

A LOVE-HATE AFFAIR:

OVERCOMING CHALLENGES OF WORKSTREAM COLLABORATION



Considering a digital workplace app break-up?

It's better to work it out.

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INTRODUCTION

Workstream collaboration in the digital workplace has transformed the way we communicate and do our jobs. Across close-knit and remote teams, collaboration applications bring the promise of improved communications, bolstered productivity, and increased competitive advantage. Small, mid-sized, and large organizations are deploying new application software—with investments in these systems projected to total \$4.8 billion by 2023, doubling the \$2.7 billion spent in 2018 ([Gartner](#)).

Yet buzz about distractions, productivity interruptions, and unhealthy impacts to the workplace continue to swirl. Headlines like “[How Slack Ruined Work](#),” are not uncommon. Many employees experience love-hate feelings toward workstream collaboration applications, which can lead to increased IT support tickets and/or decisions to opt-out of usage all together.

Defining Workstream Collaboration

As with any emerging category, **definitions can vary widely between organizations, IT leaders and analysts**. For the purposes of this report, our view is that unified communications (UC) is merging with workstream collaboration (WSC) as digital workplace communications evolve. While UC integrates telephony, digital meeting solutions, IM, email, and voicemail, WSC expands upon that. **Nemertes Research describes workstream collaboration as, “enabling teams to communicate in context by integrating chat, voice, video, and meetings with business workflows and external applications.”**

By merging with and expanding on existing UC foundations, applications in the WSC category deliver all of the video conferencing and cloud telephony benefits of UC, but then also add in:

- Persistent chat
- Awareness and discovery functionality
- Group collaboration that can be split into public and private channels, and/or organized by topic
- Integration with other applications and platforms, including existing UC, and bots
- Enterprise-wide scalability, and channel/workspace connectivity between organizations
- Persistent file sharing, and document management

Enterprise IT teams face additional [challenges](#) in deploying these applications in a seamless and widespread way.

Struggles with implementing across dispersed workforces, providing training for new interfaces, managing collaboration infrastructure, and supporting varying usage and preferences across multiple teams has left some IT departments wondering if it's time for a collaboration break-up.

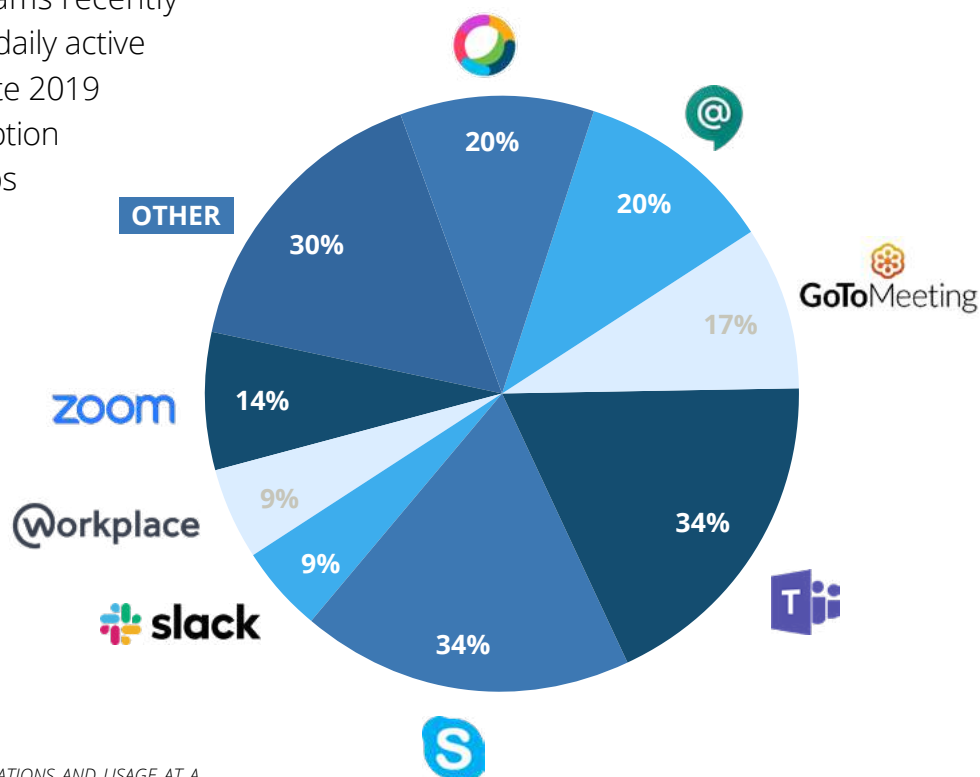
Breaking up is hard to do, though. And given the many benefits these applications provide, organizations are better off finding a way to improve the love-hate relationship, rather than calling the whole thing off. Recent research from Unify Square, which examined the current state of workstream collaboration, supports this view.

In this report, we'll reveal our survey's love-hate findings, and share insights around the most utilized features across workstream collaboration applications, usage trends, and how they are impacting productivity, employee behavior, collaboration security, and more.



WHERE'S THE LOVE? A LOOK AT WORKSTREAM COLLABORATION IN THE DIGITAL WORKPLACE TODAY

Approximately **90%** of enterprises use some form of collaboration platform for internal communications. Microsoft Teams recently **reported** more than 20 million daily active users, and Slack confirmed in late 2019 it has more than 12 million. Adoption of workstream collaboration apps is expected to continue growing significantly in the coming years. Our recent data shows widespread usage across numerous platforms.

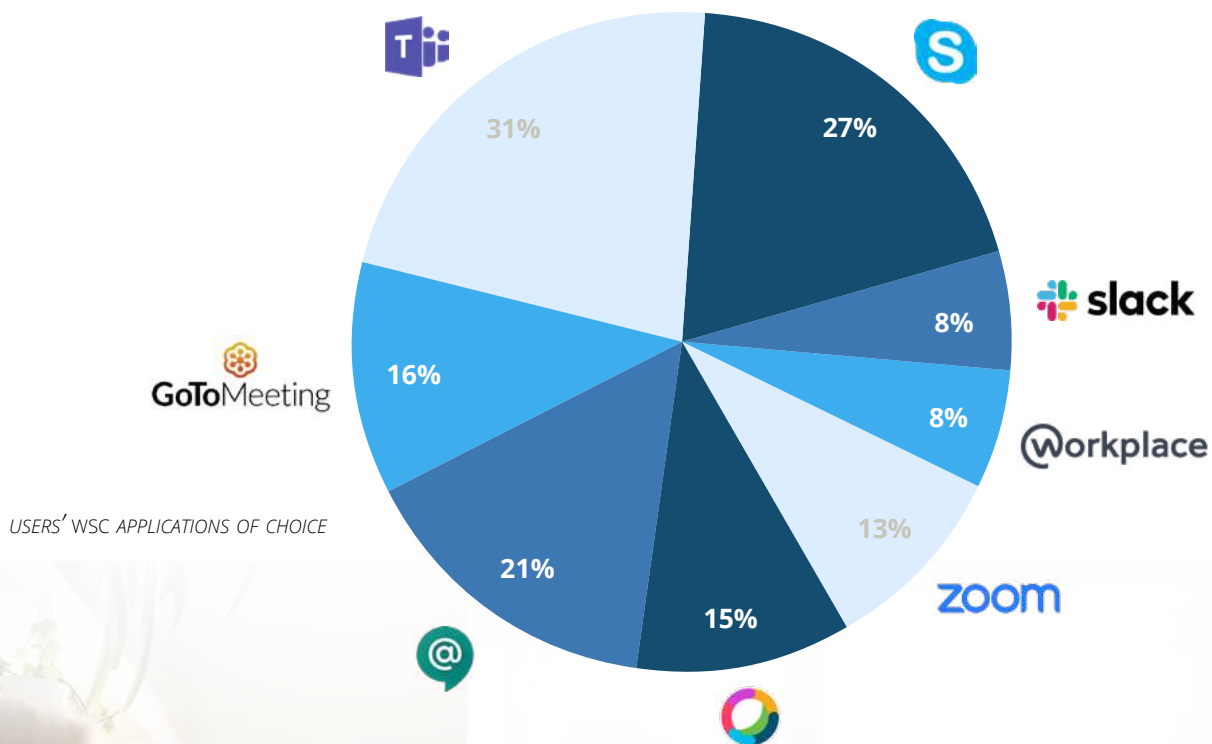


COLLABORATION APPLICATIONS AND USAGE AT A
GLANCE FOR SURVEY RESPONDENTS

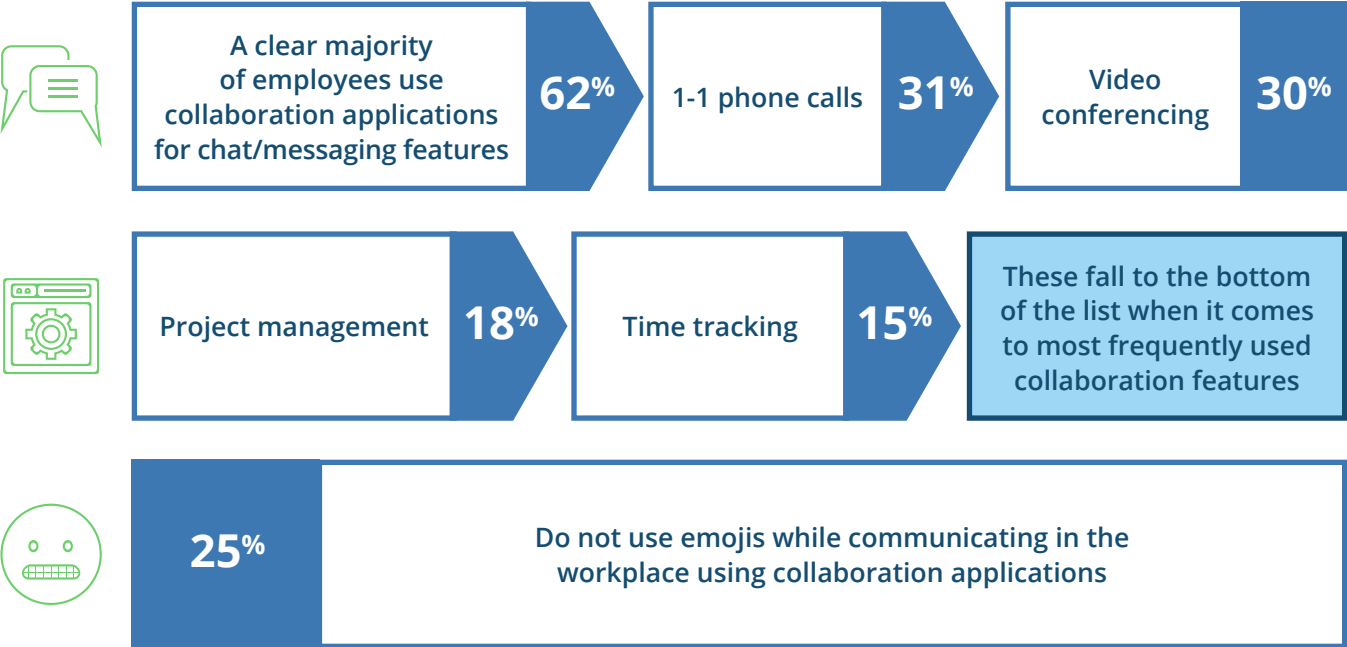
Playing Favorites

Despite pervasive use of workstream collaboration applications, most people are not using them as their primary form of communication. On average, enterprise users still practice in-person communication with colleagues more often than via a digital app. The most preferred collaboration platforms among respondents ranked as Microsoft Teams (31%), Microsoft Skype for Business (27%), Google Chat (21%),

Cisco WebEx Teams (15%), and Zoom (13%). Though Zoom ranked near the bottom of total usage, the application actually has very strong end-user adoption. When comparing the data between organizations that provide the platform, and employees that actually use it, Zoom had the lowest user drop off versus any other app platforms covered in the survey.



Employees are also using collaboration applications in expected, and some unexpected ways, indicating more love than hate across the big picture.





EMAIL GETS ALL THE FEELS

Many workstream collaboration providers tout that their applications will drive reduced internal email threads and thus reduce the estimated five hours per day most workers spend in their inboxes. Standing in defiance to these claims, email remains alive and well. [The Future of Digital Communication](#) reported that email remains a strongly preferred channel for business interactions—even among Generation Z, with 83% stating they expect their email usage will stay the same or increase in the coming years. An Adobe email usage [survey](#) found that as of 2019, email persisted as the preferred method for many daily tasks and communications.

Our survey corroborates the trend, and suggests that email evokes many “feels” among enterprise employees. Nearly 40%

of respondents said one of the chief benefits of using collaboration applications is fewer emails. Who wouldn’t want less email and more time for other work? Yet, 74% of respondents admitted they have not seen a significant decrease in emails since they started using collaboration apps. In contrast, only a mere 9% noticed a significant reduction in email.

Though email appears to be a mainstay for the foreseeable future, the good news is that most (66%) of the employees surveyed agree that they and most of their colleagues have mastered the art of effectively balancing both email and collaboration applications. This belief held true for all respondents, regardless of age, role, seniority, or work schedule.

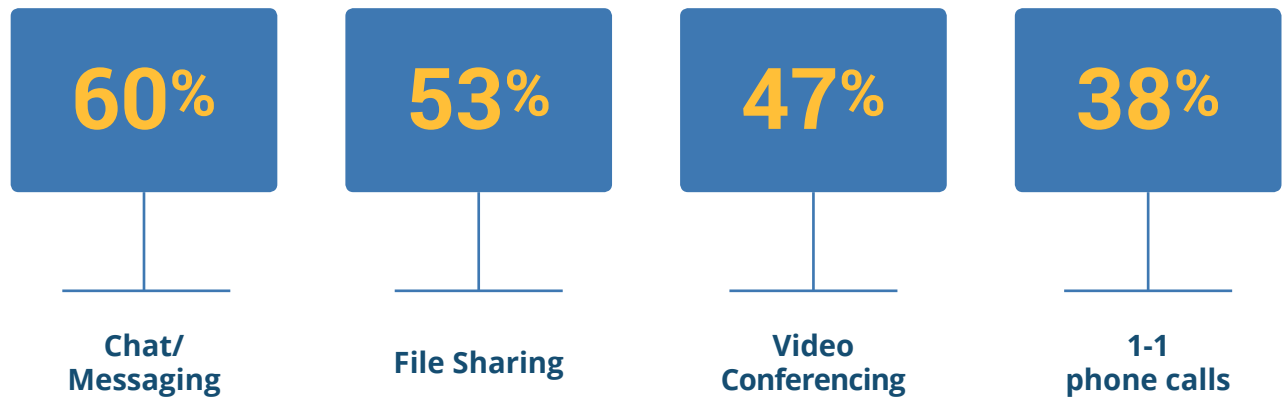
74%

of employees have **not seen any significant reduction in email** following the implementation of **workstream collaboration**

ZOOM KEEPS THINGS INTERESTING

Just when it seems like workstream collaboration is getting predictable, Zoom shakes things up. **Originally rising to prominence as a video conferencing application, Zoom is actually being used in some surprising ways.** Zoom chat is leading the usage parade (an unexpected stat for a conferencing platform) and **Zoom phone usage is remarkably healthy.**

ZOOM "MODALITY" USAGE BY THE NUMBERS...



A HOT BUTTON ISSUE: WORKPLACE DISTRACTION

In a recent [WIRED](#) article, neuroscientist Lucas Miller shared a bleak perspective on the impact of Slack to the workplace. He argued that Slack encourages constant distraction and prevents work output—doing so by tapping into our brain’s innate rewards system. With billions of interactions taking place in Slack every week via desktop and smartphones, it’s easy to buy into Miller’s view. Yet when asked about distraction, our survey respondents told a different story.

Everyone Wants...Productivity

Productivity—the converse of distraction—is undoubtedly important and considered a key driver for workstream collaboration. And, most of our survey participants said they do not feel overly distracted by collaboration applications. Their average rating of daily feelings of distraction landed at two, on a scale of one to five. Moreover, 80% said they believe collaboration applications make it easier to be productive when working remotely.



The average enterprise worker does not feel overly distracted by workstream collaboration



80%

say collaboration applications boost productivity for remote work



61%

of C-level executives and 60% of GenZ workers lead all other age ranges saying that they view expectations to respond to requests immediately as a downside of workstream collaboration



Senior managers, executive level employees, and GenZ workers are more likely to feel distracted than less senior employees or other age ranges



When users do feel distracted by collaboration applications, they cited personal conversations (41%) and incoming requests taking away from current projects (39%) as the biggest culprits. Approximately half of users also agreed that the expectation to reply to incoming requests in real-time is the main downside of workstream collaboration apps. That drawback was felt even more strongly by the owner/executive/C-level respondents, with 61% of that group saying they feel pressure to respond to requests right away.

Finding Mutual Understanding in Accountability and Attitudes

Regardless of where they landed on the spectrum of distraction, many employees (43%) believe preventing distraction caused by collaboration apps is a shared responsibility between themselves and management. But, the older the enterprise worker, the more likely they are to have difficulty with multitasking. Forty-seven% of Baby Boomers admitted that incoming requests detracting from real-time projects

is a key distraction when using collaboration applications. Similarly, senior managers and executive level employees indicated they are slightly more likely to feel distracted than lower level employees.

Contrary to popular belief, less than 20% of enterprise workers consider the following as drawbacks to workstream collaboration applications:

- 18%** Competition amongst teammates to reply quickly
- 15%** Creating silos within the company
- 13%** Information not being secure or private

#COLLABORATIONGOALS AND COLLABORATION SECURITY

Hand-in-hand with workstream collaboration—and achieving the enterprise's #CollaborationGoals—is collaboration security. This begins with a structured approach to deploying and managing applications. At the outset of a collaboration application roll-out, IT must partner with the security team to ensure firewalls, VPNs, and other baseline security measures are integrated. This also helps to manage user and group access, application growth, and mitigate the related complexities and risks of these working environments.

Employees Crave Structure and Guidelines

Fortunately, IT is not likely to see much resistance from employees when establishing structure around workstream collaboration. In fact, 40% of enterprise employees wish their organizations enforced stricter rules around collaboration application usage. More than one-third believe such guidelines would improve in-person interactions and/or productivity, and 42% crave better expectations for usage. Considering that many employees already view distraction as a minor downside, addressing these areas could be a boon to achieving further benefits and adoption.

User preferences around WSC application usage & security guidelines

40%

of enterprise employees wish their organizations enforced stricter rules around workstream collaboration



58%

think more structure will improve work-life balance



42%

crave better understanding of how they are expected to use collaboration applications



35%

believe more rules will boost productivity



Employee satisfaction stands to benefit from more rigorous collaboration security as well. Nearly 60% think more structure from IT will improve work-life balance. Younger employees were more likely to note improved work-life balance as the main driver for management-enforced rules (75% of 18-24 year-olds), while it was of the least importance to those 65+ (9%).

Among employees that do not want a structured workstream collaboration environment, 43% cited a desire for “more freedom,” as the reason. Nearly one-third said they want the option to use the applications for personal use. These are important insights that can help IT address areas where employees may be inappropriately using workstream collaboration and inadvertently increasing collaboration security risk.

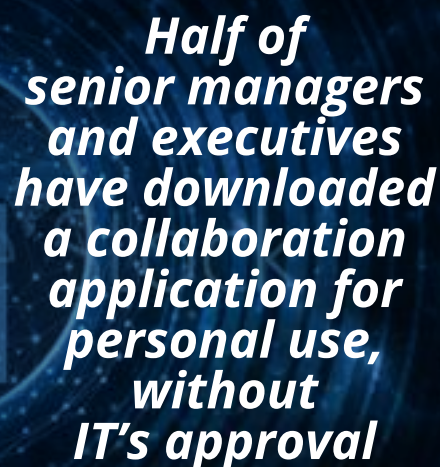
“ The traditional castle and moat model of protecting data at the perimeter has given way to a cloud-centered model where the modern security perimeter starts and ends with the end-user. ”

IT's Role: Perception vs. Reality

Largely, employees understand the need for IT to secure enterprise collaboration applications. More than 60% of respondents believe the responsibility for collaboration security rests squarely on IT's shoulders. Nearly 30% are willing to share that responsibility between IT and employees.



There is work to be done in gaining user buy-in to support collaboration security. While 80% of total respondents said they have never downloaded collaboration tools for personal use without IT's approval, the numbers look more concerning when parsed out by certain groups. Among tech industry workers, nearly 40% admitted to downloading collaboration without IT's approval, and half of senior managers (52%) and owners/C-level executives (50%) employees have done so.



***Half of
senior managers
and executives
have downloaded
a collaboration
application for
personal use,
without
IT's approval***

A Foundation of Trust

Establishing strong collaboration security is complicated, but critical. Teams must invest in building this foundation to reduce risk and ensure long-term viability for their workstream collaboration deployments.

Key steps in implementing workstream collaboration security include:

- » Planning for policies that define rules and align with how users interact with the applications day-to-day
- » Creating alerts that are triggered to inform IT of potentially risky usage
- » Analyzing for behavior and risk clues that help refine and improve policies
- » Building an information map to illustrate the common business scenarios and how various groups are working together

“ In today's digital workplace, information security paradigms have changed. Because of your users, your data is alive, moving, and continually evolving. IT must develop in concert, actively engaging business units to understand the risks and the role users play in managing collaboration risk. ”

— Alan Shen, Vice President of Consulting Services, Unify Square



LOVE ISN'T BLIND: PREFERENCES VARY ACROSS GENERATIONS, ROLES AND INDUSTRIES

From group-to-group, workstream collaboration applications are not all created equal. Microsoft continues to reign king of UC and workstream collaboration apps for enterprises. Among certain

employee segments, though, Google Chat has emerged as a serious challenger, with 39% of owner/executive/C-level employees and 33% of younger employees preferring it over other offerings.

Our survey revealed the following preferences across various segments...



Microsoft Teams

In addition to being the most preferred overall app, it is preferred by 50% of senior managers

Top choice for collaboration across consumer packaged goods, healthcare, and education industry enterprises



Google Chat

Ranked as a close runner-up to Microsoft as a preferred collaboration application among technology and education industry organizations

Tied with Skype for Business as being preferred by more than one-third of C-level employees

THE SECRETS TO SUCCESS

A successful workstream collaboration deployment is directly linked to overall improved business outcomes. Because the technology is still in its adolescence, IT teams may struggle with forging a clear path towards and benchmarking it along the way. Gartner has noted that leaders responsible for roll-out and adoption, “must understand the dynamics of this rapidly evolving market.”

Want Change? Try a Little TLC

Strategic and comprehensive change management is an important part of any digital transformation—and workstream collaboration is no exception. A Boston Consulting Group survey reported that, “By ignoring culture, an organization risks transformation failure”. The study backed up this claim with its findings that when cultural change was addressed as part of digital transformation projects, 90% had a higher rate of financial success compared to projects that neglected culture.

Analyzing Communications with PowerSuite

Managing cultural change and supporting employees in digital transformation requires a clear view into application usage, collaboration security and conferencing and calling problems. Unify Square’s PowerSuite™

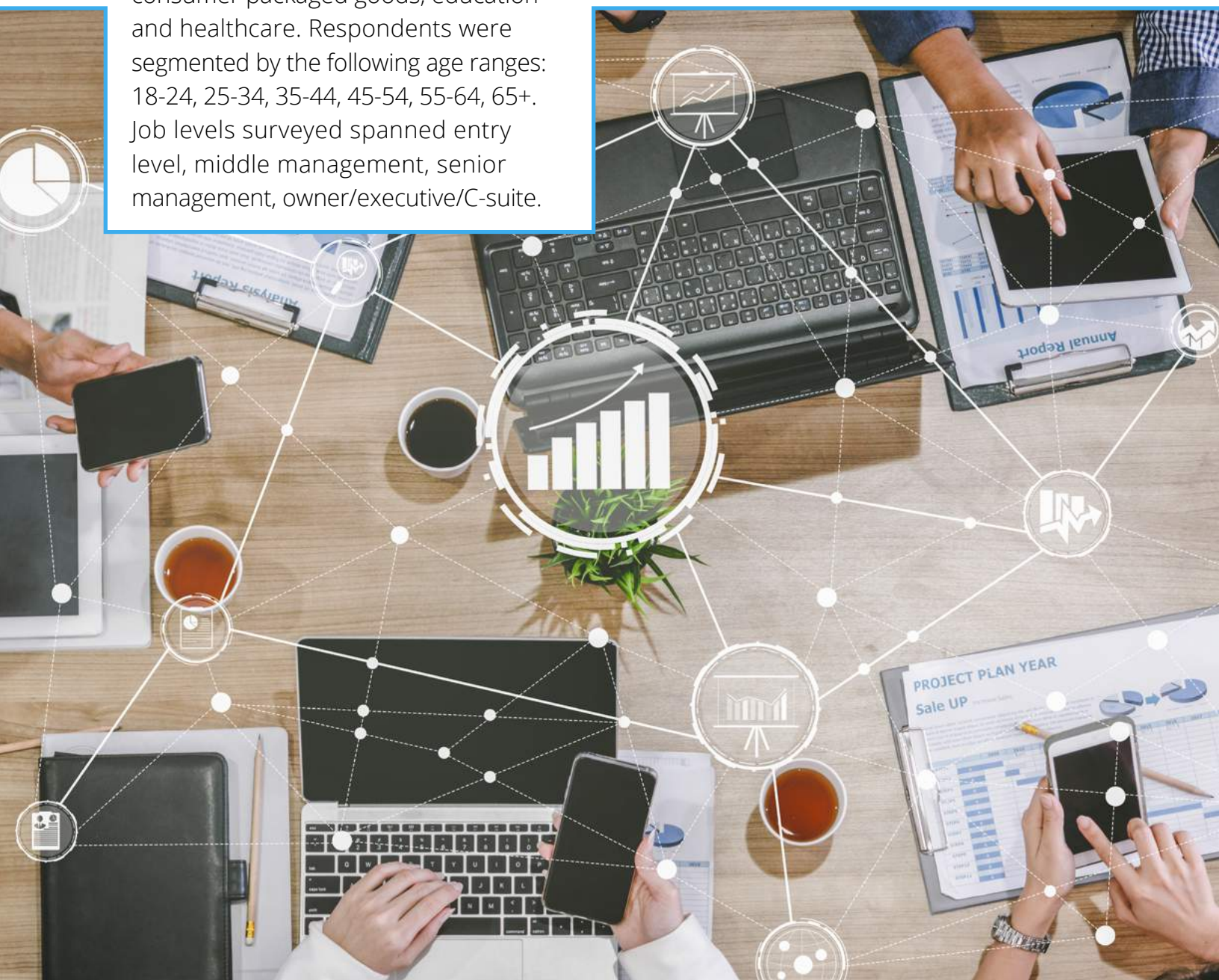
provides this through a single pane of glass that IT can leverage to monitor and optimize activity across all major UC and workstream collaboration environments.

PowerSuite helps IT accelerate and optimize collaboration by offering visibility into:

- Phone call quality and availability issues in Zoom, Microsoft Teams and Skype for Business
- Video conferencing problems with Zoom, Microsoft Teams and Skype for Business
- Security blind spots and gotchas in Microsoft Teams, Slack and other widespread applications
- Network infrastructure bottlenecks and user experience issues to proactively troubleshoot problems
- Workplace analytics regarding productivity across Slack, Zoom and Microsoft Teams to bolster change management efforts, user experience and efficiencies
- Integrations and migrations between and across the full scope of UC and workstream collaboration applications in the environment

ABOUT THE RESEARCH

From late January to early February 2020, Unify Square conducted a survey of more than 500 enterprise employees. Respondents worked at organizations with at least 1,000 employees, over a range of industries, including enterprise technology, consumer technology, consumer packaged goods, education and healthcare. Respondents were segmented by the following age ranges: 18-24, 25-34, 35-44, 45-54, 55-64, 65+. Job levels surveyed spanned entry level, middle management, senior management, owner/executive/C-suite.



ABOUT UNIFY SQUARE

Unify Square's software and services optimize and enhance the world's largest collaboration and communication deployments, helping businesses manage and secure their meetings, chats & calls. The company's PowerSuite software creates a unified dashboard to surface actionable insights and help manage collaboration platforms—optimizing and transforming performance health and user effectiveness. Founded by Microsoft product visionaries,

Unify Square has become a global elite partner for Microsoft, Slack, Zoom and Workplace by Facebook. Unify Square solutions have delivered value to more than 6 million collaboration seats, in over 275 enterprises across more than 50 countries, and in most major industry verticals. Headquartered in Bellevue, Washington, Unify Square also has offices in the United Kingdom, Germany, Switzerland, India, Australia and Lithuania.

