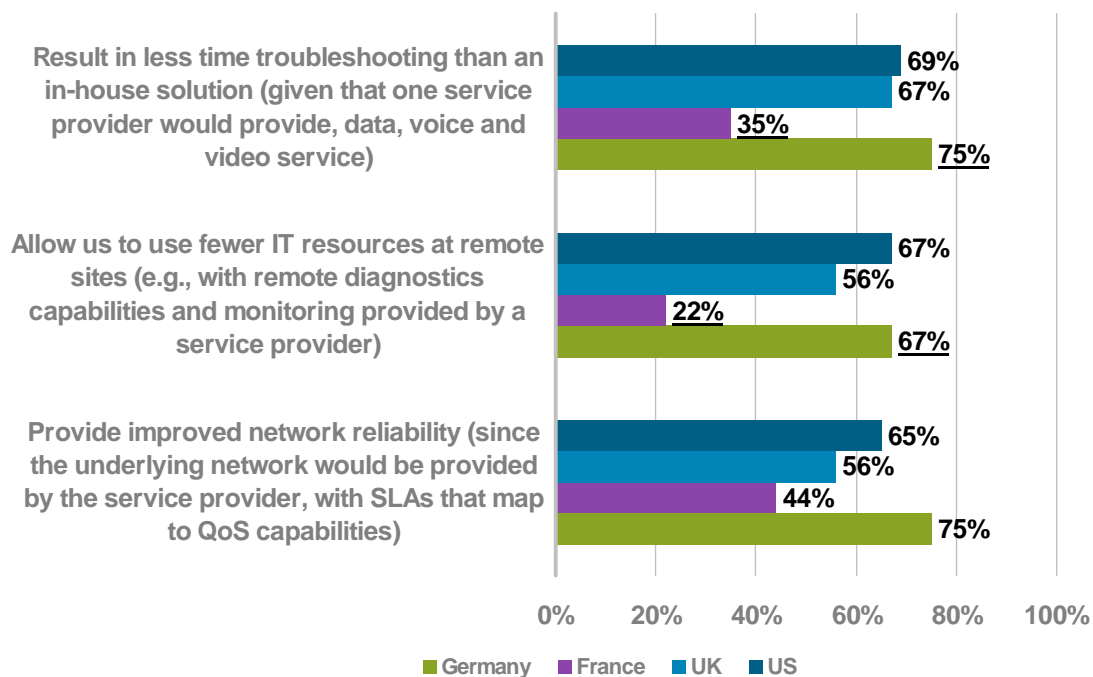
## 4.0 Options for TelePresence Delivery: In-House vs. Service Provider

Since TelePresence could be available as either an in-house solution or as a service from an external provider, this survey also explored the potential benefits of using a managed service provider arrangement. While German and UK respondents are on par with the U.S. in potential favorability towards a managed TelePresence service, French companies seem more interested in an in-house solution.

### Exhibit 14: Perceived Impact of Managed Telepresence Service on Productivity

Q: What types of benefits do you expect to get from this managed TelePresence service compared to using an in-house solution? Please rate your agreement with the following statements.

#### Top 3 Box: % 8-10 Strongly Agree



Note: Statistically significant differences are underlined.

Low Ns, interpret with caution (UK N=9, France N=23, Germany N=12)

## 5.0 About Cisco Systems, Inc.

Cisco Systems, Inc. is the worldwide leader in networking for the Internet. Today, networks are an essential part of business, education, government and home communications, and Cisco's Internet Protocol-based (IP) networking solutions are the foundation of these networks.

The company was founded in 1984 by a small group of computer scientists from Stanford University. Since the company's inception, Cisco engineers have been leaders in the development of Internet Protocol (IP)-based networking technologies. Today, with more than 56,000 employees worldwide, this tradition of innovation continues with industry-leading products and solutions in the company's core development areas of routing and switching, as well as in advanced technologies such as: IP Communications, Wireless LAN, Home Networking, Application Networking Services, Network Security, Storage Area Networking and Video Systems.

Cisco has been at the heart of many historic changes in technology, and that continues to be true today. Now, at a time when the technology industry is going through a period of dramatic change, Cisco is the market leader in multiple areas, such as routing and switching, unified communications, wireless and security. The company helped catalyze the industry's move toward IP and, not that it is fully underway, the company is at the center of the fundamental changes in the way of world communicates.

Enabling people to make powerful connections—whether in business, education, philanthropy, or creativity. Cisco hardware, software, and service offerings are used to create the Internet solutions that make networks possible – providing easy access to information anywhere, at any time.

Cisco TelePresence is an innovative, new technology that creates unique, in-person experiences between people, places, and events in their work and personal lives—over the network. The first application is Cisco TelePresence Meeting solution; Cisco TelePresence delivers greater productivity, faster decision-making and improved time to market, improved responsiveness and improved communication and collaboration with co-workers, partners, and customers.

## Appendix A: Potential TelePresence Benefits Tested in This Study

List of All TelePresence Benefits Tested	
<b>Company-wide Benefits</b>	<p>Improved productivity within geographically dispersed groups</p> <p>Faster resolution of business problems</p> <p>Increased availability of coworkers leading to overall improved workflow rate</p> <p>More focus from meeting participants</p> <p>Less time needed to schedule/reserve meetings</p> <p>Best practice sharing</p> <p>Decreased time to market from more effective teamwork</p> <p>Improved compliance (regulatory process)</p>
<b>Productivity Benefits</b>	<p>Less travel increases employee productivity by making employees more available (and more responsive) for other meetings</p> <p>Increased worker productivity as a result of reduced need to travel</p> <p>Less travel time for executives lets them be more available and attend more meetings</p>
<b>Employee Communication Benefits</b>	<p>Improved relationships and faster decision-making between headquarters and branch and/or remote offices</p> <p>Improved communications between our employees and external business partners (e.g., suppliers) shortens time to market</p> <p>Improved communications between our employee and client strengthens relationships and builds customer loyalty</p> <p>More efficient communications between employees and clients enables expanded sales coverage/market reach</p> <p>Improved communications between employees and our suppliers improves supply chain efficiency</p>
<b>IT Staff Benefits</b>	<p>IT staff time saved from not having to be physically present before and/or during meetings for support purposes</p> <p>Less Help Desk time devoted to assisting meetings</p>

<b>Service Provider Benefits</b>	<p>Result in less time troubleshooting than an in-house solution (given that one service provider would provide data, voice and video service)</p> <p>Allow us to use fewer IT resources at remote sites (e.g., with remote diagnostics capabilities and monitoring provided by a service provider)</p> <p>Provide improved network reliability (since the underlying network would be provided by the service provider, with SLAs that map to QoS capabilities)</p>
<b>Conferencing &amp; Collaboration</b>	<p>Travel savings</p> <p>Savings on video, web or audio conference services</p> <p>Faster training (for new hires)</p> <p>Lower management and maintenance costs</p> <p>Lower circuit costs from using existing network vs. dedicated circuits (e.g., ISDN)</p> <p>Other savings</p>

## Appendix B: Scope and Methodology

With the aim of helping technology decision makers assess the potential impact of a TelePresence deployment in Europe, this paper quantifies expected TelePresence benefits – including employee productivity gains and direct cost savings – as reported by 240 medium and large organisations in an online survey. The questionnaire results in this white paper can help all considering TelePresence adoption as a core business tool for their company.

All respondents participating in this on-line survey met the following qualification criteria:

- Job responsibilities
  - TDMs with current or recent past experience managing room or group video systems and
  - BDMs who are potential users of video systems (note: BDMs are not required to be current video users; however, they must have some past experience with desktop or room/group video systems)
- Organisation requirements
  - 800 or more employees for UK; 500+ for France and Germany
  - 2 or more company sites (defined as branch offices or locations with multiple employees; telecommuters do not count as company sites)
  - Mix of vertical industries are represented in the sample
  - Site location in more than 1 country: 60% minimum

The survey sample included respondents from 240 European decision makers included companies from a range of different industries, including financial services, manufacturing, government, professional services and healthcare among others.

## Appendix C: BDM vs. TDM Anticipated Benefit Value

Customer Context and Anticipated Benefits		BDMs	TDMs
Video Adoption Context/ Attitudes	% reporting videoconferencing as having an impact on employee productivity in their organisation (Q13)	<u>48%</u>	<u>68%</u>
	% seeking ways to improve how employees collaborate (top 3 boxes) (Q14)	<u>46%</u>	<u>59%</u>
	% considering investing in room/group videoconferencing systems over next 24 months (top 3 boxes) (Q14)	<u>15%</u>	<u>43%</u>
Company-wide Benefits (Q18)	Improved productivity within geographically-dispersed functional groups in the organisation	<u>54%</u>	<u>68%</u>
	Increased availability of coworkers that leads to overall improved workflow rate	<u>45%</u>	<u>54%</u>
	Less time needed to schedule/reserve videoconference sessions (if meeting scheduling was integrated with MS Outlook or Lotus Notes)	<u>43%</u>	<u>67%</u>
Employee Communication Benefits (Q19)	Improved relationships and faster decision-making between Headquarters and branch and/or remote offices	<u>64%</u>	<u>79%</u>
Cost Savings (Q22)	Savings on video, web or audio conference services	<u>33%</u>	<u>54%</u>
	Faster training (for new hires)	<u>37%</u>	<u>38%</u>
	Lower management and maintenance costs	<u>39%</u>	<u>59%</u>
	Lower circuit costs from using existing network vs. dedicated circuits (e.g., ISDN)	<u>43%</u>	<u>59%</u>
Revenue Opportunities (Q23)	Ability to have higher volume of meetings with new customer prospects	<u>38%</u>	<u>48%</u>
	Increased customer purchase volumes from improved communications with our organisation	<u>24%</u>	<u>32%</u>
TelePresence Use (Q17)	% of workforce that would use TelePresence system (estimated by respondent – median average)*	<u>20-29%</u>	<u>20-29%</u>

Note: Statistically significant differences are underlined.

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### **About Sage Research – The Technology Practice of Chadwick Martin Bailey**

Acquired in December 2005, Sage Research is now the technology practice of Chadwick Martin Bailey. With in-depth experience in the networking and telecommunications markets, Sage delivers actionable data and recommendations based on the most current qualitative and quantitative methods. Founded in 1993, Sage serves a broad client base that includes industry leaders and innovative start-ups.

Chadwick Martin Bailey conducts market research for some of the world's largest companies in more than 30 countries. With corporate offices in Boston, Massachusetts, Chadwick Martin Bailey's team-based approach ensures that it applies the right combination of people and expertise to each business challenge or opportunity it faces. Whether it be marketing ROI, product development, or enhanced customer satisfaction, all of Chadwick Martin Bailey's custom research approaches have a singular focus: to bring clarity to what clients can do to get, keep, and grow customers. For more information please visit [www.ChadwickMartinBailey.com](http://www.ChadwickMartinBailey.com).