

# ***Driving Adoption***

***A Conferencing Manager's Guide  
To Marketing And Promoting the  
Use Of Conferencing Solutions  
Within The Enterprise***



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A conferencing manager's guide to marketing and promoting the use of conferencing solutions within the enterprise.

*Sponsored by:*



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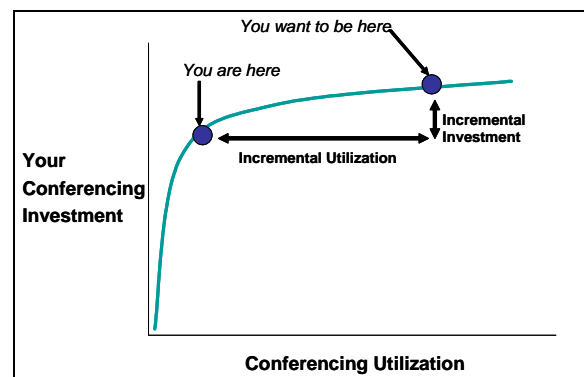
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*Diagrams courtesy of CMS Innovative Consultants*

# 1. Executive Summary

You've researched, tested, evaluated, and finally purchased conferencing equipment and services. You've acquired the needed audio and video bridges and gateways, or contracted for bridging services from a Conferencing Services Provider (CSP). You've settled on a web conferencing solution, either hosted by a service provider or deployed on your own network (or both). You've worked with your networking experts to install a video-capable network or external service, or to add video capabilities to your existing network. Now what? Your work isn't really done. You need to take the final steps to make the conferencing environment reliable, user friendly, productive. You need to take the final actions to **drive adoption** within your enterprise. Until your conferencing products and services are actually USED by your employees, your executives, line managers, and product managers won't reap the rewards that audio, video, and web conferencing solutions promise: decreased travel, reduced wear and tear and stress, improved teamwork, higher operating efficiencies, and faster decision making.

*The purpose of this white paper is help conferencing managers promote the use of conferencing within their organizations.*



**Figure 1 Incremental investments can drive conferencing utilization**

How does one increase conferencing utilization? **First**, you need to ensure that all equipment and services are in proper working order; **second**, you need to implement support mechanisms to solve problems and answer user questions; **third**, you need to market and promote the conferencing solutions that you've worked so hard to deploy. To that end, this document contains recommendations on:

- Preparing the conferencing environment including audio requirements, ease of use, lighting considerations, video image size and quality, and general room cleanliness and décor. Following these suggestions will help provide a positive end-user experience during any conferencing session.
- Deploying infrastructure products and services to make the conferencing environment easy to use and manage. These products support audio, video, and web conferencing applications.
- Conducting a marketing campaign within your organization to increase awareness of the services you can deliver and the benefits those conferencing services can provide. Recommended marketing initiatives include the creation of brochures and handbooks, hosting of demos and training, and the use of signs and advertisements in conference rooms, lobbies, auditoriums, and cafeterias.

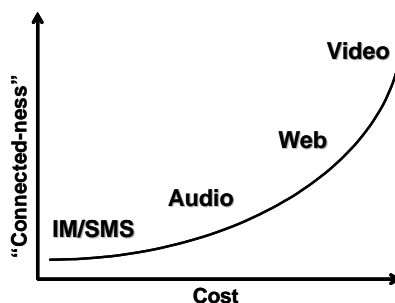
The majority of the suggestions and recommendations contained in this document DO NOT require significant room upgrades or major investments in hardware or software.

## 2. Understanding the Conferencing Options

As a conferencing expert, you understand that there are a range of conferencing options available. Your job is to educate your users on topics including:

- Which conferencing tools are available within the organization
- The costs, benefits, and potential risks of using each conferencing tool
- How to select the appropriate conferencing venue for specific applications
- Exactly how to access and use each conferencing medium

After some experience, users will understand that each conferencing type provides its own level of interactivity, or “connectedness” ranging from low with instant messaging to very high with videoconferencing. In addition, each conferencing type occupies different cost and complexity points in the spectrum.



**Figure 2 Matching the media to the needs of the message**

**Audio conferencing** is the mostly widely used, and best understood conferencing solution. Audio conferencing is easy to use (requires only a telephone), comfortable for the users, and relatively inexpensive. Audio conferencing today is available in two flavors; automated and attended. In an automated audio conference, the host manages all aspects of the meeting. An attended audio conference meeting is managed by one or more operators providing meet and greet, dial-out, and problem resolution services. As one might expect, attended audio calls are more expensive than automated meetings. Audio conferencing occurs in both conference rooms and individual offices.

**Web conferencing** is the newest and fastest growing segment of the conferencing industry. Basically a browser based form of data conferencing, web conferencing allows users to share computer based content through the public Internet, corporate intranet, or other IP network. Basic web conferencing solutions provide the ability to view another person’s computer screen, while function-heavy offerings allow document sharing and real-time collaboration. The most common use of web-conferencing is to host and distribute web-based presentations and software demonstrations. Web conferences are usually combined with audio conferences to provide content and voice sharing capabilities.

**Videoconferencing** has been around for approximately 20 years and provides the highest level of conferencing intimacy and “connectedness.” The basic videoconference is a point-to-point session between two different locations, however specialized bridging equipment (available for purchase or through conferencing service providers) enables multi-point meetings between three or more video systems. Because videoconferencing enables participants to see each other’s faces, videoconferencing is often viewed as a replacement for travel.

Videoconferencing has traditionally been implemented on a specialized digital telephone network called ISDN, but in recent years a trend to migrate videoconferencing over to IP networks has surfaced. Promising improved

reliability, lower cost, and improved efficiency, IP videoconferencing is likely to become the norm within the next few years.

The table in Appendix 1 provides more information about the differences between the types of conferencing.

**Integrated Environments**, often known as portals, are now available to give users a single place to schedule, launch, and control their conferences. Many of the integrated products and services available today support audio and web conferences, and some of them support video as well.

**CSP (Conferencing Service Provider) and CPE (Customer Premise Equipment) Solutions** are available for all forms of audio, video, and web conferencing. The decision to use an outside conferencing service provider (CSP) or purchase and host your own conferencing equipment depends on many factors, including your usage patterns, security concerns, aversion to risk, and ability to deploy the necessary internal support resources. In addition, it is also possible to purchase the equipment and use a service provider to operate and manage the conferencing infrastructure and endpoints. Since end-users are only concerned with the quality of their conferencing experience, the decision to insource or outsource conferencing services should not impact the end-users in any way.

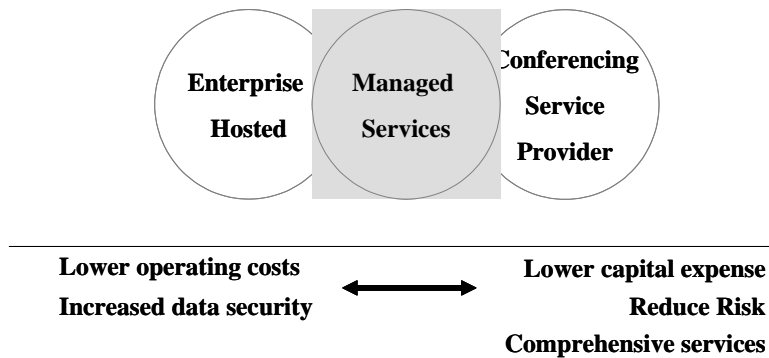


Figure 3 Three CSP vs. CPE Models

### 3. Preparing the Conferencing Environment

The first step to driving adoption within an organization is to properly prepare the conferencing environment. If the sound quality is inferior, if the remote participants cannot hear the presenter because the microphones are poorly placed or the ambient noise level is too high, or if the room lighting prevents acceptable video image quality, then your “clients” will not use your facilities. Even the best marketing can’t compensate for poorly prepared conferencing facilities. Our preparation coverage includes tips on audio and video for both conference rooms and desktop applications.

#### *The Conference Room*

The location of the conference room is as important as the equipment it contains. The following checklist should help conferencing managers and planners determine the best location for conference rooms.

<input type="checkbox"/>	Position	Away from common areas like copier rooms, storage rooms, and cafeteria areas.
<input type="checkbox"/>	Background Noise	Less than 35 dB SPL (decibels). Also called NC-35 (noise criteria 35), this can be measured using an SPL meter available in many electronics stores.
<input type="checkbox"/>	Infrastructure	Away from noise and EMI generators such as elevator shafts and main HVAC trunks.

**Figure 4: Determining Conferencing Room Location**

#### *Conference Room Audio*

The importance of audio during ANY conference cannot be overstated. Without audio there is no conference. Therefore, providing top quality audio should be the highest priority for every conferencing manager and every conferencing room. These factors apply equally across audio, video, and web applications whether your equipment is videoconferencing systems with attached microphones/speakers, speakerphones for ordinary point-to-point and multipoint telephone calls, or microphone/speaker arrays controlled by sophisticated hardware for echo cancellation, balancing, noise reduction, etc.

Once the location has been set, your goal should be to create an acoustically “dead” conference room. This means that audio signals should not easily reflect or bounce around the room causing audio distortion and inconsistent audio levels. Note that many acoustic problems cannot be heard from within the conference room itself because microphones “hear” different from the way people hear. Therefore, even if a room sounds “good” from within, problems may still exist for those listening through the microphone system. The following guidelines should be helpful during the room design and fit-out:

<input type="checkbox"/>	Ceiling	Workable, soft ceiling tiles or acoustic panels. No hard or shiny surfaces.
<input type="checkbox"/>	Walls	Covered with acoustic panels or felt. Avoid glass, wood, tile, or marble walls.
<input type="checkbox"/>	Floors	Carpeted with padding. Avoid hardwood, cement, tile, or other hard floors.
<input type="checkbox"/>	Windows	Covered with drapes, ideally motorized and controlled by AV control system
<input type="checkbox"/>	Artwork & Furniture	Avoid large glass framed artwork and hard, shiny surfaces.

**Figure 5: Conference Room Acoustic Treatments**

#### *The Sound System*

The conference room sound system consists of three parts: the microphones, the sound processing system, and the reproduction (speaker) system. Each of these areas can significantly impact the audio quality of any conference.

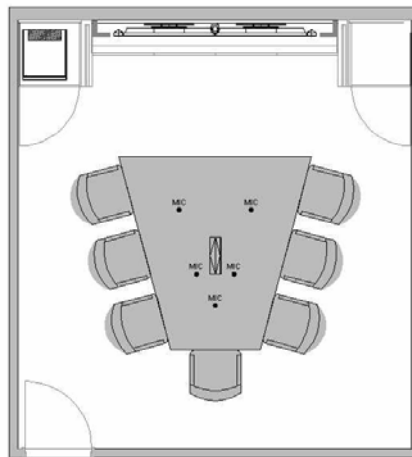
i) Designing the Microphone System

The following table lists the steps for designing a conference room microphone system.

[ ]	Select Type of Microphones	Options include boundary, table, and ceiling microphones. Ceiling microphones should be avoided if possible.
[ ]	Select Pick-Up Pattern	Options include omni-directional, cardioid, super-cardioid, and hyper-cardioid. Use the tightest pickup pattern possible, and minimize use of omni-directional mics.
[ ]	Determine Locations (and Quantity)	Closer to participants is always better. Typically, two people can be covered by a single table or mini-gooseneck mic.
[ ]	Plan Cabling Route	Mic cables pick up noise very easily and should not be close to high voltage, network, telephone, ISDN, or speaker cables.
[ ]	Calibrate Microphones	System should be balanced to ensure consistent levels from each mic. Requires special tools and knowledge. Consult system installer or A/V consultant..

**Figure 6: Designing A Microphone System**

The drawing below illustrates a typical microphone plan for a video conference room (note the lack of a microphone at the foot of the table).



**Figure 7: Typical Conference Room Microphone Plan**

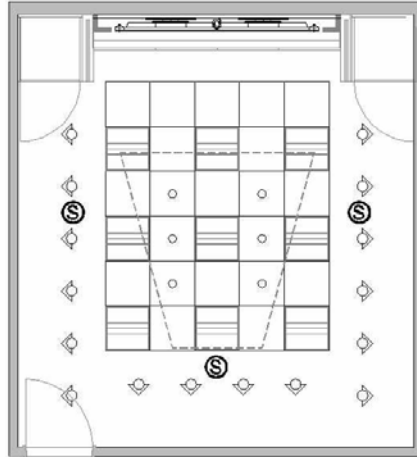
ii) Speaker system

The conference room speaker system also requires careful planning to ensure a positive meeting experience. The following table lists the key areas of consideration:

[ ]	Speaker Type	Ceiling speakers are a superior way to provide an equal distribution of sound to all participants seated at the table.
[ ]	Speaker Specification	Typically 70-volt distributed speakers are used in conference rooms. Speakers should be optimized for voice range.
[ ]	Location & Quantity	Install speakers above and behind seated participants to avoid echo and feedback. Allow 6 feet between speakers.

**Figure 8: Ceiling Speaker Type and Layout**

The drawing below illustrates a typical ceiling speaker and microphone plan for a video conference or audio conference room. Note the inclusion of light fixtures in the ceiling plan.



**Figure 9: Typical Conference Room Ceiling Speaker Plan**

**Tips and Tricks:**

- 1) Studies show that high sound levels and distorted sound quality are more distracting and annoying to participants than low audio. Therefore, resist the temptation to set the volume level too high.
- 2) To resolve audio problems, use items like automatic gain controllers (AGCs), limiters, filters, and feedback eliminators. For rooms with non-optimal layouts, glass walls, high background noise, or other audio problems, as well as for large rooms, these devices are worth consideration.

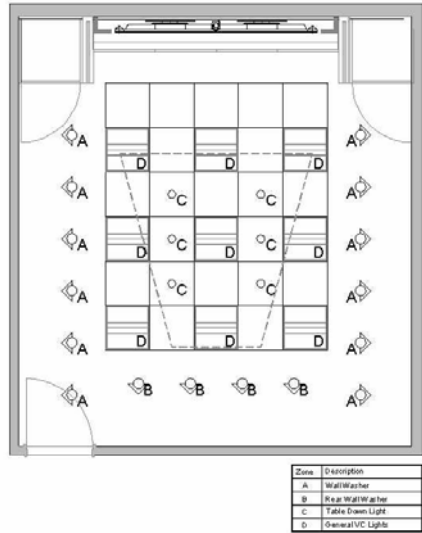
***Lighting Considerations***

Many people believe that standard meeting room lighting will provide sufficient lighting for videoconferencing. Unfortunately, the reality is that cameras “see the world” in a manner different from that of the human eye, and therefore a room that seems properly lit may not be videoconferencing-ready. The following table illustrates the lighting required for a typical video conference room:

[ ]	Table Lighting (60 – 70 ft candles)	Fluorescent fixtures positioned directly over the table area provide task lighting for note taking and standard meetings.
[ ]	Face Lighting (a.k.a. fill lighting)	Fluorescent fixtures positioned over the table but designed and installed to provide reflected (angled) lighting. Illuminates dark areas and shadows on participants’ faces.
[ ]	Perimeter Lighting (30 foot candles)	Incandescent fixtures positioned around the perimeter illuminate areas around table and walls (wall-washers). Low light levels provide optimal contrast for the camera.

**Figure 10: Conference Room Lighting Design**

The drawing below illustrates the typical lighting plan for a videoconference room. Note the use of all three types of lighting; table, face, and perimeter.



**Figure 11: Typical Conference Room Lighting Plan**

Tips and Tricks:

- 1) The use of light dimming controllers (available from Lutron – [www.lutron.com](http://www.lutron.com) - and Brightline – [www.brightlines.com](http://www.brightlines.com)) allows participants to set proper lighting levels with the push of a single button.
- 2) Integrating the light dimming controllers with the AV control system ensures the use of proper light settings for all videoconferences.

***Conference Room Video Quality / Image Size***

The ability to see clearly the remote participants and/or presentation content is an important part of a positive meeting experience. Chairs should be arranged so that all local participants can see the “screens” while the screens need to be large enough to have the remote people and the remote presentation visible and readable.

The following table lists some of the options for presentation and display systems:

Type	Image Size / Room Size	Compatible Signals*	Cost
Video Monitors	Small (5”) to Large (37”+) Small to Medium Room	Video only	Inexpensive
Data Monitors	Small (5”) to Large (37”+) Small to Medium Room	Video, Computer Signals	Moderately Expensive
Flat panels	Medium (30”) to Large (60”) Small to Medium Room	Video, Computer Signals	Expensive
Front Projection	Medium (30”) to Very Large Medium to Large Room	Video, Computer Signals	Moderately Expensive**
Rear Projection	Medium (30”) to Very Large Medium to Large Room	Video, Computer Signals	Expensive**

\* Video represents NTSC, PAL, and/or SECAM signals. Computer signals include VGA, XVGA, SVGA and other PC standards as well as Macintosh video signals.

\*\* Front projection systems require a front projection screen and often a projector mount or lift. Rear projection systems require a projection room and often a mirror assembly. These items contribute to the cost of deploying these solutions.

## Tips and Tricks:

- 1) To calculate the necessary image size, measure the largest viewing distance (the distance between the image and the furthest chair in the room) in inches and divide that number by eight. The resulting number is the display height necessary for effective viewing. For example, a viewing distance of 240 inches (20 feet) requires a 30" image height, which is approximately what is provided by a 60" flat panel.
- 2) Many designers recommend even larger image sizes when small text or detailed graphics are used. In this case, replace the above image height factor of eight with either six or seven.

## ***The Desktop Environment***

Audio, video, and web conferencing are often performed directly from the desktop. While offering users the convenience of not having to schedule or reserve a shared resource like a conference room, and not having to leave their office or cubicle, desktop of personal conferencing also presents its own preparation challenges.

### ***Desktop Audio***

Audio conferences from the desktop nearly always employ the normal telephone already installed on the desktop. This is one reason that audio conferencing is so popular – it requires no special equipment, network, or user training. However, unlike the conference room, most offices and cubicles have not been designed with conferencing in mind. Users should be made aware however that normal office background noise can be distracting in a multipoint (or point-to-point) call and that speakerphone mode is not always appropriate and that the mute button should be amply employed.

For desktop videoconferencing, audio is also a primary concern. Many desktop videoconferencing systems do not handle acoustic echo cancellation in a robust manner and the audio quality can be significantly improved with the use of a headset which, by its basic design, separates the sending/receiving audio streams, eliminating many technical problems, and improves the audio quality of a desktop videoconference

### ***Desktop Lighting and Video***

Desktop videoconferencing users should be aware that good desktop lighting and camera placement are just as important as they are in the conference room setting. Lighting is often not a straight forward issue, since the user often has limited control over the environment. Likewise, camera placement options are usually limited.

## 4. Preparing the Infrastructure

Users expect to be able to schedule conferences easily and conveniently, to have help available as required, to receive detailed billing and cost information (sometimes), and to have all problems be quickly addressed. Mastering these areas allows conferencing managers to provide a positive conferencing experience for their end-users.

### *Scheduling & Reservations*

The scheduling and reservations process is one of the most important aspects of the conferencing environment because it provides most end-users with their first impression of conferencing services. Your meeting reservation process must be convenient, accessible, and user friendly, whether the application is audio, video, or web conferencing. (Most audio conferences today are unscheduled, but important events and meetings are still often reserved or scheduled. Multipoint video calls are often scheduled, while web conferences tend to be an even mix of scheduled and unscheduled.)

To manage the conference room scheduling environment effectively, Wainhouse Research recommends the use of conferencing scheduling software packages or services. These systems range from inexpensive to very expensive depending upon the feature set, necessary customization, and resources (rooms, people, etc.) under management. Excellent software packages are available from companies including Forgent Networks, MagicSoft, Todd Video Network Management, and some of the videoconferencing vendors themselves for those who prefer customer premises equipment. Solutions are available from most Conferencing Service Providers as well. In addition, many vendors and service providers are providing hooks between their products and Microsoft's popular Outlook scheduling system.

The benefits of a centralized scheduling system include the ability to:

- View room schedules quickly and easily
- Schedule reservations 24 hours a day
- Book rooms and resources in remote locations
- Schedule multiple resources simultaneously
- Share rooms and resources between multiple departments (and even companies)
- Empower end-users to schedule and modify their meetings independently
- Maintain up-to-date room listings and equipment inventories
- Track equipment and meeting problems and resolutions
- Generate a variety of reports and statistical information to justify investments and expansions

Experience has shown that the best solution is often to encourage end-users to book their meetings themselves via centralized scheduling systems, but to make dedicated support personnel available for assistance. This provides the end-users with the control they crave and the support they need in a cost-effective manner.

Additional information on scheduling systems is available at [www.wainhouse.com/whitepapers](http://www.wainhouse.com/whitepapers).

### *Conferencing Personnel*

In an effort to minimize costs, companies are reluctant to deploy technologies that require significant support personnel. In the past, this limited the deployment of videoconferencing. Fortunately, thanks to more reliable and easier-to-use videoconferencing endpoints, centralized management systems, and global scheduling software packages, the quantity of personnel needed for videoconferencing support has been greatly reduced.

A typical conferencing support team will consist of the following people / teams:

- Schedulers / Reservationists
- Operational Support (technicians) / Meeting Management
- Departmental Management
- Administration / Billing

The need for each of these resources depends very much upon the internal culture of the individual organization and the infrastructure elements in place. For example, if the company follows a policy that all meetings are to be scheduled by end-users, there may be little justification for dedicated reservationists. Furthermore, since many centralized scheduling systems provide cost and billing capabilities, administration and billing resources may not be required. These types of strategic infrastructure (software) deployments can significantly decrease the cost of ownership for conferencing technologies.

Our experience with audio and web conferencing products and services is that the load on conferencing personnel is largely concentrated on training. Once people know how to launch or attend an audio conference or a web conference, they are far less likely to encounter technical issues than is the case with videoconferencing.

### ***Billing and Chargeback Systems***

In many organizations, the use of conferencing resources is charged back to the user department, an obvious impediment to driving adoption. If the conference is CSP-based, the chargeback can be very straightforward. If not, you may be tasked with charging back for communications costs, the use of internal equipment, plus overhead, etc.

For organizations without centralized scheduling systems, billing and chargeback methods are somewhat limited by the lack of easily accessible usage data. Fortunately, many conferencing scheduling packages track all usage of video conferencing equipment, meeting rooms, and even portable equipment. As each reservation is created, detailed information about the meeting host, including the cost code, is captured in the system. This information can then be exported in report (or excel) format for use by corporate billing and chargeback systems.

Note: chargeback systems often have the effect of causing conferencing (especially videoconferencing) usage to decrease since the “cost” of a conference or video call is highlighted. Department managers may be tempted to appear to be cutting costs by cutting videoconferencing usage, perhaps opting for audio conferencing or web conferencing (which may cost MORE than a video call, depending on the configuration involved) if videoconferencing appears as a separate line item in their monthly cost figures.

Depending on how your organization handles internal chargebacks, you may be in the position of highlighting to the end users some of the benefits of conferencing by including with the chargeback reports your estimate of how much they saved by using conferencing technology.

### ***Tracking and Resolving Issues***

The high level of interaction afforded by conferencing makes conferencing suitable for many critical company meetings. When such a meeting is impacted by technology problems, the results can be significant. For this reason, Wainhouse Research recommends the use of scheduling systems that include basic problem tracking capabilities. Alternatively, such problems can be tracked using the company wide issue tracking system if such exists.

The most important aspect of trouble tracking and resolution is to keep the impacted end-users “in the loop” at all times. Ideally, the end-users would receive an e-mail or phone call confirming each of the following:

- Logging of the problem (creation of the trouble ticket)

- Start of troubleshooting efforts
- Discovery of problem
- Resolution of problem or escalation to next level of support
- Closure of trouble ticket

All communications should provide the end-users with a clear, non-technical description of the cause of the problem and the steps taken to avoid any recurrences. In addition, should a “trouble ticket” remain open for more than a few days, follow-up emails should be sent to the end-users explaining why the issue is still un-resolved. Finally, information about any problems that impacted their meetings should be presented to end-users during quarterly account meetings (described below). Data from tracking and resolving problems is also very useful input to training sessions.

### ***Insourcing (self-hosted) vs. Outsourcing (conferencing service providers)***

Determining whether use enterprise hosting, an outside conferencing service provider (CSP), or a managed services strategy is outside the scope of this document. But one of the advantages of working with a competent CSP is that the CSP not only provides the needed conferencing resources (audio, video, web, integrated) as a service, but also helps you prepare the infrastructure elements described above to help drive adoption. Many CSP offerings include sophisticated scheduling systems, billing packages, and problem tracking systems that can automate much of your conferencing environment. In addition, many CSPs have dedicated resources tasked with providing end user training and helping conferencing managers develop and implement internal marketing programs.

Understanding the full range of CSP services available to you is a key step in understanding your “infrastructure” and being able to communicate to your users the different conferencing resources available. Many CSPs have audio, video, and web services that cover a spectrum of user needs ranging from impromptu meetings among small groups of people (typically not scheduled or reserved in advance) to conferencing services that are “event-centric.” The events business centers on important, high impact conferences that typically employ a spectrum of operator or CSP resources before the event, during the event, and often after the event as well.

## 5. Making Your Conferencing Service Easy to Use

The three most important elements to making your conferencing service easy to use are **training, training, and training**. After that, there are a few documentation steps that will help people get started and address minor problems when they arise.

### *End-User Training*

The first type of training is geared toward teaching end-users how to use conferencing technology. If possible, these sessions should be conducted regularly to meet the needs of busy employees and new hires. Topics to be covered include:

Types of conferencing and benefits of each	Benefits of conferencing overall
How to schedule a meeting	Pre-meeting requirements
How to initiate or host a conference	How to attend a conference
Post-meeting suggestions	Tips and tricks for effective conferencing

Trainers should use the technology available in the conference room. Therefore, content should be presented in PowerPoint form, and the conferencing section should include live audio, video, and web conferences (if applicable).

End user training sessions should be conducted monthly if at all possible and more frequently when new facilities are opened (also a good excuse for holding an open house). In addition, an introduction to conferencing resources should be made part of the new employee orientation program. In the same way that new recruits are briefed on the corporate email and PBX-phone system, they should be introduced to the audio, video, and web conferencing solutions deployed by your company, and the benefits that these tools provide.

Our experience indicates that the most effective training programs are modular and cater to various types of users. For example, conferencing managers may choose to offer basic and advanced courses on each of audio conferencing, web conferencing, and videoconferencing. The basic courses would introduce students to basic functionality and guide them through their first successful conferencing experience. Advanced training modules would cover topics like multipoint video calls, using a web conferencing solution for application sharing, whiteboarding and polling.

If you are currently using a CSP, you may find that your service provider has already created a variety of training modules covering their products and services. In addition, training may be available from hardware manufacturers and resellers. With minor revisions, these modules may meet your training requirements quite nicely.

### *Administrator Training*

In recent years the role of the administrative assistant has increased significantly. Busy executives, and even mid-level employees, depend upon departmental support staff to manage the coordination, organization, and logistics behind their meetings. Therefore, it is important that corporate administrators become comfortable using conferencing resources.

The administrator training should be similar to the end-user training with more emphasis placed on scheduling, and pre- and post-meeting requirements. The administrators should be trained to consult with their end-users to help them select the right types of conferencing for their specific requirements. In addition, they should be able to schedule and modify meeting reservations on behalf of their end-users. One tip for increasing the attendance at

administrator training is to cater the sessions, and mention in the invitation that food will be served. Administrator training should be conducted regularly.

## ***Documentation***

### ***Quick Start Guides***

Conferencing users need to know how to initiate conference calls quickly and easily. Therefore, appropriate quick-start guides should be available **in every conference room**. These guides should cover the following topics:

- |   |   |
|---|---|
| How to schedule a meeting               | How to initiate an audio conference call          |
| How to initiate a video conference call | How to mute / unmute the microphones              |
| How to adjust the incoming volume       | How to adjust camera position                     |
| How to set the proper lighting levels   | How to disconnect all calls / terminate a meeting |
| How to request help / support           |   |

### ***User Handbooks***

Conferencing managers can foster success by creating and distributing end-user handbooks designed to guide end-users through the process of using the services. These handbooks should include the following information:

- |  |  |
|--|--|
| Detailed descriptions of each service offering         | How to make, update, and cancel meeting reservations     |
| 'How-To' section for using each service                | Screen shots of scheduling systems or control interfaces |
| Tips and tricks for getting the most from each service | Warnings about limitations or common problems            |
| Basic troubleshooting tips and suggestions             | Sources for additional information (including intranet)  |

The end-user handbook should be structured to allow end-users to either read through the entire document or reference specific sections of interest. In addition, a glossary of key terms is often helpful. As with all other collateral, the user handbooks should be updated frequently and made available to all end-users on the corporate Intranet. In addition, handbooks should be made available within conferencing rooms, at registration desks, and at reception areas.

### ***Help Notices***

Nothing is more frustrating than having many people in a conference room when a problem occurs, and not knowing what number to call for help. Therefore, the telephone number of the conferencing department support line should be prominently displayed in every conference room. Labels with this number should be placed on key pieces of equipment, on the conference room telephone, and in other locations as appropriate. This help number should also be marketed to those who want help *in advance* of a meeting.

### ***Outside Training Resources***

As mentioned above, conferencing administrators may benefit from the use of existing training resources from third-parties. The most common sources will be conferencing service providers, hardware manufacturers, resellers and integrators, and industry consultants. Many of these companies make their on-site training available for free realizing that such training drives the demand for their products.

## **Driving Adoption**

## 6. Marketing Your Conferencing Services

Marketing video conferencing within the enterprise does not require a marketing degree, nor does it require dedicated marketing personnel. However, it does involve a variety of projects designed to spread the word about videoconferencing and to overcome any negative pre-dispositions held by the user community. Perhaps the most common complaint we have heard in enterprises where videoconferencing is used sparingly is that many employees didn't even know that the service was available.

### *Marketing Collateral*

The first step in the VC marketing campaign is the creation of the necessary collateral materials including brochures, white papers, site lists, and best practices documentation. As with any other product or service, this type of documentation is necessary to demonstrate to potential customers (i.e. internal end-users) the professional nature of the services and benefits from the offerings. Wainhouse Research recommends the following types of collateral:

[ ]	General Brochure	Full color marketing piece describing the type, location, reservation procedures, and cost of services available. Should include quotes from satisfied users of the services. Available in hard copy and PDF.
[ ]	Service Brochures	Individual brochures for each service available (video, audio, web, etc.). Should describe service offering, features, functions, costs, and how to schedule the service. Available in hard copy and PDF.
[ ]	Site Lists	Available as a document (PDF) and online, the site list illustrates which services are available in which locations. Should be organized by type of service and by location. Must be updated frequently as sites are deployed / decommissioned.
[ ]	White Papers / Articles / Case Studies	Designed to educate the end-user community, this content can be internally or externally generated. Content should be accessible via the conferencing dept. Intranet site, and summaries and abstracts of each element should be provided.

**Figure 12: Marketing Collateral**

### *Newsletters / Bulletins / News Flashes*

Effective marketing requires consistent exposure to the target market. Therefore, conferencing departments should consider the creation and regular distribution of professionally written newsletters, bulletins, and short news flashes. Topics to cover in these recurring releases include:

- New offerings
- Service enhancements
- Site list changes and updates
- Cost changes (hopefully price / cost decreases)
- Tips and tricks on how to be a successful conferencing user
- Staffing updates
- Procedural and process changes

These documents should be distributed each month to an opt-in list of end-users interested in conferencing services. For political reasons, this service should be opt-in only and should not be released to the entire user community. As a means of increasing the audience, invitations (including the link) to opt-in to the list should be placed on the corporate website, electronic surveys, handbooks, and collateral. In addition, as with all marketing collateral, these files should be available for download from the corporate Intranet site.

## ***Signs and Displays***

Conferencing managers should create and strategically place signage and displays promoting conferencing services. Specific suggestions include:

- Three sided cards on conference room tables and credenzas
- Signs in common areas and bulletin boards (cafeterias, snack bars, lobbies, reception areas, etc.)
- Video / PPT commercials on monitors located throughout the facilities

Note that most organizations wouldn't approve the deployment of announcement displays solely to promote conferencing services. However, by hosting additional information from other departments, such as corporate announcements, stock prices, safety information, and today's cafeteria menu, it may be possible to obtain executive buy-in on this project.

## ***Open-Houses / System Demonstrations***

Companies have reported to Wainhouse Research significant success in promoting conferencing by holding open-houses in conference rooms. Typically, one room per facility will be staffed from 9 AM to 5 PM. End-users are then invited to visit these conference rooms at any time during those days without the need to RSVP. A typical open house includes the following:

- Available literature (brochures, reports, user handbooks, quick-start cards, site lists)
- Live audio, video, and/or web conferences with other facilities
- Tours of the corporate Intranet site
- Training on how to schedule and host a conference
- Training on other conference room equipment such as electronic whiteboards, projectors, etc.
- Requests to schedule follow-on meetings with department managers

## ***Intranet Web Site***

In recent years, the corporate Intranet has become one of the most valuable informational resources for employees. Therefore, it is vital that the conferencing department have a significant presence on the company Intranet. Among other items, the typical conferencing department website should include the following up-to-date items:

- Overview of services offered
- An in-depth description of benefits and features
- FAQs
- Short versions of user guides (how to book a meeting, etc.)
- Detailed cost information (and perhaps a savings calculation tool)
- The ability to download site listings, user handbooks, brochures, newsletters, bulletins, etc.
- Quotes and testimonials from satisfied internal clients
- Statements from upper-level managers about the firm's commitment to conferencing technologies
- Access to industry and company white papers, articles, and case studies on conferencing
- Access to user surveys and recent survey results
- Bios of conferencing department staff
- News about recent events, activities, and milestones
- Links to other services (such as the company's web-based scheduling system)

## ***One-On-One Meetings***

One-on-one meetings (a.k.a. account meetings) and departmental staff meetings are a critical part of generating awareness and providing customer service and support. These meetings are a valuable opportunity for conferencing

managers to meet with line management and with their administrators, who serve important gatekeeper roles in many organizations. The goal of these meetings is, to better understand client needs and concerns, to promote conferencing services, to solicit first-hand feedback, and perhaps to justify additional investments in conferencing products and services.

Location: Conference room convenient to end-users  
Invitees: Department managers, key end-users, support staff and administrators  
Frequency: Quarterly (at least)

Suggested agenda:

- 1) Conferencing manager provides usage report for the last quarter and year.
- 2) Conferencing manager summarizes recent problems and solutions
- 3) End-users present their feedback on conferencing department's services, support, and value
- 4) Conference manager presents information about future projects, recent events, or industry advances
- 5) All parties discuss steps to help end-users receive maximum value from conferencing team

The key to an effective one-on-one meeting is to clearly communicate to the end-users your desire to provide the best possible service and support. By showing your genuine interest in exceeding their expectations, you set the stage for a productive and constructive meeting.

### ***The Corporate Travel Department***

Many companies have internal travel departments. The staff within the travel department should be educated on the conferencing solutions you offer, the savings they can generate, and their benefits for busy managers and executives. The travel department should be encouraged to respond to all reasonable travel requests with a written or oral questionnaire that asks the tough question, "could the purpose of this trip be accomplished by conferencing"? The goal is to remind the requester of the available conferencing options and the potential cost savings that can be realized by replacing this business trip with a video, web, or audio conference meeting.

### ***The Corporate HR Department***

Many companies have found videoconferencing to be an effective interview tool, particularly for the initial screening interview. Encourage your HR department to institute a video interview program. This introduces more people to the power of videoconferencing, especially new hires. You may want to work with a third party booking agency to find public rooms where you need them.

### ***The Top-Down Endorsement***

We have observed that the enterprises where conferencing is most readily adopted are often the enterprises where conferencing is endorsed by the most senior management. If possible, arrange for your CEO or other C level manager to use a conferencing technology during a high-profile, wide exposure corporate event. Ideally, the executive would state publicly that conferencing is a viable communications tool that can save money, increase productivity, and boost collaboration inside the company.

### ***End-User Surveys***

The goal of every conferencing manager should be to meet and ultimately exceed the expectations of the end-users. Soliciting feedback from end-users is one of the best ways to measure the performance of the conferencing services

team. One effective way to coordinate feedback collection is through the use of end-user surveys. Conferencing managers should consider several different survey vehicles:

[ ]	Quarterly Surveys	Released via e-mail to all users of conferencing during the quarter. Allows for forwarding to other users for feedback. Includes basic satisfaction questions.
[ ]	Post-Meeting Surveys	Released in hard copy or via e-mail to meeting hosts and participants right after the meeting. Includes questions about the performance, quality, support, and utility of the conferencing services used during their last meeting.
[ ]	Random Surveys	Meant to discover open problems and issues, these surveys should be sent to hosts of randomly selected meetings. Should include specific questions about the reservation process, support personnel, quality and condition of facilities, and perceived value of services.
[ ]	Follow-Up Surveys	Sent to impacted end-users after a problem or issue has been resolved. Designed to solicit feedback on the method of discovering and resolving the problem and the communications maintained with the end-users throughout the process.
[ ]	Online / Web Surveys	Hosted on the company Intranet site, these surveys cover the breadth and value of the services provided, and the general performance of the conferencing team. Note that survey results may be highly critical as only interested end-users are likely to participate.
[ ]	New Offering Surveys	Designed to test the interest and need for new services, these surveys include questions about the importance of a new offering, the perceived value, the expected frequency of use, and relative concerns. Surveys should be released to a random sample of end-users.

**Figure 13: Recommended End-User Surveys**

The results of these surveys should be available to end-users on the corporate Intranet and in quarterly / yearly reports.

### ***Quarterly and Yearly Reports***

A common criticism about conferencing departments is that they don't freely and openly share cost and usage information with end-user departments. This can be addressed by releasing quarterly and/or yearly reports that outline the performance of the conferencing services department, including:

- Staffing information (headcount, locations, etc.)
- Facility information (number of systems, locations)
- Information about service updates and enhancements
- Detailed usage information (by location, by service type, etc.)
- Departmental cost information (headcount, maintenance, projects, etc.)
- Comparison information (benchmarking against conferencing departments in other organizations)
- Future plans for new service offerings and/or facilities (the departmental roadmap)
- Notes and comments from the conferencing department managers
- Information about major contracts or partnership formed (i.e. selection of new service provider)
- Quotes from satisfied end-users / executives
- Statistical information from end-user surveys
- Graphs demonstrating trends

The creation and distribution of such reports demonstrates to the end-user community that the management of the conferencing department understands the critical nature of their service offering.

## ***Marketing During Meetings***

One of the best ways to market the conferencing services department is during meetings and conferences. This can take a variety of forms including:

- Placing / leaving marketing collateral on the conference table
- Placing information cards/signs on tables and credenzas
- Running commercials, advertisements, and messages on display devices in conference rooms
- Playing commercials, advertisements, messages, and announcements while on-hold during calls

These marketing activities provide an excellent opportunity to expose your existing customers to new features, functions, and offerings.

## ***Marketing After Meetings***

Many conferencing departments miss a wonderful marketing opportunity by simply forgetting to contact their users after their meetings. Often this is because conferencing managers expect to receive negative feedback from disappointed users. Other times it is a simple misperception that marketing ends once the meeting itself begins. Conferencing managers should consider the following:

- Post meeting satisfaction survey – left in room or via email
- Thank you email to conference hosts, organizers, and participants
- Marketing statements placed on the invoice / chargeback forms
- Aggressive and pro-active problem resolution

## ***Monitoring Usage***

Conferencing managers should monitor usage and develop an understanding of what is “normal” for any site, conference room, or equipment type. If usage begins to drop, or if there are sharp unexplained usage patterns, conferencing managers should explore to find the root cause of the change. Problems may need to be fixed, or additional training may be necessary.

## Appendix 1: Conferencing Types

Comparison Area	Instant Messaging Short Message Service	Audio Conferencing	Web Conferencing	Videoconferencing
Level of "Connectedness"	Low	Low to Medium	Medium	High
Cost	Free / Low	Low	Medium	High
Interface	IM Client / Notes	Telephone	Browser	Video System
Ease of Use	High (easy to use)	High	Medium	Low
Training Required?	None	None to Basic	None to Moderate	Moderate to Advanced
Support Requirements	None to Limited	None to Limited	Limited	Moderate to High
Usage Locations				
Desk	YES	YES	YES	YES
Conference Room	Some	YES	YES	YES
Mobile (Cell / PDA)	YES	YES	NO	NO
Content				
Text	YES – Primary	NO	YES – Limited	NO
Voice	NO	YES	YES – When combined with audio conferencing	YES
Data	NO	NO	YES – Primary	YES
Video (Face to Face)	NO	NO	NO	YES - Primary

## Appendix 2: Tips & Strategies

During our interviews with conferencing managers, and based on our experience working with end-users in the conferencing space, we've compiled the following list of tips, tricks, and strategies for conferencing managers. Following these suggestions will improve end-user satisfaction and therefore increase the usage of conferencing technologies.

[ ]	Make Scheduling Easy	Deploy centralized scheduling systems and, if possible, allow end-users to schedule their own meetings. Provide end-user training on these systems.
[ ]	Hide the Technology	Install A/V control systems or other front-end tools to simplify the use of any video equipment. Provide end-user training on the use of these systems.
[ ]	Keep Things Clean	Keep all conferencing spaces neat and tidy at all times. This includes conference rooms, meeting rooms, storage rooms, projection rooms, control rooms, and office area. All personnel should be well groomed and professionally dressed.
[ ]	Create A Community	We recommend the creation of a conferencing user group within your organization. Meetings could be held every quarter and would involve discussions of recent events, new features, corporate requirements, and service concerns.
[ ]	Contests and Incentive Programs	Business travelers appreciate perks, so give them perks for avoiding business travel. Programs include non-frequent flier programs, gift certificates, free meetings, and other give-aways.
[ ]	Partner With Other Departments	Strive to partner with food services, security, cleaning services, global travel, and corporate communications. These departments can enhance the end-user conferencing experience and may drive business to your services.
[ ]	Seek Top-Down Support	Gain executive buy-in for conferencing services. This may take the form of corporate policies or directives, or may involve a simple announcement by upper level staff at key meetings (results meetings, briefings, announcements, etc.). A short announcement by the CEO will go a long way. Experience has shown that this is the most successful factor to drive adoption.
[ ]	Seek a Sponsor	Have a senior executive at your company send a memo to his peers that details the business benefits and cost savings that he has experience through the use of conferencing solutions.
[ ]	Focus on Administrators	Administrators are often the key to two important functions: encouraging people to use conferencing instead of travel; and providing the critical support to make conferencing-based meetings take place on-time, and without interruption. Provide the administrators in your company with abundant information on your conferencing services, and treat them well.
[ ]	Remember Account Management	Remember that your end-users are your customers. Therefore, meet with them at least quarterly, solicit feedback and suggestions, and resolve any open issues quickly and effectively. Your best marketing is a satisfied end-user.
[ ]	Use the Intranet	Your corporate intranet should provide complete information on your conferencing services, including location/directory information, how to get help, and an FAQ.
[ ]	Don't be Shy	Promote, promote, promote. Remember that advertising works only when it is repeated.
[ ]	Talk to the Travel Department	The travel department should be in the habit of asking all who request travel if they can use videoconferencing or web conferencing as an alternative. The travel department should be armed with cost data to give guidance to line managers on what it really costs to travel vs. go by conference.
[ ]	Talk to the HR Department	HR should be using conferencing wherever possible for recruiting and interviewing. Even more important, the HR department should work conferencing into every appropriate new employee orientation or training session.

[ ]	Make help available	Make a telephone number to call for help, either when problems occur, or BEFORE a meeting is launched, readily available in every conference room, on labels on appropriate equipment, and on your intranet. The helpline should be prominent.
[ ]	Monitor usage	Sharp changes in usage patterns could signal underlying problems or a need for additional training. Investigate and solve the problem.
[ ]	Use e-mail	Remind people what is available, and how they can save money, time, and energy by using conferencing for training, marketing, sales, project management, and customer relationship building.
[ ]	Leverage your Conferencing Service Provider	Many conferencing service providers (networks, bridging, gateway services) have trained professionals who can help you with a myriad of conferencing support materials as well as with training programs for your employees.

**Figure 14: Summary of Tips and Strategies**

## Appendix 3: About Wainhouse Research

Wainhouse Research (<http://www.wainhouse.com>) is an independent market research firm that focuses on critical issues in rich media communications, videoconferencing, teleconferencing, and streaming media. The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings. Wainhouse Research publishes *Conferencing Markets & Strategies*, a three-volume study that details the current market trends and major vendor strategies in the multimedia networking infrastructure, endpoints, and services markets, as well as the segment report *Video Communications Management Systems* and the free newsletter, *The Wainhouse Research Bulletin*.

### ***About the Authors***

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