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Interactive Monitors and The Buildings Blocks for Meeting Rooms

How Tools for Engagement and Collaboration Improve
Employee Experience

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Executive Summary

Overview

Developing a collaborative, agile workforce is the single most important concern to many employers these days, because it's a means of ensuring organizational health and competitiveness. As they face the challenges presented by recent worldwide business disruptions, employers nonetheless now are wrestling with how to prepare for a new, more flexible work model in terms of where and how employees work. This means redesigned workplaces, new technologies, and continued or new support for collaboration between local and remote employees.

This is where the meeting room of the future comes in. It must support essential “in-the-office” employees collaborating with employees who still may be best served working from home (WFH). This paper reports on the importance of collaborative technologies, the challenges those who use meeting room technologies today face and how to address those, the building blocks for meeting rooms, and the benefits of technologies such as interactive monitors (IMs) and PCs in the meeting room. The fact is, information workers crave modern tools, and this paper shows how these technologies can lead to increased productivity, faster innovation, and a more engaged workforce.



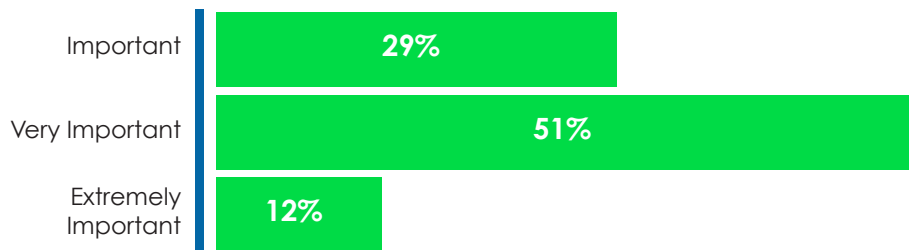
Importance of Collaboration & the Meeting Room



Employers seeking to keep their employees engaged have one big lever: the tools they give them to team and work together. They are discovering that collaborative technologies, either those in meeting rooms or delivered via PCs and other personal devices, can elevate employee engagement.

Employee Engagement and Collaboration are Job 1

Employee engagement is the glue of the workplace, driving organizational accomplishment



92% Say Improving Collaboration is Important



762 MRDMs in five countries: Australia, France, Germany, UK, and U.S.
Source: A commissioned study conducted by Wainhouse on behalf of Dell, Q2 2020
* https://hbr.org/resources/pdfs/comm/achievers/hbr_achievers_report_sep13.pdf
** <https://www.glintinc.com/blog/why-employee-engagement-is-important/>
*** <https://www.achievers.com/blog/6-mind-blowing-stats-employee-engagement/>

Top factors MRDMs consider when thinking about the future of their meeting rooms:

61% Developing a more collaborative / agile workforce

50% Expanding their remote workforce

38% Engaging younger workers

35% Supporting new workflows or processes

Meeting Rooms Will Remain Important in Coming Years

Working From Home takes priority

Improving collaboration in the office has taken a detour due to recent workplace disruptions. Enabling remote work for the millions of workers who are working from home has taken priority, and most companies have succeeded while keeping their core IT systems up and running.

Meeting rooms will remain important

Looking past today's business disruptions, meeting rooms will be as important as ever – what's changing is how they need to support remote employees even more than before. Using this time to invest in your meeting rooms makes sense because when the new normal comes, most IT decision makers believe their use of video-conferencing-enabled meeting rooms will increase. Essential workers who go into the office will be wanting to interact with those still able or needing to work from home.

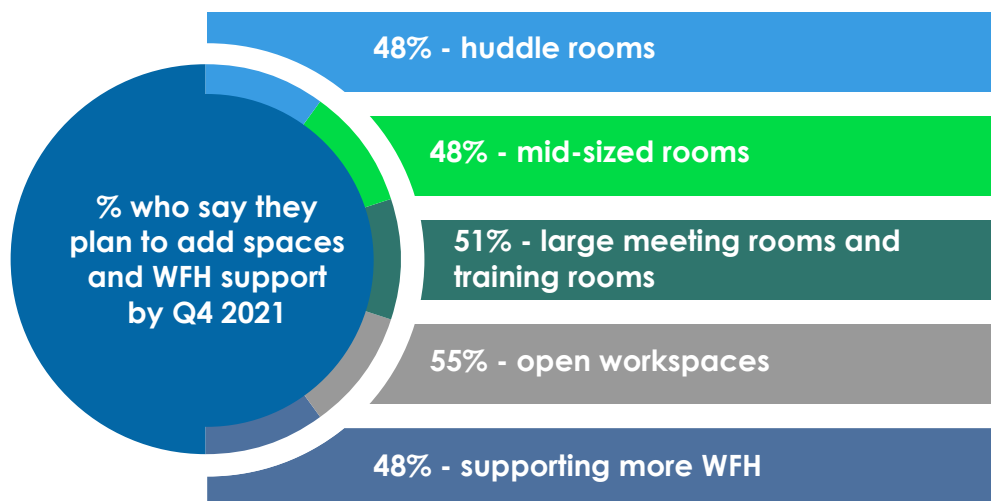
Wainhouse estimates as of 2020:

50 million conference rooms

38 million classrooms worldwide

78% MRDMs say utilization of video-conferencing-enabled meeting rooms will increase when the workplace returns to normalcy

69% say they expect their budgets for meeting room technologies to increase



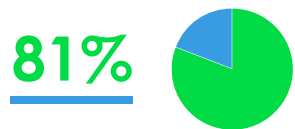
Making a Difference to Employees

IT is accountable to employees

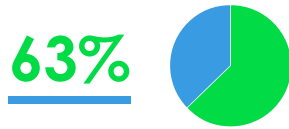
Most IT and Facilities departments are measured directly by employees. Of those surveyed, three out of five (**60%**) report that they are measured via an annual employee survey, a simple Net Promoter Score (NPS), or both. IT and Facilities are accountable to employees because their organizations increasingly place great importance on the employee experience.

Organizations that are deploying interactive monitors and other advanced technologies say they are doing better than their competitors.

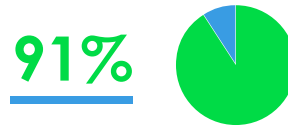
Introducing and enhancing meeting room technologies like interactive monitors, PCs, video conferencing, and communications software are important to improving collaboration between employees and promoting job engagement. But there's more.



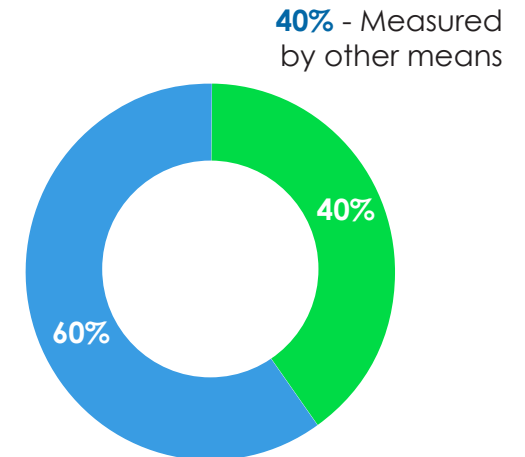
will deploy IMs by Q4 2021



say IMs are more likely to enable employees to be more engaged & team better



say their co-workers use information technology to complete work tasks collaboratively



60% - Measured by NPS and/or Annual Employee Survey

All of these elements: video, voice, and touch screen content, make for pure productivity.

- Gary, Former CIO & Managing Director, Major U.S. Bank

Challenges for Meeting Room Technologies Today

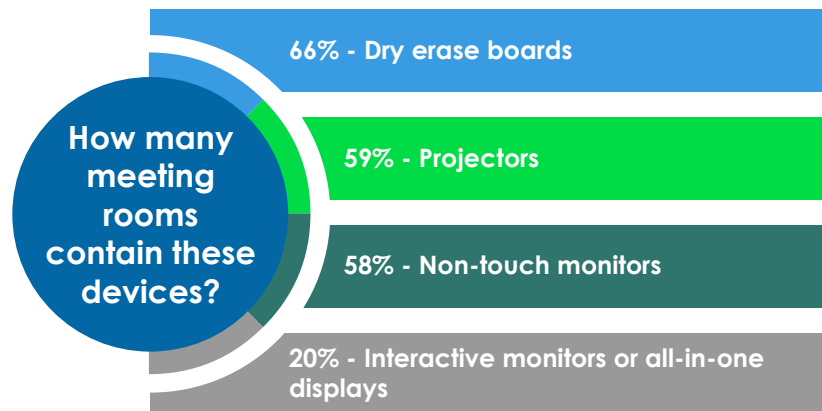


Though meeting room technologies have improved vastly in the past few years, face it: some organizations may be challenged to deploy in a way that keeps end users happy and coming back for more. Some of this has to do with the use of legacy technologies or the need for upgraded infrastructure; some with the need for training on new, sizzling hot tech; and some based on generational expectations.

Legacy Technologies are Inadequate for Today's Digital Workplace

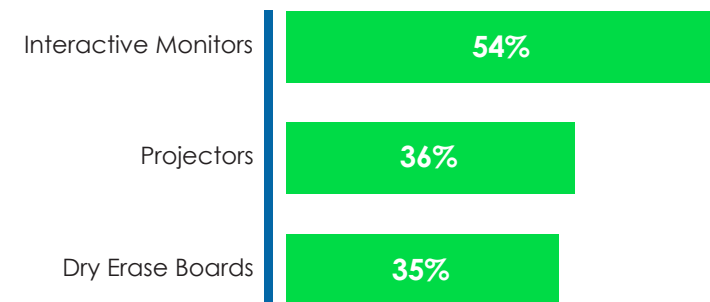
Legacy technologies fail to support today's digital workplace and collaboration needs

Legacy meeting room equipment supports neither local nor remote digital activities. Most such technologies are islands disconnected from digital tools, creating a tedious, non-productive workflow. For example, in both local and remote meetings legacy technologies lack support for recording of meeting activities. People still take pictures of flip charts and whiteboard content and email those to others post meeting.

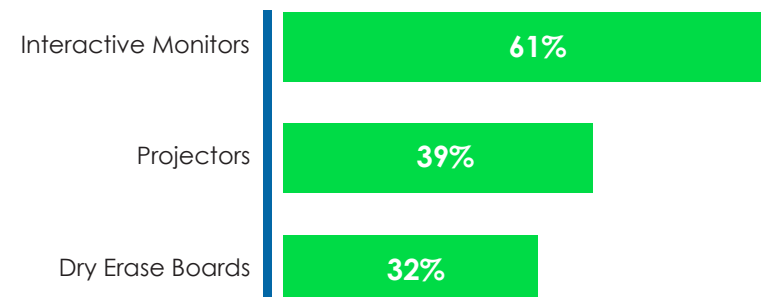


So far only **20%** contain interactive monitors or all-in-one displays, the technology considered best for supporting collaboration according to **61%** of WH survey respondents.

Which technologies best support a digital workplace?



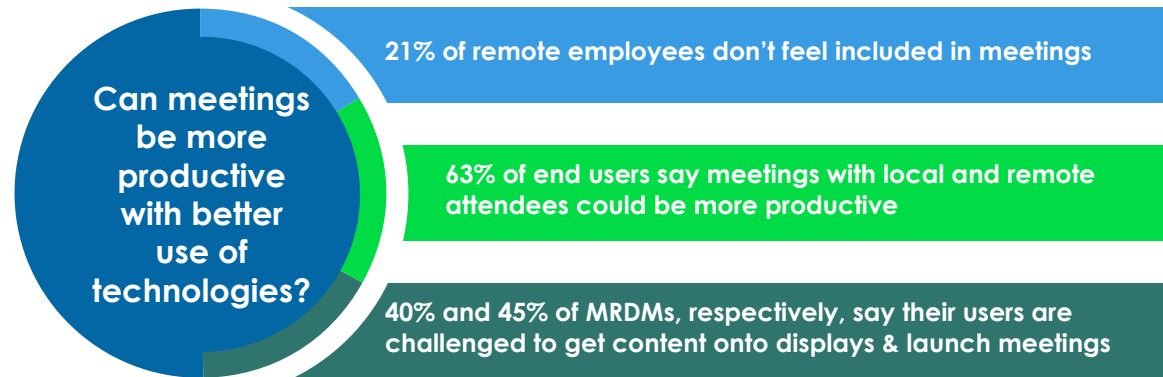
Which technologies best support collaboration?



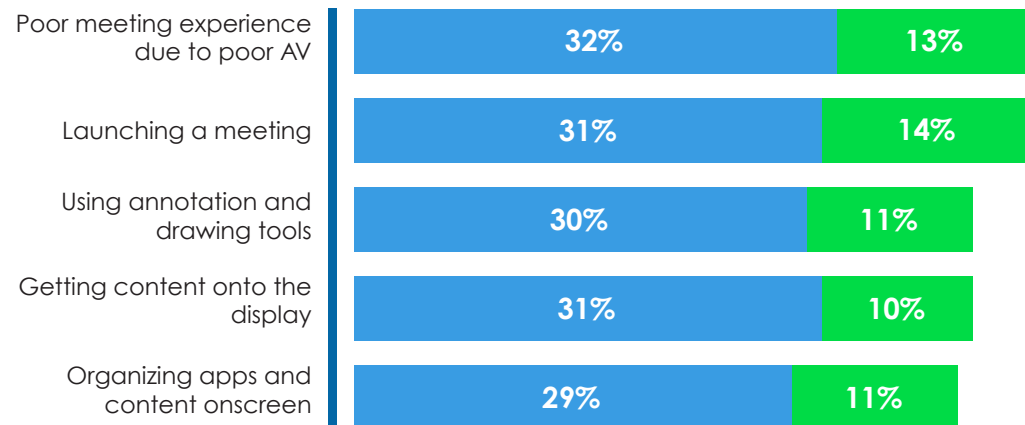
Challenges for the Meeting Room: Overall User Experience

MRDMs tell us their end users are challenged by the overall experience of collaborating over distance

Though meeting room technologies have improved dramatically in the past five years, the biggest issues faced by end users have to do with the audio/visual experience and how to effectively use tools and content. This is a serious issue in a period of business disruption, in which companies are scrambling to provide business continuity for in-office and remote workers.



What activities present challenges to your end users?



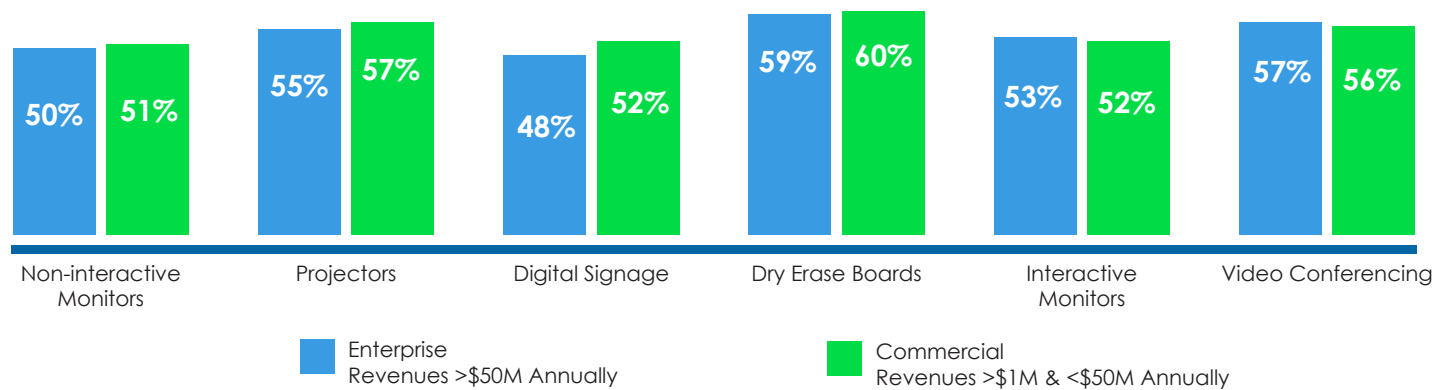
■ Significant Problem ■ Very Significant Problem

Segment Snapshot- Commercial and Enterprise Meeting Rooms

Commercial and Enterprise meeting rooms are similar

When we segment by organizational size, we find that all of these technologies have penetrated both segments in a consistent fashion.

Today: Commercial and Enterprise Meeting Rooms Have Similar Technologies



Large enterprises are accelerating their meeting room modernization efforts but commercial businesses are yet to prioritize their investments.

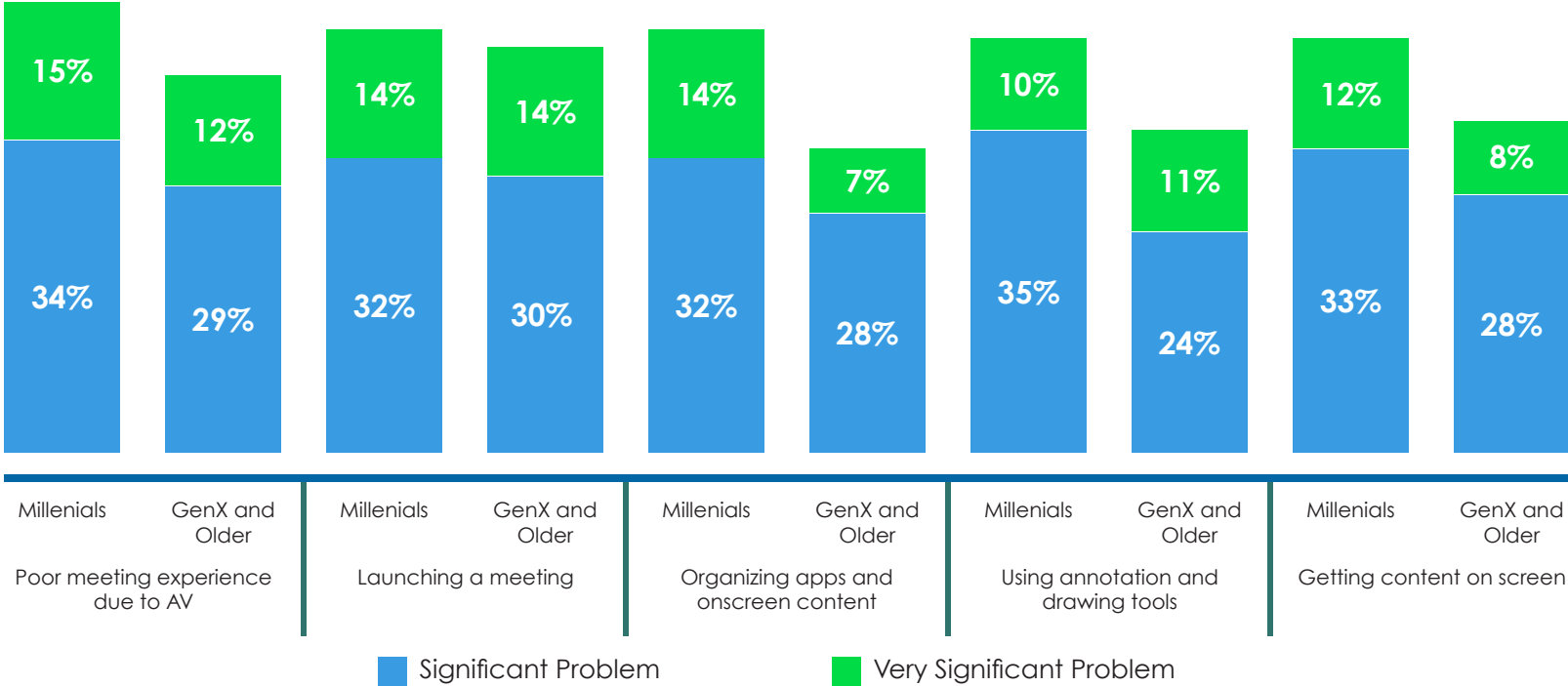
Percent of meeting rooms likely to contain modern technologies by the end of 2021

End of 2021		Video Conferencing	Interactive Monitors	Most Meeting Rooms Should be Modernized
Enterprise	\$\$\$	70%	67%	54%
Commercial	\$\$	67%	64%	31%

Challenges for the Meeting Room: Different Generational Expectations

The younger generation has higher expectations for the performance of meeting room functions than their older peers

Younger information workers who grew up with technology expect more from their meeting rooms. Millennials have less patience for poor meetings, annotation tools that are not intuitive, and difficulties in getting content onto screens than their older colleagues. This creates the need for new approaches to meeting rooms.



Building Blocks for Meeting Rooms



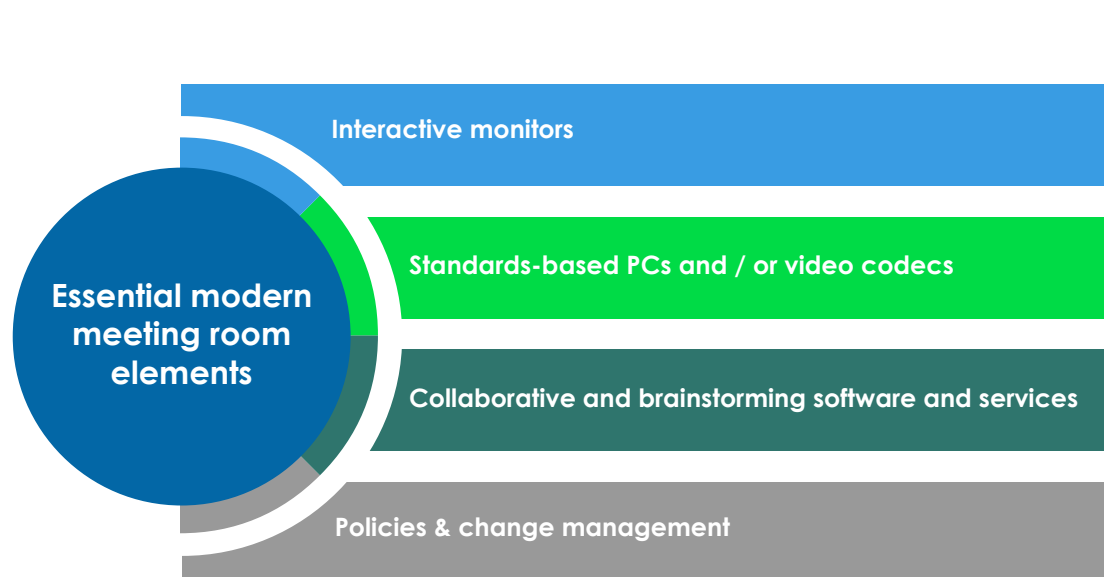
Think about the different technologies you interact with in a meeting room: a monitor. A PC or laptop and a meeting launcher. A scheduler. If holding video conferences, a camera and audio system and control unit and more. But the infrastructure that makes a meeting room effective is not rocket science: there are specific, standards-based, modular elements that can make a meeting room shine – for those both local and remote.

Map of the Modern Meeting Room

The modern meeting room consists of a collection of interoperable, standards-based technologies designed for interactivity

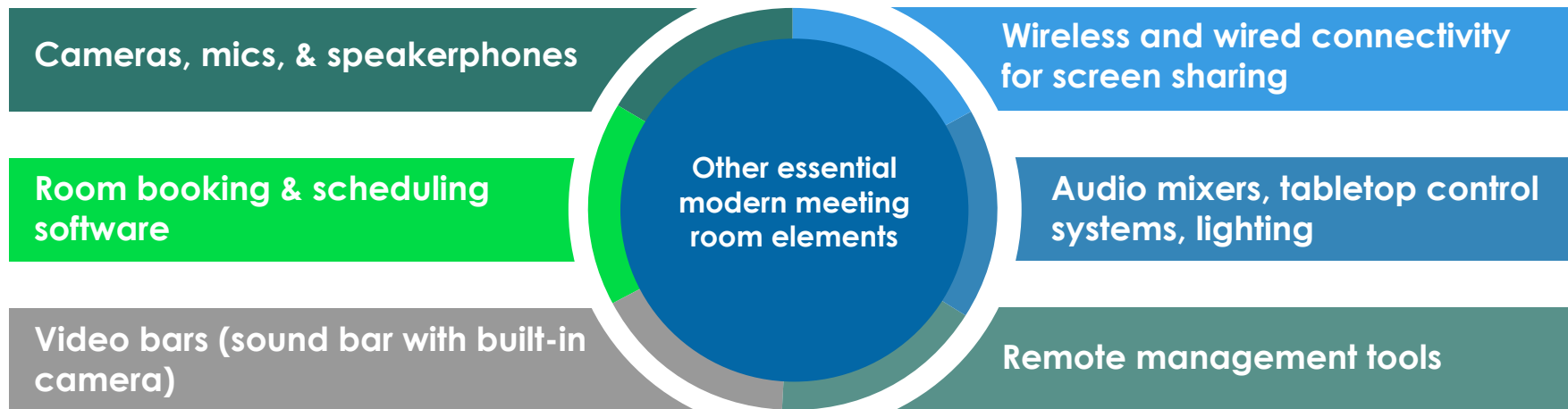
Meeting room collaboration calls for a mix of teaming, messaging, brainstorming, voice, and video technologies used for the act of working together locally and remotely. Essential elements include:

- Interactive monitors that enable use of collaboration tools, typically in 55", 75", or 86" display sizes. These tend to be placed in huddle rooms, small-to-medium rooms, and large conference rooms, respectively, often matched to the number of users seated in the room.
- Standards-based PCs and / or video conferencing codecs. These may be configured together or with peripherals from the likes of Huddly, Logitech, Bose, Poly, etc.
- Collaborative software and services such as Microsoft Teams, Slack, Zoom, etc., and brainstorming and ideation products like Bluescape, Microsoft Whiteboard, FlatFrog Board, and others.
- Policies and change management to support deployment of meeting room technologies are as important as the selected technologies.



Secondary Essential Elements of the Modern Meeting Room

These technologies round out the modern meeting room experience

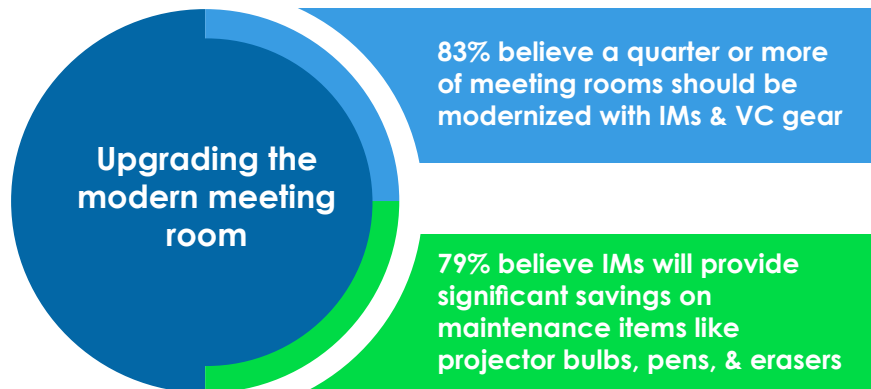


The Modern Meeting Room – Interactive Monitors

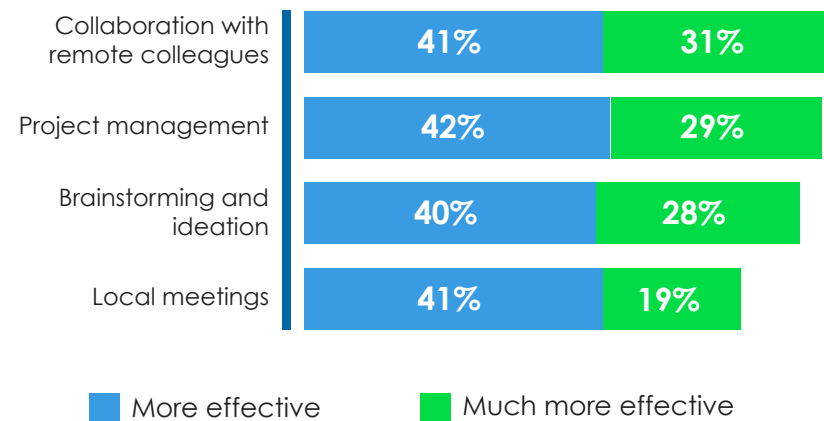
Interactive monitors are an essential element of the modern meeting room

Interactive monitors provide sizzle based on their interactivity and typically high-quality resolution. Look for multitouch surfaces, 4K resolution, palm rejection (to avoid accidental erasing of written content), and their ability to support collaboration software. Ideally, they can be used for local and remote collaboration and, using industry-standard software, be embedded in the workflow.

Interactive monitors are far more effective than non-touch monitors for collaboration



Most MRDMs say interactive monitors are more or much more effective than non-touch displays



We're firm on where we are going in our meeting rooms: We want single or dual touch displays in the future with an easier ability to display content.

– Joe, Head of Workplace Technology, EMEA Fintech Firm

The Modern Meeting Room – PCs, Codecs, BYOD, & Standards

PCs are an engine for collaboration in the meeting room

The world is split between those who select PCs and those who select appliance-based codecs in their meeting rooms. PCs are preferred by those who seek greater support for Bring-Your-Own-Device meetings, support for industry standards, upgradable processors, and modular products. Hardware codecs are preferred by those who seek locked-down appliances.

Wainhouse has reported that in Q1 2020, for the first time ever, PC-based room solutions outsold traditional appliance-based codecs worldwide.*

Enterprises are saying they seek industry-standard, upgradeable platforms – and this includes IMs

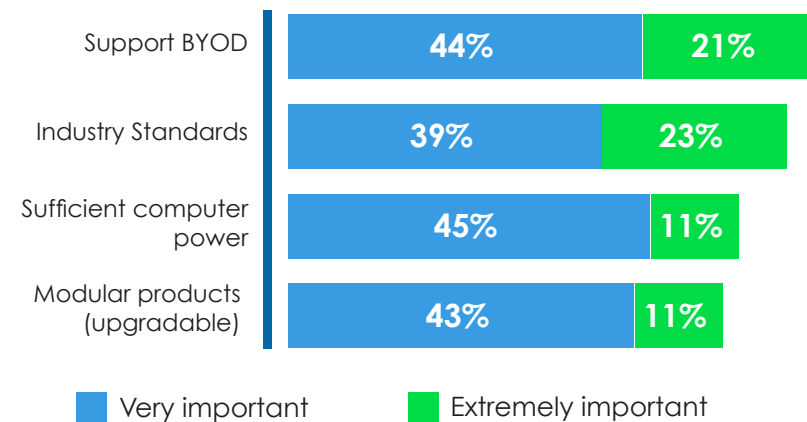
MRDM technology preferences

89% prefer mix of PCs, IMs, cameras, video bars, and such

11% prefer all-in-one IMs

* Wainhouse Video Conferencing SpotCheck, June 2020

% MRDMs who believe these approaches are very or extremely important



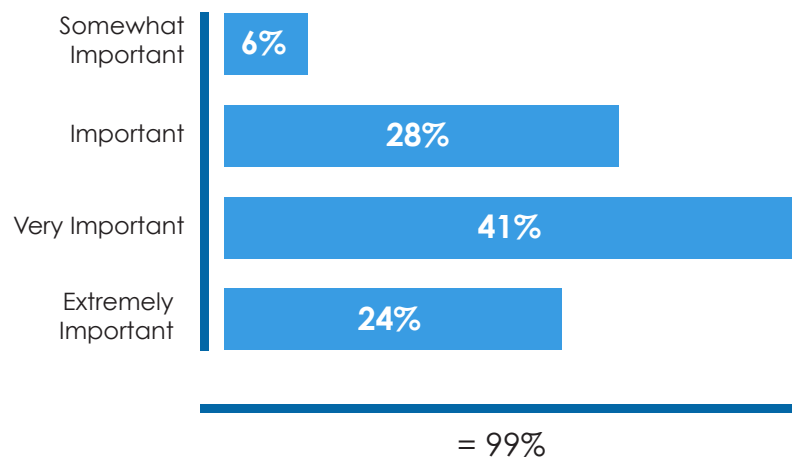
The Modern Meeting Room – Collaboration Services

Integration with collaboration services, productivity software, and brainstorming software is important to workflow

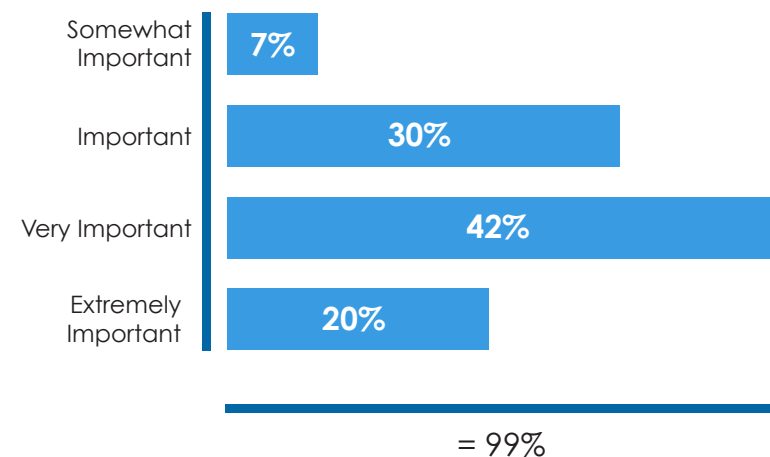
99% of MRDMs believe integration with services like Zoom, Microsoft Teams, Slack, and similar platforms is important. Employees are mobile, meet from distributed locations as well as from meeting rooms, and thus need collaborative communications services to be enjoyed from a wide variety of devices and places

99% of MRDMs believe the ability to use collaborative brainstorming / ideation tools is important. Just as Word and PowerPoint and Excel had their day to gain acceptance, whiteboarding and brainstorming software tools are becoming a key element for supporting employee engagement and productivity.

Integrated with Zoom, Microsoft Teams, etc.



Includes Brainstorming / whiteboarding



The Modern Meeting Room – Policy & Change Management

Don't underestimate the value of change management

Without change management, employees struggle to accommodate new ways of working. The speed with which MRDMs must plan, adopt, measure, and then plan again constantly is on the increase.

Meeting room replacement cycles

	Technology refresh	Replace blueprints	Evaluate supplier partnerships
Mean time to replacement (years)	2.6	2.2	2.1

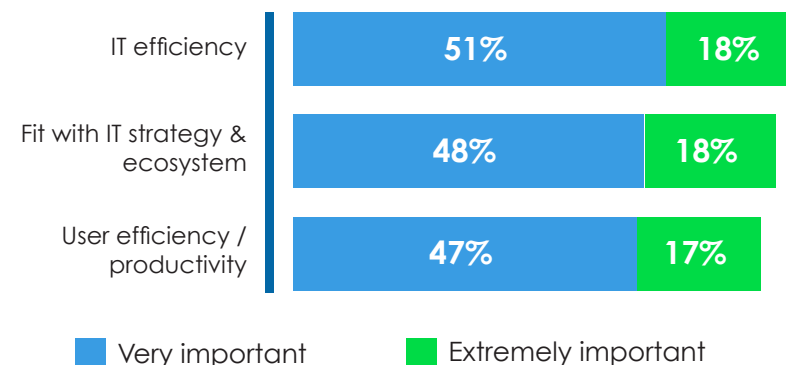
WH knows from past surveys that **11%** of end users feel they don't receive enough training on how to use their interactive monitors.* This is because many tools are far easier to use than was the case in the past. Still, this is an area worth focusing on to ensure that a segment of the workforce not be left behind.

* Wainhouse Q1 2019 Meeting Room Collaboration End User Survey

We have learned that it's best to be really intentional about change management. Thinking through what problems people will have dictates the priorities. We do dedicated training sessions to get our employees feeling comfortable using the room tech.

– Aaron, Chief Technology Officer, NA Construction Firm

Change management is essential to maintaining IT and user efficiency, two critical factors in determining meeting room solution selection.



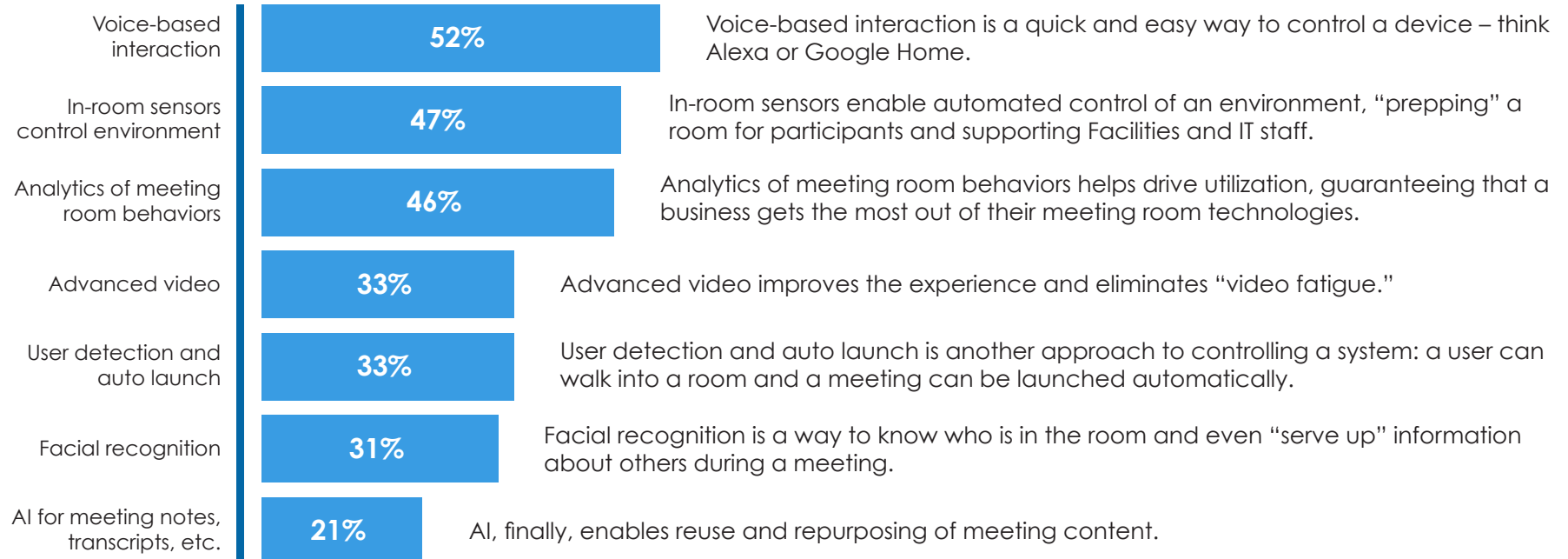
The Modern Meeting Room – What Comes Next

Building blocks for the future meeting room will change the landscape

We're looking at voice assistants and how they work. Our criteria are based on how much easier it makes the room to use. We will be testing that out this year.

– Aaron, Chief Technology Officer, NA Construction Firm

Technologies to which MRDMs are Looking Forward as Futures



The Benefits of Modern Meeting Technologies



Why spend time understanding the benefits of modern meeting technologies? Because of the payoff: they are game changers. WH research shows that benefits include better teaming and engagement, richer interactions, improved productivity, increased meeting room utilization, and even travel savings for those who might otherwise need to travel.

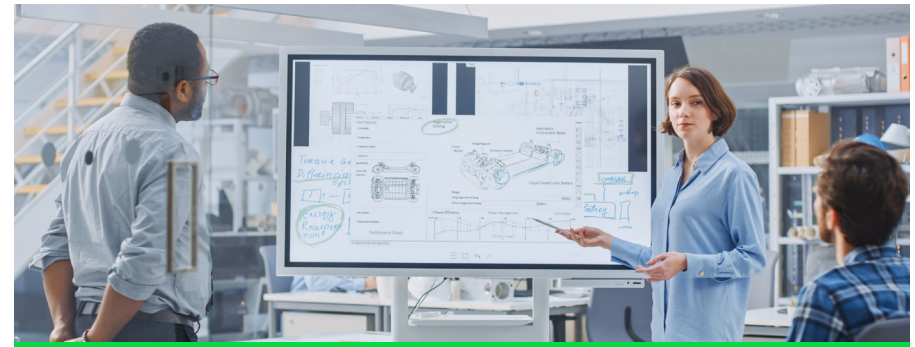
Benefits of Interactive Monitors – Teaming and Engagement

Better collaboration and employee engagement are key benefits provided by interactive monitors

The benefits of interactive monitors are based on several factors: Interactivity between team members. Quick access to shared content. Faster meeting launch. Recorded meeting results and action items more easily shared post-meeting.

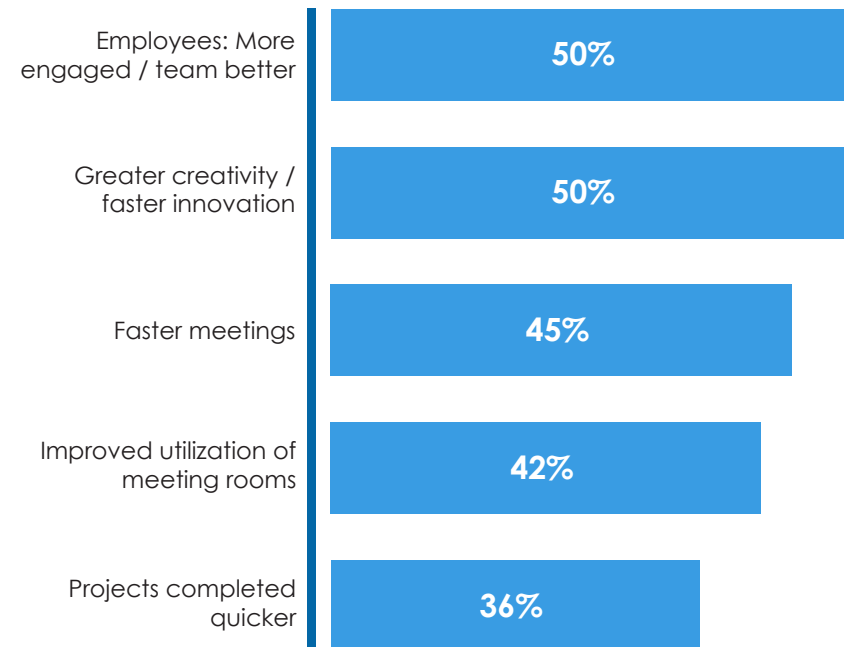
Interactive monitors support more engaged and better teams, along with greater creativity.

Other benefits include faster meetings, improved utilization of meeting rooms, and faster completion of projects.



With meetings, it's the quality of the experience. Seeing the person via video conferencing adds quality. And for any high-level conference, touch screens add the ability to move content around and easily mark it up. Touch screens improve the experience.

- Gary, Former CIO & Managing Director,
Major U.S. Bank



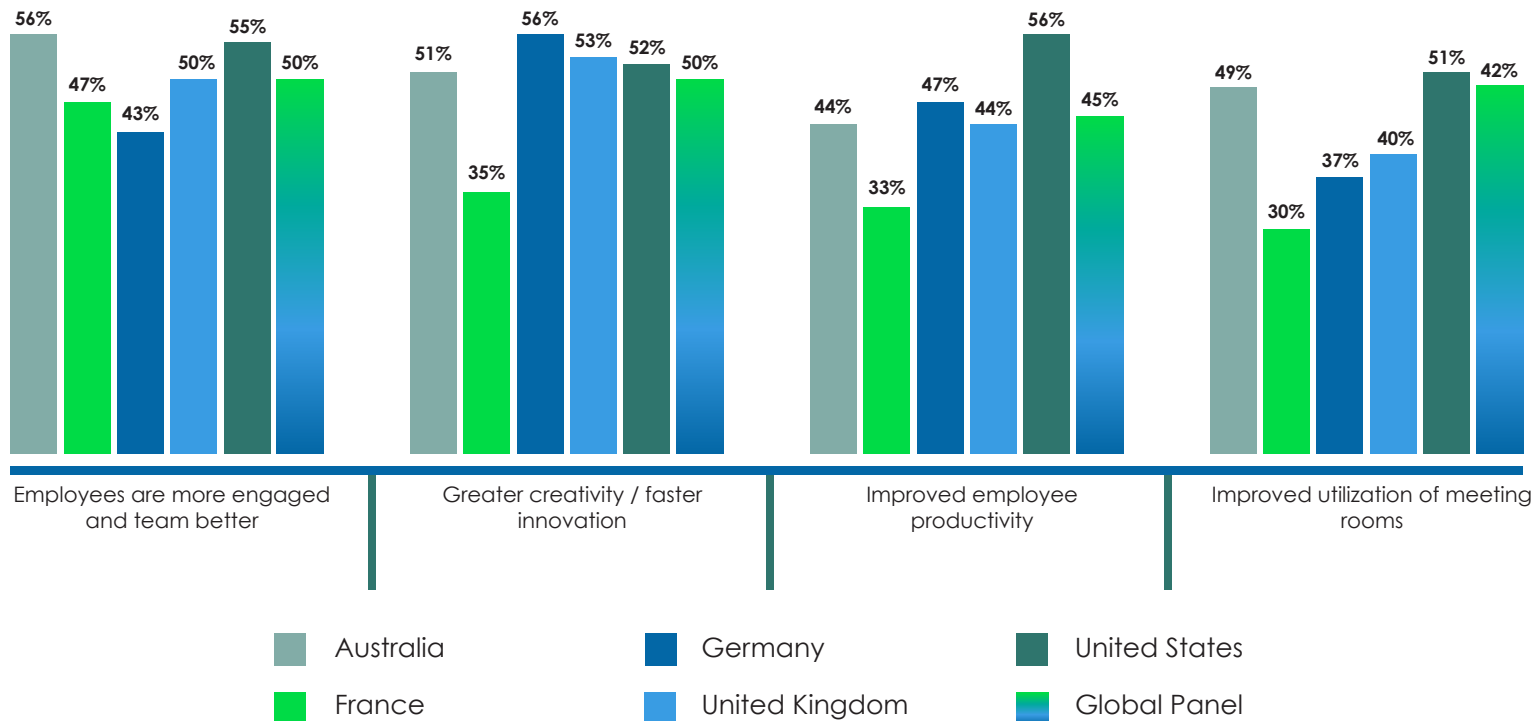
Interactive monitors offer key benefits

Benefits of Interactive Monitors – Country Snapshot

Regional differences exist regarding the major benefits



Regional View of the Top Benefits of Interactive Monitors



Benefits of Interactive Monitors – Richer Interactions

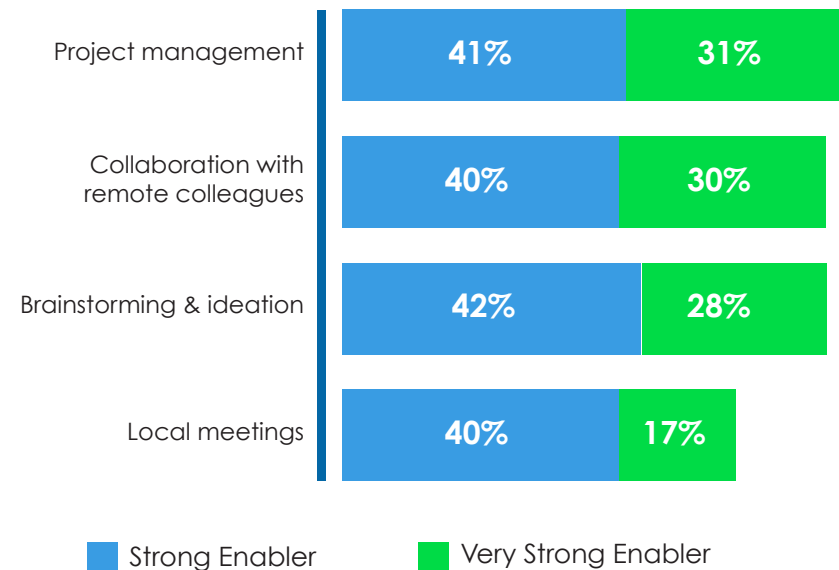
Interactive monitors enable richer interactions and better meetings

Modern meeting room technologies are producing significant benefits across major use cases. Interactive monitors in particular give faster access to data and greater ability to manipulate and then save that data. In that regard they can be well-integrated into an organization's workflow, as they help tackle the number one challenge mentioned earlier, A/V quality, while providing other benefits such as helping users launch meetings more quickly and collaborate better.

Percent MRDMs who believe IMs are strong or very strong enablers compared to non-touch displays



Interactive monitors are far more effective than non-touch displays for many collaborative activities.



Quantified Benefits of Interactive Monitors

Monitors provide significant, quantifiable benefits

MRDMs pay attention to metrics, which can be the best way of providing quality meeting technologies, supporting the business, and justifying ROI. Survey respondents globally find meeting time savings, products get to market faster, room utilization increases, projects complete faster, and travel can be minimized. With the stresses that have been present in the workplace in 2020, it makes sense that the intrinsic benefits will play out in coming years because the technologies are in the stage of early-to-intermediate adoption.

Interactive monitors provide significant improvements in productivity and room utilization

Improved Productivity (time saved in 1-hour meeting)		11.3 minutes
Innovation: Faster time to market with products and features		9.8 %
Meeting room utilization increased		10.5%
Projects completed faster		15.0%
Trips saved per month by each employee who travels extensively		0.93

Conclusion: Ready Yourself for a New Age of Collaboration

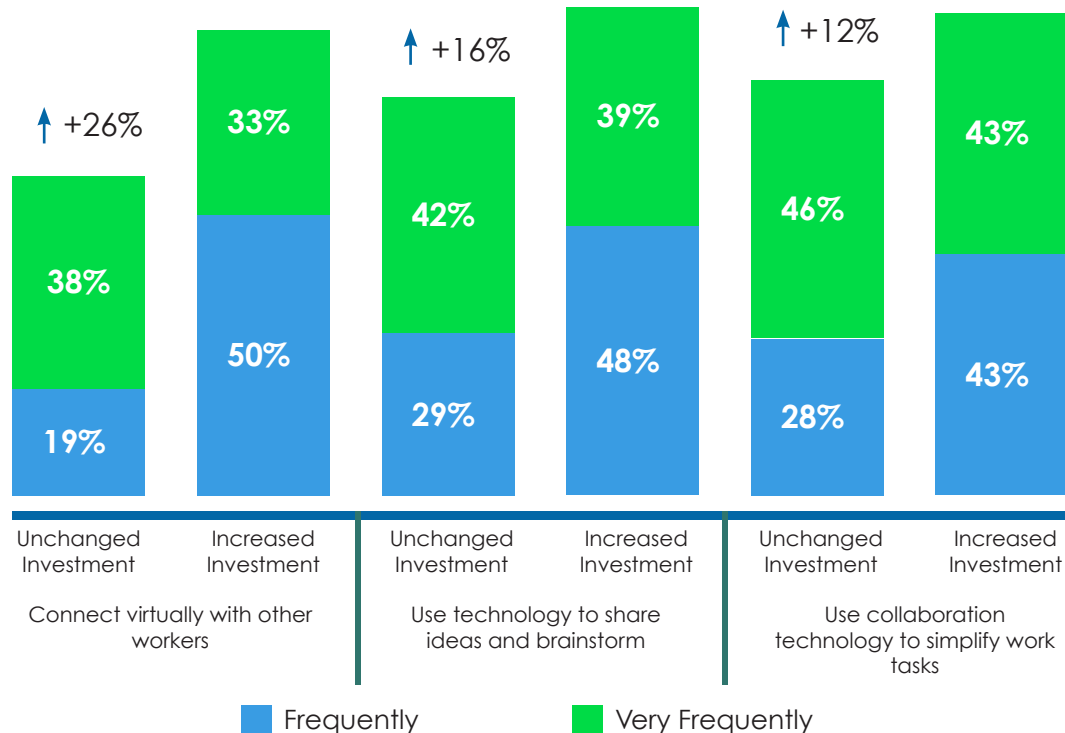
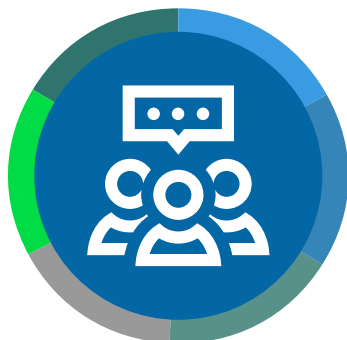


Everything is changing and you will be pivoting to address that change. Wainhouse believes that the organizations that invest in modern meeting room technologies do better than their competitors that do not, and the proof is in the data. This means new ways of purchasing, deploying, and training.

Invest in Meeting Rooms – Encourage Collaborative Work

Investing in meeting rooms correlates with greater practice of collaborative work activities

Collaboration. It sounds so simple: “Tell your employees to interact and collaborate.” It’s not. In reality, some organizations have greater employee engagement than others. And there are many reasons for this, such as change management, good technologies, infrastructure, and corporate culture. The data indicate that the more you invest in your meeting rooms, the greater likelihood collaboration will become a part of your workflow.



MRDMs who increased their investments in meeting rooms report more frequent collaboration than those who are not investing

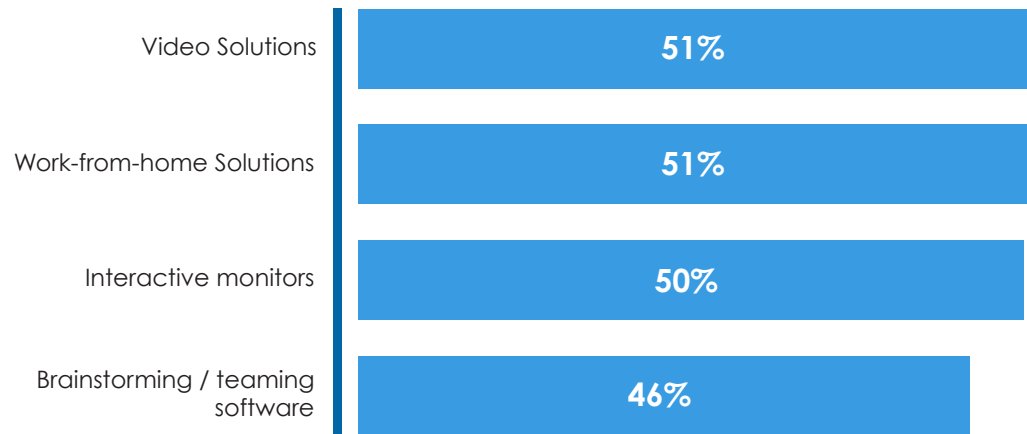
Ready Your Rooms for Your New Workforce

The modern meeting room will support diverse workflows

The modern meeting room will have great PCs, video conferencing gear, and IMs to support WFH, mobile employees, in-office employees, and brainstorming and teaming. As you look to make your meeting rooms awesome, keep in mind what is important for attracting and retaining younger workers.



Top Four Areas in Which MRDMs are Investing



The expectation in our sector, Fintech, is that you have the best technology available to you wherever you are. We hold company-wide engineering meetings every week, conducted between larger rooms and work from home employees. We have our employees bring their laptops and wirelessly present via Miracast.

– Joe, Head of Workplace Technology, EMEA Fintech

The New Workforce – Country Snapshot

MRDMs in every country seek to support Millennials and Generation Z

For organizations seeking to engage their employees, interactive monitors and video solutions are essential elements. Understanding when and where to deploy these, particularly how to make IMs useful in meeting rooms in conjunction with video solutions in both meeting rooms and as part of work-at-home solutions, is an important consideration in planning for younger employees during these days in which younger employees may not be working in an office.

Australia

video conferencing & work-from-home

France

video conferencing & work-from-home

Germany

video conferencing & work-from-home

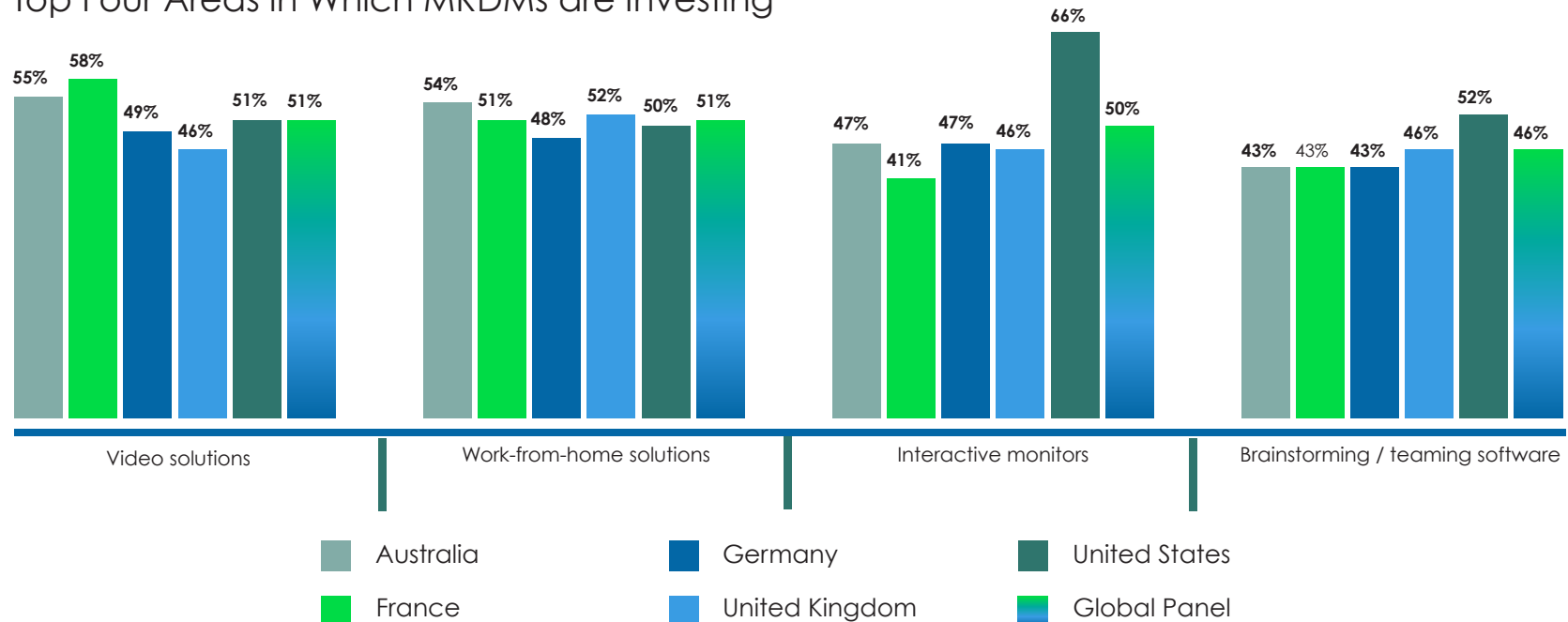
UK

work-from-home

U.S.

IMs & brainstorming / teaming software

Top Four Areas in Which MRDMs are Investing



Ready Yourself for New Ways of Keeping Up With Changing Technologies

The rate of change is leading MRDMs to consider Meeting Rooms as a Service

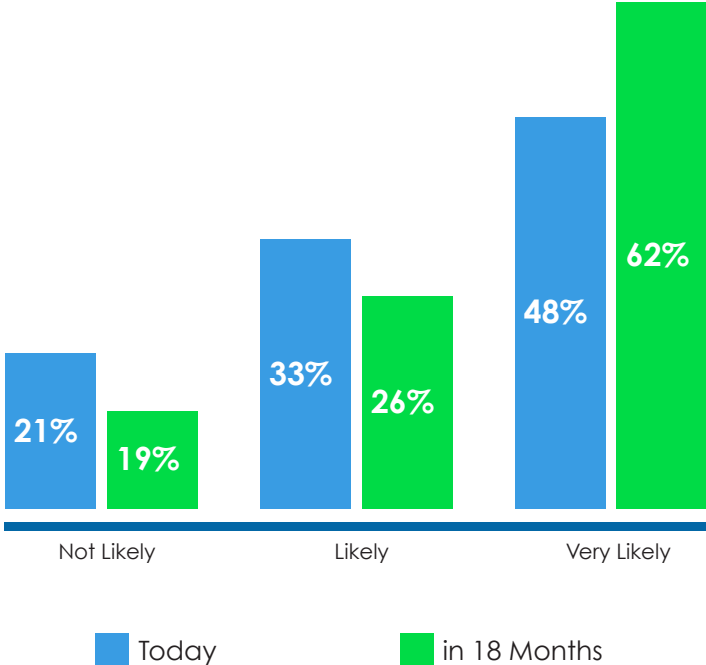
It's a challenge to keep up with meeting room technologies when they change quickly. This makes the case for industry-standard tech. Flexible, standards-based technologies can lead to lower costs via operating vs. capital expensing. Many organizations are shifting from direct purchasing of equipment to a renting or leasing arrangement (operational expenses) often bundled with other services. This is sometimes referred to as "Meeting Rooms as a Service," or MRaaS.

I'm very interested in meeting rooms as a service. Because of the investments we made in room kits a few years ago, the technology will be good for at most maybe 1-3 more years. It's much less work for my team, plus we're not keeping antiquated equipment around to drive ROI. The ROI is already built-in

- Aaron, Chief Technology Officer, NA Construction Firm



Two out of five (39%) are challenged to keep up based on rapid evolution of meeting technologies.



Likelihood of shifting to MRaaS

Ready Yourself for a New Age

Meeting rooms are the crucible of collaboration, and provide payback

An effective modern meeting room typically can cost between \$8,000 USD and \$100,000 USD. Regardless of your budget, use this period to configure and upgrade your collaborative capabilities while remodeling your workplace for the future. As we exit this period of business disruption, your employees will continue to expect relevant, easy-to-use technologies.

The incoming class of Generation Z expects these technologies

Some of those interviewed and surveyed for this report indicate that they have run into obstacles such as budget, buy-in from upper management and even trouble keeping up with the rapid evolution of meeting room technologies. But these MRDMs stuck with it and are clear that investing in meeting room technologies, specifically interactive monitors, leads to better collaboration and a more engaged workforce.



Interactive Monitors and The Buildings Blocks for Meeting Rooms

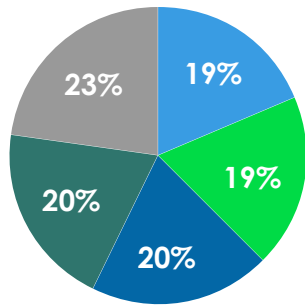
In construction, in the last two years, every year new tech has become more and more important. When hiring a young engineer out of college, you can't just say 'here are your tools: Excel, Outlook, and a conference phone number.' They look at you like you are from Mars. So it's about having relevant, productive, easy to use technology as a means of recruiting and employee retention. Without those the turnover tends to be greater.

- Aaron, Chief Technology Officer, NA
Construction Firm

New hot sectors, such as Fintech and Biotech, tend to grow quickly and need to be adaptable. This is especially the case in scenarios in which enterprises expand rapidly based on new services or expansion into new geographies.

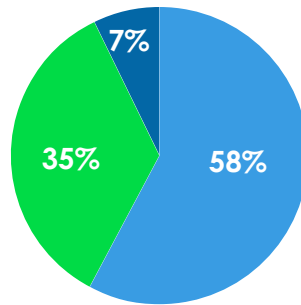
Survey Demographics

Country



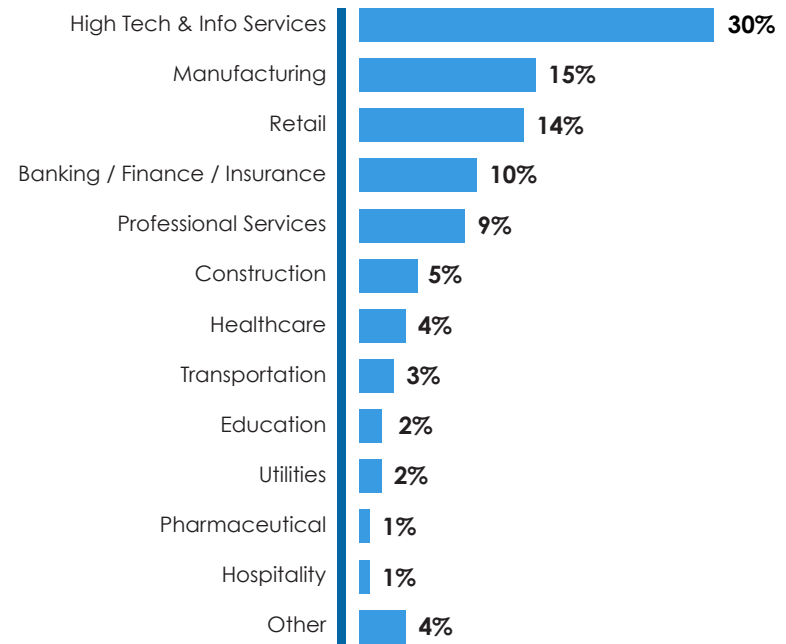
- Australia
- France
- Germany
- UK
- U.S.

Role

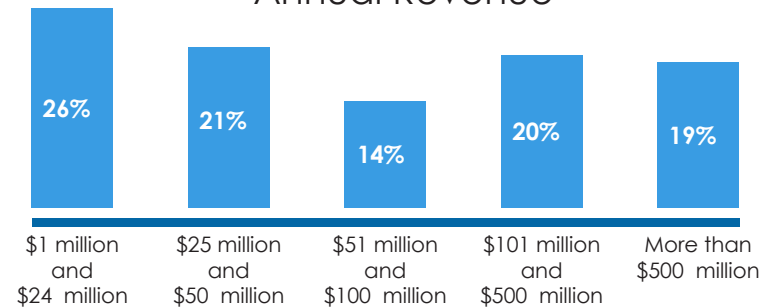


- Manager
- Executive
- Individual Contributor

Industry



Annual Revenue



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Methodology

In March-April 2020 Wainhouse interviewed several C Suite Information Technology professionals and surveyed 762 IT decision makers (ITDMs), Audio/Visual decision makers (AVDMs), and Facilities decision makers regarding their deployments of, plans for, and benefits derived from modern meeting room technologies. The survey panel was divided evenly among five countries (Australia, France, Germany, the U.S., and UK), and every respondent is involved in the selection of and deployment of interactive monitors (required). Participants were recruited randomly from a managed survey sample panel. The only pre-condition on the composition of the survey group was to recruit respondents in equal measures from organizations classified as larger than 5,000 employees.

About Wainhouse

Wainhouse provides in-depth research and analysis that helps you gain a clear perspective on the market, technology, and services for workplace communications and collaboration. Wainhouse analysts are industry experts in enterprise voice, video, team collaboration, and streaming applications, services, and devices. Our expertise is backed by one of the most comprehensive data sets and models in the world. Our domain expertise and market data combine to deliver in-depth forecasts, enterprise insight, and objective product evaluations that frame the industry's current state and anticipated direction. Services include syndicated market insight, custom research, and sales enablement. Content and additional detail is available at www.Wainhouse.com.

About the Authors

Alan D. Greenberg, Senior Analyst & Partner. Located in Austin, TX, Alan is an expert in collaboration and conferencing applications for meeting rooms and classrooms. He specializes in ideation technologies, video conferencing, web conferencing, lecture capture, and video-centric products and services. He has consulted extensively to end user organizations, vendors, and service providers and has published white papers/research notes and conducted webinars on an array of topics. Alan is also a Burke Institute-trained focus group moderator and winner of the 2010 US Distance Learning Association Outstanding Leadership Award. He has held past marketing roles with VTEL, Texas Instruments, and Xanthus. Alan holds an M.A. from the University of Texas at Austin and a B.A. from Hampshire College, Amherst MA.

Charles M. Denault, Senior Analyst. Located in Sarasota, FL, Charles serves as WH's Director of Quantitative Research and also covers Talent Management and how organizations can best utilize talent and learning solutions, exploring how these platforms can improve employee performance and engagement, and how they intersect with collaboration and communications technologies. At leading industry events such as the CLO Symposium, Workforce Live, and HR Tech Europe, Charles has spoken on a variety of topics including employee engagement, coaching and development, and social learning. Several of his articles have been published in CLO Magazine, Inside Learning Technologies, HR Grapevine, and HR Zone, as well as on vendor websites. Prior to joining Wainhouse, Charles defined and launched solutions for learning, talent management, and collaboration at SuccessFactors, Saba, WebEx, and Apple. Charles has a B.S. in Mathematical and Computational Sciences and an M.S. in Operations Research from Stanford University.