



**Avaya Scopia®**

# Video Collaboration Use Cases: Driving Productivity and Results

## Executive Summary

Video collaboration is becoming increasingly popular. Nemertes Research states that nearly three-quarters of organizations it works with are deploying or planning to deploy some form of video conferencing.<sup>1</sup> Not only does video collaboration allow face-to-face communication without the time and expense of travel, it enables organizations to enhance collaboration, improve productivity, strengthen working relationships, and speed time to market. Video collaboration solutions add a critical non-verbal dimension to communications across a wide range of applications and departments within any organization.

This white paper describes a sampling of popular use cases for video collaboration—expert anywhere, training, project management, remote eyes, and customer meetings—and the benefits of these applications.

## Seeing is Believing... Seeing is Believing... and Understanding

An estimated 60 to 65 percent of the meaning in any social encounter is communicated nonverbally.<sup>2</sup> Nonverbal communication works hand-in-hand with spoken communications to clarify and amplify meaning, express emotion, and, quite frankly, to indicate what someone is really thinking.<sup>3</sup> A high-quality video collaboration solution gives organizations all the benefits of face-to-face communication—including enhanced collaboration, improved productivity, better relationships, and faster time to market—as if they were in the same room without the time and cost of travel.

1. Source: Nemertes, *Pervasive Video Collaboration Benchmark Report, 2013*

2. Source: Burgoon, JK, *Nonverbal Signals*. In Knapp, ML, Miller, GR, editors. *Handbook of Interpersonal Communication*. Beverly Hills, CA: Sage Publications; 1985. pp. 344–390.

3. Source: Nardone DA, Johnson GK, Faryna A, Coulehan JL, Parrino TA. *A model for the diagnostic medical interview. Nonverbal, verbal and cognitive assessments*. *J Gen Intern Med.* 1992;7:437–42.[PubMed]



### The Value of Avaya Equinox™

Avaya Equinox™ provides a single platform supporting all the different modes of conferencing. High scale audio conferencing, extensive web collaboration, rich multi-vendor HD video conferencing, even event streaming to 100,000 users in an all-in-one software solution. Users can participate in meetings from mobiles, through their desktops and web browsers, along with H.323 or SIP video conferencing room systems.

## How Can You Benefit From Video Collaboration?

While all applications benefit from reduced travel time and expense, each use case derives additional advantages. This white paper is designed to give you examples of how departments within an organization, including R&D, sales, marketing, legal, engineering, HR, training, manufacturing, and corporate communications, can profit from using advanced video collaboration. Popular applications featured in this paper include:

- **Expert Anywhere**—Collaborate with specialists and subject experts regardless of their location
- **Training**—Provide distance learning to students in remote locations
- **Project Management**—Lead large teams to define and execute a major initiative
- **Remote Eyes**—Enable a team member from a distant location to ‘see’ a local situation to help assess proper action and streamline problem resolution
- **Collaborative Meetings**—Hold virtual “in person” meetings that are highly interactive and productive

### Expert Anywhere

Specialty expertise is hard to come by. With increasing specialization in many areas (i.e. tax law in emerging countries, product specialists, experts in Big Data analysis, translators, and so on), there is an increasing demand for both in-house subject matter experts and outside consultants regardless of their geographic location.

Using an advanced collaboration solution such as Avaya Equinox™, an organization can easily leverage an often limited pool of experts throughout the organization. HD video enables more lifelike, collaborative meetings that are more productive. In addition, because each consultation takes less time when travel isn’t necessary, highly sought-after experts can more easily fit a meeting into their schedules, and it’s easier to leverage subject matter expert availability across corporate locations. It can provide more accessibility to expert advice, helping organizations solve problems faster and gain a competitive advantage.

Examples include a research department within a large organization and a legal department looking to benefit from specialized outside counsel.

### Corporate Research

Corporate research departments are under constant pressure to speed projects while reducing costs. Yet, while collaboration is required for best results, researchers, labs and study participants are frequently spread over dispersed locations. These groups often experience delays and high costs due to the need for travel. Research departments can use Avaya Equinox throughout the research process—from planning to data collection to addressing problems to reporting results—helping them gain the full benefits of high quality, face-to-face collaboration. In addition, they eliminate the time and cost of unnecessary travel, speed and improve work processes and analysis, and accelerate time to discovery.



### Benefits of Expert Anywhere

- Leverage a limited pool of experts regardless of location
- Consult with outside experts on a project—by project basis
- Improve productivity of in-house experts
- Resolve problems faster
- Improve competitive advantage

### Planning

As researchers develop their research plan, distant collaborators can share presentations and Gantt charts using Avaya Equinox to solicit each other's input. Meeting participants can use the Avaya Equinox recording feature to review previously presented content as necessary. The ability to see faces and materials at the same time can help groups come to more informed decisions.

### Data collection

Avaya Equinox makes it easy to work with research subjects anywhere in the world. While in the field, researchers can initiate and moderate meetings on their mobile devices by simply sending subjects and collaborators a link. Users simply connect to an Avaya Equinox meeting through their web browser with just a click. Participants can access a video conference from any PC, laptop or mobile device. Subjects see research materials and researchers at the same time. Remote colleagues can interact with research subjects and view their facial expressions while using private chat to converse among themselves during experiments. The entire session can be recorded for later review or to ensure compliance with informed consent regulations. With the ability to schedule or have ad-hoc meetings, research proceeds more quickly and effectively.

### Address problems

When challenges arise, researchers can instantly conference with outside experts to discuss the issue, resolve it more quickly and stay on schedule.

### Benefits of Remote Training

Provide an “on-site” training experience to employees

- Face-to-face instruction increases retention
- Instructor gets feedback to personalize the lesson and can collaborate with the student
- Improve reach and frequency for employee training programs
- Train more students in less time while retaining education quality
- Lower training costs by reducing travel expenses and leveraging SMEs

### Share results

Throughout the project, researchers may need to provide updates to outside stakeholders, such as FDA review boards or their pharmaceutical company sponsor. Researchers can simply send a link to invite these stakeholders to a live Avaya Equinox meeting and lock the meeting with a PIN-code. During their presentations, researchers can share some, or all of their desktop and include not only verbal updates, but also spreadsheets, slides, images and other content.

### Financial Expert Consults

Financial services firms are constantly on the lookout for ways to enhance their customers’ banking experience and increase customer retention in a highly competitive industry. One way they can accomplish this goal is to deliver high-value services through their branch offices. Expert Anywhere capabilities enable financial services firms to create additional value for customers to improve their competitive advantage.

Financial organizations can use Avaya Equinox in bank branches to enable customers to have one-on-one meetings with bank specialists, such as loan officers, that may be located elsewhere. For example, with video conferencing, the bank can have trust officers serve customers at multiple bank locations, including distant ones. This allows the bank to build new revenue streams without over-investing in staff.

More importantly, the bank can serve customers when, where and how they want, in an affordable manner. Consider how your enterprise could benefit by being able to share experts throughout the organization using video collaboration.

### Training

The accelerating pace of business means that workers may need training on an ongoing basis to keep up with frequent updates in products, content and policies. Yet increasing globalization makes it difficult and costly to bring dispersed employees together for training.

Avaya Equinox makes it easy to train employees throughout the organization with HD video conferencing. Employees can access the training from their home offices using their desktop or laptop computers, on the road from their mobile device, or in their traditional corporate office from a conference room or their office computers. With Avaya Equinox, remote students can experience “on-site” quality training in which they see the instructor and other subject matter experts (SMEs) in HD video while simultaneously viewing documents, graphics and applications and interacting with other students and instructors. Instructors can even personalize the learning process based on visual feedback from students, and collaborate with them throughout the session. By eliminating travel, organizations can train more students as needed in less time and at less cost.

Distance learning and training applications include training new hires, rolling out new benefits policies, delivering professional development classes with remote universities, and customer service workshops.



## Sales Force Training

The global sales force needs to stay informed about all the latest information about the products they're selling. Yet sales representatives are under pressure to maximize time with customers. Avaya Equinox allows sales reps to join training sessions using their mobile devices or tablets to receive the full face-to-face training experience without losing time in the field.

### Conduct a global new product kickoff meeting

To present new product information, an organization's marketing and sales management teams may hold a global kickoff meeting. Using Avaya Equinox, any number of sales reps can join the training session from their current location by clicking a meeting link from their mobile device or their desktop. They can see slides in the content window, the presenter in an HD video window, and adjust their screen layout as necessary to maximize comprehension.

The instructor and product managers from around the globe can show a live demo of the product via video conferencing while describing features—showing how to use them—and benefits. Depending upon personal style and content, a trainer may use the "lecture mode" to see all the students simultaneously and broadcast his video and audio to all participants. For more interactive knowledge transfer, the instructor can use "active speaker" mode to automatically switch the larger video frame to the person speaking.

During the presentation, the instructor or product manager can also present and annotate slides. The session can be streamed live to a large audience or recorded so reps can review it later.

**Sometimes training encompasses more than one session. Organizations can use Avaya Equinox to train sales reps as much as necessary without taking time away from customers.**

### Conduct role playing

People learn by doing. Simply listening to a description of how to do something is never as effective as practicing it. Globally distributed sales teams can use video conferencing to role play with each other, with more experienced reps or with their managers. Managers can record and then play back these role playing sessions to help the new reps see for themselves not only their mastery of the material, but also their soft skills—such as their tone of voice and level of confidence.

### Enhance learning

Instructors can watch for visual cues, such as concerned faces and nodding heads, to determine if students comprehend the information being taught. Students can query their instructors or fellow trainees by posting questions in the private or public chat.

### Executive participation

It's critical for organizations to transmit their vision for the company and its products to the sales force, as well as their personal commitment to the training program. Avaya Equinox makes it easy to transfer these values straight from the top from geographically dispersed executives that would otherwise not be able to meet the sales team.

### Shadow more experienced reps

Avaya Equinox allows less experienced reps to shadow more experienced ones in the field, helping them fine-tune their sales knowledge. The "shadow" rep can join a meeting with a more experienced rep and a customer, and watch the meeting in progress, using chat to privately ask questions about various techniques in real time.

### Ongoing training

Sometimes training encompasses more than one session. Organizations can use Avaya Equinox to train sales reps as much as necessary without taking time away from customers. As products and messaging are revised, marketing can easily train sales on new capabilities and messages. Customers can benefit from customized training sessions as well. Using any device to call into an on-site meeting with their local sales rep, customers can view a remote presentation, learn about products, and get answers to their questions.

## Project Management

Project managers face pressure to accelerate project timelines even as resources remain in short supply and team members are increasingly dispersed across the globe. Avaya Equinox can simplify and enhance project management by enabling face-to-face meetings for distributed teams. Project teams can also use Avaya Equinox to easily access specialists that are necessary to complete a project regardless of location. These virtual meetings can enhance working relationships, improve team effectiveness, increase team collaboration, and enable global "follow the sun" meetings that speed project completion.



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As employees become part of a collaborative and highly effective team, job satisfaction may increase as well. The following examples show how remote project management through Avaya Equinox can facilitate new product rollouts and engineering project management.

### **A Marketing Department's New Product Rollout**

During a product launch, marketing departments frequently must keep track of large, complex cross-functional teams that are often spread across many offices and wide geographic areas. These teams need to coordinate closely while developing product messaging and creating a wide range of deliverables from events to presentations to advertisements. Avaya Equinox enables marketing teams to produce integrated product launches quickly and effectively.

#### Facilitate brainstorming

Launch teams require numerous brainstorming sessions to define the audience for a new product, associated marketing messages, elevator pitches, competitive rebuttals and more. Avaya Equinox allows multiple team members to congregate and see each other in HD video using their choice of smart phone, tablet, office conference room system, or desktop machine. During the resulting highly interactive brainstorming sessions, participants can see team member expressions when ideas are pitched. As they develop messages, global organizations can bring in representatives from different countries to localize materials on the fly by simply sending them a link to the meeting.

#### Develop marketing content

Avaya Equinox can help organizations quickly develop marketing content. For example, team members can gather and view designs for ads or brochures. Because Avaya Equinox offers simple connectivity through a web browser, it's easy for team members from outside agencies to join the meeting. As the marketing team proofs materials, they can use the annotation feature to change a design onscreen. When developing sales presentations, everyone can view the proposed presentation simultaneously, and participants can customize the meeting layout for themselves. The group can record the meeting for later review by new team members or those that may have been absent.

#### Solicit feedback about marketing messages and campaigns

Marketing teams can solicit real-time feedback both from geographically dispersed team members as well as from customers, partners and industry analysts about messages, content, and even entire campaigns before the launch. Teams can use Avaya Equinox to connect with different groups and show them online presentations or HD video of marketing campaigns, ask for comments, discuss any issues face-to-face, and view participant facial expressions and body language. The chat feature allows the launch team to exchange private comments regarding any reactions and come up with new questions on the spot.



### Benefits of Videoenabled Project Management

- Enhance working relationships and improve the effectiveness of dispersed teams
- Improve team feedback and collaboration
- Simplify access to consultants, developers and other experts regardless of location
- Increase productivity with “follow the sun” meetings
- Speed project completion
- Eliminate unnecessary travel
- Increase employee satisfaction by being part of an effective team

## Engineering Project Management with Remote Team Members

Engineering project managers need to oversee projects from conception to successful implementation within the agreed timeframe. These tasks become more complex when teams are dispersed over wide geographic areas and when companies must work with global supply chains. Avaya Equinox can dramatically simplify coordination and communication among project teams.

### Project definition

As they define projects, project managers need to determine budgets, schedules, technical activities, and performance metrics. Visual collaboration—where attendees see each other in HD video and share online documents—allows project managers to include global attendees in the project design and enhances teamwork.

### Coordinate projects

Project managers can use Avaya Equinox to meet regularly with engineering and other team members to review deliverables and milestones on current projects and manage any changes. The ability to see dispersed team members, share and annotate spreadsheets, and show prototypes can make the process more efficient.

### Hire and manage subcontractors

Using Avaya Equinox to conduct face-to-face interviews with specialized subcontractors can help project managers stay current on project-related work. Project managers simply send subcontractors a link that they can



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connect with any device. Project managers can also better manage remote subcontractors and suppliers by meeting with them regularly by video.

### Enhance engineering reviews

The review and approval process for engineering designs can proceed quickly and easily using Avaya Equinox. Dispersed teams can meet in virtual meetings via video, where they can review CAD Drawings on screen, make annotations, and sign-off on designs.

### Escalate issues

If the project runs into problems, the project manager can use Avaya Equinox to escalate the issue to management in a timely manner. He or she can simply send management a meeting link, and have them view project designs to solicit their input. Timely problem escalation and resolution helps keep projects on time and within budget.

### Remote Eyes

In cases where access to a project site or situation is limited, or where issues are complex and need to be resolved quickly, “Remote Eyes” using Avaya Equinox can help. Someone on site can use his or her mobile device to take a live video and share it via Avaya Equinox (or record a video for later sharing), and remote experts can assess the situation. With these capabilities, remote experts can better prepare for on-site meetings, speed decision making, improve productivity and decrease costs. The classic remote eyes application is telemedicine, in which a doctor or medical specialist can see and diagnose a patient in a remote location such as a rural hospital clinic. Manufacturing troubleshooting, marketing design reviews, and insurance claims are just a few other examples of how “Remote Eyes” can benefit an organization.

### Manufacturing Troubleshooting

Manufacturers must keep production flowing optimally to deliver products on time and within budget. Dispersed teams and offshore production sites add to the challenge. “Remote Eyes” technology can help keep production on track by making experts available to immediately troubleshoot any problems.

### Observe the situation

A multinational manufacturing organization may have plants in a number of countries. If a machine on the manufacturing line in its Taiwan factory breaks down and frontline service technicians can't resolve the problem, Avaya Equinox allows them to instantly escalate the issue. The frontline technician simply invites a remote expert at headquarters to a meeting and uses the camera in any smartphone or tablet to show a live HD video of the issue. The remote expert can see and hear the machine for themselves as the frontline tech films it from different angles. If a potential problem area is identified, the on-site tech can zoom in for a closer look.



### Fix the problem

The senior technician can discuss the findings with the on-site tech, and together they can develop an action plan. The on-site technician can fix the machine in real time while the senior tech looks on. If further problem escalation is required, they can immediately contact an outside engineer to join the meeting by simply sending a link.

### Prevent future issues

The technicians can record the session and place the recording in a knowledge base to help solve similar problems in the future.

## Supplier Management Reviews

Supply chain management relies heavily on communication and coordination between a manufacturer and its suppliers. Manufacturers need to keep in close contact with suppliers about production, scheduling and design issues. Communication can be particularly challenging when manufacturers use offshore suppliers in distant locales. Avaya Equinox greatly improves collaboration by allowing manufacturers and suppliers to meet face-to-face as well as share spreadsheets, presentations, and CAD drawings. They can also use HD video to more easily review prototypes, assembly and fit issues. Manufacturers can also use Avaya Equinox to connect and facilitate collaboration among multiple suppliers that make different parts of a larger component. They can all see and speak to each other and easily share design documents.

### Benefits of Collaborative Meeting

- Gain the productivity of in-person meetings without leaving the office
- Add a personal touch to your business
- Low cost access to a large, dispersed audience
- Personal contact with people who would not normally interact
- Faster dissemination of information
- Face-to-face interaction creates a better team environment
- More effective teamwork and collaboration
- Smarter, more informed decisions
- Control costs, including travel expenses
- Meet more frequently with customers, partners, and associates
- Extend your organization's geographic reach

## Insurance Claims Adjustment Services

When disaster strikes, insurance claims adjusters must be on scene to evaluate and assess property damage, and facilitate a timely claim settlement. With “Remote Eyes”, a single claims adjuster can travel to the disaster site—whether it’s an office building damaged by fire or earthquake, or a trucking accident—to assess the situation and, if necessary, add in others remotely.

Meetings may be conducted via live video from the scene, or later, where attendees can watch a recorded video while the adjuster discusses the incident.

This kind of real-time evaluation can help the company quickly make a settlement decision and improve customer satisfaction.

## Collaborative Meeting

Within an organization, employees need to conduct meetings of all types—from one-on-one meetings to small departmental meetings to large all-hands meetings that encompass the entire organization. With Avaya Equinox, meeting participants can attend and actively participate in these meetings while remaining in their remote location—in the office or on-the-go. Organizations can access a dispersed audience at low cost, creating opportunities for personal contact between people that would not normally interact; for example, the CEO can meet with groups all over the company. Such face-to-face interaction can create a better team environment, enhance collaboration, and enable faster dissemination of information.

A few examples of the types of meetings organizations can facilitate with Avaya Equinox include face-to-face sales meetings with customers, manufacturing meetings with suppliers, corporate town hall style meetings with employees, and candidate interviews with human resources.

## Sales Meetings with Customers

Sales representatives like to meet in person with customers, but they can’t always travel to every customer, every time. Even when they travel to a customer site, purchases are often made by a team of decision makers that are rarely in the same place at the same time. With Avaya Equinox, a sales rep can meet face-to-face with customers anywhere.

### Invite the entire customer team—including executives

Sales reps can send a meeting link to every member of the customer team. Team members can join the meeting from any desktop, laptop or mobile device without concerns about network issues. Corporate executives that would otherwise not meet with these customers can now easily attend via Avaya Equinox to show customers they are highly valued. The rep can moderate the meeting, control cameras and microphones, share content, record and text chat to the group or specific meeting attendees.

**With Avaya Equinox, the entire customer team can see a presentation simultaneously, regardless of location, and personally connect with the sales rep.**

## Make presentations and create relationships

With Avaya Equinox, the entire customer team can see a presentation simultaneously, regardless of location, and personally connect with the sales rep. By asking a sales manager or other executive to attend the meeting, sales representatives can create more personal relationships between the companies. When watching the online sales presentation, customers can emphasize either the slides or the presenter on their screen.

Sales reps can annotate slides to make a point or personalize them for the customer—helping improve communication. Throughout the presentation, the sales manager can watch the customer’s reactions and assess the level of customer engagement.

## Instant answers to difficult questions

If the customer comes up with a question that neither the sales rep nor manager can answer, the rep can instantly contact a subject matter expert and ask them to join the call. Doing so can help improve responsiveness and customer satisfaction.

## Meet with customers more often

Because setting up video meetings is simple and cost effective, sales reps can meet more frequently with customers during lengthy sales processes to help accelerate the sales cycle.

## Internal sales meetings

These same capabilities can facilitate internal meetings between sales representatives and their managers. For example, sales managers can hold forecast review meetings with reps where they can use the face-to-face video format to create more accurate sales forecasts.

## Human Resources Candidate Screening

The world’s companies and organizations are suffering from a lack of available, skilled talent. As a result, human resources departments must often cast a wide net beyond traditional geographic areas to screen potential employees. With Avaya Equinox, HR departments can set up a virtual office to help them screen and hire qualified candidates and potential teleworkers from anywhere.

## Inviting candidates for a first interview

HR departments can invite job candidates to a first interview using Avaya Equinox. Using Avaya Equinox’s uncomplicated browser connectivity, they simply email a meeting invite to the candidate who can access the meeting using any device with internet access. The candidate meets over video with HR and any other interviewers in either one-to-one or group interviews. The HR recruiter can optionally use the “lobby” function to enable a candidate to call into the virtual room. The system will play music or a pre-recorded message until the recruiter joins. By allowing others in

### Additional Avaya Equinox™ Collaboration Capabilities

- High scale audio conferencing
- HD audio and video
- Enterprise class telephony
- Desktop, browser and mobile connectivity
- Mobile first user experience
- Video conferencing room system interoperability
- Customized video layouts
- Rich meeting moderation
- Screen and application sharing with annotation
- Remote desktop keyboard and mouse control
- Whiteboard
- Recording
- Conference broadcasting via streaming
- Always on messaging
- Public and private chat
- Cloud application integration

the company to participate in the interview, recruiters receive input from the extended hiring team and managers, which can improve the hiring process. During the interview, colleagues may use the private chat feature to share comments and real-time feedback.

### Share materials

The recruiter can present, annotate and share a variety of materials over the video call, including presentations, resumes and company products.

### Gain a deeper understanding

With the ability to see each other instead of simply speaking over the phone, the candidate and recruiter can gain a deeper understanding of each other through visual cues, body language and more natural conversation. Using the latest collaborative tools can also position the company as progressive and, therefore, more attractive to new hires.

### Share the interview

With a candidate's permission, the HR recruiter can also record the interview and make it available for later reference. Others, such as managers or executives, can view the interview and provide feedback as part of the hiring process.

## Video Conferencing Applications

In addition to the applications highlighted in this white paper, a wide range of applications for video conferencing are available:

- RFP reviews
- Interpreter services
- Town Hall meetings
- Distance learning
- Project management
- Witness depositions
- Analyst and press briefings
- Emergency response / Business continuity
- Supplier management
- Customer briefings
- Benefits updates
- Product design reviews
- Office hours
- Video events
- Teleworking
- New product launches
- Branch banking
- Retail kiosk demonstrations
- Telemedicine
- Real estate tours
- Video focus groups
- Technical troubleshooting
- Financial analyst briefings
- M&A Management
- Board and trustee meetings
- Customer service
- Executive council meetings
- Contract negotiations



**Avaya Equinox can be used for virtually any application imaginable to help enhance productivity and collaboration among people that need to work together across geographic locations.**

## Conclusion

Avaya Equinox can be used for virtually any application imaginable to help enhance productivity and collaboration among people that need to work together across geographic locations. The use cases described here—expert anywhere, training, project management, remote eyes, and collaborative meetings—offer just a taste of what Avaya Equinox can deliver. By using Avaya Equinox for these applications, organizations can benefit from improved productivity, shortened time to market, and enhanced collaboration and relationships with colleagues, partners, customers, and suppliers. Discover for yourself how your organization can use video collaboration to improve productivity and deliver a competitive advantage.

Imagine the possibilities.

## Learn More

To learn more and to obtain additional information contact your Avaya Account Manager or Authorized Partner or visit us at [www.avaya.com](http://www.avaya.com)

## About Avaya

Businesses are built on the experiences they provide and every day millions of those experiences are built by Avaya (NYSE:AVYA). For over one hundred years, we've enabled organizations around the globe to win—by creating intelligent communications experiences for customers and employees. Avaya builds open, converged and innovative solutions to enhance and simplify communications and collaboration—in the cloud, on premise, or a hybrid of both. To grow your business, we're committed to innovation, partnership, and a relentless focus on what's next. We're the technology company you trust to help you deliver Experiences that Matter. Visit us at [www.avaya.com](http://www.avaya.com).

