Five Principles for Empowering Scalable, Secure and Reliable Enterprise Streaming:

Identifying the Issues that Matter Most for Organizations Investing in Video Technologies

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Streaming Video Takes Center Stage in the Workplace

Video adoption is on the rise in the enterprise. Streaming technology platforms are making it easier than ever before to inject video into online training, employee townhall meetings and a range of collaboration applications. And, as the size of video archives grows at many companies, they are creating new storehouses of institutional knowledge that can serve as valuable resources that make it easier for employees to share information and insights with one another.

As such, it’s little wonder that organizations continue to spend significantly on implementing solutions that simplify the creation, management and distribution of video for business applications. Forty-six percent of all individuals participating in a fourth quarter 2018 survey of 2,002 respondents fielded by Wainhouse Research (WR) reported that their organization plans to spend more in streaming technologies in 2019 compared with the prior year. And much of that spending is substantial. Four-out-of-10 organizations (40%) represented in the survey reported that their organization had budgeted at least $100,000 for implementing streaming solutions in 2019, an increase from the 35% of respondents reporting six-figure streaming budgets the year before.

And all that spending is translating into more extensive use of video in day-to-day business communications. The frequency with which organizations are employing video is increasing. According to WR survey results, 43% of companies used live webcasting capabilities for one-to-many events at least 25 times per year in 2018, up from 39% doing so the prior year. (Figure 1) Weekly usage of live online video (organizations using the technology at 50 times annually for live business video events) likewise increased to 29% in 2018, from 26% the prior year.

As organizations begin to create more and more videos for business use, workers begin to watch videos at greater frequency. If you create the video – it seems – they will watch. Certainly, the rate of video viewership has increased on a year-over-year basis. Overall, 59% of respondents to the WR Fourth Quarter 2018 survey reported that they watch online business video content at least monthly. In WR’s survey the prior year, 53% had reported monthly viewership of business video.

And survey results suggest that viewership rates for business video soar at companies that produce a substantial number of videos. At organizations that use video for online events more than 100 times annually, 49% of respondents say they watch online video for business use on a daily basis. Another 37% from this group say they watch online business video weekly. As might be expected, viewership of online business video is not nearly as frequent when organizations give their employees scant content to
At organizations that report production of less than 10 live online video events per year, only 5% of respondents say they watch online video for business daily with another 20% reported weekly viewership. (Figure 2)

As will be discussed later in this report, the demands placed upon a streaming platform grow in-step with video usage and viewership. Most specifically, executives increasingly want to keep prying eyes away as the volume (and presumed strategic importance) of their video grows. Among those watching online business video on a daily basis, for instance, 62% of WR survey respondents say that the ability to “secure content from those not authorized to view” is a “very important factor” influencing their organization’s streaming-technology purchase decision.

Of course, some technology purchase decision makers could justifiably wonder whether video can ever reach the type of usage levels that would invoke any legitimate concerns regarding security. For these executives, the bigger issue may hinge on whether their organization has the corporate culture needed to drive video to critical mass levels of adoption. After all, video creates no business value if workers never watch it. The WR survey clearly demonstrates, however, that individuals do watch when videos are available. More importantly, individuals perceive video as a valuable tool for enhancing the quality of business communications.

**Video Delivers Significant Business Impact**

One fundamental truth driving broader adoption of video in the enterprise is that the technology actually works as a venue for enhancing business communications. Some survey respondents – particularly those over 40 years of age – will express doubt regarding the efficacy of video and the role it can play in employee communications. But – as frequently is the case with video – survey results suggest that seeing is believing. Those who use video are more likely to see value in its ability to enhance communications in day-to-day business.

As illustrated in Figure 3, more than 90% of WR survey respondents describe online video as an “effective tool for business communications.” Exactly half of these online video users describe it as “very effective” with another 44% of users describing video as “somewhat effective.” These results represent
a stark contrast in the outlook among those who have not experienced online video at work. Of the group not exposed to business video, only 18% describe video as a “very effective” tool for business communications.

One attribute of video that fosters these positive perceptions of its effectiveness is that video can help make virtually any online experience feel more engaging. For the end-user, the video experience is far superior to consuming a comparable presentation via a conference call – or even an online audio webinar with integrated slides. Viewers of online events that incorporate video are able to pick up on facial cues, body language and other inputs that can transform how they receive – and perceive – a corporate message. For presenters, the video platform offers more ways to connect with their audience and deliver their message in a more meaningful way. As illustrated in Figure 4, a near unanimous 98% of WR survey respondents say they agree with the statement that “live streaming video enhances viewer engagement with an online presentation.” Nearly two-thirds (62%) of respondents from this group of video viewers say they “strongly agree” with the concept that video enhances engagement for an online event.

Five Principles for Empowering Enterprise Streaming

Clearly, corporate users are boosting their investment in – and usage of – streaming solutions in day-to-day business, raising the stakes for organizations to make the right choices as they consider their options for investing in video-enabling technology solutions. In this section of the report, Wainhouse Research will highlight five basic principles that purchase decision makers should keep in mind as they look to optimize a new generation of video technologies with the promise to significantly enhance how executives share information and messaging with workers across their organization.

Streaming Principle #1: Prioritize Security

One-to-many video is implemented by organizations seeking to enhance the way that workers communicate with one another. But all the benefits associated with using video can evaporate suddenly if the use of video technology winds up introducing new risks to the corporate-computing environment. Simply put, more video means more security challenges for IT teams. As workers create and watch more video, IT managers must put themselves increasingly on guard for security risks that fall into two primary categories: shielding the corporate network and controlling access to video content.

First and foremost, the deployment of video solutions must not introduce vulnerabilities to the reliable operation of the corporate computing network. This is a substantial concern for IT executives,
particularly in an era when more and more video platforms are cloud-based solutions – ones that are hosted on servers outside of an organization’s computing infrastructure.

To enable such applications, companies frequently must open a port in their firewall that allows these external solutions to reach workers on the corporate network. The downside for IT teams is that these open firewall ports also offer additional windows that outside hackers could exploit when attempting an attack on an organization’s computing network. While reported instances of network breaches fostered by video implementation are relatively rare, they still rate as a significant concern among the 304 information-technology professionals surveyed by Wainhouse Research in the third quarter of 2019.

In this survey, 68% of IT executives described the issue of “maintain network security” as a “very important” influence on the streaming technology purchase decision, ranking it higher than any other factor in terms of impact on the evaluation of these solutions. (Figure 5)

In some cases, organizations with these types of security concerns will implement streaming platforms exclusively on an on-premises basis to minimize this type of network risk. Other organizations that are more inclined to embrace the ease of implementing hosted solutions will deploy the applications using “dedicated” or “private” cloud solutions that blend the ability to easily update and centrally manage hosted solutions from a single data center while providing the protection of a private network that minimizes corporate network exposure to external threats.

Workers on the front lines of business communications also have concerns about video security. But – for these groups – the worry lies more in keeping prying eyes away from seeing content to which they should not have access. As illustrated in Figure 6,
nearly half (49%) of end users surveyed in fourth quarter of 2018 describe ability to “Secure Content from those not authorized to view” as a “Very Important” influence on their purchase decision.

As the usage of video becomes more commonplace over time – and the issues discussed in video-enabled forums grow more sensitive and strategically important to an organization – the perceived importance of content security should only be expected to rise over time. As such, interest in integrating video platforms with existing security systems should be expected to rise over time, as well.

Streaming Principle #2: Enable Video Quality

When it comes to video, we all certainly have high expectations. After years and years of watching high-quality, professionally produced video from our living room couches, we generally demand a pristine viewing experience at work, as well. Of course, many elements have to come together just right to deliver high-quality video in the enterprise. The on-screen visuals generated by presenters must be spot-on. And the technology platforms used to capture, manage and distribute video must deliver a smooth viewing experience – with no pauses for buffering content – on a reliable basis.

The ability to deliver this type of experience may make the difference in creating an effective communications environment for workers. Exactly half of respondents to the WR 4Q 2018 end-user survey report that – when evaluating the effectiveness of an organization’s streaming video – they place “significant emphasis” on the organization’s ability to deliver “broadcast quality” content. (Figure 7)

The good news is that most now have positive perceptions of the video that is being produced within their organization. Almost four-in-10 respondents (39%) say that the quality of video produced by their organization is “excellent” with more than half (51%) describing the quality as “good.” Only one-in-10 (10%) describe their organization’s video as “fair” or “poor.”

Survey results suggest that a significant correlation exists between the frequency of online video viewership and the perceptions of its quality. As illustrated in Figure 8, 71% of those
survey respondents watching online business video daily say they place a “significant emphasis” on broadcast quality. In comparison, less than one-third (32%) of respondents who watch online business video less than monthly say they place that significant emphasis on quality when gauging video’s effectiveness as a communications tool.

The survey results do not permit us to draw a direct line of causation between the quality of video and viewership frequency. However, it does present an opportunity for chicken-and-egg analysis. Does high-quality video draw enterprise video viewership? Or does quality rise to meet the demands of frequent viewers? While the data does not support a definitive conclusion, those at organizations seeking to use video more extensively in business communications should be cognizant of the role that “quality” plays among those grading the effectiveness of streaming solutions.

Streaming Principle #3: Unlock Video Value with Machine Intelligence

While the quality of the viewing experience is important to active users of business video, frequent viewers have bigger issues in mind when it comes to video’s use in their day-to-day business activities. Among those watching business video most frequently, many also perceive it as a medium for sharing institutional knowledge among workers within an organization.

More than half of those watching online business video on a daily basis (54%) say they “strongly agree” that “on-demand archives offer a valuable storehouse of institutional knowledge.” In contrast, less than one-quarter of those viewing video monthly or less report that they “strongly agree” that archives can be used as a storehouse for organizational information.

Indeed, organizations face a significant challenge when the expanding use of video begins to generate more and more video files that are saved for later reference. Simply put, as video libraries grow larger, it becomes more difficult for employees to find the on-demand videos they need to access.

Consider how the outlook toward video search shifts based on the size of an organization’s video archive. When archives are small, videos are easy to track and the need for enterprise-grade video search tools is not acute. Among WR survey respondents at companies with less than 10 hours of video archived, only 26% say they “strongly agree” that “as we archive more video, it becomes more difficult to find the information I need from our video libraries.” At organizations that have built archives with more than 100 hours of content, the sentiment is quite different. (Figure 9) Among those at companies with these large archives, 45% say they “strongly agree” that it is difficult to find the
information they need in video libraries. Essentially, as the pile of video grows, it becomes a bigger challenge for workers to find the videos they need.

As video archives begin to swell in the workplace, it highlights a fundamental realization about the role of video in the business environment. Video cannot be perceived exclusively as a medium of communications. Today, it must also be managed as corporate data.

For the most part, organizations have encountered difficulties in getting the most from their video data. It is expensive and time consuming to have individuals manually tag relevant passages of video just so that someone might be able to find a passage of content more easily at some later date. Increasingly, organizations are turning to software solutions powered by machine intelligence to help unlock knowledge that had previously been trapped in unwieldy video files. Machine intelligence also allows for the manipulation of video data in ways that would have been impossible even a handful of years ago.

A whole new range of applications become possible when computers can be programmed to automate the task of video indexing that would otherwise have to be handled by humans. Perhaps most fundamental to the streaming market today is the ability to convert audio embedded in a video into text. That text can then be used to foster better video search, create transcriptions of video content, apply foreign language subtitles and for other applications. Top-level executives are keenly aware of the potential for speech-to-text applications for video. More than half of C-level executives surveyed (52%) strongly agree that their organization would pay a premium for speech-to-text capabilities. Among associates, only 12% say they strongly agree on the need to pay a premium for speech-to-text solutions. (Figure 10)

“Speech-to-text” capabilities represent the gateway to a whole range of applications where video content can be leveraged in ways not previously possible. Once the content is converted, a myriad of existing web applications can be put to work to squeeze more information (and value) from video content.

Consider, for instance, the ability to leverage existing translation applications, creating foreign language transcripts for all videos in a business archive. For companies with multi-national operations (and those with workers speaking different native languages), the automated translation application serves as a
Innovative video platforms can also be harnessed to significantly enhance the value of video as a business communications tool. For example, many corporate leaders see the potential strategic value of video in enhancing communication and decision-making processes. Among C-level executives surveyed by WR, 63% say they strongly agree with the statement that “I believe that my organization would be highly interested in leveraging speech-to-text output to generate foreign-language closed-caption content for our videos.”

Survey results suggest that other potential video applications enabled by machine-intelligence also draw substantial interest from corporate users:

- 78% of organizations using live online business video at a weekly rate “strongly agree” that “closed captioning embedded into live business video significantly enhances the value of video as a business communications tool”
- 75% of those viewing online business video daily describe the ability to “identify speaker based on previously stored facial recognition data” as “very useful”
- 87% of those working at companies spending $100,000 or more on streaming in 2018 describe the ability to “automatically generate text summaries of meetings and presentations” as either “very useful” or “somewhat useful”

Those most involved in planning their organization’s future video deployments are also well aware of its potential strategic value over the long-term. Over time, many in corporate leadership roles see video platforms as a source of content that can be used to “train” machine intelligence solutions developed to make decisions consistent with information previously ingested by the computer system. It is not far-fetched to think of every video captured from a business meeting or presentation as a source of content that enriches an organization’s database for machine intelligence analysis applications.

Indeed, the executives holding the purse strings dictating streaming technology investments are highly likely to recognize the growing connection between the uses of video and machine intelligence.

Nine out of 10 respondents with communications technology purchase-decision authority surveyed by WR in the fourth quarter 2018 describe the ability to leverage “archive video as data to be fed into machine intelligence solutions, such as IBM Watson” as an important influence on their technology purchase decision with exactly half of the group describing it as “very important.” Among those without purchase decision authority, only 21% described machine intelligence as a “very important” influence. (Figure 11)

Any corporate leader not actively thinking about ways to marry the power of video and machine intelligence runs the risk of falling behind rivals who are actively considering ways to leverage the two technologies to enhance the decision making tools available to an organization.
Streaming Principle #4: Develop Insight Via Viewership Analytics

While the promise of machine intelligence heralds the potential future of video in the enterprise, organizations also must be mindful of justifying the use of video in the here and now. The best way to prove that video deployments are generating real-world return on investments is to implement features that measure the extent to which workers are actually using video solutions.

As such, it is vitally important for organizations to deploy streaming platforms with robust tools for tracking what employees are watching while at work and – to the extent possible – matching that viewership data with relevant performance metrics. The set of features that makes this type of measurement possible – generally known as “analytics” – is widely recognized as a key element of streaming technology implementation in the enterprise. As illustrated in Figure 12, four-out-of-five respondents to WR’s fourth quarter 2018 end-user survey describe that ability to “track video viewership patterns” as an important influence on an organization’s streaming technology purchase decision. More than one-third of respondents (37%) described the ability to track viewership as a “very important” influence on the streaming technology purchase decision.

As an organization’s investment in streaming capabilities increases, the stakes grow larger in terms of measuring and quantifying its success. Accordingly, it’s not surprising to see executives at companies that invest significantly in streaming place a greater emphasis on analytics than those with smaller streaming investments at stake. As illustrated in Figure 13, the perceived importance of analytics increases as an organization’s commitment to implementing the technology grows. At companies with no budget for streaming technology implementation, only 12% of respondents describe the “ability to track viewership patterns” as a “very important” streaming technology purchase decision influence. At organizations with six-figure budgets for streaming, 50% of respondents describe audience measurement as a “very important” feature.
One of the reasons that analytics is viewed as important by those investing significantly in streaming platforms is that the data generated by these measurement tools does not live in a vacuum. Viewership data can be exported and combined with data from other applications, such as customer relationship management (CRM) solutions. It can then be leveraged to create a richer data set that identifies whether video viewership correlates with a desired business impact.

The ability to identify tangible correlations between the use of video and the business outcomes they generate is vitally important to any streaming evangelist’s effort to promote broader spending on streaming solutions. Usage data can be employed to help quantify and justify the return on investment generated from video in the workplace—a metric that fosters additional spending on the technology.

When evaluating solutions for potential implementation, executives must pay particular attention to the types of viewership metrics collected by a streaming platform and determine whether they map to performance results relevant to their organization’s leadership team.

**Streaming Principle #5: Embrace Platform Scalability and Flexibility**

Not all streaming platform solutions are created equal, and organizations need to choose carefully when deciding which technologies to implement. Mistakes can leave organizations with investments sunk in solutions that are not well suited to evolve as their video needs and applications change.

To effectively “future-proof” streaming technology investments, organizations must implement platforms that can scale when video adoption grows and can support the integration of new applications when new ways to put video to work in day-to-day business activities become available.

While many survey respondents cite a justifiable concern over network security related to streaming video platform implementation (as discussed above in Streaming Principle #1), readers should also note the risks of not deploying a video solution that scales to the needs of an organization that uses video extensively.

As adoption of video increases, organizations need networks that are able to distribute video to all employees who want or need to be engaged with that video. Video webcasts—particularly those distributed on a live basis—can consume substantial bandwidth and cause data traffic jams on networks behind the corporate firewall. When not implemented with the right distribution solutions, video can clog the corporate network, sometimes hindering other network-dependent applications (i.e., workers sharing files, exchanging e-mail or engaging in other forms of collaboration) that are critical to day-to-day business operations.

Little wonder, then, that IT executives surveyed by WR recognize that their corporate network needs to be robust enough to handle the spikes in data traffic that can result from widespread viewership of a live video event online behind the corporate firewall. The big concern: “Don’t let video crash the network.”
In the WR survey of IT executives in the third quarter of 2019, the second most frequently cited administrative influence on the streaming purchase decision (behind the issue of “network security”) is the ability to “distribute video without harming the corporate network.” As illustrated in Figure 14, the issue is described as a “very important” factor influencing the streaming purchase decision by 58% of information-technology executives surveyed by WR. Only 2% of respondents definitively described these capabilities as “unimportant” in their evaluation.

Beyond network scalability, a second priority in selecting a platform solution well-suited for the long-term is identifying solutions that bring an open mindset in terms of interoperability with solutions from other vendors. Those platforms that publish a robust set of open “application programming interfaces (APIs)” up-front make it easier for organizations to adopt new uses of video that can be “plugged into” their already-deployed video-platform infrastructure.

Solutions that embrace the notion of interoperability give corporate users the peace of mind that they will have the option to adopt best-of-breed features from multiple vendors as market developments warrant. As illustrated in Figure 15, 64% of IT executives surveyed in the third quarter of 2019 say they agree with a statement reflecting a preference for streaming solutions made up of best-of-breed solutions from multiple vendors rather than a solution from a single vendor.

It should be noted that the corporate appetite for interoperable streaming solutions goes hand-in-hand with broader adoption of cloud-based solutions in the corporate environment. In general, hosted options are built from the ground up with interoperability in mind and are more inclined to integrate into a multi-vendor solution than are streaming platforms developed specifically for implementation on an on-premises basis.

The desire for interoperability and consolidation even extends to the implementation of streaming platforms themselves. Today, many organizations that implement streaming capabilities commonly find themselves deploying more than one streaming platform to address a variety of business communications needs. For instance, one platform may be best suited for handling outbound marketing applications of online video while another is optimized to support employee-to-employee communications applications behind the corporate firewall.

But IT executives appear to instinctively recognize that their life would be easier if their organization could simply deploy a single streaming platform to handle all of their organization’s one-to-many video
communications applications. In WR’s survey of IT executives conducted if the third quarter of 2019, 82% of respondents said it was either “somewhat important” or “very important” for their organization to standardize on using a single streaming platform solution for managing all live and on-demand content for both internal and external communications.”

One potential path for organization’s aspiring to implement a single streaming infrastructure may come in the adoption of hosted and/or hybrid solutions that are viable for use both on the corporate network and for outbound marketing applications. Survey results suggest that the adoption of these cloud and hybrid streaming platforms is becoming increasingly common in the enterprise market. Specific survey findings that hint at broader acceptance of hosted video solutions in the enterprise include the following:

- 54% of respondents from organizations implementing streaming platforms say they have deployed hosted solutions – a rate of implementation greater than the 41% reporting implementation of on-premises solutions.
- More than three-quarters (77%) of organizations that have implemented streaming report that they have deployed two or more streaming solutions, sometimes using both on-premises and cloud-based alternatives.
- Hybrid solutions – incorporating elements of on-premises and hosted solutions in an integrated package – are also used substantially with 47% of organizations reporting implementation of these hybrid alternatives.

**Key Takeaways**

Adoption of the one-to-many video approach in the workplace is substantial and growing. Implementation of streaming video platforms is taking root – in part – because workers perceive online video as an engaging, cost-effective venue for business communications. The strategic value of making smart investments in video-enabling solutions will only increase over time as individuals become more familiar with video communications solutions. Furthermore, emerging technologies make it possible for organizations to derive more value from the video content that employees create. As executives consider their options for boosting investments in enterprise video solutions, they should work to align themselves with the following recommendations that build from the five principles of streaming discussed in this report:

**Security is Job #1:** As organizations use one-to-many video more extensively, executives need to be cognizant of the risks to network security and content protection that can result from implementing the wrong video solutions. Evaluations of specific streaming solutions should be made with your organization’s risk profile in mind.

**High Quality Video is Worth the Effort:** For those working to foster video adoption in the enterprise, almost nothing is worse than giving users a bad video experience. While companies cannot always
ensure that executives will give riveting presentations, they can invest in technology platforms that make content look good on the viewer’s screen. Doing so will give workers reason to come back to video time and again, delivering on video’s value as an engaging communications tool for the enterprise.

**Unlock the Insight Trapped in Video Files:** Business video archives represent an untapped gold mine of corporate intelligence and information. Look for ways to automate the process of indexing video, leveraging machine intelligence solutions and “speech-to-text” applications. If machine intelligence solutions are not yet feasible for your organization, at least begin capturing more video now. Many employees will find value accessing the archives today, even with rudimentary search tools. Down the line, these videos will become even more accessible and also can be used to build decision databases when your organization does embrace machine-intelligence solutions.

**Track Your Video Performance:** No executive can champion expanded investments in video solutions without understanding the impact that initial implementations of the technology have on their organization. The first step in proving “return on investment” is being able to quantify what people are watching and the impact that their viewership has on business performance. Look for video solutions that can track activity relevant to your business priorities.

**Future-Proof Your Streaming Strategy:** Little value is generated for an organization that invests in a streaming platform that becomes obsolete in short order. Much more useful is the implementation of streaming solutions that can roll with the punches when the enterprise video market – and your organization’s video needs – change over time. Look for solutions with the ability to scale as your use of video grows. Also embrace solutions that bring an “open API” mindset that will make it possible to add new features to a platform without having to junk the entire original investment. Organizations that prize the flexibility that comes with strong interoperability also should consider focusing their streaming investments on hosted solutions that are both conducive to integration and easier to update than on-premises alternatives.
About the Author / About Wainhouse Research / About IBM Watson Media

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About Wainhouse Research: Wainhouse Research is an independent analyst firm that focuses on critical issues in the unified communications and collaboration market. The company provides 6 different vendor subscriptions covering unified communications, group videoconferencing, personal & web-based collaboration, audio conferencing, streaming & webcasting, and distance education & e-Learning solutions, as well as a single all-inclusive subscription for enterprise users. The company acts as a trusted advisor providing strategic advice and direction for both the UC&C industry and its enterprise users. For further details contact sales@wainhouse.com or see http://www.wainhouse.com.

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