

# 2008 IP Telephony (IPT) Management State-of-the-Market Report

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## Today's Speakers



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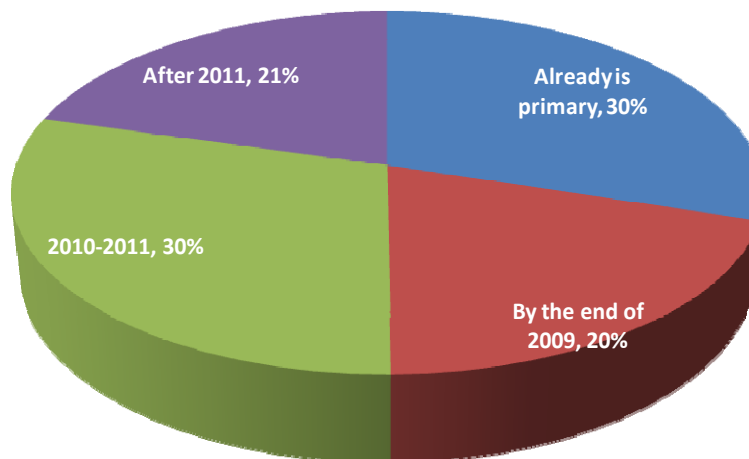
Mike Goodman  
PROGNOSIS  
Product Marketing Manager

## Survey Methodology

- Data collected in June of 2008
- Primary survey base was the Webtorials community
  - Fairly equal mix of end-users and service providers, with some manufacturers
  - Over 800 total respondents
  - Worldwide results
    - Approximately 45% North America
  - Details available at end of presentation
- Assumes there is sufficient IPT deployment to move to looking at management

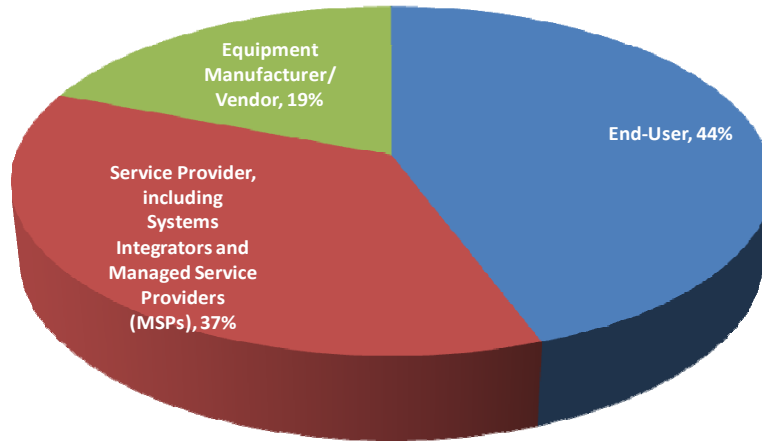
## Projected IPT Primacy

- At what point do you expect IPT to become the primary telephony technology for your company?



## Perspectives

- Please indicate which of the following best describes the perspective from which you will be answering this questionnaire.



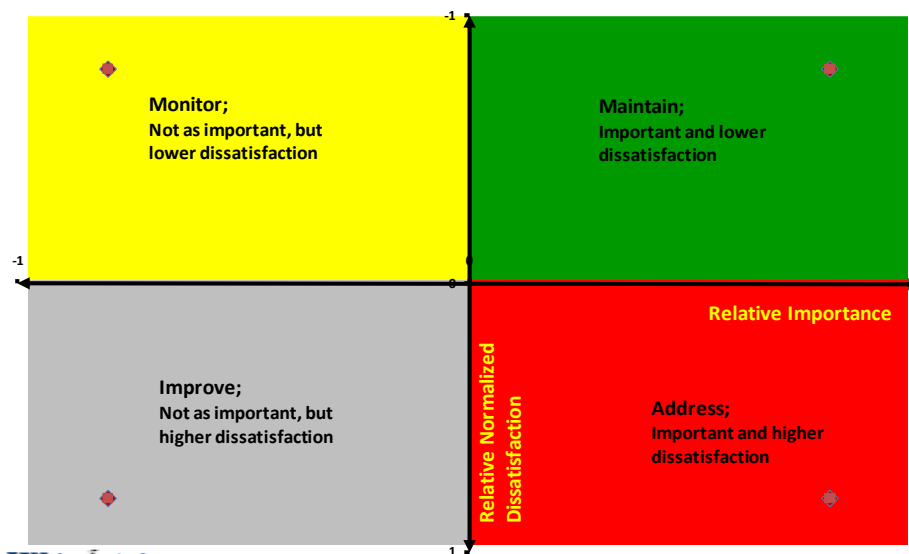
## Key Findings

- The most important capabilities are not being addressed adequately
- Top purchase drivers for enhanced management tools
  - Real-time performance monitoring
  - Measuring service levels
- Top drivers for deploying multiple IPT platforms
  - Vendor independence
  - Mergers or acquisitions
- Room for growth in enhanced management

# Relative Importance/Dissatisfaction

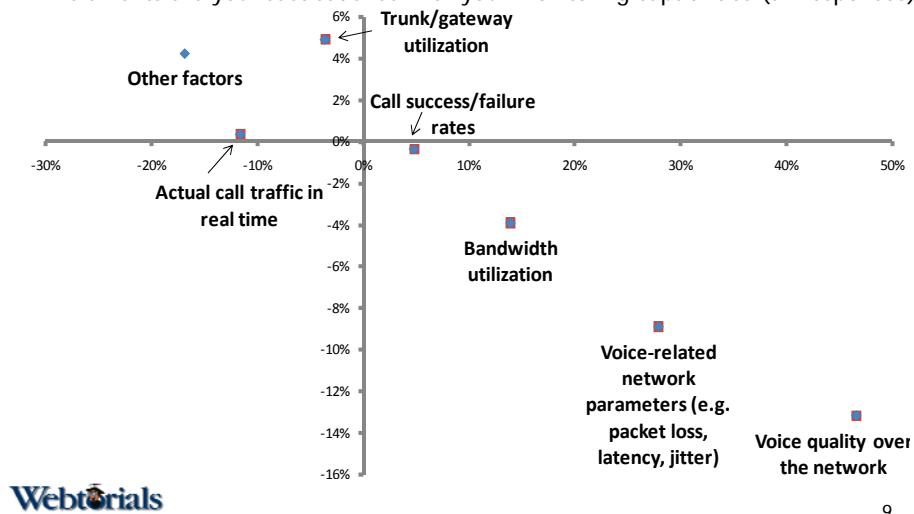
- Total Customer Experience (TCE) is key for identifying the most important issues
  - Whether the “Important” needs are being satisfied
  - Whether areas of “Dissatisfaction” are important
- Methodology
  - Average ranking of “Importance” and “Satisfaction” calculated for each area
  - Difference from average Importance or Dissatisfaction calculated
    - Average of these values is 0 (Neutral) for relative importance and satisfaction
  - Plotted Importance versus Dissatisfaction for each area
    - Vertical axis is inverted
    - Provides upper right quadrant where items are important and have low dissatisfaction
    - Example on following slide

## Importance/Satisfaction Matrix



## Importance vs. Satisfaction

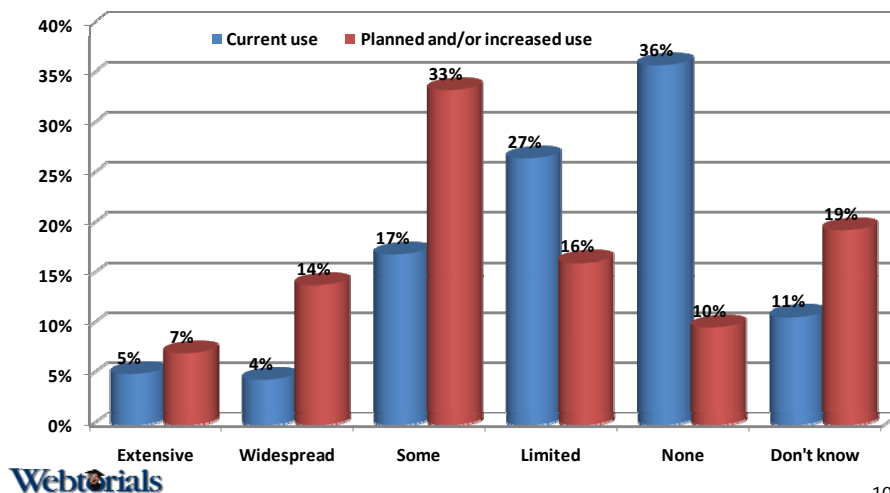
- Three most important elements of IPT to be monitored vs. with which three elements are you least satisfied with your monitoring capabilities (all responses)



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## 3<sup>rd</sup>-Party IPT Management Usage

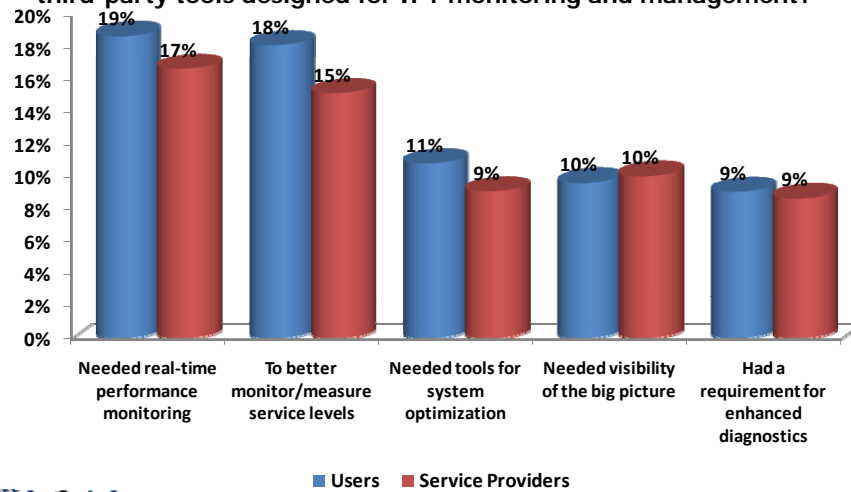
- To what extent are you using and/or planning to use third-party IPT management products?



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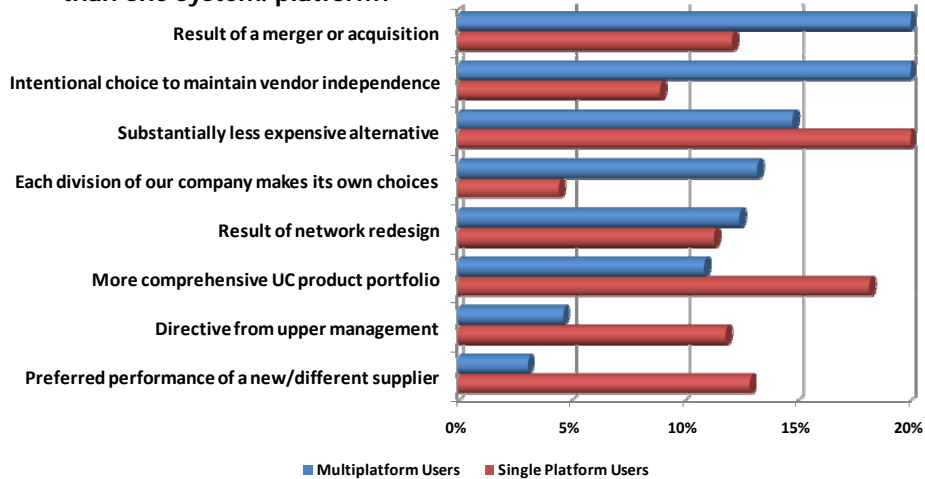
## Top Purchase Drivers

- What were (or would be) your top three drivers for purchasing/using third-party tools designed for IPT monitoring and management?



## Multiplatform Drivers

- What are the primary reasons that you have (or would have) more than one system/platform?



## A Word from the Sponsor

- This research was made possible in part due to the generous support of PROGNOSIS
- Comments by Mike Goodman
  - Product Marketing Manager



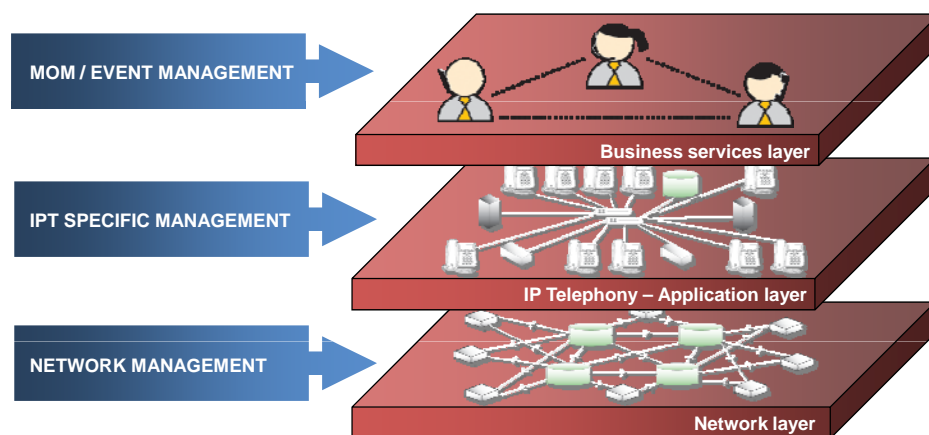
## IPT Management Vendor Perspective

- Research findings consistent with what we see:
  - Still some companies doing nothing
  - Others trying to get by with insufficient or non-telephony tools
  - Problematic when more than a few offices or PBXs
- Adding multiple IPT vendors adding complexity:
  - Knowledge, training, management, aggregated data, maintenance overhead (spare part inventory etc.)

## Emerging Best Practice

- Managing IPT as a business service:
  - Real-time and proactive monitoring to ensure service delivery
  - Time-based reporting to understand and optimize:
    - Service levels, capacity and utilization, voice quality
  - Substantiate delivery and decommission excess capacity
- Two best practice approaches:
  - Use service provider to manage IPT (35% of respondents)
  - Manage in house using best of breed management toolkit...

## Best of Breed Management Toolkit

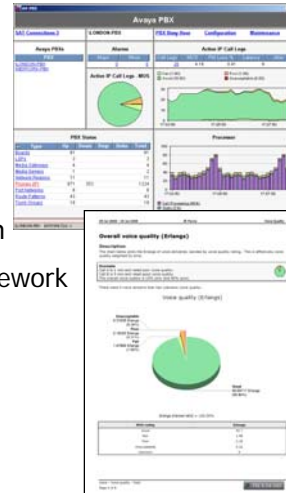


Managing IPT is more than just network management



# Specialized IPT Management Solution

- Telephony-centric view of all moving parts
- Empowers the telephony expert:
  - Call and voice quality monitoring/alerting
  - Deep diagnostics and troubleshooting
  - Service level reporting and analysis
  - Capacity planning and resource optimization
  - Integration with existing management framework
  - Visibility across multiple IPT vendors
- Better call quality, improved reliability, lower operational costs



## What's Next?

- This is the first part of a series on the IP Telephony (IPT) State-of-the-Market
- Planned coming report/brief topics with expanded coverage of the discussion here
  - Overall Trends for IPT Monitoring and Management
  - Detailed Total Customer Experience (TCE) analysis
  - Customer experience with current tools and more on drivers for third-party tools
- Webcast presenting the PROGNOSIS solution to the issues identified in the study

# Thank You!



## Background information

- The following slides provide some demographic information about the end-user respondents to the survey.

## Technology Adoption - Users

- How would you rate your company relative to how rapidly it adopts new technology?

We are reluctant to go to new technologies and will generally do so only when necessary  
8%

We like to be among the first to implement new technologies  
13%

We see ourselves as an early adopter; however, we wait until we see the problems others have had  
31%

We adopt new technologies when we are confident that they have become mainstream and widely accepted  
48%

## Role of Respondent - Users

- Which of the following best describes your role in an IPT management tools decision?

Other, 6%

None, 10%

Approve purchases, 11%

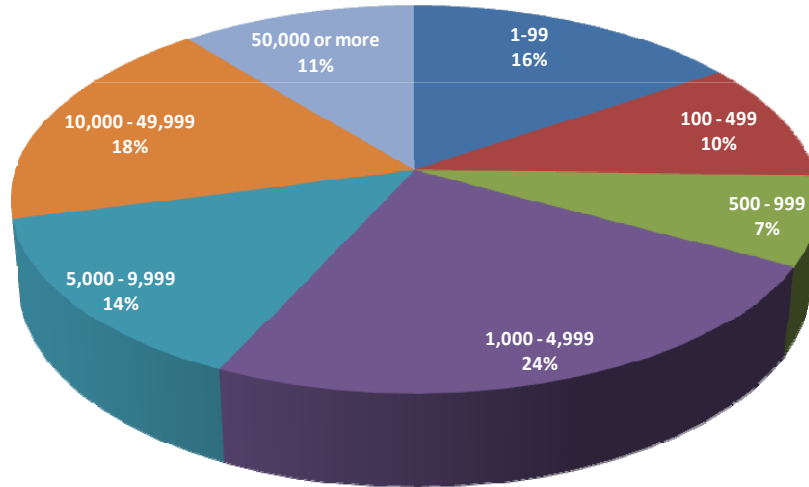
Network Design Team, 13%

Specify, 19%

Recommend, 41%

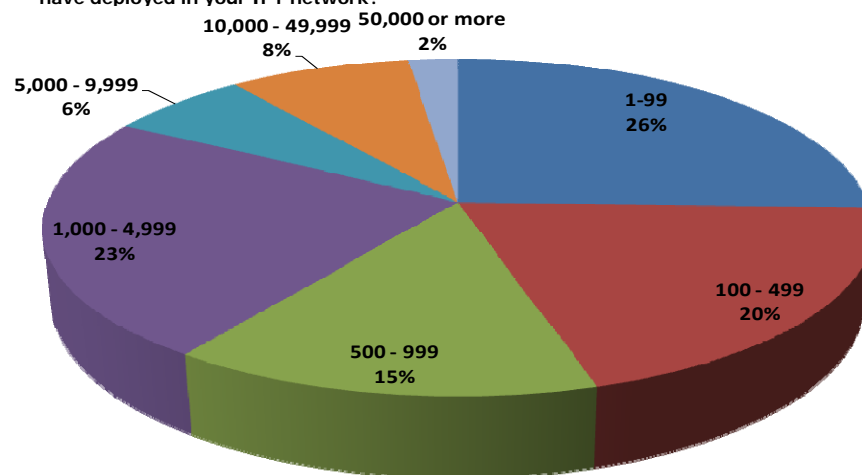
## Number of Employees - Users

- How many employees are there in your organization?



## Number of Phones - Users

- How many phones (including softphones and IP-enabled analog phones) do you currently have deployed in your IPT network?



## Geographic Distribution - Users

- Where is your company headquartered?

