

THE BUSINESS CASE FOR ENTERPRISE CONFERENCE SCHEDULING

*People, Processes, and
Infrastructure*



The Business Case for Enterprise Conference Scheduling

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The Business Case for Enterprise Conference Scheduling

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Executive Summary

The typical enterprise increasingly is comprised of a “dynamically collaborative” workforce, embodied by growing numbers of remote relationships, mobile workers, and virtual teams. The effectiveness of this workforce – and to a real extent, the success of the enterprise as a whole – is largely dependent upon the degree to which it can effectively collaborate.

Unfortunately, the job of scheduling and executing meetings, conferences, and other collaborative events in most organizations is inefficient, based on legacy tools and business processes, and leaves much room for improvement. These inefficiencies negatively impact the performance of many organizations by impeding their ability to collaborate.

Enterprise Conference Scheduling (ECS) refers to the capability to schedule and deliver all elements of a meeting, conference, or other collaborative event in an enterprise environment, in a unified, manageable fashion. ECS delivers the following key benefits:

- > Improves conference execution by synchronizing the scheduling and delivery of facilities, attendees, and services;
- > Removes barriers to collaboration among virtual teams, remote relationships, and mobile workers by improving accessibility of conferencing technologies;
- > Optimizes conferencing services’ quality and costs by increasing an organization’s flexibility to deliver services that fit user requests;
- > Enhances Facilities and IT management capabilities by providing new management capabilities for conferencing;
- > Bridges existing operational islands to deliver measurable Quality of Service;
- > Reduces labor costs by automating conference administration tasks;
- > Provides greater organizational control over all conferencing-related costs; and
- > Improves utilization and ROI of conferencing space and resources.

ECS benefits corporations, businesses, governmental and educational organizations, and other entities with “enterprise” conferencing environments, characterized by:

- > Significant conferencing facilities, including dedicated conference rooms and other shared workspace;
- > Existing or planned investment in conferencing technologies such as audio, video, data, and web conferencing; and
- > A geographically distributed workforce, especially one spanning multiple time zones or countries.

This white paper identifies the business needs that may justify adoption of ECS, provides a “maturity model” for evaluating your organization’s relative capabilities in terms of ECS, and provides an overview of ECS-enabling tools and key criteria to use in evaluating these tools.

The Conference Scheduling Needs of Enterprises Today

Productivity, Growth Pressures

Managers, consultants and academics alike understand the variety of business and operational challenges facing enterprises today. Organizations are required to do more with less with regard to capital resources and people resources. The seemingly simple need to get more out of people has had a tremendous impact on employee workloads – and organizations are scrambling to address the fallout of these workloads. Meanwhile, more and more business processes have been subject to radical review and change.

This has placed great pressure on the collaboration needs of enterprises. Meetings, in fact, are one aspect of business operations going through an evolutionary change. Enterprises annually spend millions of dollars on organizational developers, facilitators, trainers, and coaches to try to improve the effectiveness of how people get together, meet together, and work together. And they spend equally on the facilities, infrastructure, and enabling tools to improve the effectiveness of meetings as well as “on-demand” collaboration tools. Yet enterprises remain challenged to maximize the ROI from these expenditures.

The Operational Challenges of Time and Space

Organizations are hard pressed to constantly improve how they manage two valuable resources that impact the ability to collaborate, namely time and space. Benjamin Franklin once said, “lost time is never found again.” The pressure to utilize time better exists because time not only is a commodity, but also a kind of business process. How an organization manages time says a lot about its mission and its ability to achieve its organizational goals and time-to-market.

As enterprises struggle to manage their time better, they also struggle to manage space. In 2000 there were 37.3 million teleworkers globally,¹ with the growth rate projected to total 5.6% annually. The intersection between workspace, mobility, and time is most telling: according to the American Business Collaboration, a group of leading American corporations partnered to support workforce “quality of life” initiatives, more than 80 percent of full-time American employees either *labor off-site* or *work with others who work at a distance*.² Mobility and virtual teams have become the norm. The organization’s ability to effectively manage collaboration among these teams will dictate whether this trend can be leveraged to its advantage or disadvantage.

Meanwhile, reductions in business travel since the tragedies of September 11, 2001 are placing greater demands on conferencing technologies and enterprise resources that support those technologies. A Wainhouse Research survey determined that almost two thirds (64%) of business travelers considered access to audio, video, and web conferencing technologies to be important to them in a post 9/11 environment.³

¹ JALA International, ITAC

² American Business Collaboration, 2002

³ *Conferencing Technology and Travel Behavior*, Wainhouse Research, 2002

The Complexity of Managing Collaboration Infrastructure

In the enterprise, the job of building and maintaining physical infrastructure for resources never ends. The same holds true for building collaboration infrastructure. A short list of items that should be coordinated to enable collaboration includes:

- > People (meeting schedulers and participants)
- > Administrative staff
- > Meeting rooms
- > Communications technologies, including audio, video, and web conferencing
- > Supporting equipment, such as presentation products and whiteboards
- > Catering
- > Specialists
- > Other event services

At different times, according to different needs, all of these have a role in the infrastructure of conferencing, either as participant, beneficiary, or supporting element. The list may seem simple, but the ability to bring together and manage so many disparate elements is far from simple. The organization's ability to effectively coordinate scheduling and execution of meetings among all these elements directly impacts its ability to effectively and efficiently collaborate.

How Enterprises Schedule Conferences Today

With all of the different tools available today, or perhaps because of that breadth of tools, meeting management in the enterprise is typically a mess. Why? Some of the reasons are simple, and have to do with human preferences (for both technology-based and manual scheduling tools). Some of it has to do with legacy or homegrown scheduling systems and tools that are not scalable or have outlived their usefulness. And some of it has to do with the array of options that face enterprise workers every day.

Traditional Methods of Scheduling

The following table illustrates just a few of the many methods people use to plan, record, and otherwise schedule their own time or the time and availability of other enterprise resources:

Manual Scheduling	Group Messaging and Calendaring	Specialized Service Scheduling
<ul style="list-style-type: none"> • Paper • Phone • E-Mail • Personal Information Managers (PIM's), e.g. Palm Pilot, etc. 	<ul style="list-style-type: none"> • Lotus Notes / Domino • Microsoft® Outlook® / Exchange • Oracle Calendar / Collaboration Suite 	<ul style="list-style-type: none"> • Facilities schedulers • A/V bridge, gateway, and/or gatekeeper schedulers • Web conferencing service schedulers • Catering and other event schedulers

Every organization has individuals who might need to use a number of the tools above just for a single meeting. To schedule a multi-site meeting with audio conferencing and web conferencing, for example, a user might use one tool to book the room, another to invite attendees, a third to schedule the audio conference, and a fourth to schedule the web conference. Any changes to the schedule must be carefully replicated across each of these tools – and the meeting attendees must wade through multiple messages to piece together the information they need to attend the meeting, such as audio conferencing dial-in numbers, web conferencing URLs, passwords, etc.

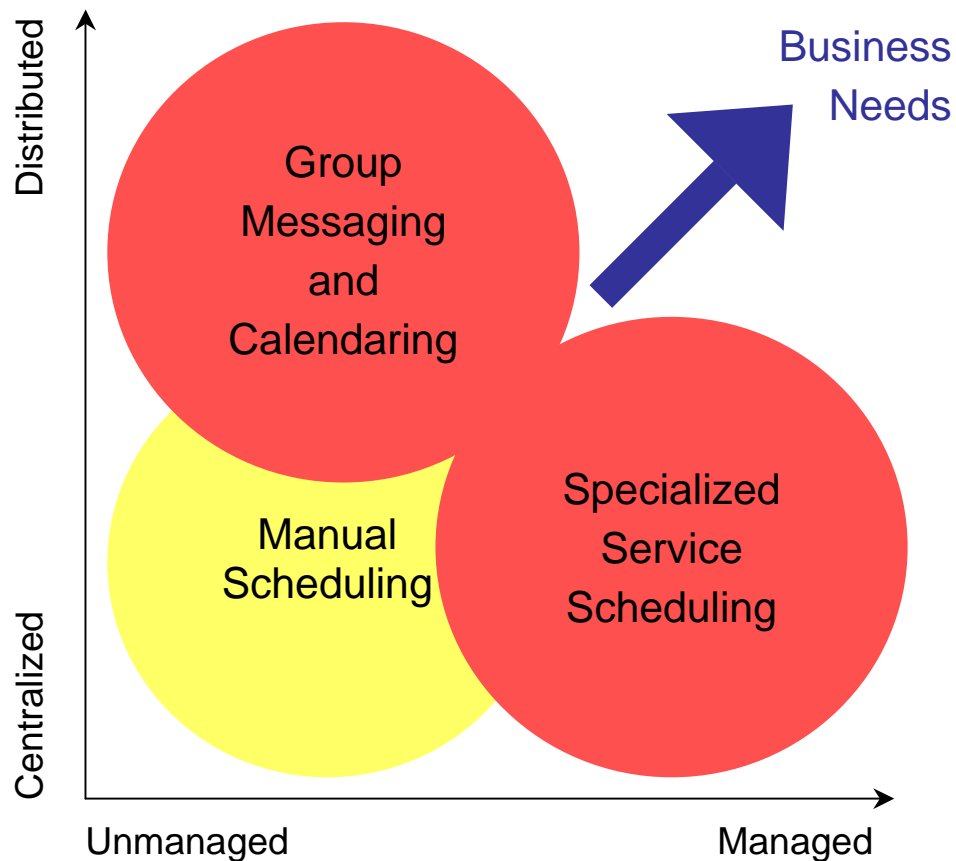
Across the organization, individuals, groups, and divisions frequently use different tools, with varying degrees of interoperability. This results in multiple scheduling methodologies that introduce inefficiencies. Schedule information is retained in a variety of locations and types of databases, without the ability to gather a comprehensive, unified view. Various tools may only support the scheduling of pieces of the overall infrastructure, not the complete set of elements that need to be scheduled. Information may be local to an office, a building, a campus, a region, or some other geographical constraint. And for the global enterprise, different software packages may be used in different regions based on preferences, mergers and acquisitions, and other variables that no amount of planning can account for.

Contrasting Approaches: Centralized and Distributed, Managed and Unmanaged Services

Every organization must decide whether to employ centralized versus distributed scheduling methods. *Centralized* refers to the environment in which a dedicated reservations staff is responsible for all aspects of scheduling; in this environment such staff may not only own scheduling, but also room and equipment support, conference management, and other aspects of conferencing – and may provide “full-service” scheduling. *Distributed* refers to the environment wherein employees are responsible for making their own meeting requests and confirmation of those requests. In many organizations, requirements exist to support a hybrid of these two methods – where users self-serve most scheduling tasks, but supplemental centralized scheduling services are provided based on the class of user, meeting, or resource being scheduled.

Organizations also are faced with an increasing need to manage conferencing and conferencing resources. *Managed* refers to the ability to control and track scheduling, use, costs, and class and quality of service related to conferencing – to understand what is happening at a global level, and ultimately to measure and drive ROI of a conferencing environment.

As the diagram below illustrates, traditional meeting management tools tend to array themselves along the axis of centralized/managed at one extreme or distributed/unmanaged at the other. Legacy manual solutions may fail to support either distribution or management of scheduling.



The trend toward a collaborative workforce is helping to drive the need for distributed, on-demand methods of scheduling. Just as users are accustomed to personal productivity tools, they expect anytime, anywhere access to the tools they need to do their jobs.⁴ This trend also is driving a parallel need: the requirement for management of the conferencing environment to control class and quality of service; the more workers make demands on resources, the greater the need to manage those resources.

In adapting to meet these needs, organizations with centralized scheduling processes justifiably want to retain the abilities they have today to offer full-service options to selected users or meeting types. They may be reticent to adopt distributed scheduling tools because such tools neither provide equivalent “full-service” scheduling options, nor allow the organization to maintain managerial oversight of the meeting environment. Organizations with distributed scheduling processes are searching for the means to improve their ability to manage their conferencing environment without sacrificing the “on-demand” self-service processes to which they’re accustomed. Fortunately, ECS address many of these issues.

The “Hidden Costs” of Today’s Solutions

The financial implications resulting from how an enterprise handles deployment of conferencing and scheduling technologies can be dramatic. As an example, take the enterprise that uses five centrally located individuals who serve as conference room schedulers. Suppose one of their primary responsibilities is to manage the rooms, as well as other facilities. Suppose also that the model for full-service reservations agents includes high labor costs and high transaction costs, e.g. the expense for the entire workforce to use these reservations agents to complete each reservation. The net result is 200 (5 x 40) hours per week of direct labor costs, plus the time of the workforce making the reservations, all of which could be reduced through greater efficiencies.

As another example, in this case a more distributed model, an enterprise might use 50 personal assistants and administrative staff globally to book meetings and make arrangements for management and staff. Those individuals might spend 20 minutes daily (as a conservative estimate) making calls to check on availability of rooms, people, caterers, and the like. This estimate accounts for 17 person-hours per day, or 85 hours in a week—not counting the time of those they contact who support rooms and event services. The impact on productivity and ability to let people focus on more important tasks is clear.

Without the proper infrastructure, the task of scheduling is costly and unmanageable. Ultimately this diminishes quality of service (QoS). And it can actually negatively impact the ROI of all those capital resources purchased by the enterprise; without QoS, people get angry and/or give up on the services they require. They must “use it” or the enterprise “loses it”; if a piece of equipment does not work or a room is unavailable more than a few times, people drift away. The impact on business productivity and the ability to “drive” ROI can be significant.

⁴ For an additional discussion of workplace trends for scheduling services, see the Wainhouse Research white paper *Scheduling Systems for A/V & Videoconferencing Resources*, available at www.wainhouse.com/whitepapers .

Enterprise Conference Scheduling Software

Definition

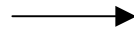
Enterprise Conference Scheduling (ECS) refers to the capability to schedule and deliver all elements of a meeting, conference, or other collaborative event in an enterprise environment, in a unified, manageable fashion. ECS unifies scheduling of meeting attendees, facilities, and services via a single mechanism or set of synchronized mechanisms. ECS routes back-end service requests to automate delivery of conferencing services. It also provides management control and tracking of access, use, costs, and class and quality of service associated with conferencing.

Maturity Model

ECS is the third and most mature stage of managed enterprise collaboration:

Stage 3

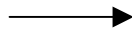
Enterprise Conference Scheduling: unified, managed, distributed scheduling of all conferencing activities in an enterprise environment



**Enterprise
Conference
Scheduling**

Stage 2

Group calendaring tools supplemented by specialized service schedulers: limited integration; requires tradeoff between integration, distribution, and manageability

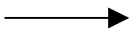


**Group
Messaging
& Calendaring**

**Specialized
Service
Scheduling**

Stage 1

“Manual” scheduling via paper, phone, or email: inefficient, unscalable, and unmanageable



Manual Scheduling

Why Enterprise Conference Scheduling Matters—The Payback

As described earlier, the entire job of scheduling infrastructure elements for collaboration has much room for improvement. What remains to be discussed is the proof that introducing Enterprise Conference Scheduling can actually provide genuine value and ROI while addressing improvements in efficiencies.

A proper ECS infrastructure helps to re-engineer business processes because it provides the framework for improved efficiency, and thus faster time to decisions. Such a platform should *work with* existing software tools or help consolidate those tools, to allow individuals to select from the approaches they prefer while having a supporting, consistent platform across the enterprise. The result can be immediate and dramatic, translating into efficiencies that cut across all lines of an organization and all aspects of meetings; these efficiencies typically span pre-meeting, real-time, and post-meeting activities. These efficiencies also translate into specific payback for a variety of constituencies: collaborative workers, management, IT departments, conferencing services staff, and indeed the entire enterprise.

The Payback for Collaborative Workers

1. One-Stop Scheduling

ECS eliminates conflicts because it synchronizes scheduling and prevents conflicts from occurring. It can improve efficiencies because it is immediate in its ability to properly schedule conferencing elements. For example, suppose the 50 administrators described earlier work in multiple business units that are the result of acquired companies, and that each uses his or her respective scheduling tool, such as Microsoft® Outlook®, Lotus Notes, or a web interface to the ECS package. As these workers book meetings, they immediately check availability of all resources and people to be scheduled, resolve conflicts, and ensure that notifications take place. Instead of spending 20 minutes booking a meeting, each spends 5 minutes. The enterprise gains not only in its people's ability to work intelligently, but also in their productivity.

2. Meeting Efficiency

Those on the team who demand that meetings begin on time benefit from ECS. Because any ECS worth its salt is universally accessible, it gives the ability to schedule, invite, accept, and extend conferences from anywhere at anytime, while also providing a centralized, synchronized scheduling database: one place to go for a view of availability and planning data, instead of various islands of data that each need deciphering while in planning mode. All of this results in the ability to work more effectively without bothersome interruptions to clarify uncertainties when in planning mode. Meetings then transpire with greater efficiency, as participants arrive with everything necessary for success.

Two benefits more difficult to measure can result from improved scheduling. The first is improved inter-departmental communication, and the ability to rely on the ECS to be part of the “glue” that holds together different departments needing to work together. The second benefit has to do with enabling end users to decipher cross-cultural factors. These include the ability to understand cultural differences that might interfere with smooth communications, such as time zone conversions, holiday schedules, linguistic translations, and financial transactions (e.g. disbursements and chargebacks) that need clarification.

The Payback for Management

1. Policy Control

For management, the payback begins the minute a window becomes available on global and local conference activity, as that window improves the ability to set and enforce policy and use of resources. Policy then results in greater cost control and improved accounting; many organizations need the ability to control access to conferencing resources and to track and charge back costs associated with those resources. Policy also results in improved planning, in effect the ability to maximize the effectiveness of the conference infrastructure such that the right decisions can be made about increasing resources.

2. Labor Savings

Payback results through better use of resources, not only physical resources, such as space and equipment, but also employees. By enabling employees to focus on their roles and responsibilities, and not on mundane tasks or intrusive technology, a well-implemented ECS platform can result in efficiencies and improved operations that can be tracked. This translates into reduced labor costs, because greater self-service can directly result in the ability to cut unnecessary labor. Other benefits include the ability to provide billing and chargeback services on a local or global basis. This can be invaluable in organizations with multiple business units or divisions that use chargebacks as an accounting method.

3. Cost Containment

Organizations struggle to plan for physical requirements for shared workspace – and supporting capital expenditures. Many organizations lack facilities and equipment to meet internal demands. Planners can no longer build dedicated conference rooms with high-cost equipment. So they need shared-use conference rooms that support both local meetings, and technology-enabled remote conferencing. This places a burden on them to schedule and manage these resources for multiple types of usage.

An ECS should supplement sound space planning techniques because it can offer a universal, global view on conferencing activities that far exceed traditional tracking mechanisms. By aggregating data, it helps an organization understand its own needs. As organizations continue to adopt “hoteling,” a method of providing “check-in, check-out, use-when-needed” shared spaces, they will be in greater need of systems and techniques for managing those spaces. (Hoteling is a facilities management approach also known as “alternative” or “progressive” office management, which enables shared use of equipment, facilities, and other resources based on organizational requirements.)

4. Services Abstraction

ECS enables management to exercise greater flexibility in delivery of “abstracted services,” that is, the ability to deliver the specific service that best meets a user’s scheduling request at the best cost and value to the organization, without imposing on the user to manage the intricacies of the available options and scheduling processes. For example, the organization may select different A/V or catering providers for its different divisions, locations or user groups – and to switch providers to obtain the best value – without requiring users learn new scheduling processes or contact points. This capability also enables the organization flexibility in fulfilling service requests internally or externally. This improved flexibility in fulfilling meeting services can provide the organization potentially significant cost savings.

The Payback for the Information Technology (IT) Department

If an IT organization has a collaboration strategy, that strategy can be enhanced by an Enterprise Conference Scheduling system. Such a system brings together conferencing tools, allowing for management of all the elements necessary to deliver conferencing services. Equipment, rooms, and services can even be managed in concert with device management and monitoring software. There is no reason a product that prioritizes requests for resources and determines attendee requirements for equipment shouldn't interface to and interact with a system that determines availability of bandwidth or the "health" of a conferencing tool. Traditional audio and video bridges have their own scheduling and management software tools, for example. An enterprise conferencing scheduling system should support those tools, as well as scheduling and management tools for other devices. This leverages investments in existing technologies.

Even without a collaboration strategy, IT groups may find value and payback in having Enterprise Conference Scheduling at their disposal. As long as disparate groups of workers maintain their own preferred scheduling programs, IT organizations will be challenged to service those groups. This is not to say that an IT group will not need to support both Outlook and Notes, as an example. But it does mean that IT may experience fewer headaches by embracing Enterprise Conference Scheduling as the glue that holds together disparate users and systems. The ECS's ability to provide a unified scheduling interface and abstract the underlying scheduling and delivery of services means less proliferation of scheduling tools and interfaces for IT to manage.

The Payback for Conferencing Services Staff

A big issue in scheduling conference elements is that multiple constituencies often have their own partial perspectives on their roles and responsibilities. In other words, a room scheduler knows her job, a caterer knows his job, and the two may rarely intersect. Because ECS supports all elements, whether technology-, people-, or room-related, it can add a level of intelligence by providing a global view of upcoming requirements, and then serving as an alert mechanism. This global view for coordinators results in economies, efficiencies, and QoS.

Other benefits exist as well. Because users can be guided through menus populated with the appropriate options, service requests are more likely to be complete, on-target, and automatically routed to the correct contact. Requests can be synchronized so that if a meeting date, time, or location changes or the meeting is cancelled, the service request is updated appropriately. Chargeback capabilities help a conferencing services group charge other groups with greater timeliness and chance of accuracy. Lastly, staff receive access to feedback mechanisms and software that is integrated with network management and trouble ticketing applications, providing greater awareness of QoS issues.

The Payback for the Organization

1. Mobility and Virtual Teams

These are:

- > Providing the intelligence to understand what is needed in the way of devices and other technologies and resources to make a particular conference successful.
- > Providing policies addressing the need for room prioritization, access queues, and waiting lists, which adds a degree of versatility by enabling schedule or resource adjustments based on the enterprise's needs.

Unanticipated or unresolved conflicts are one of the major factors in the failure of effective conferences. The ability to resolve conflicts *before* they occur, resulting in greater planning success and more efficient meetings, is another important component of an ECS.

The net result of an ECS can be a kind of meeting intelligence, the ability to make the most of meeting time and turn meetings from drains on an organization's productivity into productivity enhancers. An ECS helps to reduce human error (while also providing the ability to track human error). This means less wasted time waiting for meetings to begin, which typically is the result of human error as often as technology error or resource conflict.

3. *Hard Savings, Soft Savings*

The final point to make about payback to an organization has to do with the ROI of an ECS as measured in both hard savings and soft savings. The hard savings are those areas that can be measured, as in the earlier example of an enterprise with dedicated scheduling administrators. Other areas might include savings based on measured utilization rates, whereby an effective tracking tool supports greater understanding of where unnecessary costs can be eliminated.

Some immeasurable but likely soft savings can also be found in organizations that are "self-serve" already in their approach to meeting management. These savings can be based on the delivery of a platform that enriches the scheduling experience while keeping it simplified and convenient. For example, intuitive and easy-to-understand time zone calculations should make it easy for a user to determine the best time to schedule a meeting without wasting time on an information-gathering phone call to someone else. This kind of payback cannot be quantified easily, but certainly has an impact on the productivity of anyone associated with that meeting.

These benefits are part of what is leading software vendors to build a new breed of enterprise conference scheduling products to address the challenges of meeting management.

Key Criteria for Enterprise Conference Scheduling Software

Certain basic capabilities are essential elements of any Enterprise Conference Scheduling software.

Buyers should expect some or all of the following capabilities:

- > One-stop scheduling of all enterprise conference resources – meeting facilities; attendees; audio, video, and web conferencing; and catering, equipment, specialists, and other services.
- > Flexible workflow management, accommodating schedulers, administrators, attendees, and service providers to support “hybrid” modes of centralized and distributed scheduling.
- > Support for managing an overall meeting environment, including multiple sites, and extensions to external locations, such as business partners outside the enterprise.
- > The ability to control and track access, utilization, costs, and quality of service for all conferencing resources.

The software platform itself must be designed for enterprise deployment. It should offer:

- > Universal accessibility from any type of interface product: not only Microsoft® Outlook®, Lotus Notes and the Web, but also PDA’s and cell phones.
- > Full two-way synchronization with other corporate calendaring and information systems, especially Microsoft® Exchange and Lotus Domino.
- > Scalability to accommodate enterprise deployments, and integration with corporate LDAP directories and single sign-on systems to manageably accommodate large user bases.
- > Support for scheduling standards, including the iCalendar standard for sending calendar data to standards-based PIM’s. Support for email iMAP4 and POP3 accounts is a basic element.
- > Extensibility, to accommodate future product features or customizations.

Things to look for in a vendor include:

- > Expertise in enterprise software product development, and a focus in the somewhat specialized area of scheduling software.
- > Full supporting services for solution planning, integration, deployment, and customization.

Conclusion

Most – but not all – of the capabilities described in *The Business Case for Enterprise Conference Scheduling* are available in products today. Likely developments in this product space includes greater than ever meeting and event control, including what might be called “soup to nuts” automation. For users, this will result in the experience of technology that is transparent, whereby they walk into conference rooms and experience more successful meetings with smarter capabilities. For management, this will result in greater business intelligence and analytics for understanding how to continue to drive efficiencies and maximize productivity. For organizations, the net result will be improvements in dynamic collaboration and overall workflow.

About Forgent Networks

Forgent Networks is a leading provider of collaboration management software and solutions that empower organizations to communicate effectively, drive to decisions faster and streamline operations. Forgent’s software manages the essential elements of collaboration – people, resources and technology – providing one-stop scheduling of all resources necessary for complex conferences, and automation and management of the communications network. For additional information visit www.forgent.com.

About Wainhouse Research

Wainhouse Research, 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 Author

Alan D. Greenberg is a Senior Analyst & Consultant at Wainhouse Research. As consultant, analyst, communicator, and strategist, Alan has worked in the telecommunications, videoconferencing, software and services, and multimedia arenas for 20 years, holding positions with VTEL and Texas Instruments and consulting to many organizations. Most recently he was primary author on the segment report, *Video Communications Management Systems*. He also has authored reports on conferencing endpoints & bridges, streaming video, distance learning, and voice/fax services. He specializes in primary end user research and is a trained focus group moderator and interviewer. Alan holds an M.A. from the University of Texas at Austin and a B.A. from Hampshire College, Amherst MA. He can be reached at agreenberg@wainhouse.com.