RISE OF THE SUPERUSER
Bringing global enterprises together with unified communications
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AN IN-DEPTH INSIGHT INTO THE CHALLENGES THAT MUST BE ADDRESSED
In September, Telstra commissioned a unique research endeavor – to interview 675 IT decision makers from around the world in private sector international organisations with more than 250 employees.

Our aim was to quantify the mood of IT leaders on how employees were adopting and utilising technology tools to communicate and collaborate in the workplace, and use this to help our customers be better prepared when rolling out such solutions themselves.

Through our research, we uncovered some interesting insights into how organisations embrace, deploy and prioritise IT within their business, including that:

- Nine out of ten IT leaders find it challenging to effectively implement all the technology tools employees expect in the workplace, from remote access to desktop virtualisation and video conferencing
- Despite considering end-user expectations more than ever before, almost half (47 per cent) thought their organisation had higher priority IT projects than delivering technology that met these needs
- Improving user experience, promoting innovation and enhancing internal collaboration all rank behind security, efficiency and cost reduction IT initiatives, demonstrating that many end users aren’t getting the attention they deserve.

Our research also identified a superior category of top performing organisations – which we’ve termed superusers – who are working most closely with employees to exceed and adapt to their expectations of the modern workplace.

Today, around 40 per cent of organisations have achieved superuser status and what we found particularly interesting was the fact that their employees are not just demanding physical hardware for collaboration; they are expecting the software and services to enable them to do this too.

Clearly, end-users now play a critical role in IT deployment and adoption, which means organisations cannot afford to ignore their demands, especially in the current environment where employees are more aware than ever about the technology available to them.

By engaging with employees to fully understand their expectations, organisations can stay ahead of the curve. Communication and collaboration tools, such as Telstra’s Cloud Collaboration solution may work to fulfil these needs and help deliver potential rewards, including better decision-making, faster identification of new business opportunities and greater job satisfaction.

The Rise of the Superuser provides an in-depth insight into the challenges that must be addressed, while offering a number of compelling lessons from those organisations already making the transition, which we believe can inform decision making and IT management strategy, now and into the future.

Jim Clarke
Director, Marketing, Product & Pricing – International
Telstra Global Enterprise & Services
November 2014
RESEARCH SUMMARY

Introduction
Telstra commissioned Vanson Bourne, an independent specialist in market research, to undertake the research upon which this report is based. In total, 675 IT decision makers were interviewed from organisations in five countries/regions:
- UK - 200 interviews
- US - 200 interviews
- Singapore - 100 interviews
- Hong Kong - 95 interviews
- Australia - 80 interviews

Respondents work for organisations in the private sector with 250 or more employees. Due to the range of sectors involved in this research, the results are based on the global or regional average to be representative of the target population.

Fieldwork took place in September 2014 using a mixture of online and telephone interviewing. A robust multi-level screening process was used to ensure only appropriate respondents participated in the research.

Background to the research
With the emergence of big IT trends such as cloud and mobility in recent years, organisations and their end users have become increasingly aware of new cloud-based technologies available for business use. Such services no longer just appeal to IT departments but to multiple business departments and users across an organisation.

As a result, end users now have a critical role to play in the products and services which are commissioned for business use. Failure to acknowledge end users' awareness and desire for current technology can mean that some business units bypass the IT department and source their own solutions, potentially leaving organisations exposed to security risks and hidden cost implications.

Aims of the research
This research was commissioned to evaluate what role end users play in the demand for collaboration tools in modern enterprises. What challenges are organisations facing when trying to implement end user demands? Can cloud-based solutions such as Unified-Communication-as-a-Service help bring global enterprises closer together? Are there any business benefits to using cloud solutions and if so, what are they?

Figure 1: Those selecting very or extremely helpful for “How helpful have the following technologies been in enabling the organisation to embrace remote working?” asked to all respondents (675 respondents).
Superusers

The research results highlighted two distinct respondent groups: ‘superuser organisations (superusers)’ and ‘traditional organisations’. Superusers have identified over half of the available collaboration tools as enabling the organisation to embrace remote working. Superusers are more aware of the current technology available for their organisations and are more aware of how these solutions can benefit them. Most importantly, superusers are more likely to have either adopted solutions to enable the business to adapt to end users’ expectations of the modern workplace environment, or will be in the process of doing so.

In the research sample, 42% are in the superusers group and the remaining 58% are considered to be traditional organisations. 14% of all respondents are classified as ‘extreme superusers’ – those who say that all collaboration tools enable the organisation to embrace remote working.

Almost half (47%) of respondents from the US are superusers with one in five (20%) classified as extreme superusers. In comparison, only three in ten (30%) from the UK and 26% from Hong Kong are superusers.

The manufacturing, mining and resources, and utilities sectors have a higher proportion of superusers than other sectors. Business and professional services, higher education and media sectors have the lowest proportion of superusers.

Only 20% of respondents’ organisations with 250-500 employees are superusers. This is almost half (39%) as many as those from organisations with 5000 employees or more, meaning that larger organisations are more likely to be further ahead.

Organisations with superusers are likely to be ahead of the curve, working closely with their end users to implement the best solutions for their bespoke challenges. These organisations are more likely to see a more efficient and productive work environment and higher levels of end user satisfaction.

Figure 2: Percentage of respondents that are superusers, asked to all respondents (675 respondents).
POWER TO THE PEOPLE
People and technology challenges

Traditionally, hardware and software issues were known as the key challenges of introducing and implementing new and innovative technologies. However this appears to be shifting. Most (71%) surveyed IT decision makers claim that resistance from people about adopting new technology is either equally or more difficult to overcome than challenges associated with technology. Only one fifth (20%) find the technology more challenging.

The implementation of IT products and services is no longer just about finding the most appropriate solution for the organisation. End users also play a critical role in its success in deployment and adoption. Resistance from these end users will pose difficulties for companies to overcome if end users deem the technology being implemented to be unsuitable for their needs or are not engaged earlier in the procurement process and embrace the change.

But the fact that end users are increasingly becoming vocal about their technology wants and desires suggests that they only resist when the technology is inappropriate. Employee awareness of available technologies has led to this group questioning the decisions that have been made on their behalf. IT departments are therefore having to consider their expectations now more than ever.

Figure 3: “Which of the following is more difficult to overcome when trying to introduce unified communications into your organisation - challenges with technology or resistance from people?”, asked to all respondents (675 respondents).
End users are driving productivity, enterprises need to adapt

Multiple groups within an organisation are leading the adoption of collaboration tools, evidence that challenges from end users are becoming difficult for IT departments to ignore. Over half of respondents report that both senior managers (54%) and employees (53%) are leading the adoption of collaboration tools in their organisation.

Fewer than 15% report that end users fight the adoption of collaboration tools. This suggests that end users recognise the need for these tools and are more likely to lead adoption rather than fight it. End users are aware of the tools that they want and are now demanding such tools from the IT department, or finding them elsewhere.

Although respondents believe that the IT department is more likely to be leading the adoption of collaboration tools (70%), business departments are not far behind.

Business departments and units are fulfilling the expectations of their end users by commissioning their own services without having to go through the IT department.

Superusers are more likely to report that end users within their organisation are leading the adoption for collaboration tools. As this group is more aware that end users want collaboration tools, they will also be more aware of the need to implement them sooner rather than later. This suggests that superuser organisations are engaged with rolling out innovative technology and listening to their end users to a greater extent than those in other organisations.

It will become increasingly important for IT departments to ensure that end users are being listened to, in order to retain control of the technology infrastructure and use. Organisations cannot afford to ignore such demands, especially in the current environment where users are more conscious about the technology available to them and their organisation.

Differences in the results based on demographics

Respondents from the US report that end users are leading the adoption of collaboration tools more than any other country in this study. In comparison, in Hong Kong traditional organisations are more prevalent and likely to encounter more resistance from people (76% in Hong Kong compared to 67% in the US).

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<thead>
<tr>
<th>Department</th>
<th>Proportion</th>
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<tr>
<td>Information Technology</td>
<td>70%</td>
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<tr>
<td>Business Development/Sales</td>
<td>64%</td>
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<tr>
<td>Business Direction &amp; Strategy</td>
<td>62%</td>
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<tr>
<td>Customer Service</td>
<td>57%</td>
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<tr>
<td>Marketing</td>
<td>57%</td>
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<td>Product Development</td>
<td>55%</td>
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<tr>
<td>Operations</td>
<td>55%</td>
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<tr>
<td>Procurement</td>
<td>49%</td>
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<td>Finance</td>
<td>48%</td>
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<td>Human Resources</td>
<td>47%</td>
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<td>Legal</td>
<td>42%</td>
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Figure 4: “To what extent are the following departments driving the adoption of collaboration tools in your organisation?”, asked to all respondents (675 respondents).
TOMORROW’S WORKING ENVIRONMENT
Employee expectations are high

End users have high expectations of their current workplace. Most now expect remote access, mobility, desktop virtualisation and video conferencing as standard. These expectations have grown with the emergence of recent IT trends such as cloud computing. The opportunities for remote access and mobility, for example, are no longer just a desire amongst end users but are an expectation for most.

However, it is not always a simple task to implement the tools that end users expect. In fact, almost all (95%) surveyed IT decision makers find this to be a challenge.

These challenges may not be a surprise, but they create significant implications for organisations. Allowing remote access and mobility will force an organisation’s infrastructure to be more open, which has the potential to leave data exposed or to allow entry to the network from unauthorised connections. Implementing new security processes to protect the organisation from these risks has a cost implication.

This situation is compounded by the fact that almost half (47%) of respondents claim that their organisations have higher priority IT projects than implementing what end-users expect.

Lurking in the shadows

Citing these reasons for neglecting end-user demand often can result in users sourcing solutions without the explicit approval of the organisation, this is known as shadow IT. Although appealing to business departments, this can lead to a lack of control and visibility over technology within an organisation.

At present, 36% of IT decision maker respondents already find shadow IT a challenge; if shadow IT and the reason for its implementation is ignored, then its use is likely to increase in the future.

If organisations do not prioritise end user expectations, business departments are more likely to create shadow IT. The consequent risks and cost implications are likely to far exceed the original risks and costs saved by not addressing end user expectations in the first instance.

Superuser organisations recognise, and will therefore be more likely to address, the threat of shadow IT more than ordinary users do (44% compared to 31% respectively).
**TOMORROW’S WORKING ENVIRONMENT**

Top 10 collaboration tools being requested by end users.

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<th>Rank</th>
<th>Tool</th>
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<td>1</td>
<td>Laptops</td>
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<td>2</td>
<td>Remote working</td>
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<tr>
<td>3</td>
<td>Online document storage</td>
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<tr>
<td>4</td>
<td>Smartphones and tablets</td>
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<td>5</td>
<td>Mobile success for corporate applications</td>
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<tr>
<td>6</td>
<td>Cloud services for processes</td>
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<tr>
<td>7</td>
<td>Web and video conferencing</td>
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<td>8</td>
<td>Integration of unified communication tools and services</td>
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<tr>
<td>9</td>
<td>Instant messenger</td>
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<td>10</td>
<td>Audio conferencing</td>
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**Matching the right tools to the job**

End users are putting significant pressure on IT departments to provide them with collaboration tools to enable remote working and mobility. While it’s less of a surprise to see that laptops and smartphones are being demanded, the same end users are also requiring conferencing accounts and instant messaging – tools that help them to communicate more effectively across borders. End users expect to be able to work outside the office on a range of devices. They know that communication tools are available and they want them.

What is clear is that end users are not just demanding hardware for collaboration. They are demanding the software and services to enable them to do this, too.

The collaboration tools that end users demand will help their organisations to successfully embrace remote working. However, it is only superuser organisations that make this link. Over one third of organisations classified as superusers are experiencing very significant demand from their employees for collaboration tools. This same group has also witnessed the demand for collaboration tools increase over the last two years – much more so than ordinary users. End users know that these software and communication tools will improve their working practices and are expecting their IT departments to provide them.

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*Figure 6: The top 10 collaboration tools requested by end-users. “What demand is there from end-users in your organisation for the following collaboration tools?”, asked to all respondents (675 respondents).*
Shadow IT is one possible consequence of not meeting end user expectations, a challenge that larger organisations are more likely to be experiencing than smaller enterprises.

**Differences in the results based on demographics**

Some organisations are experiencing particular challenges when implementing what end users want more than others. Respondents’ organisations in the US are more likely to report they have higher IT priorities, organisations in Hong Kong are more likely to have a lack of funding and those from Australia are more likely to experience difficulties with legacy systems that do not support modern working expectations.

Larger organisations have more end users and business departments to contend with and therefore retaining control of the IT estate becomes more difficult. Regardless of the size of organisation, shadow IT will, if it has not already, become a significant problem for enterprises in the near future.

**Figure 7:** Percentage of respondents that find shadow IT a challenge, analysed by the size of their organisation, asked to all respondents (675 respondents).
UNIFIED COMMUNICATIONS FOR GLOBAL BUSINESS

UCaaS in the enterprise
Unified-Communication-as-a-Service (UCaaS) refers to the use of a cloud-based solution to integrate multiple collaboration tools such as video, voice, data and instant messaging. UCaaS can lead to better working practices as it enables employees to be more productive, share ideas more easily, and communicate from different locations across numerous devices.

It is little surprise that the vast majority of respondents’ organisations now allow employees to use certain elements of Unified Communications. However, such tools are still often procured from suppliers individually and deployed as ‘point solutions’ rather than in an integrated way that is representative of UCaaS. Such an approach may lead to many benefits of the aforementioned technologies to go unrealised in the enterprise.

Benefits of UCaaS
The adoption of UCaaS can lead to significant benefits for organisations – most (58%) surveyed IT decision makers recognise this fact. One area that UCaaS can help is with is improving organisational efficiency. UCaaS is seen to help this fundamental objective for IT departments by almost seven in ten (67%) respondents.

Moreover, UCaaS can assist with increasing employee productivity (64%) and employee satisfaction (62%), which in turn can also make businesses more profitable.

Superusers are more astute of the UCaaS solutions that will benefit their organisations than traditional organisations. For instance, around nine in ten (91%) respondents in extreme superuser organisations believe that UCaaS is very or extremely helpful in helping them achieve key business goals.

86% Remote access
85% Video conferencing
84% Mobility
84% Audio conferencing
82% Instant messaging
81% Content collaboration
78% Desktop virtualisation
74% Enterprise social networks
73% Administration rights for devices/PC as standard
71% Bring your own device
60% Bring your own application

Figure 8: Percentage of respondents whose organisations have adopted elements of UCaaS, asked to all respondents (675 respondents).
Differences in the results based on demographics

Although all regions see Unified-Communication-as-a-Service as helpful, IT decision makers from the US are more likely to recognise these benefits than any other region (68% in the US see benefits compared to 52% in the UK). With more superusers in this country compared to the others in this study, their recognition of the benefits of UCaaS is not surprising.

Figure 9: Those selecting very or extremely helpful for “To what extent can UCaaS help with the following?”, asked to all respondents (675 respondents).
05
ACHIEVE THE EXTRAORDINARY
CONCLUSION

Superusers see communications tools as important in helping to provide end users with what they now expect as part of their modern workplace environment. This group also has a much greater awareness of the challenges associated with implementing communications solutions for end users. This places them in a position to recognise and overcome challenges when implementing the right solutions for the business.

As end users now question technologies being implemented in the enterprise more than ever before, most respondents report that gaining buy-in and support from employees can be more challenging than overcoming issues associated with implementing the technology itself. Implementing new technology without end users in mind is likely to cause organisations more difficulties in the long run. Many enterprises cannot easily identify the right solutions or struggle to build a business case that fits the needs of employees. For example, 47% of respondents report that their organisation has higher priority IT projects.

These circumstances have led to over one third (36%) of respondents’ organisations already finding shadow IT a challenge. This is only set to increase if they do not find solutions to match end user expectations. This is an area that superusers are particularly aware and concerned about.

End users are demanding that their organisations provide them with collaboration tools. To fulfill end user demands, most organisations have adopted some elements of Unified-Communication-as-a-Service, and the benefits for both the organisation and end users have the potential to be substantial. Traditional organisations who lack awareness and understanding could miss out on a vital method of improving productivity.

Traditional organisations are less likely to see the benefits from UCaaS. This lack of awareness and understanding could mean that their organisations are missing out on a vital method of improving productivity.
By working closely with cloud service providers, global organisations can embrace tomorrow’s working environment and fulfill end user expectations; in turn maximising overall productivity, increasing satisfaction, and limiting the impact of shadow IT.

Telstra provides a range of collaboration services that can help organisations communicate in better ways across timezones, cultures and geographic borders.

Cloud Collaboration
An enterprise-grade UCaaS solution with a per-user-per-month (PUPM) charging model that integrates voice, instant messaging, presence, web and video conferencing and can be extended seamlessly to compatible mobile devices.

Virtual Contact Centre
An agile cloud-based contact centre service with real-time scalability and flexible commercial models.

Whispir
A two-way conversation platform that facilitates communication across multiple channels including SMS, email, voice and social media.

Telepresence
A true-to-life conferencing service that allows clients and colleagues to communicate across the globe without associated travel time and costs.

Conferencing
Integrated audio, video and web conferencing services that can enhance workforce collaboration across time-zones.
Telstra is Australia’s leading telecommunications and information services company with its international operations headquartered in Hong Kong. We provide top-tier international customers across Asia Pacific, Europe, the Americas, Middle East and Africa with a full breadth of holistic and end-to-end solutions including managed network services, global connectivity, data, voice, satellite solutions, collaboration and cloud.

We have licenses internationally and facilitate access to more than 2,000 PoPs in 230 countries and territories.

Our extended reach provides our customers with smarter technology solutions to support sustainable business growth.
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