Video: The New Normal for Enterprise Communication and Marketing

A Frost & Sullivan White Paper

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MEET VIDEO: THE NEW LIFEBLOOD OF YOUR BUSINESS PROCESSES

For many enterprises still caught up in the transition to digital workflows and mobile work-anywhere trends, video seems to be an interesting yet nascent trend. Though some savvy corporations are increasingly leveraging video to maximize customer engagement, enrich career development and more effectively communicate with internal and external stakeholders, we still see too many executives blissfully unaware of the video-powered revolution under way. The fact is that video within the enterprise is decisively moving past an experimental technology to become a business-critical communication and productivity enabler. Video has also emerged as a very critical element of a company’s content marketing strategy, be it in-bound or out.

While many think of media and entertainment companies as the major content producers in the market today, enterprises today already create orders-of-magnitude more video than Hollywood. For example, in 2014, based on publicly available information, approximately 250 feature-length titles were released by the 15 largest studios in the United States, which translates to approximately 500 hours of content. In contrast, the enterprise community generates that amount of video every day, and YouTube reports that volume of content uploaded every minute. According to Frost & Sullivan estimates, streaming media players such as Adobe Flash Player, JWPlayer and others commonly used by enterprises reported a whopping 250% growth in content volumes processed and over 100% growth in active users in 2014, emphatically indicating that video engagement is gaining both depth and breadth—and at a breathtaking pace.

Enterprises that are not already actively integrating video into their everyday business processes are not only falling behind the competitive curve, but are also unknowingly impacting their top-line revenues and bottom-line expenses. Enterprises must work quickly to embrace video as a first-class citizen within their networks and in their knowledge management systems. Video needs to be as pervasive as voice and documents in today’s enterprise, and business leadership must empower IT teams to lead the charge in making this transformation. In this paper, we discuss the value proposition of video in the enterprise. We also clarify common executive confusion regarding the relative role of various video-based solutions in the enterprise and best practices to keep in mind when deploying video for internal productivity and external marketing applications.

THE VALUE PROPOSITION OF VIDEO IN THE ENTERPRISE

Understanding the value that video can bring to various aspects of communication, training and marketing is the first step to developing a video-centric growth strategy. Let us now discuss what Frost & Sullivan’s research across end-user groups in multiple verticals has unveiled as the most important drivers for video across the enterprise.

Our research assures that video can and should be fully leveraged to educate and communicate across the enterprise, both internally and externally. Both live and on-demand video can be used effectively across a range of use cases. These drivers of enterprise video are discussed in detail below. Readers should note that while the individual use cases are distinct in their own right, the principal benefits and value that resonate across each case are very similar:

- Consistency and ubiquity of training leads to a better informed workforce and improved compliance;
- Stickiness and reach of messaging ensures common goals, purpose and awareness among employees and partners;
• A high level of engagement with internal and external audiences promotes brand value, catalyzes innovation and improves productivity; and
• Millions to hundreds of millions of dollars of savings on travel and live event coordination lend much-needed relief to the corporate bottom line.

The Value of Enterprise Video – Internal Use Cases

Enterprise Video Webcasting

Enterprise video webcasting remains the most popular and most impactful application of video. Webcasting allows enterprises to consistently, efficiently and quickly disseminate visions and messaging, provide training to employees and contractors, facilitate collaboration, catalyze ideation, and knit the workforce together into a community with common goals and common understanding. Accordingly, enterprise video webcasting is being used to enhance every business process from executive broadcasts to corporate communications, investor relations to product launches, and training to knowledge sharing. Video webcasting is increasingly leveraged at all-hands meetings and employee town halls, and is gradually making inroads into smaller-scale scenarios such as department-level think tanks as well.

Every enterprise segment of note is reporting soaring adoption of enterprise video webcasting. One key benefit that video-based training offers is consistency of presentation and messaging. Another key benefit is the ability to access training material and strategic communication on any device from any location; reducing travel costs (and the opportunity cost of time lost to travel) is typically the number one reason why enterprises embrace video. Since the costs of hosting physical events and the productivity impact from in-person event attendance are quite high as compared to the cost of recording and broadcasting a video webcast, video solutions quickly pay for themselves simply by virtue of reduced bottom-line costs.

Video-Enabled Collaboration

A key priority for CXOs is figuring out ways to improve communication with globally distributed employees, always-connected customers, technical collaboration partners, information-hungry shareholders, key suppliers and distributors, and other stakeholders. Improved communication, agile collaboration and rich interchange of information despite physical distance are all critical to achieving compressed business cycles, controlling employee attrition, maximizing customer loyalty and achieving competitive success. The power of video as a tool to engage, educate, communicate and sell is seated within this context. The magnitude of this potential impact is only slowly being recognized and realized by enterprises. Video-enabled collaboration can be as simple as the ability of employees to form a virtual think tank by recording ideas and sharing videos within a team or across teams. With rich tagging and searching capability, videos can form a knowledge database in their own right and accelerate learning, while ensuring consistent methodology and viewpoints throughout an organization and its partner ecosystem.

Anytime, Anywhere Productivity

Mobile devices and cloud computing are together redefining the workplace. Portable devices allow knowledge workers to be continuously connected and afford greater productivity. Nearly every large enterprise today permits and even encourages the use of BYOD in everyday business tasks. Citrix reported in 2014 that nearly half of enterprise workers use their own mobile device or are provided a company-owned device for everyday business tasks. Accordingly, BYOD-based video delivery improves rollout and efficacy of training programs and allows faster decision-making. The ability to view live and on-demand videos inside and outside the firewall with a high-resolution, high-quality experience and within a tightly controlled experience helps workers reap the
benefits of strategic vision alignment and effective communication, while still realizing the benefits of the work-everywhere lifestyle.

When key training can be rolled out not only at live kick-off events, but also in on-demand fashion, enterprises gain the ability to record once and train everywhere (through the create-once-publish-many paradigm), lending tremendous economies of scale. Furthermore, analytics and measurement allow HR departments to improve efficiency by not only delivering live and on-demand content, but also by tracking and monitoring to provide better compliance measurement for corporate governance purposes. Better compliance achieved at lowered cost is one of the strongest benefits that video offers today.

Flexibility across live video, video on demand (VOD) and live-to-VOD capabilities help maximize the capitalization of existing video. The ability to make live webcasts available for on-demand viewing on an anywhere-anytime basis produces dramatic positive impact on viewership and usage. Where enterprises were once considered strongholds of live video, today on-demand consumption is becoming the norm—particularly for employee training, partner training, corporate vision communication, and product launches. When supplemented by security, analytics, storage, monitoring and reporting features, video platforms can significantly simplify and streamline processes such as corporate compliance and governance, even for globally dispersed workforces.

**The Value of Enterprise Video – External Use Cases**

**Market Education and Lead Generation**

One functional area that has been fundamentally transformed by video is marketing. Increasingly, video is being chosen by forward-looking companies as the preferred content type for their content marketing strategy because of the uniquely engaging and highly sticky experience that it provides. Statistics from online video platform (OVP) vendors, digital player vendors, network providers and content delivery network (CDN) vendors all point to soaring consumption, particularly of video clips shorter than 10 minutes: this duration is the norm for outbound enterprise video. Uptake is growing in the triple-digit percentages on nearly every type of client, from PCs to smart phones and tablets. Social media sharing is lending even greater power to marketing campaigns built on compelling video; marketers are thus increasingly using engaging internal videos as well as custom-crafted advertising videos and syndicating them out to the public domain as part of a viral marketing strategy. Integration with social media sites including LinkedIn, Twitter and Facebook is particularly profitable when it includes in-experience lead capture and tight integration with measurement and analytics, which allows marketers to immediately gather leads and measure follow-through.

Frost & Sullivan finds a groundswell increase in the combined use of enterprise video platforms, along with integrated email campaigns launched through marketing automation tools. A key reason for this is the tremendous sticky appeal of video: customers, on average, spend three to five times more time on pages with video content as compared to pages with simple text and images. Marketers report that users are, on average, two to 10 times more likely to click on ads or execute a call to action when engaged with video as opposed to more traditional content. According to Dan Rayburn, principal analyst with Frost & Sullivan, when StreamingMedia.com added video to the tutorials section of its website, the average viewing time per user went up by more than 100%, to over 12 minutes on average versus less than 5 minutes per user when the tutorials were only available with photos and text. This affinity for video, combined with advanced analytics allowing highly targeted and personalized customer experiences, is a game-changer in the status quo for advertising. Marketers who can successfully deploy sticky content, fine-tuned through analytics and ongoing updates, benefit from a far more effective marketing funnel and far more successful nurture campaigns as both raw and qualified leads grow in number.
Brand Enhancement and Customer Engagement

Enterprise video in conjunction with digital signage can improve brand awareness and product awareness while improving customer engagement. One example is a bank leveraging video to carve out its position in the intensely competitive retail banking space. Video formed a core part of a messaging campaign designed to raise the profile of the company in the eyes of its employees and emphatically define its brand to customers. In particular, the bank leveraged digital signage at retail locations to provide information about its products and services to customers. Using video through signage and kiosks at branch locations helped create differentiation and increased customer value and satisfaction, significantly reducing time spent with bankers, while also increasing uptake of featured products and services. In other words, video delivered on its promise of reducing bottom-line expenses while improving top-line revenue, as well as laying the foundation for ongoing, long-term growth.

Increasingly, enterprises are becoming content creators in their own right, as retail-centric businesses like Coke and Red Bull run their own 24x7 channels. Enterprises can even be considered the new record labels, as bands and musical groups are engaged to promote brands, and live events including music and gaming are broadcast live and made available on-demand to support brand marketing and customer outreach. Even within enterprises, the popularity and usage of so-called “Enterprise YouTube” is soaring. Accordingly, enterprises are finding the need to deploy industrial-grade platforms in scalable, standardized, secure fashion with high availability and high agility—not much different, really, than what are traditionally considered media and entertainment over-the-top (OTT) video deployments.

CHOOSING THE RIGHT PLATFORM SOLUTION FOR YOUR ENTERPRISE VIDEO STRATEGY

The term video platform has historically conjured images of a sophisticated, rigid technological solution involving hardware, custom integration and continuous maintenance. Modern terminology has swung to the opposite end of the spectrum, where free and low-cost solutions abound for someone as unskilled as a high school student can create video, post it online and monetize it. Enterprises seeking to deploy video need to find the ideal middle ground between an open, agile and scalable platform, and a sophisticated solution that provides the reliability and analytics necessary to securely and profitably deliver video inside and outside the firewall, both within and outside of controlled enterprise networks.
## Differentiating Mature Video Solutions from Garage Hacks—Factors to Keep in Mind When Choosing and Enterprise Video Partner

<table>
<thead>
<tr>
<th>CRITICAL</th>
<th>Security of video for internal applications, advertising-enablement for external-facing applications and converged live and VOD support are critical for ongoing viability and ubiquitous use of video for its intended purposes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>URGENT</td>
<td>Reliability is an often overlooked but urgently required feature in enterprise video. As video becomes an integral part of every business process, its reliability directly impacts productivity, profitability and brand value.</td>
</tr>
<tr>
<td>KEY</td>
<td>Scalability and agility are key for an enterprise video platform. Video volumes are projected to triple by 2017; user numbers are similarly growing while the device landscape is further fragmenting. The solution must be designed to grow and adapt accordingly.</td>
</tr>
<tr>
<td>ESSENTIAL</td>
<td>Closely tie video with analytics and monitoring to ensure that usage can be tracked, uptake can be measured and ROI can be quantified.</td>
</tr>
<tr>
<td>BASIC</td>
<td>Provide cross-platform, cross-device video delivery capability, using industry-standard compression technology such as AVC, and streaming protocols such as HDS, HLS and HTML5.</td>
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</table>

Enterprise video platforms are often confused with point solutions such as learning management solutions for training applications or unified communications solutions for point-to-point live communication. In reality, an enterprise video platform offers far more; it is an enabling platform that can be seamlessly deployed across all the internal-facing and external-facing scenarios described above, and that can empower disparate teams ranging from product management, R&D, HR, sales, finance, marketing and investor relations to engage with their stakeholders and streamline their tasks to better achieve their individual goals.

Scalability is an often overlooked but key consideration, especially from the point of view of traffic optimization within the enterprise. As thousands of employees sign in to view live video events, for example, enterprise networks can quickly be overwhelmed if they are not architected for such traffic bursts. The problem will inevitably worsen over time as trends predict more concurrent users viewing more HD video without corresponding expansion of network bandwidth, especially if the video delivery solution naively unicasts to every client. The problem becomes even worse if a video platform is licensed as a SaaS and every user, inside or outside the firewall, pulls video from an external cloud source. The video platform solution thus needs to perform far more intelligently as a de-facto enterprise content delivery network to ensure an engaging and high-quality experience for every user without undue impact on the network and ongoing productivity.

While basic cross-platform, cross-device delivery capability is a fundamental requirement, existing learning management solutions or telepresence systems can often struggle to provide this. As a specific example, systems that were architected for internal YouTube-for-the-Enterprise use cases are often unable to provide easy access for remote employees using their own devices.

### Critical Considerations for Enterprise - Internal Use Cases

The more pervasive and insidious the use of video becomes, the more powerful it is—but also the more vulnerability it introduces. Hacking and espionage are gaining in sophistication and transparency, even as the need to protect sensitive internal IP, controlled financial data and, in some cases, personally identifiable information becomes ever more urgent. Ensuring protection travels with videos outside firewalls and across networks is particularly important to prevent accidental or intentional leakage.
Security is paramount for all video, regardless of where it is created, how it is delivered and what type of client it is rendered on. Authorized access, controlled distribution, and monitored usage are crucial to protect company IP and maintain compliance. At the same time, to maximize automation, scalability and reliability, IT teams strongly prefer to leverage existing federated authentication infrastructure—this preserves single sign-on and removes the need to manage user permissions and credentials in multiple places. Prevalent solutions include on-premises user management systems such as Active Directory or LDAP, or common authentication services such as OneLogin, Google Apps ID or Active Directory in Azure. SAML is the common protocol used to interface across all these mechanisms. Accordingly, a video platform that supports SAML-based integration will deliver much better long-term ownership and user experiences than one that does not.

One step beyond this, modern authentication mechanisms pervasive in industries such as banking and financial services—such as two-factor authentication, blacklisting and whitelisting—are hard to find as turnkey features in enterprise video solutions today. However, they are increasingly critical to provide durable and reliable security across the fullest range of use cases.

Any security feature is expensive to implement as an add-on; additionally, security as a tacked-on component is inevitably both cumbersome and fragile. To deliver reliable protection, a video solution should ideally incorporate security as a first-class feature providing ease of use, automation and auditing capability, as well as flexibility in authentication protocols. This is one area where upfront evaluation and careful vendor selection is critical.

**Critical Considerations for External-Facing Enterprise Use Cases**

As discussed earlier, as much as content is king, video is the emperor. While video in general will improve the quality and depth of customer engagement, the actual content is central to the degree of success a campaign will have in capturing attention and retaining visitors. Content should encompass a variety of modes, including text, images and rich media. Video itself could be enterprise-produced, user-generated, or a combination of the two. Successful enterprises are increasingly leveraging a rich library of video and active graphics to generate adaptive, personalized experiences based on predictive analytics that leverage captured and stored individual visitor preferences. The goal of an omni-channel marketing campaign is to target the right person, through the right channel, at the right time, with the right content. It is critical for a video platform to enable this full spectrum of functionality, going beyond simple video hosting and delivery to enable an enterprise to target a user with precise content, measure the success of engagement, personalize the content experience based on known user metrics and preferences, engage the customer through a rich interactive experience, respond to customer actions, and optimize this entire process in real time.

It is critical, therefore, for a video platform to offer interoperability with all major marketing automation and CMS systems on the market, such that an enterprise can avoid watershed disruption and eliminate the need to reinvent any wheels. Marketing teams should, with minimal upfront custom development, be able to streamline the process of capturing and storing search histories and personal preferences to optimally adapt to a visitor’s unique needs and thereby develop enduring one-to-one relationships with their customers. The ability to put interactive, targeted video at the center of marketing campaigns generates great bait for lead-generation and lead-qualification campaigns.

Another critical competitive differentiator is the ability to quickly create compelling, customized landing pages and campaigns without relying on expensive and scarce IT resources. Your platform should not require a technical wizard or IT expert to do this; business line managers should be able to unleash video at the push of a button. Agility is also crucial to respond in real time to analytics and feedback to readjust and reprogram campaigns on the fly. The Web is a fickle landscape, where videos can go viral without warning and campaigns
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...can just as easily fizzle out. Video platforms that allow you to remotely update campaigns to respond quickly to trends and observed metrics are particularly valuable in this regard.

**Converged Live and On-Demand Support – Easier Said than Done**

Boredom is quick to set in on the Internet today, and a competing site or another content source is only a few seconds or a few keystrokes away. Where slick video once sufficed to capture user attention, marketers today must distinguish simplistic lean-back video rendering from a rich, interactive, engaging video experience. That lean-forward, inclusive experience is crucially important to ensure viewers don’t tune out or bounce away.

Another important transition under way in enterprise video is the converging of live and on-demand use cases. Users are no longer differentiating between live and on-demand content experience. The same expectations of time-shifted, place-shifted, anywhere-anytime video that are redefining OTT video consumption in the media and entertainment (M&E) sector are influencing user expectations in the enterprise sphere as well. Accordingly, the need for a solution that can equivalently handle live and on-demand workflows, and provide a convergent user experience, is critical for maximal uptake and thus maximal ROI. This is a challenging goal as vendors have traditionally specialized in one or the other, and implementing cross-over models such as live-to-VOD in an easy-to-use yet reliable manner is easier said than done.

While the value proposition of enterprise video is quite obvious, it is also clear that realizing its full range of benefits is heavily reliant on a solution that can deliver a broad range of features and functionality to meet current and emerging demands. Fortunately, vendors are stepping up to the plate to deliver state-of-the-art video systems that comprehensively deliver the necessary suite of requirements and capabilities.

**USTREAM SOLUTION BRIEF**

Ustream provides three editions of its video platform to optimally serve the internal and external video needs of enterprises, not only today but also in the future. These include the Ustream Pro Broadcasting platform for all use cases related to live and recorded media distribution; Ustream Align for internal-facing communications; and Ustream Demand for marketing activity where the primary goal is lead generation. Avant-garde enterprises including Nike, Yammer, Verizon, LinkedIn and Facebook rely on Ustream today to harness the power of video.

**Connect the Dots for Your Employees and Partners with Ustream Align**

Ustream Align is optimized for internal-facing applications and provides all the basic, key and essential features any enterprise needs, as discussed above. The solution differentiates in terms of its security features. Administrators can choose whether the system should use a two-step email verification process, admit users by comparing their credentials against a stored list of email IDs, or hand off to the enterprise’s federated authentication service. Configuration can be easily accomplished using a dashboard, and video can be accessed inside or outside the company network from any location and device. Enterprises can decide, at a channel level, whether a given user has owner, manager or simply viewing privileges. Multiple content managers can help enterprises keep up with the flow of live and pre-recorded content, both of which can be shared easily within a channel. Because access privileges are integrated with the user management system, any addition or removal of users or privileges are automatically reflected in video-based permissions with zero latency or IT intervention. Multiple channels can be created with different access permission lists to ensure that even within the enterprise, only the appropriate viewers gain access to each content type.
Ustream Align is also designed to optimize traffic on corporate networks. The product leverages Ustream’s long history as a best-in-class provider of live video streaming solutions to enterprises; it is built on the same platform that today reportedly powers more than 20 million live broadcasts each year and is measured as the largest live video streaming solution by volume worldwide.¹

**Ustream Demand Fulfills Every Marketers’ Video Needs**

Another side of Ustream’s video platform coin, Ustream Demand, is designed to help marketers energize their lead-generation campaigns by unleashing the power of video. Key features of Ustream Demand, which streamlines and automates the process of leveraging video in marketing campaigns, are depicted below.

![CAPTURE LEADS](image)

- **CAPTURE LEADS**: Add registration forms to your live and recorded videos to turn your viewers into prospective leads.

![INCREASE CONVERSION RATE](image)

- **INCREASE CONVERSION RATE**: Analyze lead and content consumption metrics to identify what resonates most with your audience.

![ENGAGE YOUR AUDIENCE](image)

- **ENGAGE YOUR AUDIENCE**: Answer questions submitted by your viewers on the fly and get feedback with surveys integrated in your videos.

![THINK BEYOND VIDEO](image)

- **THINK BEYOND VIDEO**: Share your screen, and documents with your audience and add call to actions to your content.

This video marketing platform is designed as a complement to leading marketing automation and CRM solutions, including Eloqua, Marketo, Hootsuite, and SalesForce. This ensures that deployment is quick and economical, with minimal disruption of processes already in place. Ustream’s video marketing platform is focused on streamlining the capture of user information and user video consumption behavior. By ensuring that user data and consumption behavior are available to the users of these marketing automation platforms, Ustream can power the process of using video content as a component of integrated content marketing plans.

As with email and website content, video data can be used within an automated marketing platform to contribute to educating prospects, lead scoring, and behaviorally triggered marketing actions. By combining user video consumption preferences with other behavioral cues tracked within a marketing automation system, the clearest picture of a potential customer’s interests emerges. This embodies the paradigm of “Know your audience to grow your audience.” Ustream Demand is not seeking to replace existing marketing platforms, but rather to complement them by adding the ability to include video content as a highly engaging and elucidating additional media type for integrated marketing campaigns.

A differentiating complement to Ustream Demand is Ustream’s LiveAd offering, which uniquely offers a solution to the problem of finding and bringing in a significant audience for video streams. LiveAd can take live video streams and embed them in a rich media ad unit, distributed across the sites where a marketer’s target audience is likely to frequent. This creates exposure to a new audience that might otherwise be unaware of the appeal of the content available, and helps marketers cast their nets more widely, particularly at the top of the funnel, where they are trying to generate awareness.

Further, with LiveAd, viewers don’t just view videos. Rather, they engage by rolling over, clicking through, sharing on Facebook and Twitter, entering text, and controlling playback. Consequently, the system delivers much more than a simple video publishing platform—it enables real-time engagement features and the ability to deliver rich media video webcasts with built-in calls to action, giving marketers powerful tools to meaningfully deepen engagement and leverage the device-centric and social-centric browsing and discovery behaviors that modern users are increasingly exhibiting. The proof is in the proverbial pudding; Ustream reports that early LiveAd users have seen average view times of 12 minutes per ad in contrast to the industry average of just a few seconds for a typical display or banner ad. Interaction rates can be as high as 15%, and CTR’s are as high as 2.5%—this is nearly 25 times the typical 0.1% CTR for display ads.

LiveAd allows marketers to supplement basic click-through metrics and dive deeper into stats such as total viewing and playback time, and social impressions. Again the results speak for themselves; compared to recorded video playback on other video platforms, LiveAd reportedly delivers up to 200 times greater exposure for Ustream’s customers as compared to other lean-back video playback solutions.

Most importantly, LiveAd ensures that ad placement is carefully targeted, optimizing budget while maximizing impact. Ustream’s massive global syndication network, coupled with precision targeting based on industry-leading analytics, ensures that a customer’s ads are placed only in appropriate, well-matched, highly visible and brand-safe websites.

**SELF-ASSESSMENT CHECKLIST**

<table>
<thead>
<tr>
<th>Video Competency Question</th>
<th>Yes</th>
<th>No</th>
</tr>
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<tbody>
<tr>
<td>Is security a prerequisite for you to deploy video for widespread internal use across your enterprise?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you believe that your employees’ and partners’ quality of experience with video is adversely impacted due to lack of scalability that you can presently provide?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you eager to deploy video within the enterprise but have been unable to because of the diverse array of point solutions specializing in either live, demand or collaboration use cases?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you effectively able to monitor video consumption and measure viewer engagement for actionable insights into optimizing the value you are deriving from your video-centric initiatives?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is providing easy access for employees connecting remotely and/or connecting on their own devices (mobile, tablet) in the critical path to unlocking productivity for the workforce?</td>
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</tbody>
</table>

If you answered yes to any of the above questions, it is business-critical for you to engage with a vibrant vendor community, exemplified by Ustream in this paper. Not doing so means that you are underutilizing your video initiative and robbing yourself of opportunities to streamline and grow your business.
Frost & Sullivan, the Growth Partnership Company, works in collaboration with clients to leverage visionary innovation that addresses the global challenges and related growth opportunities that will make or break today’s market participants. For more than 50 years, we have been developing growth strategies for the Global 1000, emerging businesses, the public sector and the investment community. Is your organization prepared for the next profound wave of industry convergence, disruptive technologies, increasing competitive intensity, Mega Trends, breakthrough best practices, changing customer dynamics and emerging economies?

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