

Strategies And Solutions For Secure Webconferencing

Choose Deployment Models And
Products To Suit Security And
Performance Requirements For
Business-Critical Meetings

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Executive Summary

The No. 1 reason for choosing webconferencing on-premises is security. The use of webconferencing continues to grow as businesses rely on it for business-critical meetings and use it to increase the frequency of touchpoints between customers and partners. Firms need solutions that allow them to restrict or secure sensitive content that employees want to share in meetings as they connect using multiple devices from multiple locations.

In September 2014, Brother commissioned Forrester Consulting to evaluate market/adoption trends and the benefits of moving webconferencing on-premises. Forrester hypothesized that companies are deploying webconferencing on-premises because of the proliferation of sensitive content that employees want to bring into meetings.

In conducting in-depth surveys with 150 IT professionals, Forrester found that contrary to popular belief that the public cloud is the dominant choice, most firms have webconferencing deployments on-premises, using a combination of applications in the public cloud and on-premises, or on-premises alone. Although the public cloud continues to gain traction, most firms plan to continue using webconferencing on-premises in their next provisioning cycle.

KEY FINDINGS

Forrester's study yielded five key findings:

- › **Controlling the exposure of sensitive content is the top security concern.** Four out of five IT decision-makers consider this important, and 51% consider it very important. Three aspects of this concern are: 1) employees could be sharing unauthorized content in meetings; 2) employees could lose devices containing sensitive content; and 3) unauthorized participants could download content shared in webconferences.
- › **Firms choose on-premises deployments for security, performance, and cost.** Security was very important to 74% of IT decision-makers in their choice of webconferencing on-premises. Firms are more comfortable with their ability to limit the exposure of content and recordings — and control access to meetings in general — if they remain behind the firewall. Optimizing performance and controlling license costs are the No. 2 and No. 3 reasons for choosing webconferencing on-premises.
- › **Firms use multiple deployment models and applications.** One in three firms uses a mix of webconferencing on-premises and in the cloud. Two in three firms have multiple webconferencing applications deployed. Hybrid deployments can be used in a strategy to segment employees with different needs, allowing firms to optimize costs and address the breadth of requirements for webconferencing functionality.
- › **Webconferencing is growing in importance for business-critical meetings.** The most prevalent reason for using webconferencing is executive meetings. Most firms have employees who rely on the technology to participate in meetings while traveling. And most firms use the technology to meet with customers and partners — a use case they expect will continue to grow.
- › **Employees practice risky meeting behaviors.** Most firms have web meetings where employees share sales and marketing plans, information on customers or suppliers, and new product plans. Nearly 40% have meetings that involve financial data; one-third have meetings where employees share private customer or patient information; and approximately one in five have web meetings that involve trade secrets.

Webconferencing Is Critical To How Companies Collaborate

Webconferencing is an important tool that serves many different meeting and conferencing scenarios. All told, about 57% of information workers use these tools:

› **To connect from multiple locations to important meetings.** The most prevalent reason for using webconferencing is executive meetings, followed by company meetings and routine team meetings (see Figure 1). Most firms have employees who participate while traveling, and 17% have employees who join from public places, which is the meeting scenario where IT decision-makers are most concerned about security in the public cloud (see Figure 2). Nearly 60% of firms have employees who join over mobile devices, and most expect this behavior to increase.

FIGURE 1
Employees Use Webconferencing For A Variety Of Reasons



Base: 150 IT professionals at the manager level or above involved in selecting/managing webconferencing

Source: A commissioned study conducted by Forrester Consulting on behalf of Brother, October 2014

FIGURE 2
Employees Rely On Webconferencing While Traveling



Base: 150 IT professionals at the manager level or above involved in selecting/managing webconferencing

Source: A commissioned study conducted by Forrester Consulting on behalf of Brother, October 2014

- › **To meet with customers and partners.** Three-quarters of firms use webconferencing to meet with customers, and three-quarters use the technology to meet with partners. The most common external meeting scenario is online customer support, followed by meetings with sales prospects, webinars, and then customer or partner training. More than half of firms expect to use webconferencing even more for customer collaboration in the future, signifying the growing importance of this technology for how they conduct business.
- › **For rich collaboration with videoconferencing.** Nearly 80% of firms have employees who use their webcams in meetings, with most expecting their adoption of video to grow. Video is particularly valuable for meetings involving employees working from home (a scenario for 51% of firms we surveyed) and to increase intimacy and trust when meeting with customers. For meetings involving multiple participants at company offices, however, IT decision-makers need to consider the performance implications of putting video on the network.

Companies Need Solutions To Secure Sensitive Content

The value of webconferencing is enabling participants from multiple locations to share and collaborate on the same content in real time. As webconferencing becomes engrained in the work habits of increasingly mobile employees using the technology to collaborate with customers, partners, and distributed teams, IT decision-makers are worried primarily about data security.

Most firms have web meetings where employees share sales and marketing plans, information on customers or suppliers, and new product plans. Nearly 40% have meetings that involve financial data; one-third have meetings where employees share private customer or patient information; and approximately one in five have web meetings that involve trade secrets (see Figure 3).

FIGURE 3
Employees Bring Sensitive Data Into Web Meetings

“To the best of your knowledge, which of the following types of data do employees at your company collaborate on during web meetings?”
(Select all that apply)



Base: 150 IT professionals at the manager level or above involved in selecting/managing webconferencing

Source: A commissioned study conducted by Forrester Consulting on behalf of Brother, October 2014

IT decision-makers' security concerns around webconferencing include:

› Controlling the exposure of sensitive content.

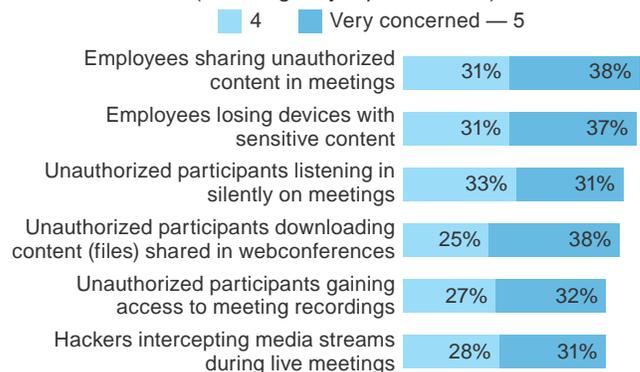
Controlling the exposure of sensitive files was the No. 1 security concern overall, important to 80% of IT decision-makers. Three aspects of this concern are: 1) employees could be sharing unauthorized content in meetings; 2)

employees could lose devices containing sensitive content; and 3) unauthorized participants could download content shared in webconferences (see Figure 4).

- › **IT administrative controls.** Although controlling the exposure of files is the No. 1 security concern, support for IT administrative controls is actually more of a factor at decision time: Nearly 50% of respondents factored in IT administrative controls in choosing a specific vendor or deployment model, compared with 40% who factored in features to control the exposure of content. Administrative controls typically include user management and provisioning as well as meeting configuration.

FIGURE 4
Firms Are Concerned With Security Threats With Webconferencing

“How concerned are you with the following security threats with webconferencing? Please rate on a scale of 1 to 5, where 1 = not at all concerned and 5 = very concerned.”
(Showing only top two boxes)



Base: 150 IT professionals at the manager level or above involved in selecting/managing webconferencing

Source: A commissioned study conducted by Forrester Consulting on behalf of Brother, October 2014

- › **Controlling access to meetings.** IT decision-makers want to prevent unauthorized participants from listening in silently on meetings. Surprisingly, password protecting meetings was the most important feature here, important to 71% of IT decision-makers. Authenticating users against a lightweight directory access protocol (LDAP) server is important to 64% of respondents, compared with 57% who are interested in enabling single sign-on (SSO). However, enabling SSO was more of a factor than support for LDAP when it came to differentiating between specific providers.

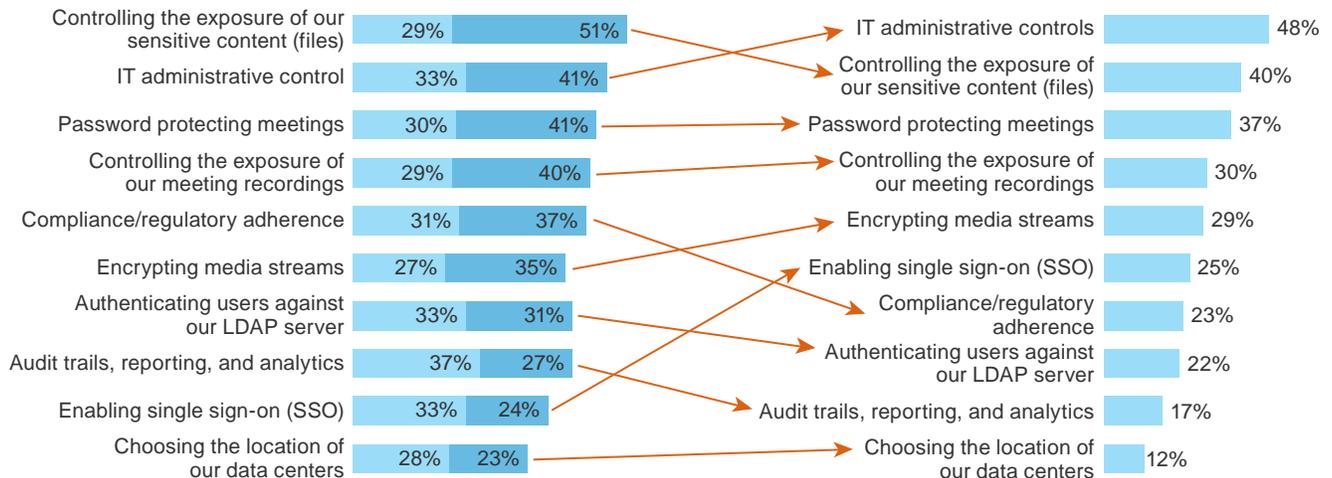
- › **Governance around meeting recordings.** Twenty-five percent of firms record meetings regularly, and 41% do so occasionally; the rest have either blocked recordings or have employees who aren't interested. Controlling the exposure of meeting recordings — by blocking the option or by preventing unauthorized participants from gaining access to them — is important to 69% of IT decision-makers and a factor in deciding between specific vendors or deployment models for 30% of them.
- › **Compliance and regulatory adherence.** Although compliance and regulatory adherence overall was an important aspect of security, choosing the location of data centers was the least deciding factor when choosing between vendors or deployment models, affecting the outcome 12% of the time. This suggests the above-mentioned aspects of security — IT administrative and access controls and controlling the exposure of content and recordings — are more important to regulatory compliance. Audit trails, reporting, and analytics factored into decision-making 17% of the time (see Figure 5).

FIGURE 5

Controlling The Exposure of Sensitive Content Is The Most Important Aspect Of Security

“How important are the following aspects of security when it comes to webconferencing? Please rate on a scale of 1 to 5, where 1 = not at all important and 5 = very important.”

■ 4 ■ Very important — 5



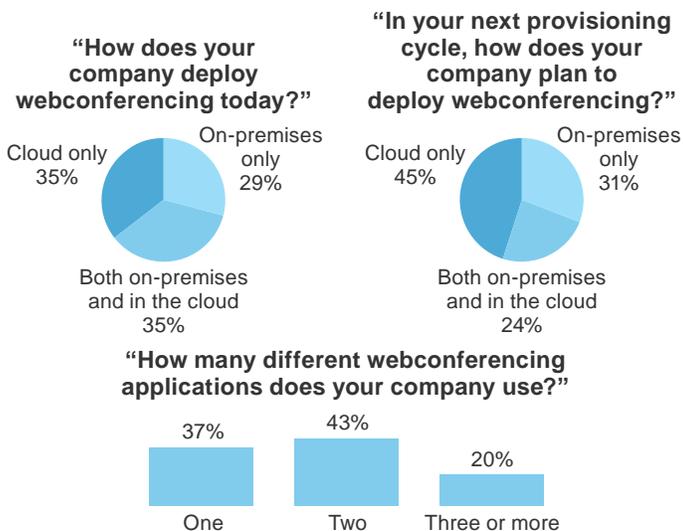
Base: 150 IT professionals at the manager level or above involved in selecting/managing webconferencing

Source: A commissioned study conducted by Forrester Consulting on behalf of Brother, October 2014

On-Premises And Hybrid Deployments Address Security And Performance Requirements

Most firms with employees using webconferencing actually have multiple webconferencing applications in their environments: Just 37% of respondents have one. Furthermore, over a third of respondents have a mix of applications running on-premises and in the cloud. The trend is for companies to increasingly move webconferencing to the cloud: 45% of respondents expect to strictly use webconferencing in the cloud in their next provisioning cycle, compared with 35% who do today. However, most firms still expect to use webconferencing on-premises as well, with 29% expecting to strictly use webconferencing on-premises and 24% expecting to use a mix of webconferencing on-premises and in the cloud (see Figure 6).

FIGURE 6
Most Firms Have Webconferencing On-Premises



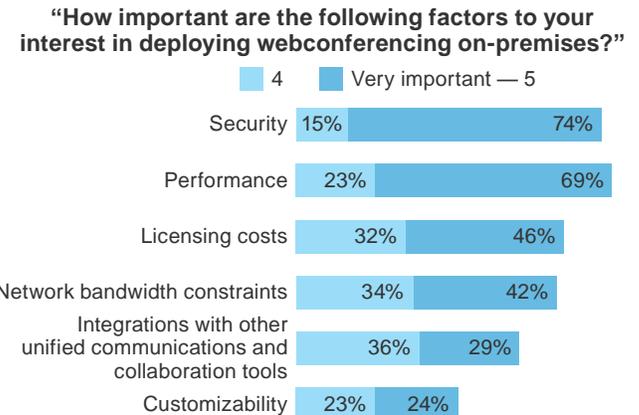
Base: 150 IT professionals at the manager level or above involved in selecting/managing webconferencing

Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf of Brother, October 2014

Firms are interested in webconferencing on-premises for (See Figure 7):

FIGURE 7
Security And Performance Are Primary Reasons For Webconferencing On-Premises



Base: 150 IT professionals at the manager level or above involved in selecting/managing webconferencing

Source: A commissioned study conducted by Forrester Consulting on behalf of Brother, October 2014

- Stronger security.** For firms interested in or already deploying webconferencing on-premises, the No. 1 reason is security — a factor that was very important to 74% of IT decision-makers in their choice. Companies are more comfortable with their ability to limit the exposure of content and recordings if they remain behind the firewall. Companies also find it easier to limit visibility for outside parties into what meetings are going on and control the process for external participants wishing to join those meetings when they aren't hosted in a public cloud.
- Higher performance on internal networks.** The second most popular reason for IT decision-makers to choose webconferencing on-premises was performance, which was a very important factor for 69% of respondents. Network bandwidth constraints are one component affecting performance, which was a very important factor for 42% of respondents. Depending on network architectures, meetings that stay on the internal WAN, particularly meetings involving video, will take up less bandwidth, be more reliable, and have higher quality.

› **Better visibility and control over costs.** Licensing costs were a distant third reason why firms chose or were interested in webconferencing on-premises. A little less than half — 46% of respondents — considered it very important. Many factors affect the cost of webconferencing, and licensing models vary across solutions. However, companies tend to have fewer variable costs when choosing webconferencing on-premises. When we asked companies what deployment model they would choose if cost were not a factor, responses broke out similarly across pure cloud, pure on-premises, and a mix of both.

Key Recommendations

Webconferencing has become a business-critical application not only for important meetings between employees, but for meetings with customers and partners as well. Firms need to plan strategically for broader adoption of webconferencing and the security considerations of employees bringing sensitive content into meetings. This study's findings call for the following actions:

- › **Choose webconferencing on-premises for security and performance.** Contrary to popular belief, many firms today use and plan to continue using webconferencing on-premises. The public cloud tends to be lower cost for smaller deployments and makes it easier to conduct meetings with participants outside the firewall. However, when it is paramount for IT to control the exposure of content and recordings, firms should choose webconferencing on-premises because it is easier to secure. They should also choose it to optimize performance in larger deployments with heavy use for internal meetings and heavy use of video.
- › **Avoid unforeseen costs by understanding the total cost of ownership (TCO) implications of different deployment models.** Although licensing costs were one of the top three reasons that firms chose webconferencing on-premises, ironically the No. 1 concern with webconferencing on-premises overall was also cost. Although webconferencing on-premises requires firms to stand up and manage servers, licensing can be more attractive for a firmwide deployment with heavy utilization. Companies should avoid specialized hardware that makes deployments more complex and reduces their flexibility to switch solutions. For many IT decision-makers, having visibility, control, and predictable costs is just as important as the actual costs themselves. This tends to be a complaint with webconferencing in the cloud, where the cost and cost structure of audioconferencing is sometimes obfuscated or hidden.
- › **Consider a hybrid environment to address comprehensive employee needs.** Most firms with employees who use webconferencing use multiple applications in their environment to address a range of employee needs. A common scenario Forrester sees is deploying one particular application for 80% of employees and another for the 20% who need additional capabilities. An example would be primarily deploying webconferencing on-premises and reserving licenses for webconferencing in the cloud for employees who have to collaborate regularly with external participants.
- › **Mitigate barriers to employee adoption with deployment best practices.** With any collaboration initiative, getting employee adoption is the No. 1 challenge and the primary indicator of success. When it comes to deploying webconferencing on-premises, 22% of IT decision-makers were concerned that it's more difficult to conduct meetings with participants outside the firewall. Unless their strategy is to deliberately make it more difficult for external participants to join, firms need to take care in deploying and configuring webconferencing on the network. In a hybrid strategy involving multiple webconferencing applications, IT decision-makers should also mitigate issues of fragmented toolkits and employee confusion over the different available tools by communicating clearly on what is available and what meeting scenarios tools are best suited for.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 150 regulated and nonregulated organizations in North America to evaluate market/adoption trends, the benefits of moving to a private cloud, and best practices for doing so. Survey participants included decision-makers in IT. Questions provided to the participants asked about their current webconferencing solutions and their concerns with on-premises solutions. Respondents were offered incentives as a thank you for time spent on the survey. The study began in September 2014 and was completed in October 2014.