

# Create A Benchmark Strategy For Your Enterprise Collaboration Technology

**Benchmarks: The Enterprise Collaboration Playbook**

by Art Schoeller  
February 27, 2018

## Why Read This Report

Enterprise collaboration (EC) takes place independent of any specific technology, tool, or service. However, the breadth and depth of adoption and effective use of EC varies widely. This report maps out a model for enterprise collaboration benchmarking so that application development and delivery (AD&D) professionals can better understand their current state and set a path for the future.

This is an update of a previously published report; Forrester reviews and revises it periodically for continued relevance and accuracy.

## Key Takeaways

### **No Benchmarking Metric Does It All**

Many metrics can indicate if your EC initiatives are working, but no single metric can prove the value of your entire EC strategy. Rather, you need the right combination of metrics to keep your strategy on track.

### **Your Benchmark Strategy Depends On Your Maturity**

Firms typically begin measuring EC with either an internal (employee) perspective or an external (customer, partners, and suppliers) perspective. More mature EC measurement takes in the full scope of the customer experience ecosystem, including metrics like revenue generation and customer satisfaction.

### **To Set Up A Benchmark Program, Focus On Four Areas**

To set up your own benchmark, assess governance, tool adoption, future requirements, and business impact for a full picture of your enterprise collaboration program.

# Create A Benchmark Strategy For Your Enterprise Collaboration Technology

## Benchmarks: The Enterprise Collaboration Playbook



by [Art Schoeller](#)  
with [Daniel Hong](#), Sarah Dawson, and Shayna Neuburg  
February 27, 2018

---

## Benchmark Your Enterprise Collaboration Program

When it comes to measuring the success of your enterprise collaboration strategy, too many companies go no further than measuring application adoption. As organizations implement EC tools, they must gather deeper insight into the use of the tools and how they can help drive business results.

This report outlines four elements of a strategy that your organization can use to benchmark your EC capabilities, which includes: governance, tool adoption, future requirements, and business impact.

### 1. Establish Governance To Focus The Benchmarking Exercise

We see too many IT and business leaders jumping into a benchmarking effort without a clear understanding of the real impact and utilization of EC. Putting an EC strategy in place requires more than just deploying the technology tools: It requires governance. AD&D pros need to think of EC as the connective tissue of the customer experience ecosystem. To set up the proper governance framework, we recommend that application development and delivery professionals:

- › **Build a cross-functional enterprise collaboration council.** Getting an enterprise perspective requires bringing together representatives from across the business. The CEO should charter a council made up of business leaders and managers from across the enterprise, representing every business unit, geography, and functional area, including the technology organization, marketing, HR, and legal. This council's primary responsibilities are to help formulate the EC strategy, meet regularly to manage and govern its implementation across the organization, and set up the definitions of EC success.
- › **Focus first on workers, not applications.** Today, line-of-business professionals are committed to providing both budget and staffing to implement and support EC, so it's critical that you understand their expectations and usage patterns. Before jumping into benchmarking, ask difficult questions, such as how you expect EC tools to benefit the business and what role the EC applications play in fulfilling the enterprise strategy. The EC council can help nominate key "collaboration champions" who can articulate important workflows across the CX ecosystem.

**FORRESTER**

Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA  
+1 617-613-6000 | Fax: +1 617-613-5000 | [forrester.com](#)

© 2018 Forrester Research, Inc. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. Unauthorized copying or distributing is a violation of copyright law. [Citations@forrester.com](mailto:Citations@forrester.com) or +1 866-367-7378

**Create A Benchmark Strategy For Your Enterprise Collaboration Technology**

Benchmarks: The Enterprise Collaboration Playbook

- › **Gain alignment on which applications support enterprise collaboration goals.** Unlike many other mandatory applications, such as enterprise resource planning (ERP) or a contact center agent desktop, workers can easily ignore or substitute readily available applications from the cloud (e.g., Skype, Slack). This means any organization setting up collaboration benchmarks must be willing to look beyond traditional EC and be prepared to understand new applications and new collaboration objectives.

**2. Understand The Current State By Assessing Utilization And Satisfaction**

Once you've established the governance program and business objectives, you can understand current application usage. Collaboration road maps and maturity models today must include new, cloud-enabled, real-time, and asynchronous collaboration workloads — including unified communications, document coediting, file sharing, and file sync across devices. They must also give employees what they are demanding, as Forrester surveys indicate that workers need access to content in a variety of forms including email, desk phones, smartphones, web, and video.<sup>1</sup> To understand collaboration tool utilization, AD&D leaders must:

- › **Track employee utilization of EC tools.** The goal of the tracking exercise is to understand current application usage and use that baseline to inform your future EC investments. For example, tracking the number of employees working on internal social networking sites and trending the increase in videoconferencing room use are two common examples of metrics that highlight application adoption. The biggest challenge is how to tag interaction and utilization metrics to specific groups, lines of business, and initiatives.
- › **Use surveys to assess the quality and reach of their enterprise collaboration tool set.** Adding quantitative data can move the adoption needle in the right direction. Use employee surveys to measure the rate of adoption into the employee workflow and how the employee collaboration experience is changing over time. Use vendor partner surveys to assess how well your collaboration network extends beyond your company's walls. Use customer surveys to pinpoint performance issues like poor voice or video quality that may otherwise go unnoticed — especially if submitting a help desk ticket is time-consuming for customers.
- › **Benchmark the behavior of key collaboration users.** Identifying key collaboration champions across the CX ecosystem provides direct feedback about the effectiveness of an EC tool set. Workshops with key users not only help build a community to drive adoption but also add an additional feedback loop for continuing improvement.<sup>2</sup> You can use this information to understand how to benchmark usage patterns. For example, if you find that employees spend 80% of their personal time on Facebook, it may affect your decision to include Facebook's new enterprise solutions in your EC plans.

**Create A Benchmark Strategy For Your Enterprise Collaboration Technology**

Benchmarks: The Enterprise Collaboration Playbook

**3. Set A Path For The Future With New Collaboration Capabilities**

Once you have established utilization for your organization today, you can begin to plan for the future. The EC market continues to evolve rapidly, so there is a natural tension between the rush to adopt the latest market innovations and the anarchy of disparate systems spread across the customer experience ecosystem. This has major implications for your EC benchmarking strategy, as you must always strive to stay ahead of adoption trends and measurement metrics. To do this, you must:

- › **Target the tools that enable the connected mobile workforce.** Although organizations widely deploy EC tools for desktop environments, widespread adoption is a continuing challenge. As mobile devices and smartphones, in particular, become the primary vehicle for communications, firms must extend collaboration service to the mobile app world.<sup>3</sup> The speed and access from increased mobile connectivity is key to not only deploy and track mobile EC usage, but also to assess mobile user satisfaction through surveys and focus groups.
- › **Facilitate customer and partner collaboration.** Extend the perimeter of your collaboration boundary to encompass customers, and watch information flow more freely between employees, customers, and partners. Google, Microsoft, and Vidyo support direct customer videoconferencing via guest access. Bring your document collaboration out of the shadows of email attachments with a cloud collaboration platform from a supplier like Box, Dropbox, or Egnyte. These external users are an additional category that requires assessment of adoption and satisfaction through targeted surveys and focus groups.
- › **Adjust risk and compliance requirements.** The CX ecosystem must extend beyond the enterprise firewall in order to engage customers, partners, and suppliers. A disjointed and disparate tool set can expose the enterprise to security risks and loss of intellectual property. Consumer-level enterprise applications like WhatsApp are not designed with these requirements in mind.<sup>4</sup> Beware that your traditional approach to risk and compliance will be tested with many new EC applications. Update your standards to account for mobile and external workers and security issues associated with cloud technologies.<sup>5</sup>

**4. Drive Increased Relevance By Measuring Business Impact**

There is growing evidence that there is a road to measuring enterprise collaboration business impact. The journey is marked at first by a series of small wins that, taken together, represent discrete business value. Our research points to sales, customer service, and the supply chain as initial destinations where EC adds measurable business impact.<sup>6</sup>

Once companies begin to see these business impacts, they can begin to quantify the benefits of EC across the organization.<sup>7</sup> Driving productivity gains is the single most important goal for 19% of enterprises, and revenue gains follow close behind at 14%.<sup>8</sup> We recommend that our more mature clients:

**Create A Benchmark Strategy For Your Enterprise Collaboration Technology**

Benchmarks: The Enterprise Collaboration Playbook

- › **Track sales increases as the most direct measure of business impact.** Among companies that are attempting to measure the direct business impact of their enterprise strategy, measuring the increase in sales is a solid contributor. There is evidence to suggest that some measures, like employee attrition, are connected directly to business goals, thereby making the success or failure of an EC strategy much more cleanly defined.<sup>9</sup>
- › **Track customer satisfaction as an indirect measure of customer impact.** Metrics like customer satisfaction surveys and Net Promoter Score are indicators of performance but not real measures of business outcomes.<sup>10</sup> The outcomes are the result of these changes in customer index scores. Measuring outcomes such as average purchase value or lifetime customer value is still relatively rare.

**Recommendations**

## Use Your EC Benchmark To Guide Your Organization's EC Priorities

EC strategy combines internal, employee-oriented approaches with external, customer-facing ones to form a connected customer experience ecosystem. The eventual success of the ecosystem requires the entire organization to develop a high degree of maturity in the application of enterprise technologies. AD&D leaders can use our benchmark framework as a guide to understand whether they have the fundamental elements of a benchmark strategy in place or are mature enough to track business impact. We recommend that clients embarking on these efforts:

- › **Tap their enterprise collaboration suppliers for additional data and best practices.** Suppliers of EC technology are well aware that increased maturity drives increased spending.<sup>11</sup> Be on the lookout for case studies that target specific workflows and roles in your industry that contain quantitative results.
- › **Do not lose sight of engaging the entire customer experience ecosystem.** Recruiting participants for EC governance is already a difficult task inside the firewall. It becomes even more difficult to recruit participants from your customers, suppliers, and partners. Yet, this is where the critical information and decision making occurs every day — and is either hampered or improved with a mature EC strategy.
- › **Keep the EC focus on business impact.** Focusing on business impact can feel like a difficult task at first, but it's an effort that will anchor deeper relevance, awareness, and justification of your EC investment. For example, instead of simply measuring videoconference room occupancy, stretch to capture the topics, teams, and objectives accomplished in video sessions. While this exercise can feel odd to companies used to measuring traditional metrics like usage or availability, the long-term effort will help you understand the business impact of your EC tool set.

**Create A Benchmark Strategy For Your Enterprise Collaboration Technology**

Benchmarks: The Enterprise Collaboration Playbook

## Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

### Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

[Learn more.](#)

### Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

[Learn more.](#)

### Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

[Learn more.](#)



**Forrester's research apps for iOS and Android.**

Stay ahead of your competition no matter where you are.

## Supplemental Material

### Companies Interviewed For This Report

Colgate-Palmolive

Socialtext

ConocoPhillips

## Endnotes

<sup>1</sup> We asked global information workers who are part of a team at work, “What are the top three technologies that you use to share information, content, and expertise with members of your team?” The top responses were email (74%), desk phones (44%), and smartphones (31%). Source: Forrester Data Global Business Technographics® Applications And Collaboration Workforce Survey, 2016.

<sup>2</sup> For strategies to drive formal workshops and more informal “jam sessions,” see the Forrester report “[Collaboration Success Hinges On Effective Change Management.](#)”

**Create A Benchmark Strategy For Your Enterprise Collaboration Technology**

Benchmarks: The Enterprise Collaboration Playbook

- <sup>3</sup> Sixty-six percent of global information workers use a smartphone for work at least weekly — the same percentage of global information workers who use a laptop or notebook computer for work. Source: Forrester Data Global Business Technographics Workforce Benchmark Survey, 2017.
- <sup>4</sup> For more information, see the Forrester report “[Vendor Landscape: Enterprise Team Messaging Apps.](#)”
- <sup>5</sup> See the Forrester report “[Create Your Cloud Security Technology Strategy And Road Map.](#)”
- <sup>6</sup> See the Forrester report “[Effective Enterprise Collaboration Grows Your Bottom Line.](#)”
- <sup>7</sup> Defining the business value of social business and collaboration by measuring knowledge worker efficiency is like trying to nail Jell-O to a wall. The nature of the work is simply too ad hoc. Focus instead on known business processes that can benefit from better access to information, expertise, and collective action. Do this by defining areas of human latency in these processes, assigning costs to those areas, and defining new social and collaborative processes that remove the latency and/or drive better results. See the Forrester report “[Effective Enterprise Collaboration Grows Your Bottom Line.](#)”
- <sup>8</sup> Source: “2016 Connected Enterprise Report,” Dimension Data.
- <sup>9</sup> For more information, see the Forrester report “[Effective Enterprise Collaboration Grows Your Bottom Line.](#)”
- <sup>10</sup> Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.
- <sup>11</sup> For more information on the maturity and business value of enterprise collaboration technologies, see the Forrester report “[The Forrester Tech Tide™: Enterprise Collaboration, Q1 2018.](#)”

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

#### PRODUCTS AND SERVICES

- › Core research and tools
- › Data and analytics
- › Peer collaboration
- › Analyst engagement
- › Consulting
- › Events

---

Forrester's research and insights are tailored to your role and critical business initiatives.

#### ROLES WE SERVE

##### **Marketing & Strategy Professionals**

CMO  
B2B Marketing  
B2C Marketing  
Customer Experience  
Customer Insights  
eBusiness & Channel Strategy

##### **Technology Management Professionals**

CIO  
› Application Development & Delivery  
Enterprise Architecture  
Infrastructure & Operations  
Security & Risk  
Sourcing & Vendor Management

##### **Technology Industry Professionals**

Analyst Relations

---

#### CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or [clientsupport@forrester.com](mailto:clientsupport@forrester.com). We offer quantity discounts and special pricing for academic and nonprofit institutions.