The Business Case for Webex Calling

Considerations for Migration to Cloud Calling & Collaboration

1 | **Introduction**

TODAY'S MODERN WORKFORCE & WORKPLACE CONTINUE TO EVOLVE

Today's modern workforce expects a modern workplace. They are highly collaborative, engaging each other and in flexible groups via audio, video, messaging, and content sharing. They require a comprehensive collaboration solution that **gives them the flexibility to connect their own way.**

They are tech-savvy and "multi-device", hopping between their computer, mobile device, and desk phone as they collaborate. **They get their jobs done in multiple locations, working from the office, at home, at desks, in conference rooms, and on the road.** And, above all else, they have high expectations – "my communication tech at work should at least equal my personal tech."

Most IT teams, however, find it difficult to meet these expectations. **The typical large enterprise supports a complex – and often dated – mix of calling and collaboration solutions.** Many find their vendor list growing across calling platforms, video conferencing solutions, and messaging apps. **This complexity is often expensive, hard to manage, and delivers a sub-par user experience** – too many tools dampen productivity on every level.

Worse, this mix of sanctioned and unsanctioned apps poses a serious security risk – what data is being captured? Where is it stored? Who has access to it?

IT leaders are pursuing a single platform strategy and are looking to the cloud to deliver a unified and agile communications experience. However, they also struggle with the reality of transition – and most find themselves with new islands of collaboration tools, but with stranded users on older platforms. Unified, fully cloud-based collaboration is an elusive unicorn, as many vendors push for all-or-nothing deployments – with a migration strategy a common barrier to the modern workplace.

Alternatively, a thoughtful approach is emerging that delivers a modern communications experience while accounting for existing investments and **core enterprise requirements – reliability, governance, security, and budget realities. The cloud is still at the center of the action** – but so are interop, flexible architectures, and migration solutions.

CLOUD CALLING MEETS COLLABORATION

This is an ebook about Webex Calling. But it is not just about Cloud Calling - it is also about transition and migration from where you are today towards a new end state. **It is about delivering a modern unified communications experience across solutions on-premises and in the cloud – calling, meetings, team collaboration, administration, and control**. It is about acknowledging both enterprise and end-user realities and delivering a unified experience that doesn't strand anyone.

KEY CHALLENGES

Unified Communications (UC) can provide the enterprise with an advanced and flexible communications framework providing the end-user with a suite of messaging, audio, video, content sharing, and meeting functionality integrated across apps, devices, personal and shared meeting spaces, and integrated into their daily business workflow. **The cloud has evolved rapidly, and now serves as the primary delivery method for the most advanced UC services – from video conferencing to content sharing to today's complete Team Collaboration experience – and increasingly enterprise calling.** The leading cloud UC solutions enable the service provider to deliver features and integrations faster and more securely than premise-based architectures would allow – microservices, centralized security, monitoring and analytics, and extensive APIs combine to create a more reliable service with a rapid feature delivery tempo. **The end-user gets a modern communications and collaboration experience, and the enterprise gets a complete, secure, and cost-effective service, with better and simpler management.**

When it comes to calling services however, the cloud still represents a relatively new architecture for most enterprises. Today, the majority of enterprise calls flow through PBXs, gateways, and devices located on-premises – in the customer's data center. Premises-based calling systems represent a significant investment and often include complex integrations. **This requires a flexible migration path to the cloud and to a full UC experience**.

WHERE CISCO FITS IN

Cisco has a unique perspective on these challenges, thanks to its market leading position across both on-premises and cloud-based UC. This experience underpins its mission to deliver the best calling and collaboration experience, with reduced complexity, and as required by today's modern workforce. Cisco is delivering this calling experience with a focus on reality – integrating the Webex Cloud with on-premises solutions. Its mission is to deliver a path to the cloud by leveraging on-premises solutions – providing a fast track to an advanced and fully unified communications experience, while some workloads and/or specific corporate locations can remain supported on-premises until they are ready to move.

Webex Calling delivers a **fully cloud-native, enterprise-class calling platform, integrated with the latest Webex Meetings and Team Collaboration and meetings feature-sets, underpinned by Cisco's security and admin experience.** It combines years of learnings and related technologies across well-known, proven and trusted solutions, all anchored in the Webex cloud.

"Webex Calling delivers a fully cloud-native, enterprise-class calling platform, integrated with the latest Webex Meetings and Team Collaboration feature-sets, underpinned by Cisco's security and admin experience."
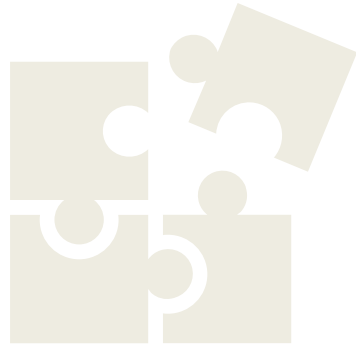
THIS EBOOK

This ebook provides an overview of the Cisco Webex proposition from a UC analyst's perspective. It provides detail on the UC market, enterprise trends, the Webex value proposition, and opportunities associated with a hybrid transition strategy. We combine our industry research with experience working with the enterprise and partner community.

Unless indicated otherwise, all market data cited is sourced from Wainhouse studies.

While Cisco commissioned this study, the details provided in this report are unbiased and represent Wainhouse Research perspectives on the topic. The reader should evaluate this against their own unique environment and enterprise requirements.

2 Market Trends

A MARKET IN TRANSITION

While the majority of workforce communications remain on-premises today (2019), that is changing rapidly as the cloud now represents the fastest growing segment of the unified communications (UC) market. That is because the cloud has matured rapidly over the last 10 years – providing richer functionality, greater security, better uptime, and rapid delivery of user experience enhancements required by today's modern workforce. **The result is a market in obvious transition – seats are moving from the datacenter to the cloud at a rapid pace.**

On-Premises calling is set to decline from 225M seats in 2018 to170M by the end of 2023 – a transition of 55M users.

CLOUD MOMENTUM

Meanwhile, the UC cloud is set to grow from 46M to 113M seats by YE 2023 – with over 67M new calling-enabled cloud users entering the market (55M move from on-premises, 12M net-new) – **with cloud UC seats dominating the market by the end of 2024**. (source: Wainhouse 2019 UC Forecast)
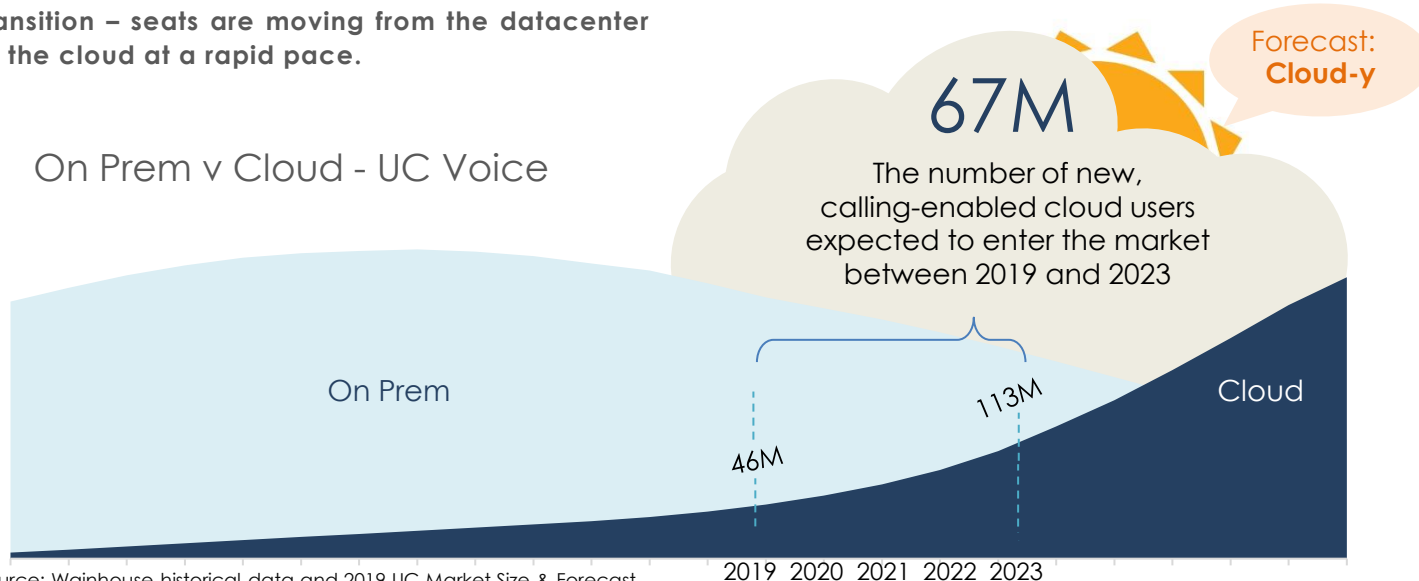
SEGMENT DYNAMICS

The transition to the UC cloud has varied by company size. Because of their smaller size, fewer offices, and less complexity, smaller businesses have fueled the first wave of UC cloud growth. **However, with cloud maturity, we see increasing velocity in the mid-to-large enterprise** as they demand the same agility, integration, and cost benefits.

TRANSITION PATHS

This transition implies an ongoing – and increasing – demand for flexible migration and solutions in the mid-to-large enterprise segments, as the migration from on-premises-to-cloud is expected to accelerate rapidly in the years to come.

In support of this market dynamic, **a Wainhouse survey of IT Decision Makers confirms the need for transition– from 2015 to 2018, the number of pure-cloud enterprises has remained relatively flat (~33%), while those reporting a hybrid environment have almost doubled (26% - 48%).**

On Prem v Cloud - UC Voice

Forecast: **Cloud-y**

67M
The number of new, calling-enabled cloud users expected to enter the market between 2019 and 2023

On Prem

Cloud

46M

113M

2019 2020 2021 2022 2023

Source: Wainhouse historical data and 2019 UC Market Size & Forecast

NOT ALL CLOUD PROVIDERS ARE BUILT FOR EVERY ORGANIZATION

The increased demand for cloud collaboration services has driven an explosion in the number of vendors competing for attention. Some built a solid base of SMB users and are working to add features and support models to cater to the larger enterprise. Others are adding enterprise calling and other UC features to existing meeting or productivity cloud solutions – each defining and redefining their UC value proposition based on their starting point and progression through the maturity curve. In all cases, the growing number of solutions can create confusion and difficult tradeoffs for the enterprise decision maker and their stakeholders. Careful evaluation across features, support models, and total project costs is warranted.

Our UC market share estimates indicate that most vendors cater predominately to one market segment and / or a limited number of vertical markets. Cisco, however, leads in the SMB, Mid-market, and MLE segments through a broad product portfolio.

"Most vendors cater predominately to one market segment and / or a limited number of vertical markets."

*Acquired by Microsoft in 2020

Cloud Share SMB (<100 seats)

SMB <100 Cloud	
Vendor	**Share**
Cisco	73%
Metaswitch*	9%
Ring Central	7%
Mitel	4%
8x8	3%
Other	4%

Cloud Share Mid-market (100-1k seats)

Mid-mkt 100-1k Cloud	
Vendor	**Share**
Cisco	52%
Mitel	17%
Huawei	8%
Avaya	6%
Microsoft	6%
Other	9%

Cloud Share Mid-to-large (>1K seats)

MLE >1,000 Cloud	
Vendor	**Share**
Cisco	43%
Avaya	23%
Mitel	13%
Huawei	11%
Microsoft	7%
Other	3%

Cisco leads in every market segment and holds 61% overall Cloud Calling share through a broad product portfolio.

END USER REQUIREMENTS

Every enterprise we talk to starts the conversation with a focus on transformation – an acknowledgement that today's digital toolset is critical to driving profitability and an improved competitive position. And, it is generally acknowledged that a unified calling and collaboration platform is a critical element of transformation strategy – accelerating individual and team productivity and effectiveness, improving customer engagement, and improving the value of information through business process integration. Today's end user expects more.

- **Consistent Experience:** pivoting between different access methods (e.g. dial-in, click-in, sign-in), user interfaces (UI), and overall user experiences (UX) creates numerous points of friction, kills productivity, and delays and disrupts calls and meetings. Today's unified platform approach enables a consistent user experience for calls, meetings, team collaboration – whether on personal devices or in the conference room.

- **Intelligent Collaboration:** Modern UI and UX experiences are being driven by Artificial Intelligence and Machine Learning that learns and anticipates users needs and habits and can offer a seamless flow of intelligent information to reduce calling and meeting friction points and provide meeting insight.

- **Integrated Workflow**: today's modern workforce requires collaborative toolsets beyond voice calling and conferencing that adds more comprehensive and integrated functionality that is much easier to achieve in the cloud. Business process integration into your cloud calling and collaboration platform brings critical data and communication together – where they belong.

- **Agility & Innovation:** keeping functionality and user experience up to date require feature velocity, costs, and workflow automation that only the cloud can provide. **The Cloud delivers a modern experience with a faster pace of innovation** than is possible on a premises-based solution.

"…it is generally acknowledged that a unified calling and collaboration platform is a critical element of transformation strategy."

CLOUD CALLING DEPOLYMENT – IT LEADERS PRIORITIES

The focus on cloud calling and collaboration is driven by IT priorities that align with their primary goals – workforce productivity, reduced complexity and cost, and increased security and quality. IT leaders quote the following objectives as they evaluate a transition to the cloud:

- **Consolidate and effectively manage Platforms**: complexity and solution fragmentation create an unmanageable environment. The cloud represents an opportunity to consolidate these disparate solutions into a common framework, providing an end-to-end analytics and controls over the user experience, and solution adoption.

- **Comprehensive Security** : most IT teams acknowledge they have a range of known and unknown security gaps within their environment. They also acknowledge that today's enterprise cloud delivers a higher level of security than they can implement cost effectively. Security must be a core-competency for an enterprise cloud vendor, and they are better positioned to fund the required human and technical resources at scale.

- **Cost and Scale Flexibility**: the move from hardware to software for communications has driven a shift from CAPEX to OPEX-based consumption models. This requires a cost model that scales up and down as needs change, all the while delivering a continuous stream of feature and service improvements – with support and maintenance costs included.

- **Advanced Intelligence**: key to workplace transformation is the Cloud's massive compute and storage resources. There's a reason enterprise AI was born in the cloud, and IT Decision Markers (ITDM) see the opportunity to apply this evolving intelligence to calling and collaboration

- **Support Flexible Workspaces**: With the move to remote work and flexible workspaces, communication and collaboration must be adaptable to provide a consistent user experience and performance anywhere. Collaborations devices must support meeting spaces of every size as well as individuals wherever they be working from. This requires supporting a range of devices, granular management and analytics with real-time quality assurance and innovative space utilization and environmental performance management.

- **Simplicity and openness**: The average enterprise has 2 or more different PBX vendors in production, multiple UC-capable solutions, and often uses 2 to 3 (or more) meeting solutions. These solutions also require ongoing integration with multiple other business systems to support integrated workflows. For IT to meet their security, quality, and cost mandates, they need to simplify their communications environment and integration capabilities.

"The focus on cloud solutions is driven by IT priorities that align with their primary goals – workforce productivity, reduced complexity and cost, and increased aglity, security and quality."

3 | **Enterprise Opportunity**

CLOUD CALLING EVOLUTION

Consider these datapoints: Wainhouse estimates that over 75% of all UC calling seats in the are still sitting on-premises (YE 2019) – in the enterprise datacenter. Add the fact that two-thirds of these enterprises are running PBXs from 2 or more vendors, a complexity driven by acquisitions, never-ending migrations, and "asset sweating" – a surprising number of IT managers admit they have 10+ year-old PBXs supporting production calls (and proudly buying spare parts on ebay)!

Roll it together, and most IT decision makers find themselves at a crossroads: either upgrade the outdated PBXs in their datacenters or make the move to the cloud. The answer always includes a cost-benefit analysis – what are my costs to upgrade on-premises, how do they compare to the cloud, and what else will I get by moving to the cloud? We'll start with the cost-side of the equation.

>75%
enterprise UC
calling seats
still on premises
(YE 2019)

60%
enterprises
with users on
2-or-more
PBX vendors
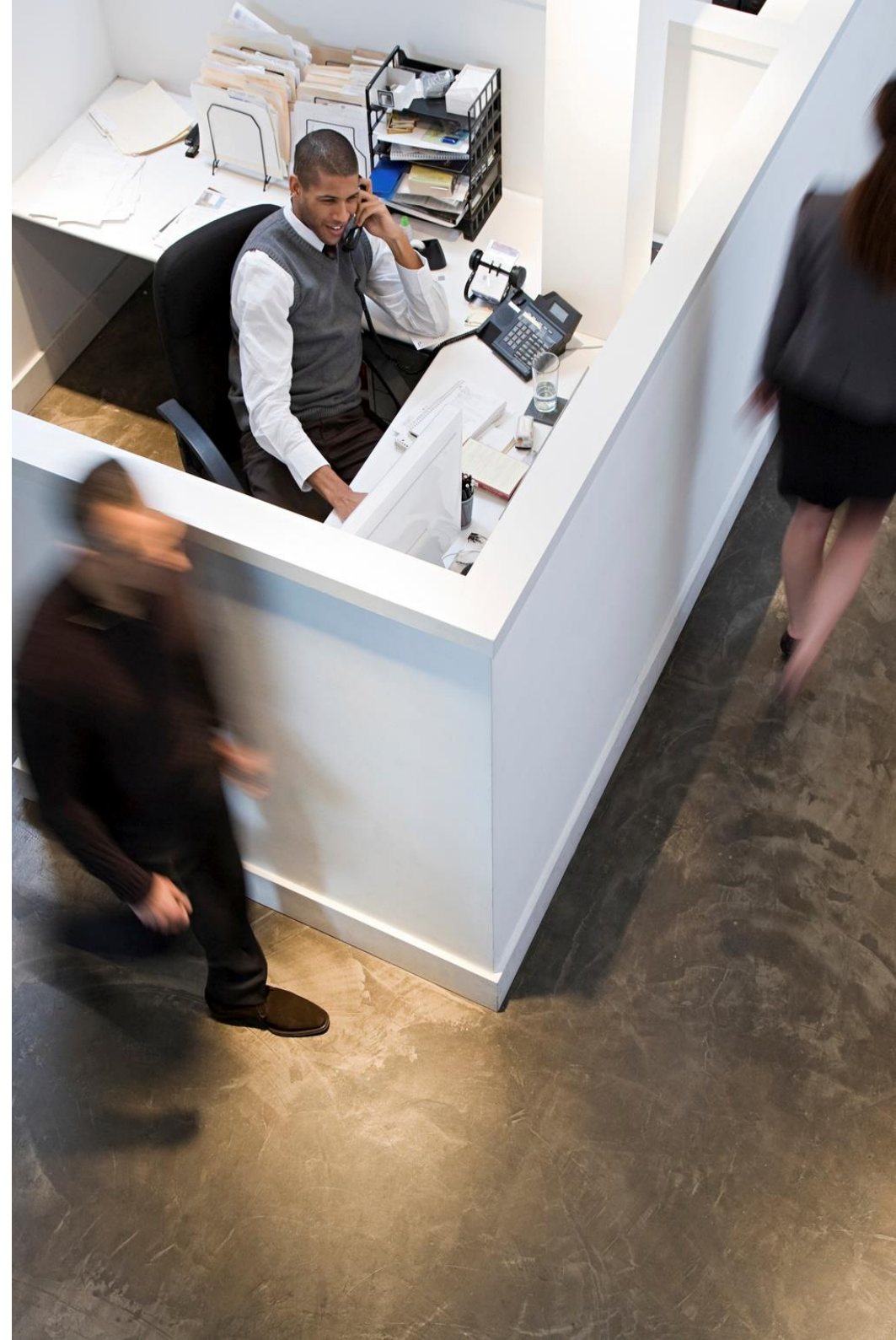
On-Premises vs. Webex Cloud Collaboration

Here we consider an example of a 1,000-user enterprise with an On-Premises PBX that wishes to add meetings and team collaboration, initially for 800 users. One alternative is to keep the PBX and add a standalone cloud collaboration solution. The other is to replace the PBX with fully integrated Cisco Webex cloud calling, meetings and team collaboration for all users.

While your mileage will vary, this example highlights that Cloud costs are largely similar. However the Webex Cloud alternative provides enormous benefits in 2 key areas:

1. **Operational simplification with future-proof, continuous upgrade to the latest user experience and capabilities**
2. **Full integration of calling, meetings and team collaboration, providing superior user experience and productivity.**

In what follows we cover in more detail the incremental enterprise benefits you should expect from cloud collaboration.

Solution	Cost Element	Type	Users	ASP	Year 1	Year 2	Year 3	Total 3-Year Costs
On-Premises with 3rd party Meeting Service	PBX Maintenance and Upgrades	OPEX - 15% of license / user / year	1,000	$24	$24K	$24K	$24K	$1,335,000
	Meetings: Standalone solution	OPEX - per-user-per-month	800 (80%)	$25	$240K	$240K	$240K	
	Voice Plan	OPEX - per-user-per-month	1000	$6	$72K	$72K	$72K	
	Data Center	OPEX – two equipment racks / $1k each / month	N/A	$2,000	$24K	$24K	$24K	
	Support Staff	OPEX - annual salary for 1 telecom support engineer	N/A	$85,000	$85K	$85K	$85K	
Cisco Webex Collaboration	Cisco Webex Calling + Teams + Meetings	OPEX - per-user-per-month	1,000 (100%)	$30	$360K	$360K	$360K	$1,296,000
	Voice Plan			$6	$72K	$72K	$72K	
	Maintenance			$0	$0	$0	$0	
	Data Center	Included		$0	$0	$0	$0	
	Support Staff			$0	$0	$0	$0	

The webex cloud solutions offers compelling benefits: Fully integrated collaboration and operational simplification

Costs are based on Cisco guidance & Wainhouse estimates as of March 2020

4 Why Consider Webex Calling?

"Cisco is unique in that they are an early leader in both on-premises and cloud-based IP calling – with an estimated 45% on-premises market share and 61% in cloud calling"

Cisco is unique in that they are an early leader in both on-premises and cloud-based IP calling – with an estimated 45% on-premises market share and 61% in cloud calling. It understands the need for a complete solution and interoperability within and outside the Cisco portfolio. It also recognizes enterprises with an on-premises estate have both a desire to move calling to the cloud, and a challenge due to cost, complexity, and extensive existing system integrations.

Four Cisco Collaboration Group pillars guides strategy, development, and client engagement:

1) **Connecting is more than a meeting** – a complete and intelligent business collaboration should accelerate productivity
2) **Work is not where you go** - a broad and intelligent device portfolio should enhance user experience and management
3) **Create customer delight** - AI in the contact center platform enhances customer engagement
4) **Make IT hum** – a secure, reliable and scalable global platform lowers complexity and TCO

Cisco Collaboration Strategy

1) **Unified User Experience** – a single app with an intuitive and consistent experience across platforms and applications enables easy integration and migration of workloads and deployment models.

2) **Flexible cloud migration** – support existing on-premise estates while enabling hybrid deployment and gradual transition of workloads to the cloud.

3) **Open integrations and an app ecosystem** – provide interoperability within and outside the Cisco portfolio. Critical integrations such as Microsoft Office are built in, while an app ecosystem and API's support hundreds of additional integrations.

5) **Commercial Flexibility** – make the buyers journey with Cisco simple and flexible easy, e.g. simplified agreements and buying flexible plans across on-premise and cloud deployment.

6) **Security: built in, not bolted on** – provide deeply integrated end-to-end security - encrypting all data 'in transit and at rest' - for apps and devices deployed both inside and outside the enterprise.

6) **Collaboration Intelligence** –guides interactions to make work more productive on the individual and the organizational level. AI and voice recognition provide contextual data and insights based on user profiles, preferences, and past interactions to support peer-to-peer and group workflow.

The Cisco Webex Calling Value Proposition

Capabilities: Cisco Webex Calling is an integral part of the Cisco Webex collaboration suite which delivers the following benefits:

- **Full Collaboration Stack** – complete integrated suite of calling, video meeting and collaboration applications and devices.

- **Unified User Experience** – a single modern user interface and experience via the Webex Teams modular client. It is a single – one app-that can be configured for any combination of workloads – calling, video meetings, team collaboration and integrations with popular business applications like Microsoft Office, Google and Slack.

- **Unified Management –** a single portal to monitor and manage the full stack of apps, devices, security, network, and space utilization from the Webex Control Hub.

- **Openness/Integrations** – 120+ Webex Teams integrations and fully supported developers' program for integrations & bots, API/SDK, workflow connectors, and custom development.

- **Intelligence** – provides people insights, device connectivity assistance, speaker tracking in video meetings, and more to assist and ease collaboration.

- **Integrated Devices** – video collaboration, headsets, desk phones, mobile, and desktop PCs are integrated and work together seamlessly through the Webex collaboration suite.

Features: Scale, reliability and security are key enterprise concerns when assessing cloud deployment. Cisco Webex Collaboration offers the following deployment benefits:

- **Dedicated, real-time optimized Webex Cloud -** Webex has been a pioneer in cloud-based collaboration, supporting enterprise meetings for almost 25 years. During this time Cisco has been busy updating, augmenting, and evolving its Webex cloud to become a complete real-time enterprise communication and collaboration platform. It is supported by a global network of redundant datacenters connected by a managed dedicated network optimized for the latency and throughput required for real-time communication performance.

- **Cloud Native** – Cisco has built calling technology directly into the Webex cloud – this is a **native service**, not a hybrid integration between disparate clouds. This native integration creates a unified architecture for Calling + Meetings + Team Collaboration experience, leveraging common microservices and compatible with a broad range of Cisco's existing audio and video endpoints.

- **Security from the Ground Up** – Webex Collaboration Cloud is protected by physical & network access controls, infrastructure monitoring & management controls, with end to end encryption. In addition, it maintains industry certifications for ISO 27001, SOC 2 Type II, FedRAMP, C5 attestation, and Privacy Shield Framework.

- **Reliability –** Extensive redundancy and performance monitoring with a single enterprise view of QoS via Webex Control Hub end to end monitoring of apps and devices across various Telcos and service providers to ensure a consistent quality of voice and video calls.

A Flexible Path to the Cloud

Given Cisco's experience and insight into both on-premises and cloud collaboration, Cisco has put a lot of thought into the cloud transition and migration path. At the core of this is an optimized strategy that evolves on-premises Cisco Unified Calling Manager (CUCM) and other PBXs with Webex cloud calling (Webex Calling), collaboration, and control.

- **Hybrid Deployment and Cloud Transition**: Webex Edge for Calling allows Cisco UCM and third-party PBXs to be connected to the Webex platform and Webex Calling enabling a hybrid deployment with a single unified user experience. It also provides cloud-based integration and management of enterprise-wide dial plans, least cost routing, user profiles and 3rd party app integration. It protects on-premises investments while enabling a path to the cloud at the enterprise's own tempo - migrating some locations/users/workloads to the cloud while keeping some on-premises. Webex Edge for Meetings allows enterprises to significantly reduce PSTN expenses and provides hybrid on-premises and cloud video solutions.

- **Flexible commercial model**: the Cisco Collaboration Flex plan and the Webex Work plan include calling, meeting and contact center functionality and provides access to Webex Teams at no charge (depending on subscription selected). Each subscription can be provisioned on CUCM, in the enterprise datacenter, or the Webex Cloud. All of which drives consolidated procurement and billing, while users migrate from on-premises to cloud over time.

- **Flexible PSTN Options** – enterprises can purchase a voice plan from a Cisco service provider partner or leverage their existing– provider through bring your own-carrier (BYOC) option. BYOC is supported either through a local PSTN gateway or through a direct connection via the Webex cloud. Webex Edge for calling and Webex Control Hub provide centralized management of dial plans and features across premise and cloud.

> "Cisco has put a lot of thought into the cloud transition and migration path. At the core of this is an optimized hybrid deployment strategy via Webex Edge for Calling and Meetings delivering unified user and management experience ."

5 Summary & Next Steps

In summary, today's cloud calling integrated in a unified collaboration suite increase productivity, reduce complexity and costs, free up IT resources to focus on your core business, increases security, and increases the value of your communication services.

- **Secure** – dynamically updated best in class security.
- **Complete** – seamlessly integrates calling, meetings, team collaboration and contact center across all desktop and mobile devices
- **Flexible – supports all workspaces and devices with a unified experience**
- **Manageable – provides real-time analytics and integrated control across all workloads**
- **Intelligent** – AI & machine learning enables constant learning to inform, advise, and improve.
- **Commercially flexibility –** reduce TCO by lowering CAPEX and optimizing OPEX across both cloud on-premises

NEXT STEPS

- **Assessment** – determine all the communication and collaboration infrastructure and services being used in your enterprise today. Besides those you have officially sanctioned, don't neglect legacy estates associated with mergers and acquisitions, as well as shadow IT deployments of both individuals and business units.

- **Determine & Design your End State** – create the ideal communications and collaboration environment for your organization - taking into account different personas, business unit needs, security protection, and compliance regulations. Today's workstyles require new user experiences. If you understand how work gets done in your organization, the right tools and services can easily be applied.

- **Reduce Complexity & Retain Assurance** – consider an environment the unifies the user experience, yet accommodates different modalities of working in-office, remote & mobile; individually, in groups, and each in different work modes - working meetings, presentations, creative collaboration, etc. All the while retaining administrative oversight of use, quality, security, and compliance.

- **Rethink – the traditional role of telephony**. Calling is still important, but now just one component of workplace collaboration. Consider how peer-to-peer calling and collaboration mix with personal meeting services and conference room devices.

- **Transition & Migration** – it is likely some call control or collaboration infrastructure is not ready to be moved to the cloud yet. While transition and migration for some may be a speed ramp to the cloud, for others it may be accommodating what's in-place while ensuring integration and interoperability with cloud-based services. Today, on-premises, hybrid, and cloud can be seamlessly mixed and matched to allow enterprises make the transition as their own pace.

- **Enhance** – contact center is not just for the call center anymore and has become an important part of an enterprise unified communication strategy – e.g. think about including a technical engineer in a customer service call where all the pertinent client data transfer with the call. Additionally, app, bots, and integrations dramatically improve peer-to-peer and group interaction and workflows.

ACRONYMS & DEFINITIONS

AI	Artificial Intelligence
API	Application Programming Interface
ASP	Average Sales Price
CAPEX	capital expense
IP	Internet Protocol
IT	information technology
IITDM	IT Decision Marker
MLE	Medium/Large Enterprise
OPEX	operating expense
PBX	Private Branch Exchange
PSTN	Public witched Telephone Network
SMB	Small/Medium business
UC	Unified Communications (calling + conferencing + messaging)

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expertise. depth. insight.

Wainhouse (http://www.wainhouse.com) provides research and strategic guidance on products and services for workplace communications and collaboration. Our global client base includes established and new technology suppliers and service providers, as well as enterprise users of voice, video, streaming, and web collaboration solutions.

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