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Unlock Business Value With A Single-Vendor UCaaS And CCaaS Solution

Leaders Seek Transformative Value Of Unified EX/CX Technology, But Must Align Internal Stakeholders And Processes To Realize Full Potential

Table Of Contents

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Executive Summary

A recent Forrester study notes that "customer-obsessed B2B organizations outdo their less mature counterparts in almost every business metric that matters."[1] Enterprise leaders are increasingly focused on improving their customer experience (CX) and employee experience (EX). Many businesses realize the value of unified communications as a service (UCaaS) and contact center as a service (CCaaS) as accelerators of companywide CX and EX transformation. In the past, IT and customer support teams made UCaaS and CCaaS purchasing decisions; however, given the importance of the decision, C-level executives are increasingly involved in vendor selection and demonstrate a preference for a unified UCaaS and CCaaS offering from a single vendor. They seek the outcomes of improved CX, security, compliance, and end-user support while reducing costs. Yet decision-makers often face new challenges adopting a single-vendor solution, including aligning multiple stakeholders and changes in procurement processes, thus limiting their time to market and access to innovation. To overcome these challenges, business leaders may benefit from a peer analysis of what it takes to successfully adopt a UCaaS/CCaaS single-vendor solution.

In January 2023, Cisco commissioned Forrester Consulting to survey enterprise-level technology decision-makers about their interest in single-vendor UCaaS and CCaaS solutions. Forrester conducted a cross-industry online survey of 567 global director-, VP-, and C-level leaders. We found that buyers, buying criteria, and KPIs are all changing as C-level executives become more actively involved in selecting communications and CX vendors.

Key Findings

Stakeholders are interested in a single-vendor UCaaS/CCaaS offering. Businesses are ready to evaluate new approaches towards their communications and customer support centers, particularly in ways that align with business value goals. Most respondents are interested in a single-vendor offering.

C-level executives and IT manager/directors lead the purchase process. Survey respondents noted that their organizations rely on C-suite executives and IT managers/directors to lead evaluation and recommendation processes. Additional leaders include customer-facing department manager/directors and EX departments.

Leaders are reevaluating their unified communications (UC) and contact center (CC) platforms to solve for EX and CX. C-level respondents are focused on UC-related issues like working with existing hardware, poor user experience, and cost, whereas director-level respondents are focused on the lack of industry-specific features and integrations. At the UC/CC level, leaders aim to improve CX and align with cost-saving measures.

C-level leaders are challenged throughout the vendor selection cycle by their organizations' processes. C-level respondents are more likely than director-level respondents to be challenged by changes in buying criteria and coordinating across multiple stakeholders. Additionally, C-level respondents and director-level respondents are often misaligned on key selection priorities including preference for compliance and security, ease of deployment, and cost/TCO.

Leaders Are Interested In A Single-Vendor UCaaS/CCaaS Offering

Enterprise leaders agree: UCaaS and CCaaS solutions can improve employee and customer experience. A single-vendor solution has the potential to improve end-user experience while reducing administrative costs. However, IT directors and C-level decision-makers often view the same requirements through different lenses, and the research reveals that there are often priority gaps across common measurements of success (see Figure 1). For example, C-level decision-makers may have a clear understanding of the business outcomes they are seeking, but often lack the technical understanding to fully evaluate vendors. In contrast, director-level decision-makers are focused on technical requirements without seeing the full picture of the trends driving businesses to transform.

66%

of respondents are interested in a single-vendor, single-contract UCaaS/CCaaS solution.

Figure 1

Evaluating A Single-Vendor UCaaS/CCaaS Offering
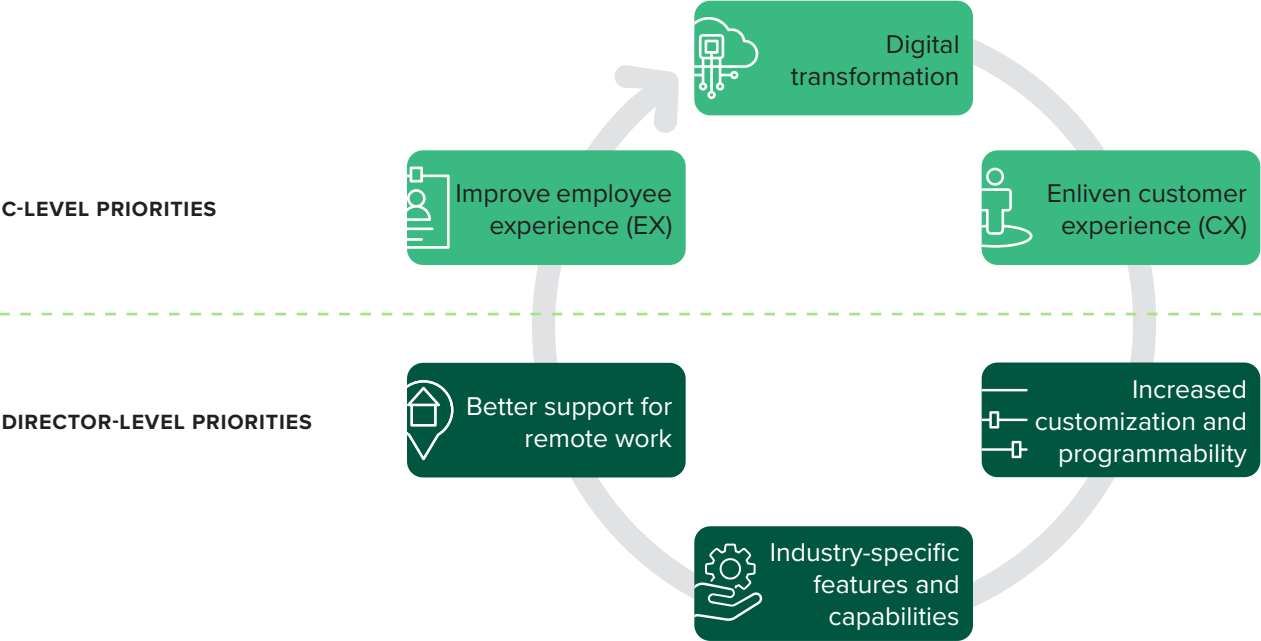
C-LEVEL PRIORITIES

- Digital transformation
- Improve employee experience (EX)
- Enliven customer experience (CX)

DIRECTOR-LEVEL PRIORITIES

- Better support for remote work
- Increased customization and programmability
- Industry-specific features and capabilities

Base: 336 global C-level and director-level IT decision-makers and influencers whose organizations have adopted unified communication, UCaaS, or CCaaS solutions
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023
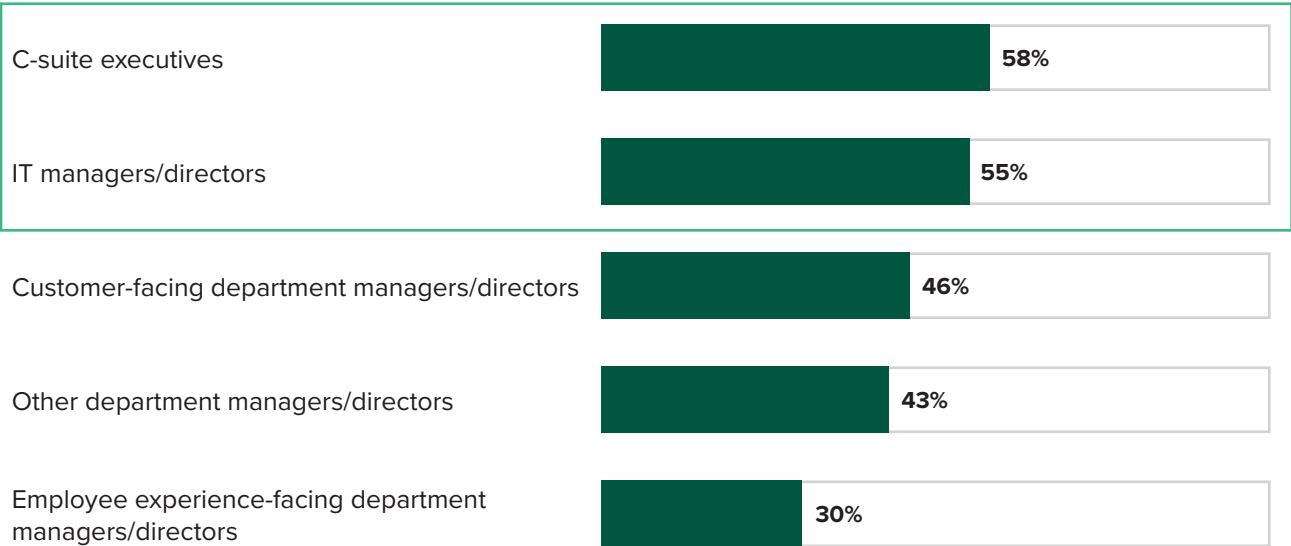
Forrester surveyed 567 enterprise-level technology decision-makers and influencers and found several commonalities that emerged across industries:

- **There is strong interest in single-vendor, single-contract UCaaS and CCaaS solutions.** Of those surveyed, 66% are interested or very interested in a unified UCaaS and CCaaS offering. This degree of interest corresponds to the trends and outcomes that buyers are seeking in today's shifting end-user behaviors and current macroeconomic conditions.

- **C-level executives and directors are actively involved in UCaaS and CCaaS vendor decisions.** Organizations are realizing the importance of vendor selection around EX and CX initiatives, and C-level executives (58%) and director-level respondents (55%) both play a significant role in the process (see Figure 2). They may be working in tandem to serve the desired business outcomes of customer-facing departments (46%) and employee experience-facing departments (30%).

Figure 2

"Which of the following parties does your organization rely on for evaluating and recommending vendors for enterprisewide UCaaS and CCaaS purchasing?"

(Showing "Recommending")

C-suite executives	58%
IT managers/directors	55%
Customer-facing department managers/directors	46%
Other department managers/directors	43%
Employee experience-facing department managers/directors	30%

Base: 567 global IT decision-influencers at the director level or higher whose organizations have adopted unified communication, UCaaS, and/or CCaaS solutions
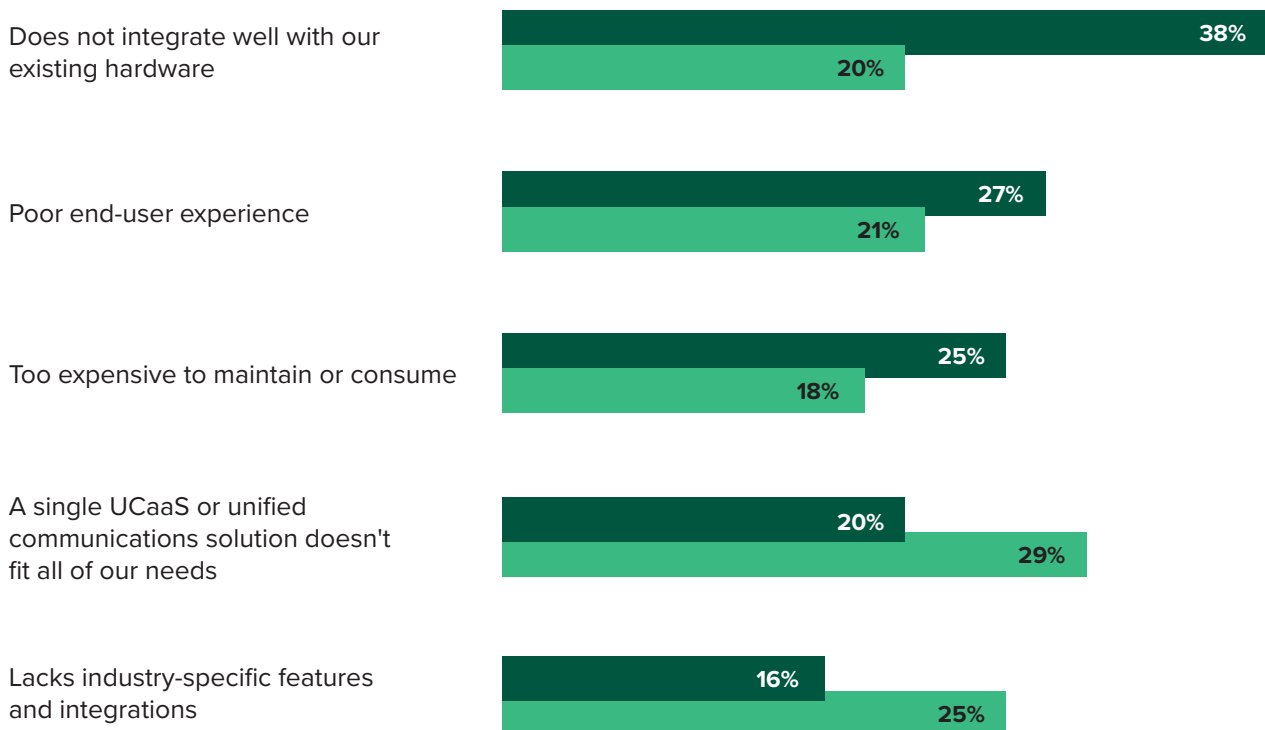Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

- **Decision-makers perceive different challenges with existing UC platforms.** Organizations may begin their evaluation processes through different lenses, but one commonality is shortcomings in their existing UC platforms. C-level respondents are focused on end-user experience like integration with existing hardware, the quality of the user experience, and overall costs (see Figure 3). In contrast, director-level respondents are more technically focused on the industry-specific features and integrations that are missing from their existing UC system. Directors can accelerate decision-making by working closer with C-levels and connecting the dots between their end-user experience and backend requirements.

Figure 3

"Which of the following challenges is your organization currently facing with its unified communications platform?"

● C-level executive   ● Director

Challenge	C-level executive	Director
Does not integrate well with our existing hardware	38%	20%
Poor end-user experience	27%	21%
Too expensive to maintain or consume	25%	18%
A single UCaaS or unified communications solution doesn't fit all of our needs	20%	29%
Lacks industry-specific features and integrations	16%	25%

Base: 336 global C-level and director-level IT decision-makers and influencers whose organizations have adopted unified communication, UCaaS, or CCaaS solutions
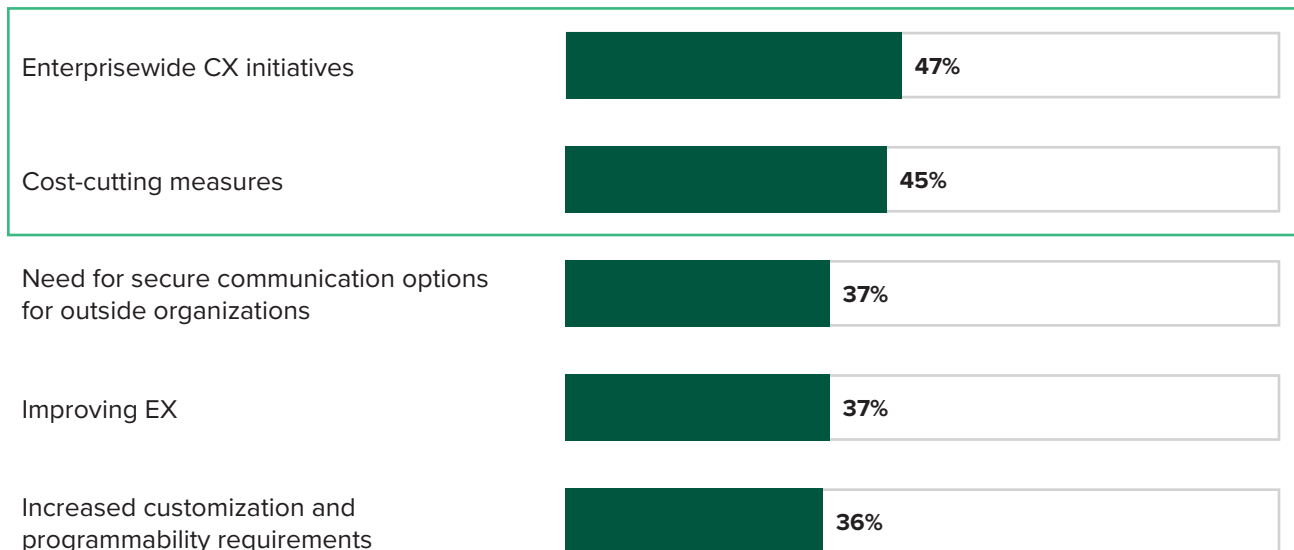Note: Showing selections with the biggest discrepancies between C-level and director challenges
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

- **Enterprise leaders are evaluating single-vendor UCaaS/CCaaS offerings to align with CX initiatives and cost-saving measures.** Once enterprise decision-makers decide to reevaluate their UC platforms, they may also take the opportunity to reevaluate their end-to-end communications and customer experience strategy at the same time. As they consider a single-vendor UC/CC offering, decision-makers are focusing on enterprisewide CX initiatives (47%) and cost-cutting measures (45%) (see Figure 4). They are also prioritizing improving EX (37%) and enabling increased customization and programmability (36%).

Figure 4

"Which of the following trends and/or initiatives are driving your organization toward pursuing or purchasing UCaaS and CCaaS from a single vendor?"

Enterprisewide CX initiatives	47%
Cost-cutting measures	45%
Need for secure communication options for outside organizations	37%
Improving EX	37%
Increased customization and programmability requirements	36%

Base: 567 global IT decision-influencers at the director level or higher whose organizations have adopted unified communication, UCaaS, and/or CCaaS solutions
Note: Showing top 5 responses
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

- **Internal challenges reflect shifts in buyer roles and criteria.** C-level respondents are more likely to be challenged by changes in buying criteria and coordinating an increasing number of decision-makers, whereas director-level respondents perceive similar challenges with changes to internal procurement processes (see Figure 5). C-levels and directors can work in tandem to resolve common organizational challenges and accelerate their transformation goals.

Figure 5

"Which of the following purchasing challenges is your organization experiencing, or do you foresee it experiencing, with the adoption of a single vendor UCaaS/CCaaS offering?"
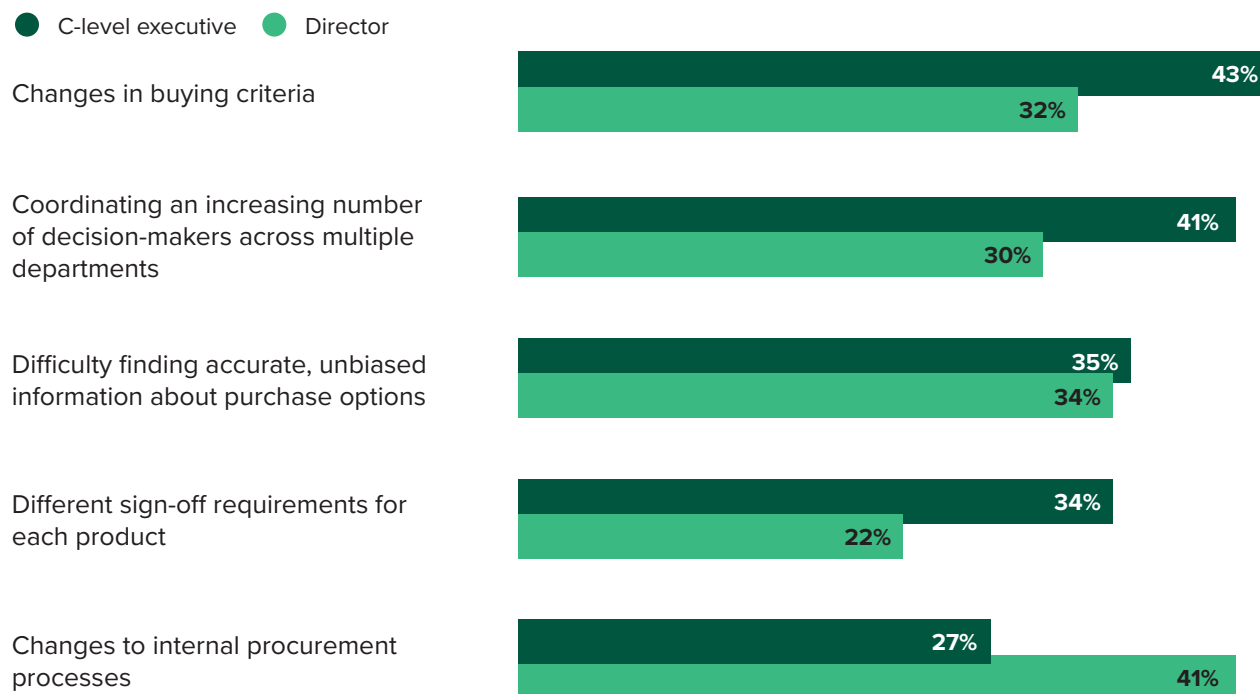
● C-level executive ● Director

Changes in buying criteria
- C-level executive: **43%**
- Director: **32%**

Coordinating an increasing number of decision-makers across multiple departments
- C-level executive: **41%**
- Director: **30%**

Difficulty finding accurate, unbiased information about purchase options
- C-level executive: **35%**
- Director: **34%**

Different sign-off requirements for each product
- C-level executive: **34%**
- Director: **22%**

Changes to internal procurement processes
- C-level executive: **27%**
- Director: **41%**

Base: 336 global C-level and director-level IT decision-makers and influencers whose organizations have adopted unified communication, UCaaS, or CCaaS solutions
Note: Showing selections with biggest discrepancies between C-level and director challenges
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

C-LEVELS AND DIRECTORS VARY ON DESIRED OUTCOMES FROM A SINGLE-VENDOR UCAAS/CCAAS SOLUTION

C-levels are focused on improving compliance and security, ease of deployment, cost/total cost of ownership (TCO), and simplicity. The data shows that there are often gaps between C-level and director-level prioritization around these outcomes. However, what the data shows as priority gaps may be C-level respondents and directors looking at different sides of the same problem.

For example, C-level respondents are decidedly focusing on improving compliance and security with a 13-percentage-point difference from director respondents (see Figure 6). Perhaps C-level respondents realize that improving customer communication capabilities may also increase the potential data and security risks associated with meeting the customer where they are at, i.e., private smartphones, home Wi-Fi, personal computers, and social media channels. Directors can ease some of these concerns by ensuring that C-level executives fully understand the technical and security capabilities of various vendors throughout this process.

Directors can expedite decision-making by liaising between the C-level and technology providers, focusing on translating solution features into C-level decision criteria.

Figure 6

Percent Differences In Importance Of Single Vendor UCaaS/CCaaS Criteria Between C-Level And Director-Level

● C-level   ● Director   ● Point difference

Base: 304 global C-level and director-level IT decision-makers and influencers whose organizations have adopted unified communication, UCaaS, or CCaaS solutions and indicated interest in a single contract solution
Note: Showing selections with biggest discrepancies between C-level and director challenges
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023
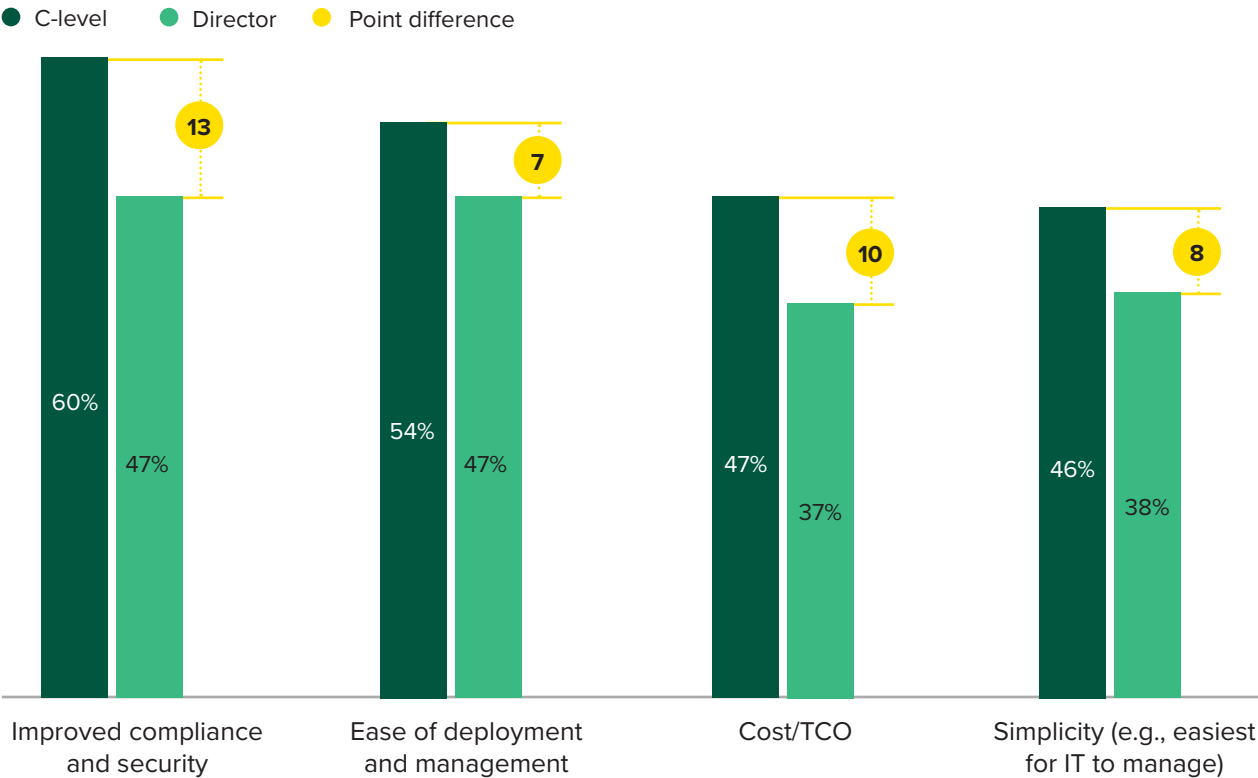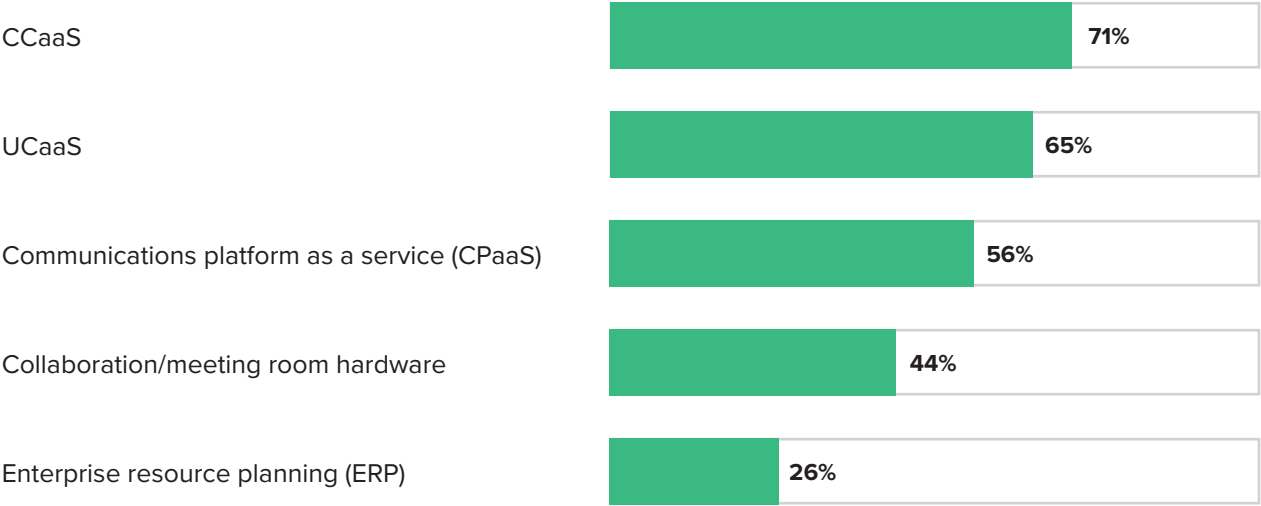
Respondents would predominantly like to see selected communications-related products and services from a single service agreement. Ideally, respondents want CCaaS (71%), UCaaS (65%), CPaaS (56%), and collaboration room hardware (44%) from a single service agreement (see Figure 7). This suggests that enterprise buyers agree on satisfying the full set of requirements to streamline communications, collaboration, and customer experience. Enterprise buyers may benefit from seeking a single vendor that offers all these components with a single contract.

Additionally, there's less interest in a single contract for additional services like enterprise resource planning (ERP), productivity, cloud infrastructure, and CRM from a single vendor. This may be because buyers realize that those capabilities can be easily added on to a communications and collaboration platform via ecosystem capabilities.

Figure 7

"Which of the following would your organization ideally combine under a single service agreement?"

CCaaS	71%
UCaaS	65%
Communications platform as a service (CPaaS)	56%
Collaboration/meeting room hardware	44%
Enterprise resource planning (ERP)	26%

Base: 567 global IT decision-influencers at the director level or higher whose organizations have adopted unified communication, UCaaS, and/or CCaaS solutions
Note: Showing top 5 responses
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

Key Requirements For UCaaS And CCaaS

The study reveals that there is demand for a single-vendor solution and provides insights on the top priorities within the UCaaS and CCaaS domains.
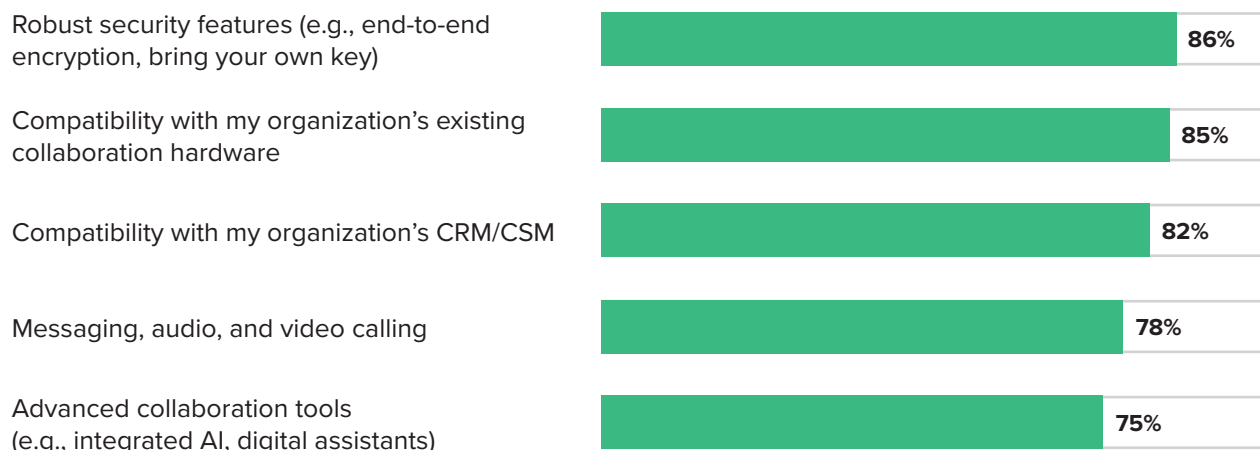
UCaaS is often seen as the foundation, and surveyed buyers are prioritizing security, compatibility with existing collaboration hardware, and compatibility with existing CRM/customer success management (CSM) solutions (see Figure 8). There are also specific requirements for unified messaging, audio calling, and video calling, as well as access to innovation including advanced collaboration tools like integrated AI features (e.g., assistants, transcription, and translation). Overall, these takeaways highlight that respondents want a vendor that is committed to supporting hybrid work, thereby positively impacting EX.

Decision-makers want CCaaS systems to work with their existing communications and CRM systems (see Figure 9). CCaaS buyers are also interested in innovations like support for digital channels and advanced AI capabilities in the CX space. A unified approach to seamless, high-quality media experiences across voice, video, and digital channels is integral to bettering CX. Buyers are focused on vendors that offer a balance of assurance and innovation, while also providing the cost benefits of working with existing systems.

Figure 8

"How important are the following UCaaS solution features to your organization's purchasing decision?"

(Showing "Important" and "Very important" combined)

Feature	Percentage
Robust security features (e.g., end-to-end encryption, bring your own key)	86%
Compatibility with my organization's existing collaboration hardware	85%
Compatibility with my organization's CRM/CSM	82%
Messaging, audio, and video calling	78%
Advanced collaboration tools (e.g., integrated AI, digital assistants)	75%

Base: 567 global IT decision-influencers at the director level or higher whose organizations have adopted unified communication, UCaaS, and/or CCaaS solutions
Note: Showing top 5 responses
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

Figure 9

"How important are the following CCaaS solution features to your organization's purchasing decision?"

(Showing "Important" and "Very important" combined)

Feature	Percentage
Ease of integration with existing communications solutions	85%
Compatibility with my organization's CRM/CSM	84%
Multiple digital capabilities and channels	82%
Advanced artificial intelligence capabilities	82%
Call-centric capabilities (e.g., queueing, routing, IVR)	82%

Base: 567 global IT decision-influencers at the director level or higher whose organizations have adopted unified communication, UCaaS, and/or CCaaS solutions
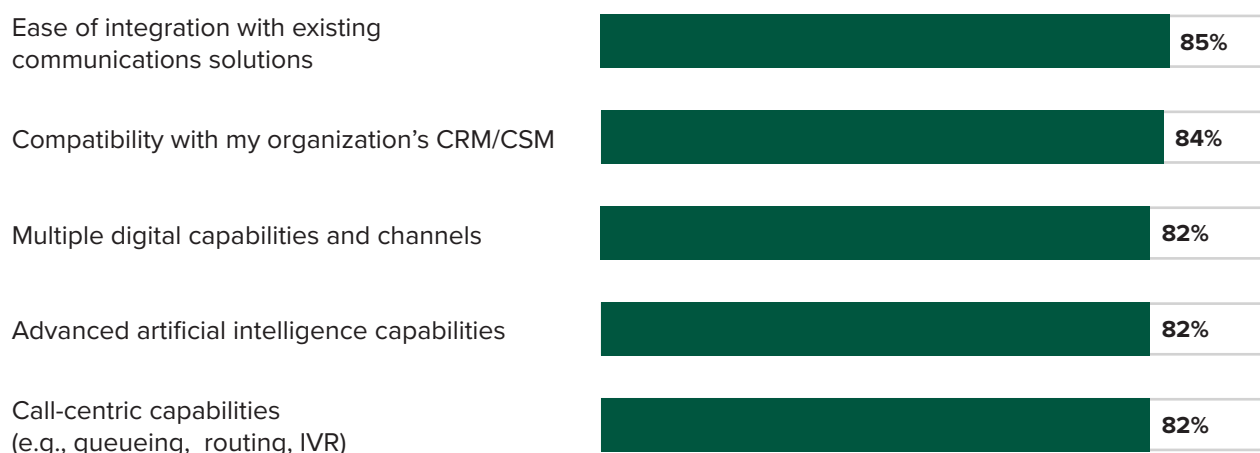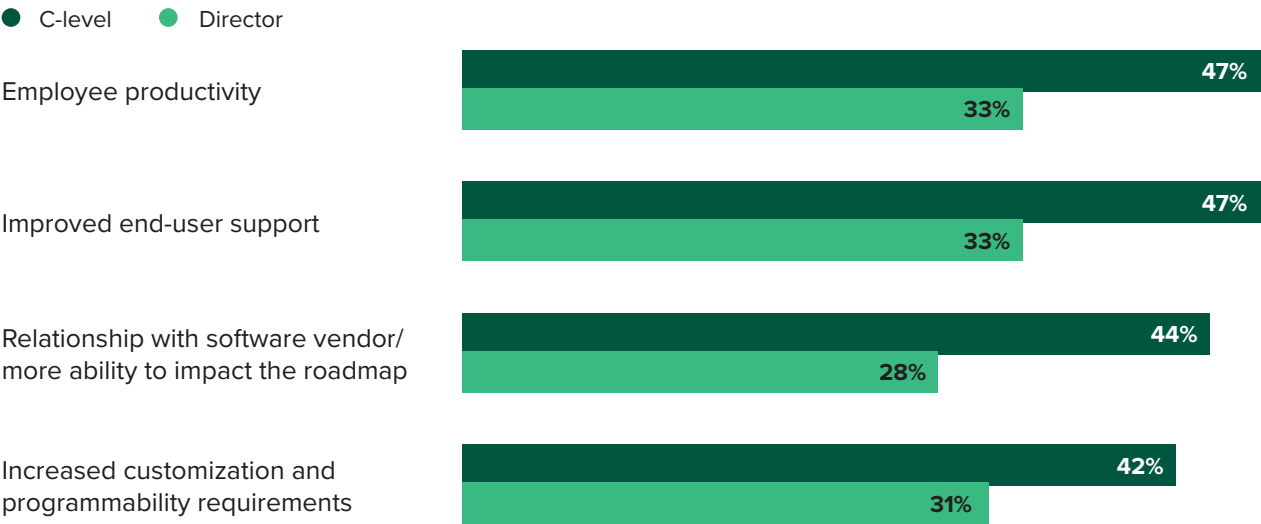Note: Showing top 5 responses
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

Benefits Of A Single-Vendor Approach

C-level respondents are focused on costs and interested in improving end-user and administrator support. They are also interested in developing a stronger relationship with software vendors, understanding the correlation between strong vendor relationships and alignment with longer-term business goals (see Figure 10).

C-level and director-level respondents find common ground on the benefits of a simplified contract, improved networking and infrastructure, better support for remote work, access to vendor ecosystem capabilities, and improved interaction between contact centers and employees. These areas serve as a critical starting point in framing the single-vendor UCaaS/CCaaS conversation among internal stakeholders and as key screening criteria when inviting vendors to an RFP process.

Figure 10

Benefits, Metrics, And Trends Driving Single-Vendor UCaaS/CCaaS Purchasing

● C-level   ● Director

	C-level	Director
Employee productivity	47%	33%
Improved end-user support	47%	33%
Relationship with software vendor/ more ability to impact the roadmap	44%	28%
Increased customization and programmability requirements	42%	31%

Base: 336 global C-level and director-level IT decision-makers and influencers whose organizations have adopted unified communication, UCaaS, or CCaaS solutions
Note: Showing five responses
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco, May 2023

Key Recommendations

The survey revealed that respondents, especially those in the C-suite, are focused on improving CX and reducing costs — and they see the potential benefits of a single-vendor UCaaS/CCaaS solution to help them do so. While the data also showed differences in purchasing priorities between C-level and director-level stakeholders, there is an opportunity for director-level stakeholders to align decision-makers around a complete set of requirements at a strategic and operational level.

Align digital transformation requirements with UCaaS/CCaaS capabilities. Most enterprise buyers are interested in a unified UCaaS/CCaaS solution, but it is important to align stakeholders throughout the evaluation and purchase cycle. C-level executives need support finding trustworthy information on vendors. Director-levels can help by surfacing key technical requirements and connecting to the high-level transformation goals.

Invest in the potential value at the intersection of UCaaS and CCaaS. Ultimately, this vendor decision will influence your organization's capacity to react to customer needs, and thus drive differentiation and revenue. Ensure that the vendor offers customization capabilities, advanced AI capabilities, and a robust ecosystem of third-party integrations. On UCaaS, ensure that vendors are committed to hybrid work and positively impacting the employee experience. On CCaaS, ensure that the vendor's unified approach delivers seamless, high-quality media experiences for your customers across voice, video, and digital channels. Vendor selection is just the starting point. Enterprise leaders must have an industry-specific plan on accelerating their overall EX/CX initiatives.

Recalibrate KPIs around collaboration, customer experience, and cost-saving benefits. It is likely that current metrics are focused on maintenance rather than enablement. C-level executives and directors can work together to identify present shared challenges and connect the dots to tech vendor capabilities. New measures may be needed, including improvements to end-user support, admin support, quality of ecosystem, and access to innovation.

Proactively solve for cross-departmental approval processes. Though many stakeholders may agree on joint solutions, there's still internal processes and interdepartmental challenges that can delay the time to value. C-level and director-level stakeholders can work in tandem to solve challenges across the approval and procurement processes. Directors can surface technical and department-level requirements and connect with top-line goals.

Refine contracts to deliver on simplification, support, and direct access to the tech provider. A unified UCaaS/CCaaS vendor relationship is based on trust with a shared goal of longevity. The vendor relationship should deliver on benefits of scale, support, and innovation. Enterprises are increasingly dependent on their technology choices for business continuity and competitiveness. Encourage vendors to share their roadmaps and engage with departmental stakeholders.

Encourage vendor evaluation teams to take a C-level view. EX/CX initiatives are transformative in nature, and the most successful companies will reduce silos across departments as well as encourage top-down, bottom-up alignment. Director-level evaluators play a critical role in surfacing ground-level requirements and connecting them to top-line objectives. Find common ground on shared priorities like simplified contracts, improved networking and infrastructure, better support for remote work, access to vendor ecosystem capabilities, and improved interaction between the contact center and the rest of company. C-levels must continually communicate their key requirements, including transforming CX capabilities and reducing costs. Organizationally, C-level leaders and directors can adjust the evaluation and procurement processes. Ultimately, vendor selection results in new tools and capabilities, but realizing the full benefits requires a common vision and culture that enables transformation.

Appendix A: Methodology

In this study, Forrester conducted a cross-industry online survey of 567 global director-, VP-, and C-level leaders. Survey participants included decision-makers in IT, CX, operations, procurement, and EX. Questions provided to the participants uncovered information about their firms' UCaaS, CCaaS, and single-vendor purchasing criteria and subsequent measures of successful implementations. Respondents were offered a small incentive as a thank-you for time spent on the survey. The study began in January 2023 and was completed in May 2023.

Appendix B: Demographics

GEOGRAPHY	
United States	**50%**
United Kingdom	**17%**
France	**17%**
Germany	**16%**

SIZE	
500 to 999 employees	**13%**
1,000 to 4,999 employees	**33%**
5,000 to 19,999 employees	**31%**
20,000 or more employees	**23%**

LEVEL OF RESPONSIBILITY	
C-level	**16%**
Vice president	**41%**
Director	**43%**

DEPARTMENT	
Customer experience/customer support	**22%**
IT/technology	**20%**
Operations	**20%**
Procurement	**19%**
Employee experience	**19%**

INDUSTRY	
Retail	**10%**
Financial services and/or insurance	**8%**
Healthcare	**7%**
Consumer product goods and/or manufacturing	**7%**
Transportation and logistics	**6%**
Technology and/or technology services	**6%**
Manufacturing and materials	**6%**
Construction	**6%**
Energy, utilities, and/or waste management	**6%**
Chemicals and/or metals	**5%**
Business or professional services	**5%**
Telecommunications services	**5%**
Media and/or leisure	**5%**
Consumer services	**4%**
Advertising and/or marketing	**4%**
Agriculture, food, and/or beverage	**4%**
Electronics	**4%**
Legal services	**2%**

Note: Percentages may not total 100 due to rounding.

ORGANIZATION ADOPTION OF UCAAS	
Adopted UCaaS solutions	**65%**
Not adopted unified communications or UCaaS solutions but planning to in the next 12 months	**23%**
Using an on-premises unified communications solution	**12%**

LEADERSHIP ROLE IN COMMUNICATIONS SOFTWARE SOLUTION SELECTION AND PROCUREMENT STRATEGY	
Final decision-maker	**24%**
Part of a team making decisions	**37%**
Influence decisions	**40%**

ORGANIZATION ADOPTION OF CCAAS	
Adopted CCaaS solutions	**44%**
Not adopted contact center or CCaaS solutions but planning to in the next 12 months	**22%**
Using an on-premises contact center/call center solution	**35%**

Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"Connected: A Foundational Principle Of Customer Obsession," Forrester Research, Inc., April 19, 2023.
"The Future Of UCaaS," Forrester Research, Inc., January 20, 2023.

Appendix D: Endnotes

[1] Source: "The State Of Customer Obsession In B2B Organizations, 2022," Forrester Research, Inc., October 5, 2022.

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