



The Government Sector Rates Importance of IP Telephony Features, Management and Applications

Research conducted by: **COMPUTERWORLD**
The Voice of IT Management



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Challenges of IP Telephony in the Enterprise

Overview

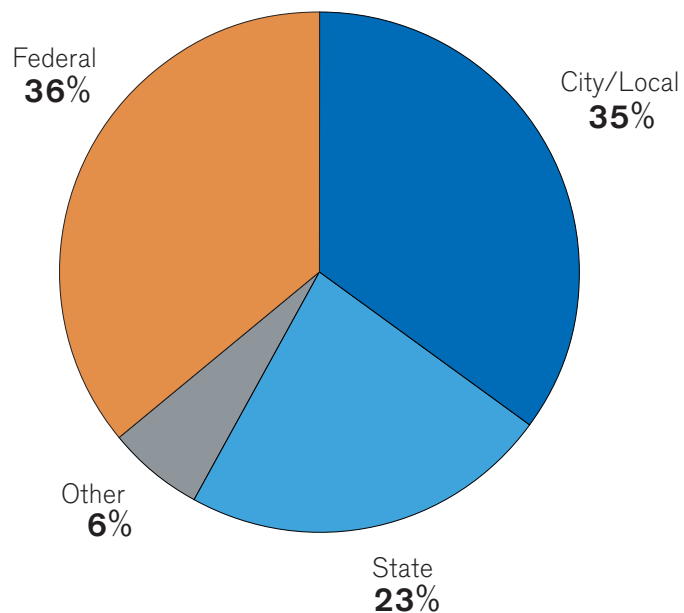
In June 2005, Computerworld invited its online visitors in the government sector to participate in a short survey on IP telephony. The goal of the survey was to better understand the challenges in IP telephony in government and how these challenges differ across federal, state and city/local government. The survey was commissioned by ShoreTel, but data was gathered and tabulated independently by Computerworld Research. The following report represents top-line results of that survey.

Profile of Respondents

Total Respondents: 363

All 363 respondents were qualified through screening questions as being in the government sector and being personally involved in evaluating IP telephony systems for their organization as either a decision-maker, technical evaluator, or business/cost justifier. Of the 363 respondents, 100 were from the federal government, 62 were from state government, and 96 were from city/local government.

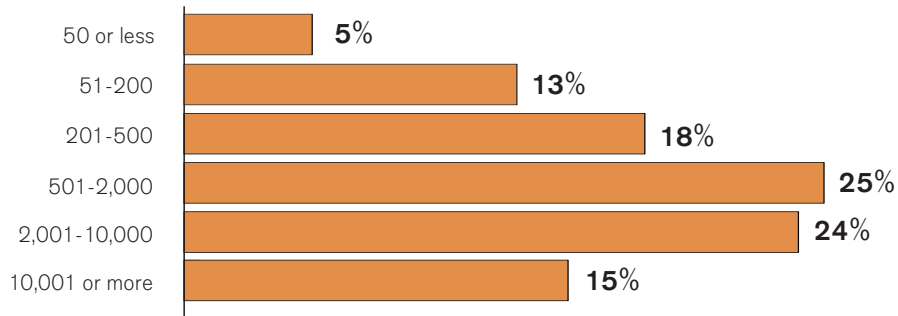
Respondents by Government Sector



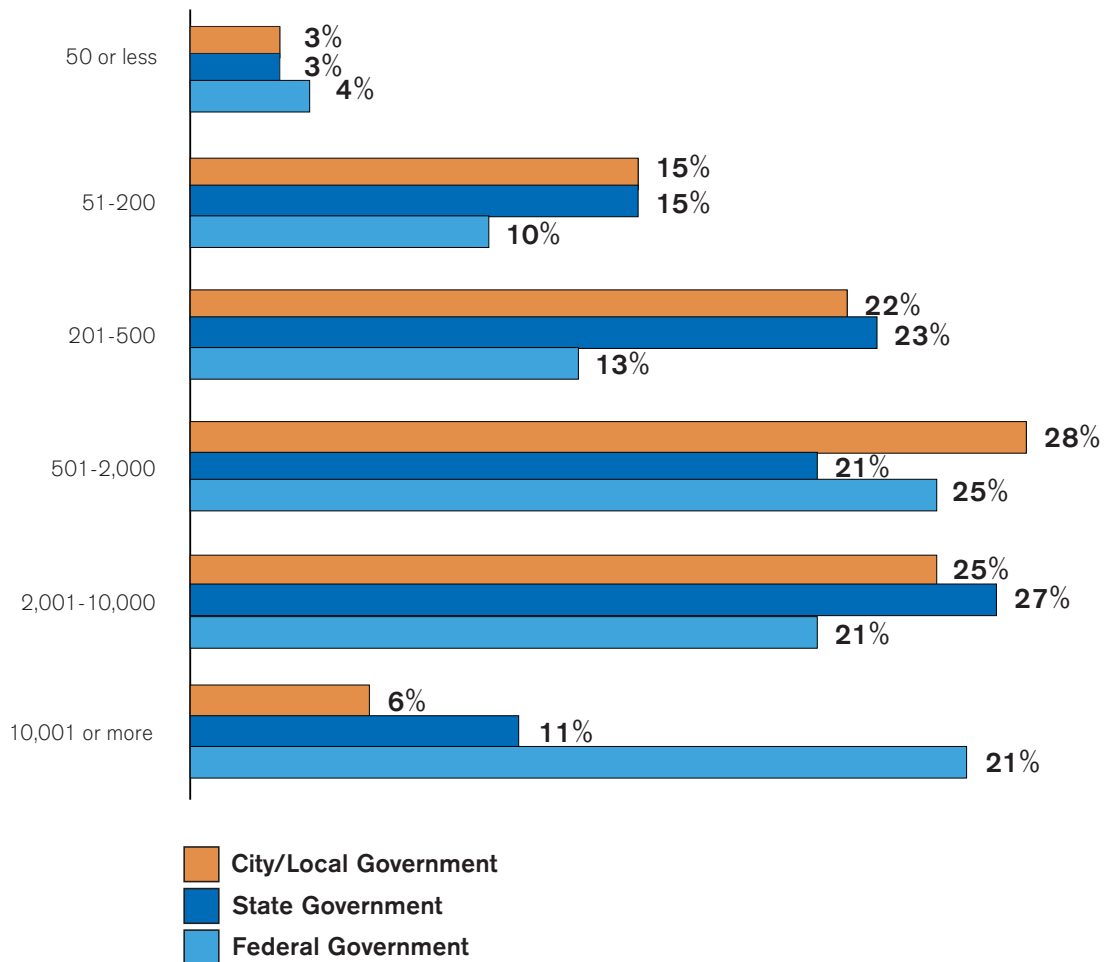
Executive Summary

- Roughly one-third of government organizations polled have already deployed or are currently implementing IP telephony. Federal and city/local government organizations are much more likely than state government organizations to have deployed IP telephony or to be in the process of implementation.
- The number one challenge government organizations face related to their phone systems is the cost related to moves, adds, and changes. For federal and city/local governments, management time/complexity is also cited as a very high challenge, while state governments don't find this as much of a challenge. State government respondents were much more likely to cite long-distance service as a challenge than their federal and city/local counterparts.
- Overwhelmingly, IP influencers across all government organizations cited system reliability as the most important capability in a phone system. The least important capability across all sectors is advanced features or applications. This seems to indicate that government influencers are looking for a no-frills system that they know will be up and running when they need it most.
- When asked what their end users consider to be the most important features, government IP influencers pointed to both telephone set ease of use and audio quality. Federal government respondents were slightly more likely to point to audio quality than their state and city/local counterparts.
- Government influencers cited two management functions as the most important: a single interface to manage the phone system and the ability to simplify moves, adds and changes. While the latter was seen as important across all sectors of government, the need for a single interface is most desired by city/local government.
- When asked about additional telephone system applications they'd most like to see added, respondents across all government sectors cited conferencing. Not surprisingly, this application was slightly more important to federal government respondents than those smaller state and city/local offices.

How many employees are at your organization?



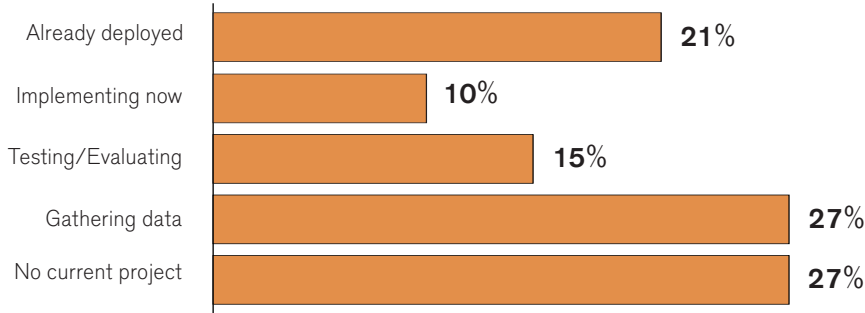
How many employees are at your organization? – by government sector



Note: Percentages may not add up to 100 because of rounding.

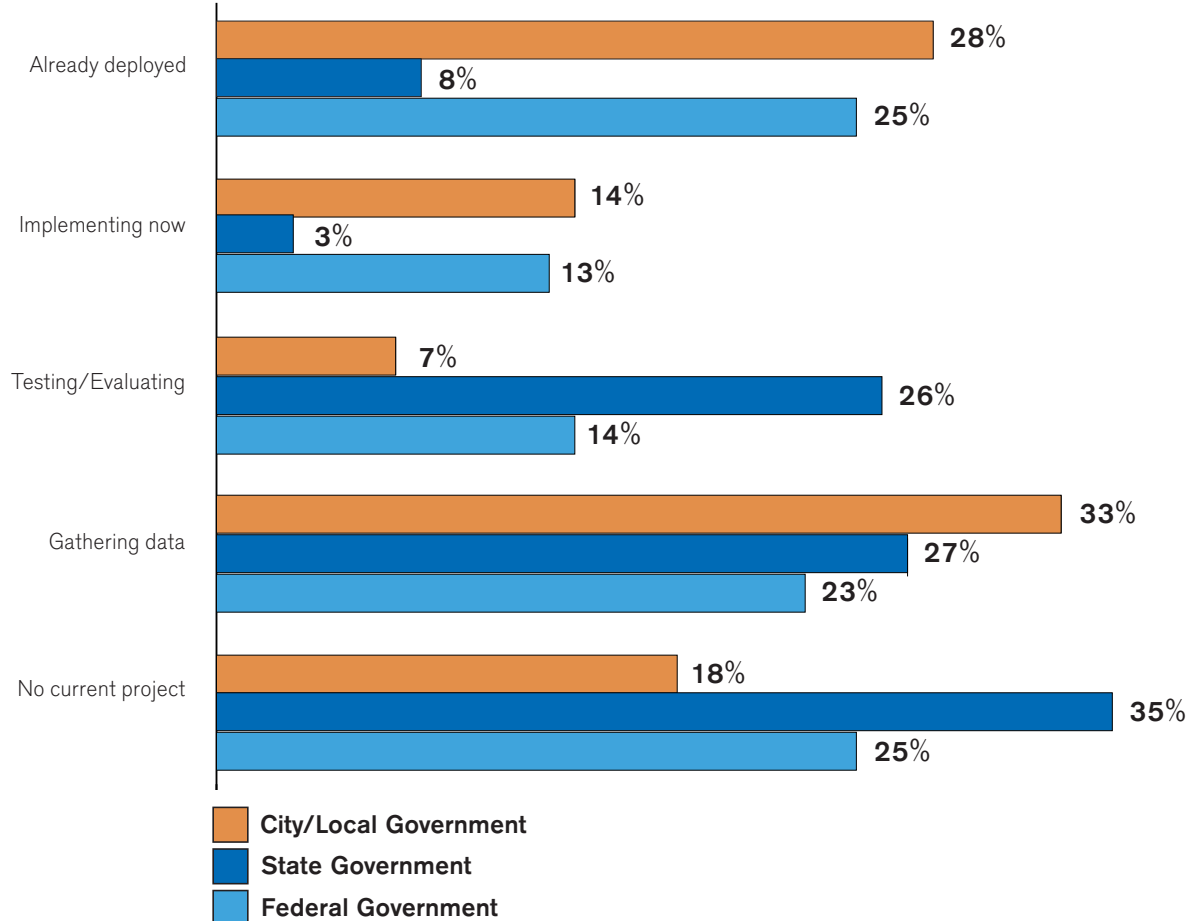
Status of IP telephony integration

Over 30% of government organizations polled reported that they already have an IP telephony system deployed or are in the process of implementing one. 42% of organizations are in process of testing/evaluating or are gathering data related to IP telephony systems, while 27% have no current plans for IP telephony implementations.



Status of IP Telephony integration – by government sector

When looking across local, state, and federal government organizations, we see that roughly 25% of local and federal government organizations have already deployed IP telephony systems. State governments are much less likely to already have systems deployed (8%) or be in the process of deploying a system (3%). We also see that state government organizations are more likely to be in the planning stages of IP telephony systems integration, with 53% reporting that they are in the process of testing/evaluation or gathering data (compare with 40% of federal governments and 37% of local governments).

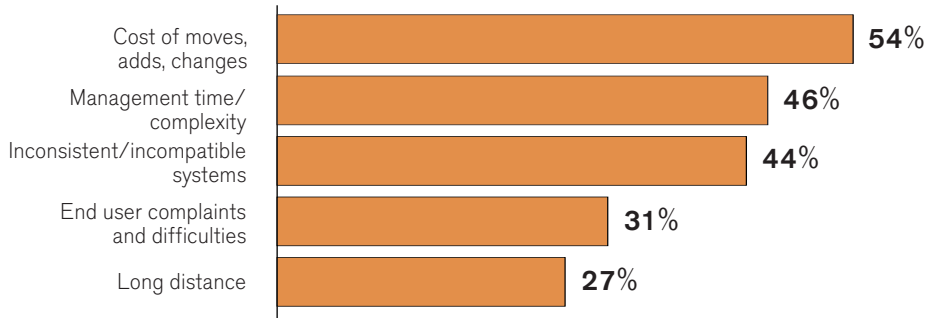


Note: Percentages may not add up to 100 because of rounding.

Current phone system challenges

The No. 1 challenge respondents cited with their current phone systems was the cost of moves, adds and changes. The second most often cited challenge was management time and complexity (46%), coming in slightly higher than challenges associated with inconsistent and incompatible systems (44%). Long distance was seen as less challenging, but still rated fairly high with over one-fourth of the respondents reporting it was a challenge for their organization.

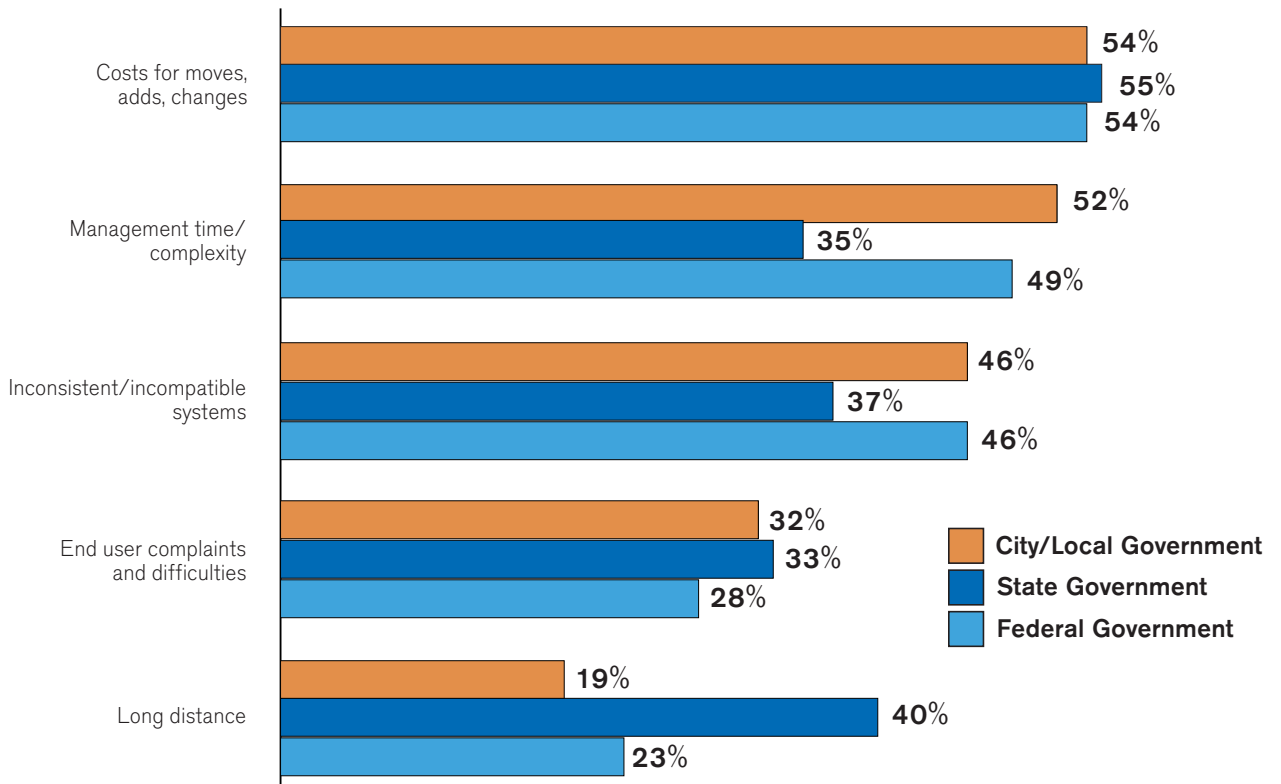
On a scale of 1-5, with 5 being the most challenging, please rate how challenging each of the following issues are related to your current phone system. (Percentage of respondents rating each "4" or "5")



Current phone system challenges – by government sector

IP telephony managers across government organizations cited similar challenges associated with their current phone systems, the strongest similarities were seen among managers from local and federal government organizations. Managers from state government organizations, however, were less likely to find management time/complexity or inconsistent/incompatible systems as challenging as their local and federal counterparts did. State government organizations were far more likely than local or federal government organization to find long distance calls challenging.

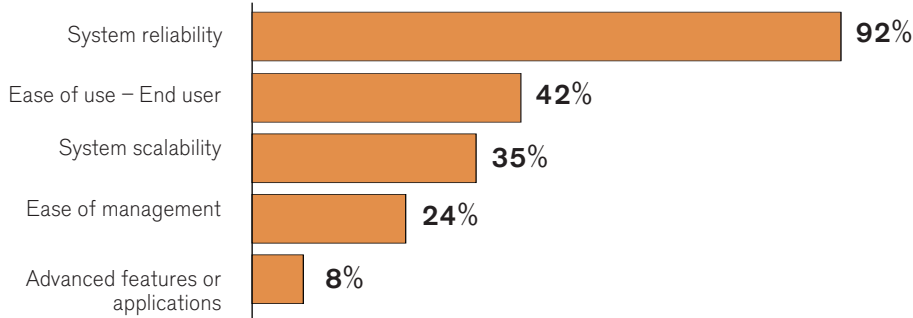
On a scale of 1-5, with 5 being the most challenging, please rate how challenging each of the following issues are related to your current phone system. (Percentage of respondents rating each "4" or "5")



Telephone system capabilities

Overwhelmingly, IP telephony managers across government organizations pointed to reliability as the most important capability in a telephone system. They were least concerned with advanced features or applications.

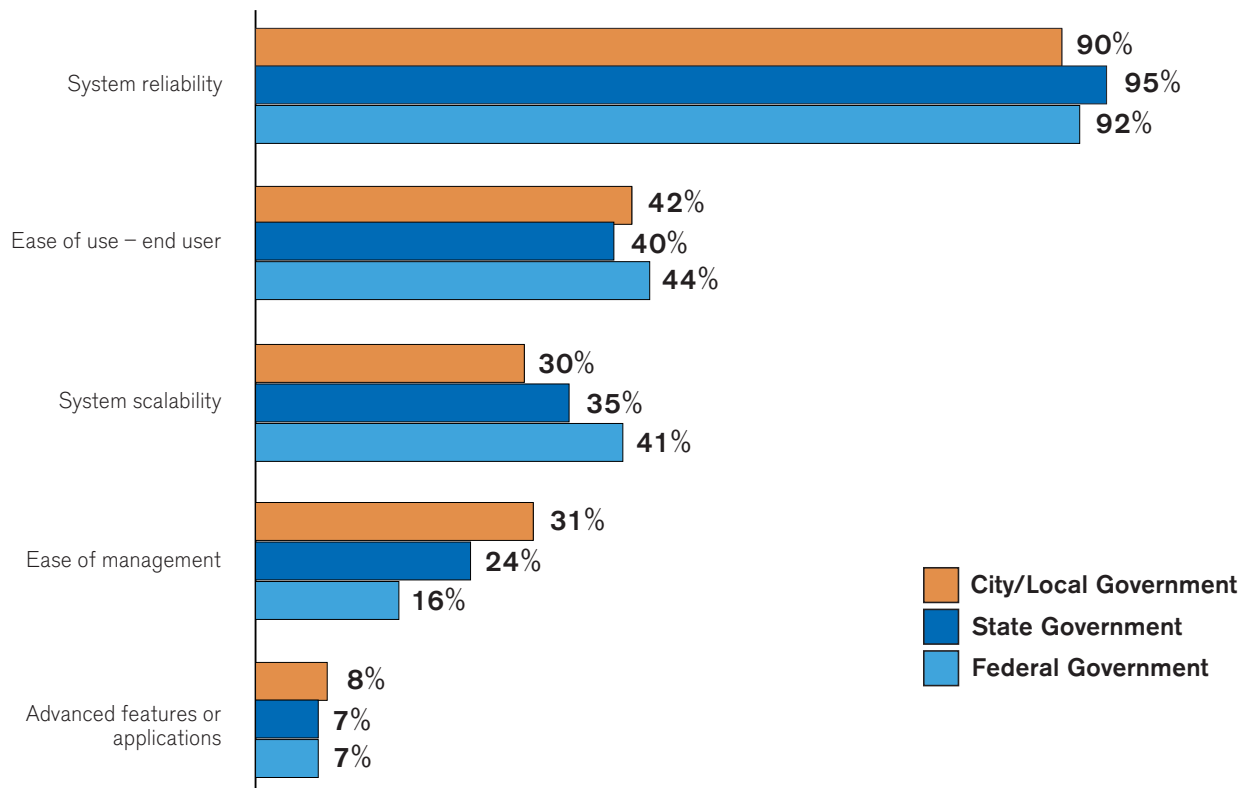
On a scale of 1-5, with 5 being the most important, please rate how important each of the following issues are related to your current phone system. (Percentage of respondents rating each “4” or “5”)



Telephone system capabilities – by government sector

IP telephony managers at different levels of government had similar views of telephone system capabilities. We do, however, see differences in the areas of system scalability and ease of management. Federal government organizations were more likely to view scalability as an important feature when compared with local and state governments. Local government organizations, on the other hand, were more likely to see ease of management as an important feature. These differences make sense, given that federal government organizations are preparing for expansion while local and state organizations value lower management costs for their smaller organizations.

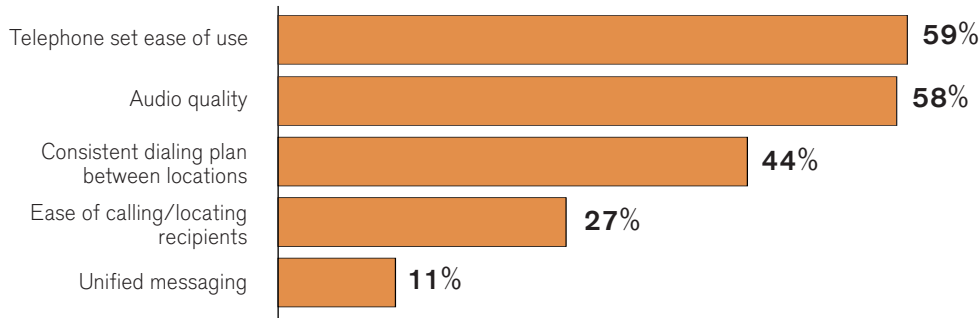
On a scale of 1-5, with 5 being the most important, please rate how important each of the following issues are related to your current phone system. (Percentage of respondents rating each “4” or “5”)



Telephone system capabilities important to end users

IP telephony managers see telephone set ease of use and audio quality as the most important features to the end user. While consistent dialing between locations was seen as less important, nearly half of the respondents cited this as important to the end user. Unified messaging was seen as least important with roughly 10% of respondents reporting this as important to the end user.

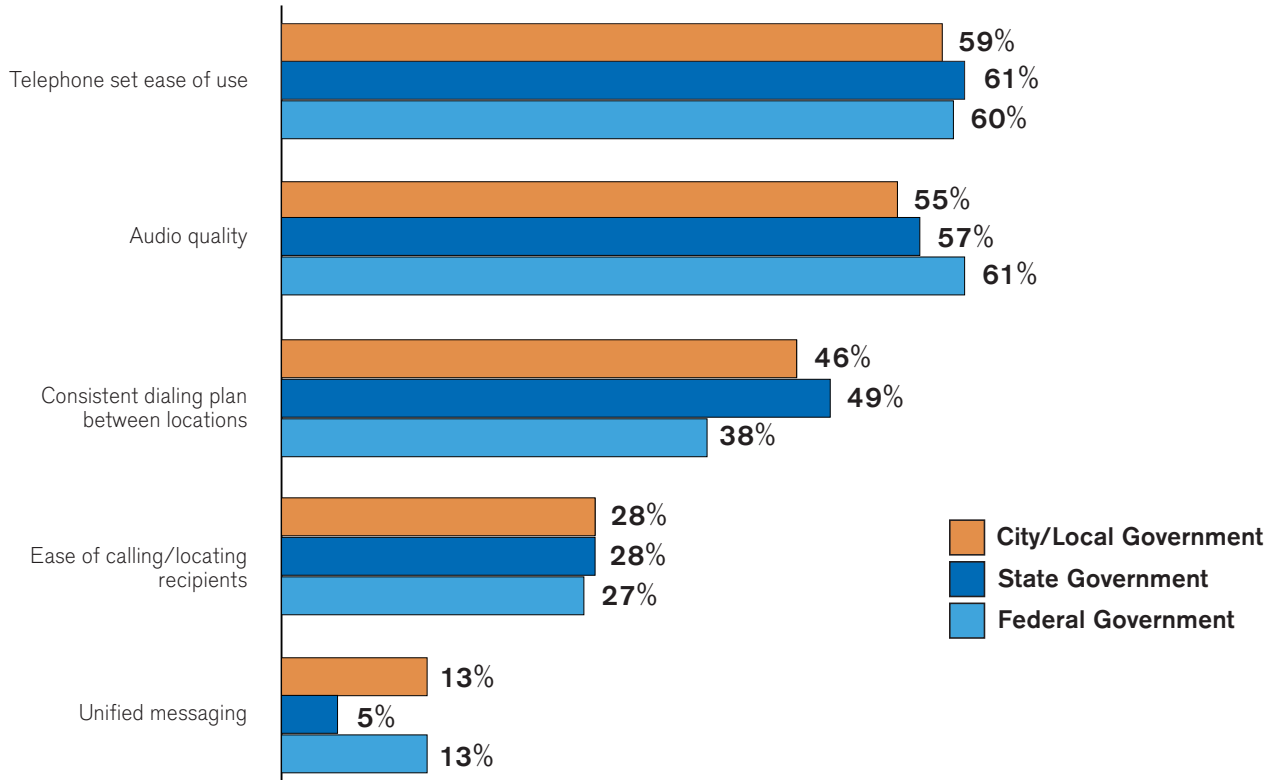
On a scale of 1-5, with 5 being the most important, please rate how important each of the following issues are related to your current phone system. (Percentage of respondents rating each “4” or “5”)



Telephone system capabilities important to end users – by government sector

When commenting on telephone set ease of use, managers across government sectors generally agree on its importance to the end user. IP telephony managers in the federal sector see consistent dialing as less important than managers in local and state governments do; federal respondents likely see consistent dialing as less important, because they represent organizations set in many locations and are thus accustomed to inconsistent dialing. State governments cite unified messaging as less important than respondents in local or federal government organizations.

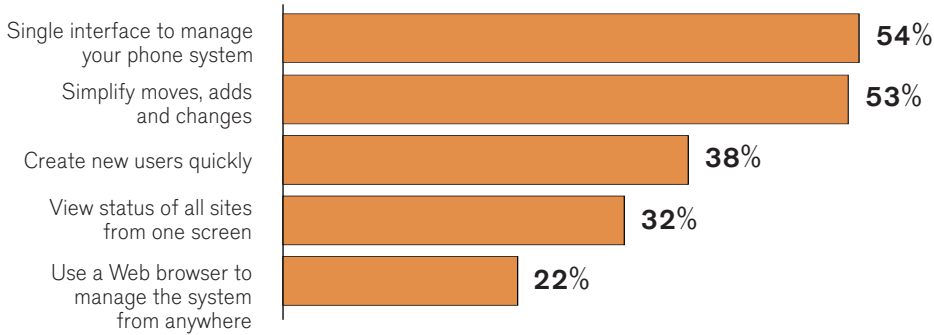
On a scale of 1-5, with 5 being the most important, please rate how important each of the following issues are related to your current phone system. (Percentage of respondents rating each “4” or “5”)



Management functions

When IP telephony managers in government organizations were asked about important system management functions, the results show telephony managers are looking to simplify. Managers report that the first and most important function is a single interface to manage the entire phone system, while the ability to simplify moves, adds and changes, is a close second.

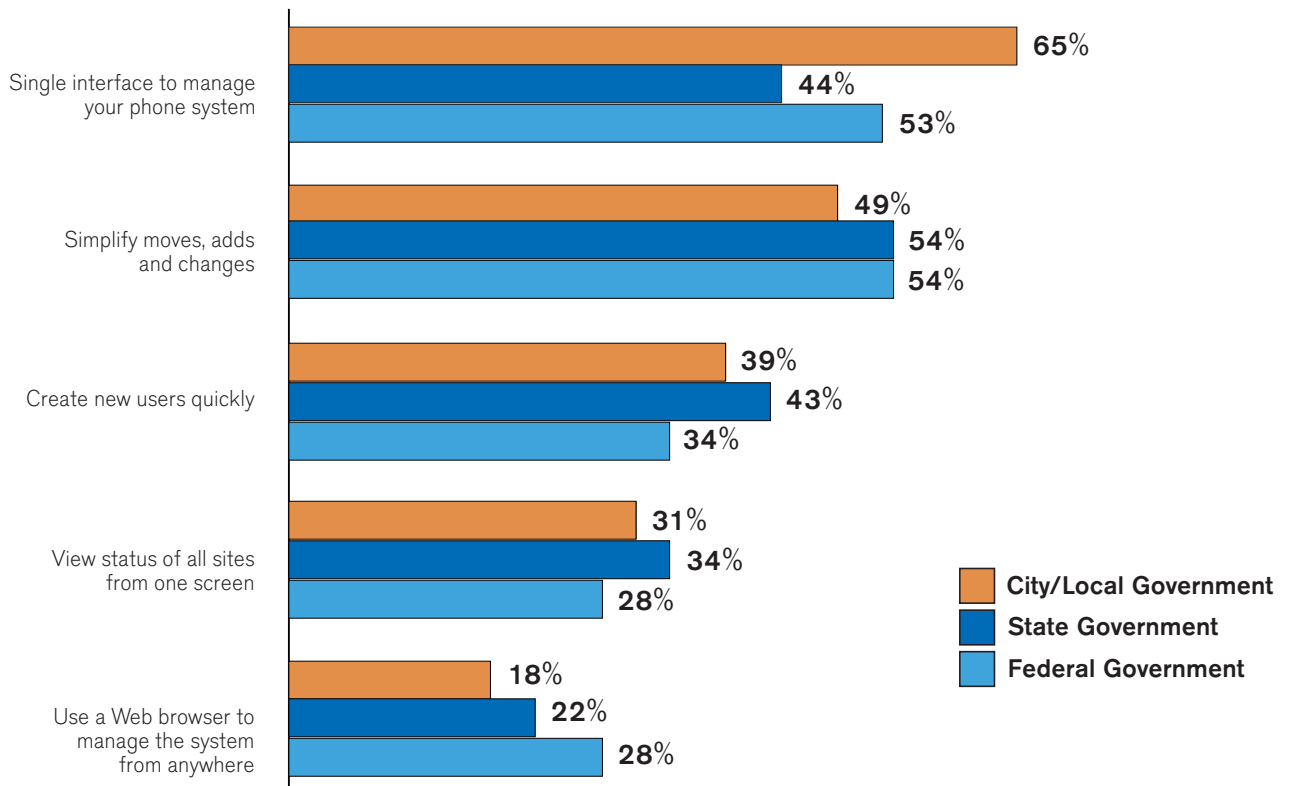
On a scale of 1-5, with 5 being the most important, please rate how important each of the following issues are related to your current phone system. (Percentage of respondents rating each “4” or “5”)



Management functions – by government sector

When breaking out the results by government sector, we see some differences in management features desired. State government organizations are less likely to find a single management interface important than are local organizations working with limited resources, or federal organizations coping with expansive systems. While not an overwhelmingly popular feature, respondents from federal organizations see a Web interface to manage the system as an important system management function.

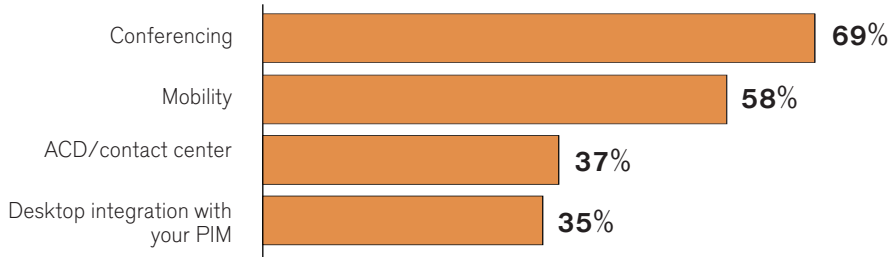
On a scale of 1-5, with 5 being the most important, please rate how important each of the following issues are related to your current phone system. (Percentage of respondents rating each “4” or “5”)



Additional applications

IP telephony influencers said the most important additional telephone system application was conferencing followed by mobility. ACD/contact center and desktop integration with your PIM were seen as less important by over one third of the respondents.

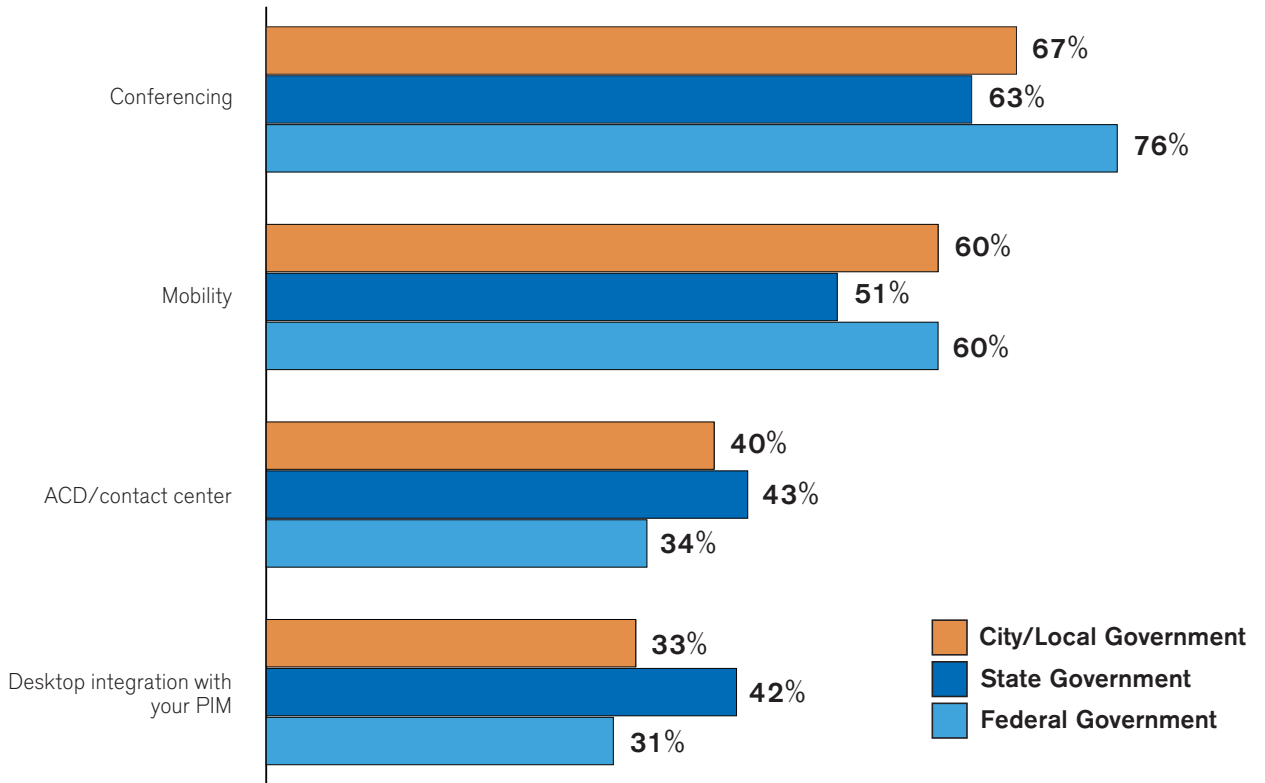
On a scale of 1-4, with 4 being most important, please rate the importance to your enterprise of the following additional telephone system applications. (Percentage of respondents rating each “3” or “4”)



Additional applications – by government sector

Respondents from federal government organizations found conferencing to be more important than respondents from local or state governments did. This likely reflects the nature of the federal government: multiple agencies dispersed across the country but still required to collaborate. State government organizations were less concerned with mobility (51%) than were their federal or local counterparts (60%). State governments also placed more emphasis on desktop integration with PIM and ACD contact center.

On a scale of 1-4, with 4 being most important, please rate the importance to your enterprise of the following additional telephone system applications. (Percentage of respondents rating each “3” or “4”)



Conclusion

With over 50% of government organizations polled still gathering data on IP telephony or not yet having begun the evaluation process, it's clear that there will be a real need for information on effective strategies in this area in the near future. This survey was able to illuminate some of the biggest challenges that government influencers are facing related to IP telephony so that hopefully, those who haven't yet started the process, will better understand what lies ahead. The biggest challenge cited across all sectors was the cost of moves, adds, and changes. Government influencers looking for a provider of IP telephony solutions need to make sure that the system they choose has a cost-effective way of dealing with these scenarios. Influencers should also look for a system that places more emphasis on reliability versus advanced features, is easy to use, has conferencing capability, and preferably has a simple, centralized management system that includes a single interface. The study also showed that needs and challenges vary across different types of government organizations. When looking for a solutions provider, organizations should make sure they identify a provider with experience in dealing with the unique IP telephony needs of government, and one that understands the unique needs across federal, state and city/local government.