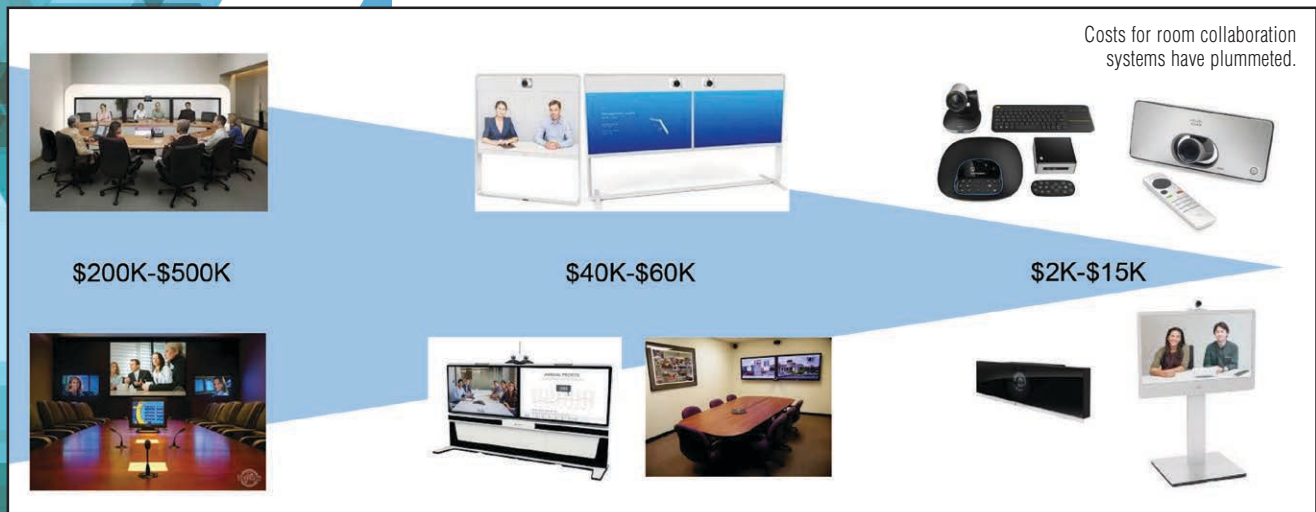


Emerging Trends In Collaboration

Multiple trends in the collaboration space are changing the game for manufacturers, resellers and end users.

By David Danto

The pace of change in conferencing and collaboration rooms and spaces is moving more rapidly now than it ever has in the past. Staying on top of the curves and twists is an urgent part of what collaboration professionals need to do to remain relevant. Most professionals know that, if they continue to build rooms and systems the same way they did even a couple of years ago, they would be using outdated ideas and obsolete technologies. Today's best practices are vastly different, and changes in technologies are only the beginning.



Margins And Free Services Dropping Away

To understand the driver of much of this, one has to look at the recent history and economics of collaboration. Ten years ago, we were all in the middle of an Immersive Telepresence hype-cycle. Organizations were spending upwards of \$500,000 to buy these immersive rooms (and/or high-end integrated systems)...and possibly up to an additional \$500,000 to remediate rooms for their installation. These very expensive systems yielded a lot of profit to the manufacturers, and there was a lot of room to provide free, value-added services to supplement installations. Manufacturers and integrators would provide free or low-cost assessments, system designs and other professional services that were funded by the margins on these sales.

Cut to five years ago and one finds solutions that were far less expensive than the immersive systems, *and* that could provide the same remote experience. They did this by using smart camera systems that automatically zoomed in on who was speaking. These modular systems carried price tags of around \$50,000 to \$60,000. Perhaps these were not as lucrative for the manufacturers as the immersive systems were, but they still carried enough margin to provide the supplemental services at low, or no, cost to end users.

In today's world, many organizations are opting for personal collaboration over room collaboration systems, and some of the room systems being installed have price tags that have plummeted to as low as about \$2,000 for a decent experience. The economics of that trend have forced a number of changes in the collaboration space.

First, those formerly free design and consulting services are gone. End-user organizations that would like to get design and strategic advice from experienced professionals must get used to the fact that they will need to pay directly for this

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Large enterprises should be looking for manageable solutions and deciding about what devices are needed (in-room codec, PC, BYOD, etc.).

The Wider-Angle Camera



The Speakerbar



The Hub



The Smaller Full System



Many new huddle room device form factors are emerging.

expertise. That is proving hard to swallow for many organizations. I've seen a number of them refuse to contract for the needed assessments and design services (because they never had to before), and then make significant, expensive, avoidable mistakes in their collaboration strategy. It will probably take a few failed deployments, poor ROI experiences and/or wasted investments before most organizations realize the value and savings yielded by investing in expert support.

The bigger change, though, is coming from the large manufacturers and service providers. Realizing that there is little to no profit in selling the now-inexpensive systems, the majority of these large companies are switching strategies; now, they're stressing a cloud/annuity model for collaboration. Whether we're talking about Cisco with WebEx/Spark, Google with G-Suite, Microsoft with Office365/Skype for Business or any of the others, the new goal is to get end-user organizations onto a platform via an Enterprise License—where they're paying a fee per person per month for everyone in their organization. Just about every new collaboration product and/or service introduced into the market is geared toward funneling end users into that annuity model to support the recurring revenue.

Cloud services (like WebEx, BlueJeans, Zoom and others)—formerly anathema to large enterprise end users in the collaboration space—are now widely embraced by most organizations, helping support this fundamental change in the economic/consumption model.

To develop a successful strategy

that navigates through these changes, organizations must design collaboration ecosystems that focus on providing seamless meeting experiences. This requires a robust interoperability strategy that ties together mobile, desk and room clients, and the selection of services and endpoints that provide powerful management and monitoring tools. These are often not the least-expensive options, but the additional cost provides enormous extra value. The catch-22 here is that organizations really should hire one of those formerly free consultants to help them avoid the mistakes others have made and design the best strategic solution to meet their needs.

Smaller Rooms

As the economic models change, so do the approaches to collaboration. The biggest change is about the biggest rooms, which are no longer the focal point of collaboration. Organizations have realized that the large, expensive rooms are not nearly as useful as smaller rooms, where small groups of people can meet and collaborate, both with each other and with remote colleagues. These spaces are now generally referred to as huddle rooms.

The huddle room is a space where a small group of people can go to have meetings away from the noise and activities of today's typically dense and/or open office environments. The majority of huddle rooms are equipped with basic technology to support collaboration with remote individuals. (However, this is dependent on how the organization defines "basic.")

Other than the fact that all these rooms (or open-walled spaces) are smaller than past norms, there are few

areas of agreement on how to approach them. Some organizations equip them with webcams (meant for desktop PC use) and expect people to use their own BYOD devices for collaboration; this often results in a poor experience. Other organizations equip them as smaller versions of integrated rooms, realizing none of the inherent benefits of scale and simplicity, but achieving superior performance. And, of course, there are many versions that lay somewhere between those two extremes.

It is clear that manufacturers are taking these spaces seriously, with many releasing hardware specifically designed and optimized for these rooms. Form factors such as "speakerbar camera/audio systems" (from firms such as Harman, Yamaha and Logitech) and "tabletop hubs" (from Crestron, Intel/HP and others) are *only* applicable for these smaller rooms.

Deciding which the best options for your organization are is, again, something that can be made much simpler with the support of expert advice. There are trade-offs inherent with each solution.

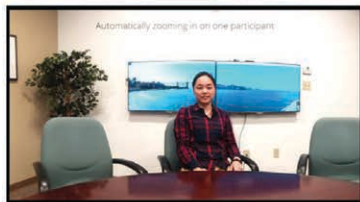
Huddle rooms aren't the only areas that have seen emerging technology disrupt the norms. Three other emerging trends are shaking up the collaboration space: intelligent cameras, electronic interactive whiteboards and team chat platforms.

Smart Cameras: We are seeing the first generation of cameras come to market that capture large, wide, high-resolution images and then electronically crop, zoom and switch to make automatically correct images.

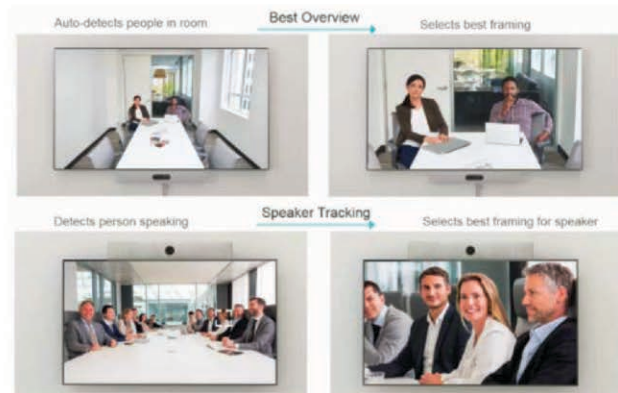
As cameras come to market that are inexpensive, that have no moving parts,



Meeting Owl



Alta Systems Panacast 2



Cisco Spark Kit & Spark Kit Plus

The new generation of cameras automatically frame without mechanical PTZ.

UC Vendors

- ALE Rainbow
- Broadsoft Team-One
- Cisco Spark
- Fuze Messaging
- Genesys PureCloud Collaborate
- Google Hangouts Chat
- Microsoft Teams
- Mitel MiCollab
- RingCentral Glip
- Skype for Business / Mindlink
- Unify Circuit
- Zang Spaces (Avaya)

Emerging Vendors

- Atlassian HipChat
- Amium
- CaféX Chime Spaces
- Chatwork
- Fleep
- Flock
- Grape
- NetSfere
- Ryver
- Slack
- Symphony
- Zinc

Project / Task Management

- Asana
- CA Flowdock (AppDev)
- Gitter (AppDev)
- Flow
- Huddle
- Quip (Salesforce)
- Redbooth
- Taskword
- Trello
- Wrike

Other / Open Source

- **Open Source:** IRCcloud, Let's Chat, Mattermost, Rocket.Chat, Zulip
- **Healthcare:** Lua / Stitch / Tiger Text
- **Federation:** Sameroom (8x8), Matrix
- **Embeddable:** Moxtra Power Messenger
- **Mobile:** Voxer
- **Consumer:** Facebook Messenger, GroupMe, Remind, SnapChat, WhatsApp

The many team chat offerings available today, identified by Nemertes Research.

that are smart enough to identify the people in the room and that are powerful enough to create high-resolution images of individual speakers/presenters without user intervention, the world of collaboration systems will change completely. The ability to install rooms inexpensively that produce great experiences, at a large scale, is here today. We can expect many more camera products with this ability to take over the space in the near future.

Electronic Interactive Whiteboards (IWB): These devices are also in the middle of a hype-cycle that parallels the immersive systems of 10 years ago. Whether you call these devices smartboards, interactive displays, elec-

tronic whiteboards or the new handle—immersive collaboration displays—it is clear that these touch-enabled, large-format displays are flooding the AV market. Despite their prevalence, there are serious questions about how frequently these systems will actually be used in enterprise environments. Before diving in to purchase them because “your preferred manufacturer says they’re hot,” organizations should fully evaluate their applications and only install these systems where they’ll likely be used.

Regrettably, general-purpose conference rooms do not qualify as a great application as, 95 percent of the time, users walk into rooms, sit at the table

and never get up to use an IWB. Engineering and/or design studios, educational facilities, scrum areas and other teams that already make extensive use of hand-drawn sketches are good candidates for these systems.

Organizations also have to be aware of the economics behind these systems as, again, manufacturers use them as incentives to drive users onto their annuity platforms, as discussed earlier. When there is truly a need to whiteboard, annotate and share real-time designs, these new systems often provide outstanding results. But, if there isn't a need to do so, then there isn't a need to pay for them on an ongoing basis.

Team Chat: The hottest trend in the

UC and collaboration space is around the concept of persistent chat spaces, or “team chat,” as most are now calling it. There are literally dozens of services and applications in this space, including Slack, Cisco Spark, Microsoft Teams and those from other developers, whether established or startups. Although these services vary greatly, they generally support the idea that conversations and workflows can take place in specific virtual spaces, each dedicated to a specific project or subject. They are often either mobile first or mobile friendly and, generally, they help foster an improved workflow—but only when everyone on a team or in an organization uses them.

Providers often brag how using them saves time versus using email, but, when even a small percentage of team members aren't using the platform, meaning you have to use email for them anyway, the platforms wind up costing more time than they save. However, once all members of a team have adopted a team chat platform, there can

be significant improvements in workflow and productivity. Understanding the specific needs of your organization (as they relate to cloud, compliance and security, integration with other apps and/or workflows, and other factors) and identifying a platform that robustly supports them is a good first step.

Getting all your team members aligned and using the platform by employing a specifically designed adoption plan is the critical second step.

Staying On Top Of The Changing Landscape

It is critical, as a collaboration professional, to stay on top of emerging trends and emerging technologies. There are many ways to do that. Here's a short list:

- Find five or 10 prominent thought leaders in the industry and follow them on social media platforms. (Feel free to reach out to me if you need advice on whom to follow.)
- Attend industry conferences and net-

work with vendors, clients and peers.

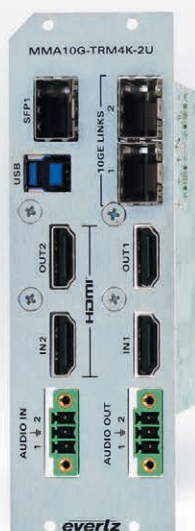
- Join the IMCCA. The IMCCA is the only non-profit association in the collaboration space. It is resolved to strengthen and grow the overall unified communications and collaboration industry by providing thought leadership, impartial information and education. IMCCA membership is free to end users, and it has reasonable dues for manufacturers and service providers. IMCCA industry activities include developing and presenting the collaboration track at InfoComm and conducting educational and social events in London, UK and New York NY. And, unlike other groups, industry professionals never need to pay to be at these industry events. Go to www.imcca.org to find out more.

The pace of change in collaboration will only increase, making the need to stay on top of emerging trends and technology all the more urgent. Collaboration and AV professionals must continually put in the necessary work to ensure their concepts, designs and strategies stay relevant.



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MMA10G-TRM4K-2



MMA10G-TRS4K-2

EvertzAV's latest generation of 4K/60 4:4:4 UHD network-based gateways are the perfect solution, offering the highest video quality in the industry at extremely low latencies. The new MMA10G-TRS4K and TRM4K standalone and modular gateways from Evertz provide two paths of HDMI 4K/60 4:4:4 transmit and receive in two convenient form factors.