

A Forrester Consulting  
Thought Leadership Paper  
Commissioned By IBM

September 2017

# Deliver Value To Customers And Employees With A Single Video Platform

How Video's Key Benefits Power Today's Digital  
Workplace



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# Executive Summary

Companies that leverage video are seizing the opportunity to enhance employee collaboration and provide quality, engaging experiences to customers.<sup>1</sup> Brands have known for decades that video is a considerably more powerful way to elicit emotional responses from and drive deep engagement with customers. But in today's workplace, where employees are increasingly likely to work in satellite offices or even from home, video can also be a key tool for tying the threads of your organization together and helping establish and maintain a sense of company culture.

Video platforms have been converging over the last one to three years to support both external and internal use cases. Converged platforms have the advantage of mitigating adoption challenges through easier use and have proven to be more cost-effective and more flexible for enterprises with multiple needs.<sup>2</sup>

In November 2016, IBM commissioned Forrester Consulting to evaluate the state of video capabilities today. Forrester conducted an online survey of 200 US-based corporate communications or marketing decision makers, as well as a survey of 505 full-time US-based employees, to explore this topic. We found that decision makers had widely adopted video production capabilities, yet their capabilities and the degree to which they made these tools available to their employees varied widely.

## KEY FINDINGS

- › **Decision makers say they provide access to video tools, but users lack awareness or access.** Marketing and corporate communications decision makers have unveiled a number of different video capabilities to deepen engagement with both internal and external audiences — yet a number of business users were unaware or lacked access to these tools.
- › **Video takes a central role in customer and employee engagement.** Video has become a primary method to engage customers — and is a highly effective tool for helping companies maintain their corporate culture.
- › **Firms must work to master video offerings or risk losing skilled talent.** Firms are grappling with a loss of institutional memory and rising costs of rehiring, as nearly half of employees say they changed jobs in the past five years. At the same time, two-thirds of employees reported that company culture is an important factor in deciding to stay with an employer. Video is the tie that binds culture, even as individuals come and go.
- › **Companies can win the culture war with a single cloud video platform.** The companies who are the most mature video users are far more likely than their lower maturity peers to leverage a single platform for all their video production needs. Single video platforms excel for users in terms of ease of use, which is a major driver of video tool adoption among business users.

# Video Takes A Central Role In Customer And Employee Engagement

Video has become a primary method to engage customers and employees through a wide range of use cases. Firms and users alike recognize the tremendous value in video's ability to create and sustain healthy corporate culture. While users push organizations for easy access to more tools, smart firms will realize the benefits of a video-connected business and take steps to expand their offerings.

As use of video permeates the organization, it will grow in step with the market's greater access to easier, higher-quality production tools. Our study of marketing and corporate communications decision makers found almost all firms agree that creating high-quality video is easier than it was two years ago. The survey also shows where firms are putting video to good use (see Figure 1):

- › Marketers are most likely to create marketing video assets that drive engagement and interest presale and trainings that help customers in the post-sale phase.
- › Corporate communications professionals are most likely to use video for on-demand and live corporate training.
- › Business users agreed that they are taking advantage of video conferencing, self-paced learning, and live company meetings.



93% of firms agree that creating high-quality video is easier than it was two years ago.

## ENTERPRISES RECOGNIZE TREMENDOUS CULTURAL VALUE IN VIDEO; PRODUCTION WILL SKYROCKET

Given the greater availability of high-quality video tools like advanced point-and-shoot cameras that capture video, DSLRs, 4K webcams, and so on, it's no surprise that companies are ramping up video capabilities in the near term. In fact, 92% of organizations expect to increase use of video over the next five years. Our study found that the increase in production is due to video's ability to enable employees to join in the cultural conversation across their ecosystem:

- › Eighty-eight percent of executives see video as crucial for fostering corporate culture.
- › More than three-quarters of users believe video capabilities have a positive impact on their company's ability to maintain its culture.

Figure 1

Firms are using video to communicate both internally and externally (Top three use cases for each group shown)

### Marketing

69% Creating marketing video assets

58% External training assets

54% Live event streaming for conferences

### Corporate Communications\*

75% Self-paced learning or continuous education

71% Live corporate training

69% Video conferencing

### End users†

78% Video conferencing

68% Self-paced learning or continuing education

58% Live all-hands meetings or town halls

Base: 100 US marketing decision makers at enterprises with 1,000-plus employees

\*Base: 100 US corporate communications decision-makers at enterprises with 1,000-plus employees

†Base: 505 full-time US-based employees at firms of 1,000-plus employees who personally work/collaborate with workers at other offices

Source: Commissioned studies conducted by Forrester Consulting on behalf of IBM, February and September 2017

While it's clear that video capabilities and fostering culture are inextricably linked in the minds of executives and users alike, our study found that some capabilities hold greater cultural weight with users than others:

- › Peer-connective capabilities are of the greatest value to employees — employee-generated content, videoconferencing, and live all-hands meetings top the list, whereas using video for sales enablement ranked at the bottom.



### LEADERSHIP SAYS IT OFFERS VIDEO CAPABILITIES, BUT USERS LACK AWARENESS OR ACCESS

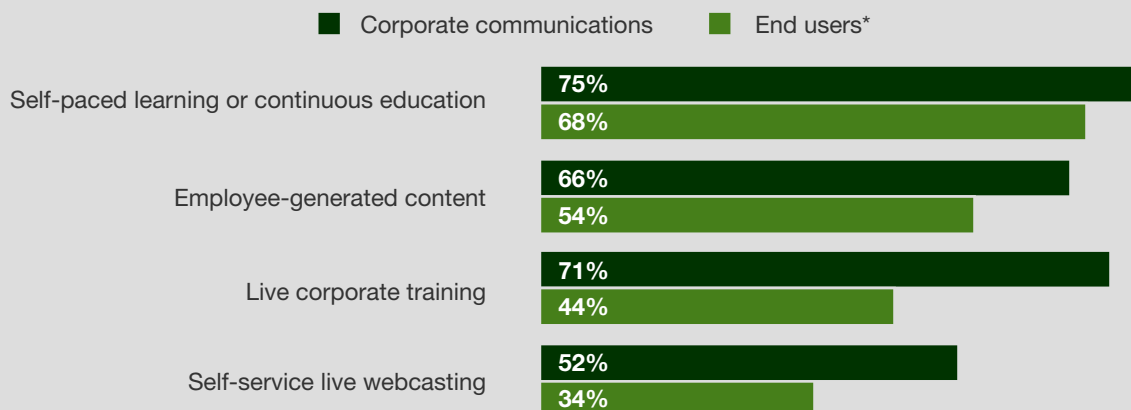
Given the clear mandate from employees, executives should not hesitate to promote the video capabilities with greatest cultural value to their users. However, there's a troubling disconnect between decision makers and employees — while nearly three-quarters of corporate communications professionals say they provide live corporate training, fewer than half of employees say their company provides it. The story is similar for the ability to access and create employee-generated content — two-thirds of decision makers say their organization provides this capability, while slightly more than half of users say it is offered to them (see Figure 2). The disagreement between users and leadership may point to process, technological, or cultural issues, including:

- › The average employee lacks sufficient training on video production tools.
- › Leadership is concerned that it is safer for the brand to restrict employee-generated content.
- › Companies store video assets outside of core intranet tools where employees search for other internal documentation.
- › Legacy search tools are not advanced enough to encapsulate all that video offers (i.e., no metadata).

The most distinct corporate cultures are shaped by peer-connective video capabilities like employee-generated content and live training.

Figure 2

“Which of the following internal uses of video does your company employ today?”



Base: 100 US marketing decision makers at enterprises with 1,000-plus employees

\*Base: 505 full-time US-based employees at firms of 1,000-plus employees who personally work/collaborate with workers at other offices

Source: Commissioned studies conducted by Forrester Consulting on behalf of IBM, February and September 2017

# Firms Must Work To Master Video Offerings Or Risk Losing Talent

The use of cloud-based video tools helps organizations grow and sustain their company culture — but what's at stake? Our study reveals that culture is crucial to attracting and hiring an increasingly distributed and mobile workforce. With nearly two-thirds of employees reporting that company culture is an important factor in deciding to stay with an employer, and 10% saying it's the most important factor, nurturing a distinct and resilient company culture should be top of mind for organizations seeking skilled talent. However, while strong culture has never been more critical, it's more difficult than ever to foster in today's fractured workplace:

- › Almost half of employees work at a company where more than 10% of employees work remotely at least some of the time.
- › Firms are grappling with a loss of institutional memory and rising costs of rehiring, as nearly half of employees say they changed jobs in the past five years.

Without a strong sense of culture, fostered regardless of distance by way of easily created and accessed video assets, employees will take their highly marketable skills and increasing flexibility elsewhere.

## **IN THE HEATED RACE TO MASTER VIDEO CAPABILITY, FIRMS ARE ONLY HALFWAY THERE**

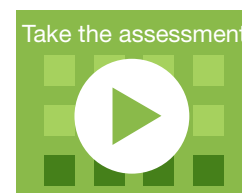
The bulk of our study of decision makers focused on a video capability maturity model. Firms rated themselves on a scale of “completely disagree” to “completely agree” for a range of video capability criteria across the maturity pillars of Culture, Organization, Technology, and Process. Based on their answers, a score was calculated such that each of the four pillar scores is shown out of a possible score of 10, and the overall maximum score is out of 40.

Our study found most organizations are in the middle ground overall (see Figure 3). The overall average maturity for the whole sample was 27.4 out of 40. For the average firm, Culture was the strongest pillar, followed by Process, Technology, and, in last, Organization. Top challenges by pillar are:

- › Culture — firms are risk-adverse to the potential wins of innovation.
- › Organization — firms are not likely to set up dedicated in-house resources for video or to distribute video capability across teams.
- › Technology — firms are not focusing on making content discoverable (i.e., with enhanced search functions).
- › Process — firms lack clear training programs that would democratize creation and use of video capabilities for employees.



**Firms will not survive if they allow their company culture to wain due to distance, team distribution, or short tenure.**



**Take an IBM-commissioned assessment based on this maturity model – and see how your organization measures up.**



Figure 3

The cloud video maturity model, based on the four pillars of Culture, Organization, Technology, and Process: For each pillar, respondents rated themselves on a range from “Completely disagree” to “Completely agree” based on how well each statement described their organization. Below is a sample of the results.

## CULTURE



**AVERAGE SCORE: 7.27 OUT OF 10**

**STRENGTH:** “We prioritize the employee and/or customer experience and produce videos that align to an overall strategy, rather than just to fill a content hole.”

**WEAKNESS:** “We take measured risks in order to innovate, including enabling employees and/or customers to create and submit user-generated content.”

## ORGANIZATION

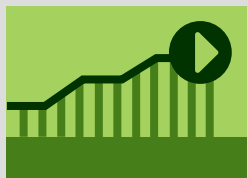


**AVERAGE SCORE: 6.61 OUT OF 10**

**STRENGTH:** “We have in-house staff who support video creation, production, and distribution.”

**WEAKNESS:** “The video team is an independent business unit.”

## TECHNOLOGY



**AVERAGE SCORE: 6.67 OUT OF 10**

**STRENGTH:** “We use technologies like videoconferencing and video chat to drive collaboration or customer service and support.”

**WEAKNESS:** “We have invested in a cloud-first online video platform that can deliver video content to employees, customers, and prospects.”

## PROCESS



**AVERAGE SCORE: 6.87 OUT OF 10**

**STRENGTH:** “We push our video content to social channels in native players where appropriate.”

**WEAKNESS:** “We have a defined video training program to democratize the use of video tools, including video creation and videoconferencing.”

Base: 200 US corporate communications and marketing decision makers at enterprises with 1,000-plus employees

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, February and September 2017

# Win The Culture War With A Single Cloud Video Platform

Companies across industries need to give their employees the tools to collaborate unfettered by silos and across great distances, with a shared underlying cultural purpose — or risk losing critical talent to competitors. This effort requires a secure, scalable, and open cloud-based solution to manage video content and experiences with ease.

## GIVE THEM THE TOOLS TO DO IT THEMSELVES

Our study reveals employee-generated content is the most valuable video capability for employees, but firms are struggling to set up the technology, processes, and organizational structures necessary to make video compelling and easy for all users. If firms are to foster compelling company culture, they must not only offer video capabilities but train users, encourage adoption, and catalog assets for future use. As they do so, simplicity must be the key for capturing and maintaining employee interest:

- › Seventy-one percent of employees are interested in having access to a simple tool that enables them to stream video live for work purposes, and the same number are interested in having access to a simple tool that lets them produce on-demand video for work purposes.

When prioritizing next steps, firms should be aware how generational differences determine the capabilities users crave most. Employees 55 and older were more than twice as likely than younger employees to say they are not at all interested in livestreaming video for work. Interestingly, employees 35 to 54 were most interested in using different video platform capabilities overall, like platforms for on-demand video and social live streaming, compared to other age groups.



Adoption of video capabilities across the organization hinges on the simplicity of video tools.





## FOLLOW THE LEADERS TOWARD A SINGLE PLATFORM

Our study shows that when it comes to technological approaches to making video creation simple and available, the majority of firms overall (nearly two-thirds) use a single platform today to manage, deploy, and share video assets. However, the trend intensifies even further when you compare those of higher maturity to those of lower maturity (leaders versus laggards) (see Figure 4):

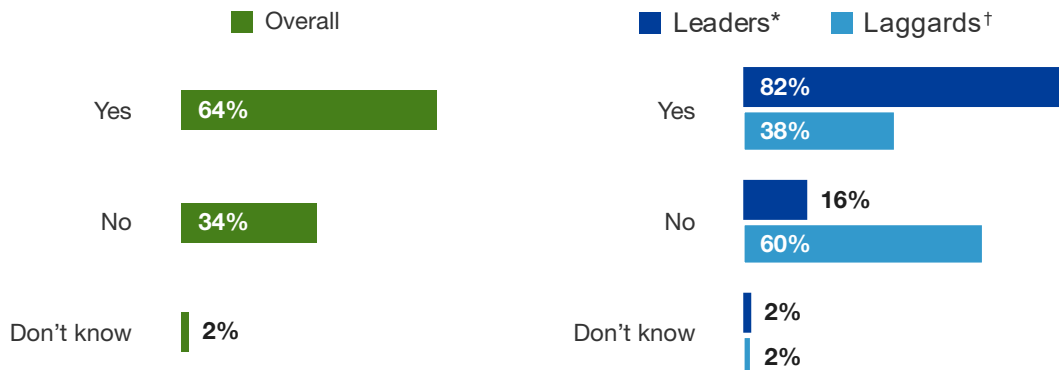
- › Leaders are far more likely than laggards to use a single platform — 82% of leaders took this approach compared to just 38% of laggards.
- › Laggards are far less likely to move toward a single platform in the next 12 months or just plain don't know.



One reason why leaders are further ahead is that firms cite ease of use as the main reason for using a single platform, which aligns to users' preferences for video tools. Higher adoption by users, driven by easier-to-use tools, is correlated with video success. Meanwhile, security concerns and difficulty uncoupling stakeholders from their established platforms are cited as the main reasons for using multiple video solutions. Efforts by firms to overcome these barriers should be considered if firms are to foster culture and win skilled talent.

Figure 4

“Do you use a single platform for internal and external video today?”



Base: 200 US corporate communications and marketing decision makers at enterprises with 1,000-plus employees

\*Base: 118 leading US corporate communications and marketing decision makers at enterprises with 1,000-plus employees

†Base: 82 trailing US corporate communications and marketing decision makers at enterprises with 1,000-plus employees

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, September 2017

# Key Recommendations

Forrester's in-depth, cross-industry survey of marketing and corporate communications decision makers and general employees about cloud video capabilities yielded several important recommendations:



**Develop and nurture executive buy-in and participation for video initiatives.** Take early, measured risks to expand your company's video capabilities. Explore initiatives that will move your video strategy from a one-size-fits-all approach to something that will take personalized needs and context (e.g., an employee's department or the stage of a customer's life cycle) into account. By deploying video to each stage of the customer or employee life cycle, you're helping align content to specific needs and pains rather than just doing video for video's sake.



**Empower in-house resources to develop innovative, engaging video campaigns and capabilities.** Bootstrap your production capabilities by repurposing a conference room or storage closet. Identify people in your organization who have strong storytelling skills and an interest in video. Don't overinvest in video hardware at first; with less than \$1,000, you can buy capable, high-quality equipment, but even your smartphone and webcam can be a start.



**Investigate flexible, cloud-based tools that can deliver video across many use cases to both internal and external audiences.** A single cloud-based video platform can deploy and scale faster than multiple tools in a hybrid deployment. And the consistent user interface between both internal and external audiences will help ease adoption. These cloud-based tools often integrate with CRM and marketing automation platforms (MAPs) to tell you who is viewing content, rather than how many.



**Review your policies for access to video tools, but maintain a bias toward openness.** It can be daunting to open the flood gates on employee-generated content — what if proprietary information slips into the public domain? Enterprise video platforms are robust and integrated with single sign-on (SSO) and active directory so you will know who is accessing what content. With video, the pros in greater engagement and collaboration outweigh the cons.

# Appendix A: Methodology

In this study, Forrester conducted an online survey of 200 US-based corporate communications or marketing decision makers, as well as a survey of 505 full-time US-based employees, to evaluate the state of video capabilities today. Survey participants included decision makers in marketing or corporate communications. Questions provided to the participants asked about the use of video at their companies today. Respondents were offered a small monetary incentive as a thank you for time spent on the survey. The study began in November 2016 and was completed in September 2017.

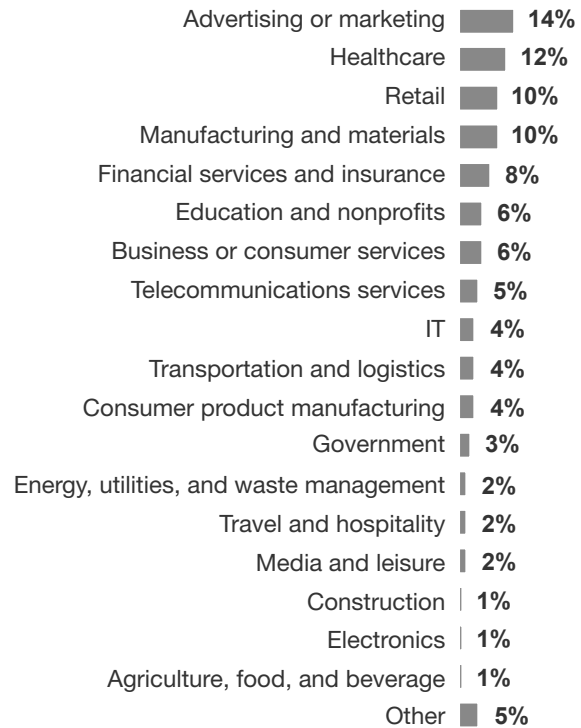
# Appendix B: Demographics/Data

## Marketing and corporate communications decision-maker survey

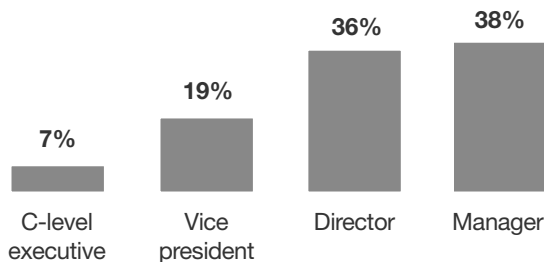
“In which country are you located?”



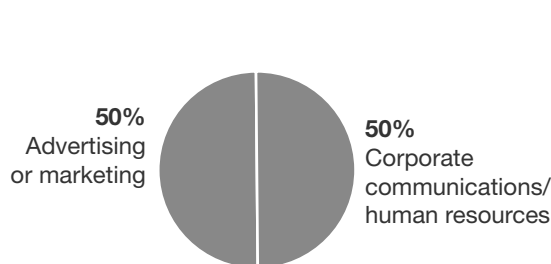
“Which of the following best describes the industry to which your company belongs?”



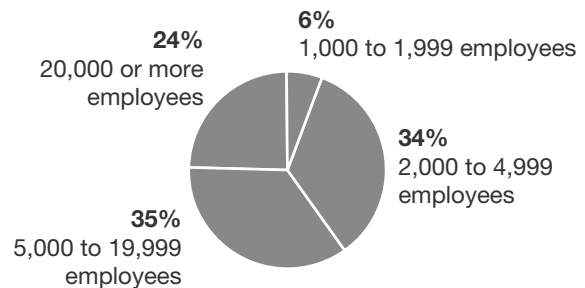
“Which title best describes your position at your organization?”



“Which of the following best describes your current position/department?”



“Using your best estimate, how many employees work for your firm/organization worldwide?”



Base: 200 US corporate communications and marketing decision-makers at enterprises with 1000+ employees.

Note: Percentages may not total 100 because of rounding

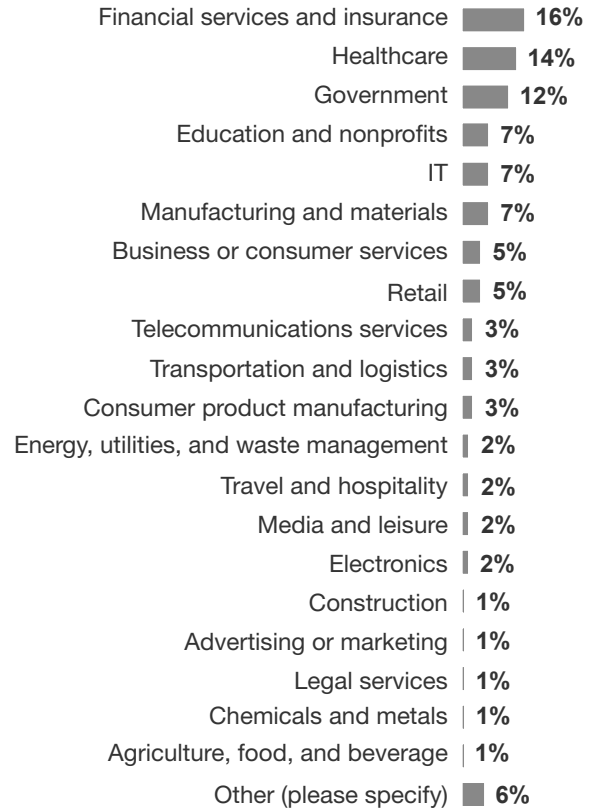
Source: A commissioned study conducted by Forrester Consulting on behalf of IBM

## Employee/end-user survey

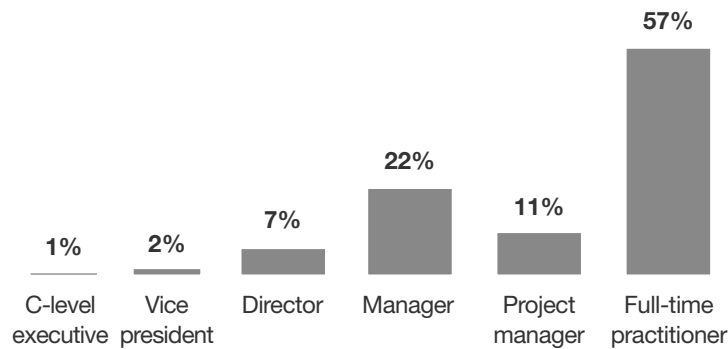
“In which country are you located?”



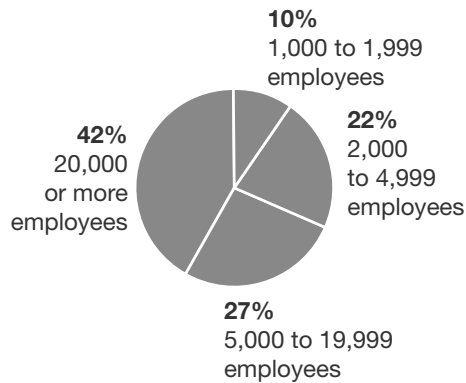
“Which of the following best describes the industry to which your company belongs?”



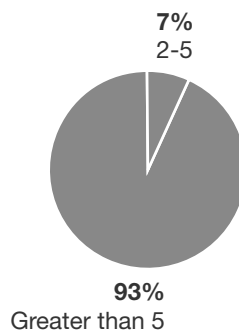
“Which title best describes your position at your organization?”



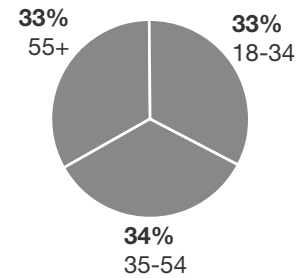
“Using your best estimate, how many employees work for your firm/organization worldwide?”



“How many office sites or locations does your organization have?”



Age group



Base: 505 full-time US-based employees at firms of 1,000+ employees who personally work/collaborate with workers at other offices

Note: Percentages may not total 100 because of rounding

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, January & August 2017

# Appendix C: Supplemental Material

## RELATED FORRESTER RESEARCH

“TechRadar™: Video Technologies, Q3 2017,” Forrester Research, Inc., September 14, 2017.

“Vendor Landscape: Video Platforms For Customer And Employee Experience,” Forrester Research, Inc., August 18, 2017.

“Enterprise Video’s Future Aligns With Customer Obsession,” Forrester Research, Inc., March 2, 2017.

# Appendix D: Endnotes

<sup>1</sup> “Vendor Landscape: Video Platforms For Customer And Employee Experience,” Forrester Research, Inc., August 18, 2017.

<sup>2</sup> “TechRadar™: Video Technologies, Q3 2017,” Forrester Research, Inc., September 14, 2017.