

Digital Communications Overall Buyers Guide

Software Provider and Product Assessment

EXECUTIVE
SUMMARY





Bend, Oregon

April 2024

The information contained in this Ventana Research Buyers Guide provides a baseline of knowledge that enterprises can use to evaluate the sophistication of software providers and products in the area of overall digital communications. Our findings are drawn from thorough, research-based analysis of product and customer experience categories that best represent how an enterprise should evaluate software providers.

Nothing in this report or our research is intended to imply that one software provider or product is the right choice for any one particular enterprise. Rather, our goal is to provide an objective rating of software providers and products related to the topic of this Buyers Guide using our research methodology and blueprint for successful evaluation and selection. We performed this research independent of any external influence, charged no fees for any software provider to participate in the research and invited all relevant providers that met our inclusion criteria. This report includes products generally available as of March 15, 2024.

The complete Buyers Guide report and research is available to be licensed for use across an enterprise or the internet. We provide insights on the technology industry, software categories and providers related to this Buyers Guide to enterprises through our Ventana On-Demand research and advisory service. We also offer assessment services using this research to help discover and provide guidance on software provider selection.

We certify that Ventana Research performed this research to the best of our ability, that the analysis is a faithful representation of our knowledge of software providers and products, and that the ratings are our own.

Ventana Research



Bend, Oregon, USA
541-940-1010

info@ventanaresearch.com



Digital Communications Overall

The necessity of enterprise communications internally and to external constituents like customers, partners and suppliers needs to be digital yet efficient and enabled across any channel and device. Dramatic technological changes have made it simpler and more cost-effective to enable these interactions in every business process across the workforce. Now, digital communications technology is more easily adopted globally, enabling supply chains to meet the demands of consumers through commerce.

Organizations invest in digital communication to increase the productivity of individuals and the workforce in the context of their roles and responsibilities. These systems enable seamless collaboration among workers to provide effective interactions and impactful communication experiences across the workforce and external constituents. And with the distributed workforces operating from retail locations to corporate offices to home locations, the ease of interactions across mobile devices to computers via chat or video is an essential part of what digital communications enable.



Through 2027, only one-quarter of enterprises will have standardized their digital communications technologies to provide the highest level of resilience and unification for an effective workforce.

Digital communications is possible because of the technological evolution over the past two decades, including unified communications and collaborative computing software. With the advancement of cloud computing, these technologies have evolved into a platform and software as a service engagement and subscription model. The technology industry has positioned the requirements for a communication platform as a service operating with unified communication, supporting collaboration tools and embedded communication between parties.

In today's organization, dozens of software providers and tools for digital communications operate across an enterprise with little to no integration to interoperate. This creates unnecessary costs and absorbs resources. Software and platforms that integrate into business applications can remedy the situation. However, consolidating providers requires business and IT

leaders to navigate a course to assess and select the products that best meet the enterprise's use cases and requirements. Through 2027, only one-quarter of enterprises will have standardized their digital communications technologies to provide the highest level of resilience and unification for an effective workforce.

The foundation of digital communications is a cloud-computing platform that supports all requirements through automation and workflows, with analytics and insights to support any interaction, whether audio, text or video. Users can choose any device and medium, including



chat, collaboration or phone that operates across carriers and networks. More advanced enterprise requirements need communication platforms that embrace a portfolio of APIs and support the languages, protocols and routing to interoperate internally and externally. This includes authentication, WebRTC, programmable numbers, emergency calls, social messaging, mobile identity and notifications.

The administration of communications platforms and tools is critical for enabling proper software governance and management. The platform must support users, groups and organizations with policies and procedures to govern access to the technology and content. Archiving and storage plans should be managed through subscription and billing, coordinated by IT and procurement. The platform must support web and contact accessibility standards and comply with section 508, WCAG and European standards like EN 301 549.



Communication systems should be simple for users to operate and deliver impactful experiences but also have intelligence and workflows.

The integration of communication platforms and basic and premium tools should support a range of applications, including contact centers, CRM marketing, sales, websites and customer experiences. IT and developers across the enterprise also require support for operating communication technologies through APIs and workflows. Direct integration for supporting audio and video should include computers, mobile devices, Apple and Microsoft technologies and even into automotive dash displays.

Communication systems should be simple for users to operate and deliver impactful experiences but also have the intelligence and workflows to interoperate across people and processes. Platforms and premium suites should maximize artificial intelligence and machine language to support intuitive interactions

across text, video and voice. This requires integration with knowledge bases, accessed through conversations and workflows, using rules and prompts to support notifications.

Applying analytics for conversational insights can provide monitoring and intelligence on interactions. The broader use of analytics supports simple reporting, but analytics on speech and video are necessary to understand the usage and adoption of available tools. Monitoring also provides insights into quality, infrastructure, hardware and storage related to digital communications. The advanced use of generative AI like ChatGPT and large language models is becoming integrated into digital communications platforms.

Extended use of digital communications helps organizations to communicate externally through the management and production of webinars and training for workforce requirements. Webinars need the capability to send invitations, accept registration and record the session. Webinars also need the functionality to support interaction between participants



and presenters. Typical webinar requirements include questions, spotlight, polling, handouts, surveys and notifications. Internal training requirements typically include registration, recording, playback, material review, multi-session courses, testing, catalog, payments and certification. Using digital communications for webinars and training is a recent advance, using readily available technologies instead of requiring separate skills and resources.

Premium suites offer the most sophisticated digital communications, where platforms and tools blend with advanced capabilities to deliver a unified approach. Use cases must interoperate with documents, electronic mail, messaging and tasks. Digital communications should integrate into business applications, accessible to a hybrid workforce and mobile devices. Systems must also interact with external parties.

The need to govern and manage digital communications requires administration and workflows across a variety of human and machine types, including conversational experiences that utilize AI/ML to increase sophistication.



The need to govern and manage digital communications requires administration and workflows across a variety of human and machine types.

Innovations in type interfaces include translations, text to speech and prioritization of notifications. Meeting functionality now supports avatars, consent, polling, panels and town halls. Digital communication providers should also have marketplaces that can augment existing deployments with more capabilities. And supporting phones is essential and should embrace the needs for conferencing, recordings and voicemails.

The Overall Buyers Guide includes analysis of Premium Suites category of Digital Communications and encompasses a portfolio of products including platforms and tools that span use of physical and virtual phones, chat, collaboration and meetings with related plan support, administration and integration of communications, device and digital technology support, intelligence and workflows, analytics and insights,

marketplace support and compliance to accessibility standards. Support and management of webinars and training have expanded the category to meet enterprise requirements. This segmentation ensures that software providers are recognized for the level of sophistication and commitment to this unified software category to meet the breadth and depth of enterprises, paving the way for a future where every organization can find the software provider that best meets its needs.

This research evaluates the following software providers that offer products that address key elements of overall digital communications as we define it: 8x8, Avaya, Cisco, Google, Microsoft, RingCentral and Zoom.



Buyers Guide Overview

For over two decades, Ventana Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



Ventana Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business requirements in any enterprise.

methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

This Ventana Research Buyers Guide: Digital Communications Overall is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for overall digital communications software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource

and financial investment.

In this Buyers Guide, Ventana Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the Ventana Research Value Index methodology and blueprint, which links the personas and processes for overall digital communications to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of overall digital communications technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its



performance potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

Ventana Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of overall digital communications software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating overall digital communications systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise’s established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Rating of Software Providers Across Categories

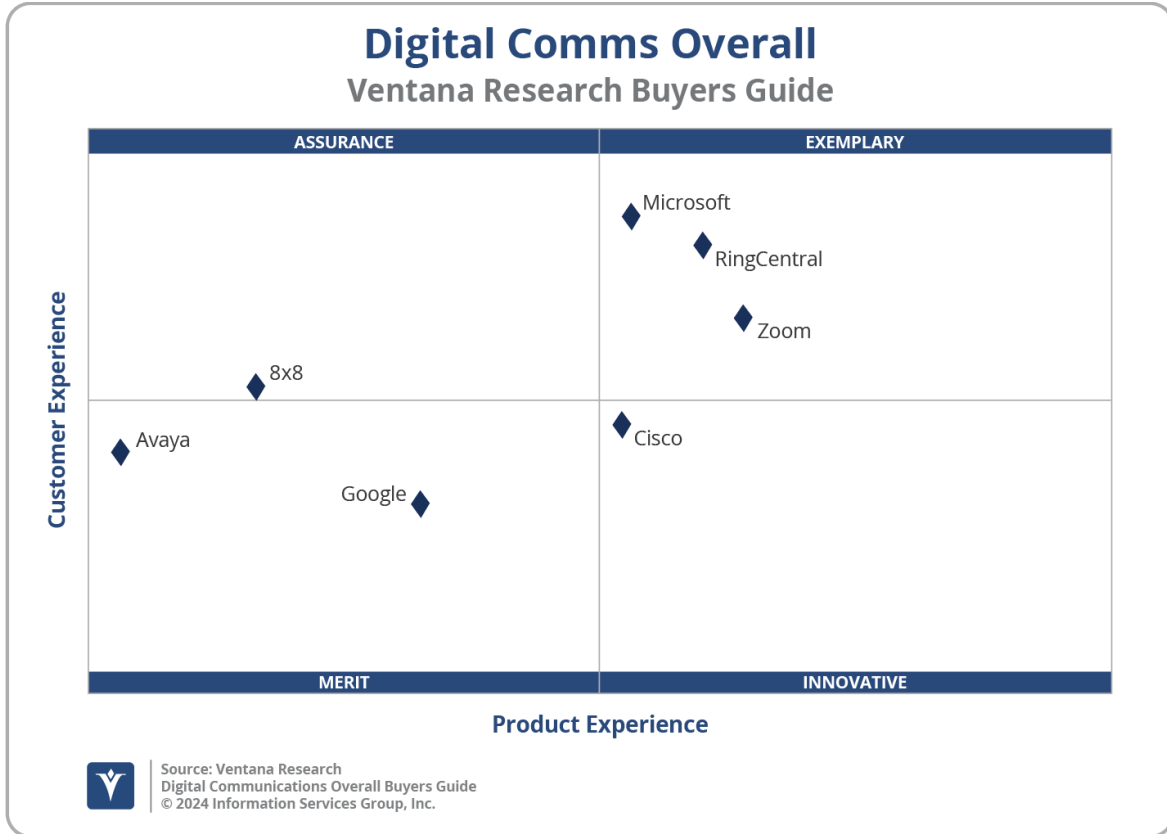
The research finds RingCentral atop the list, followed by Zoom and Microsoft. Companies that place in the top three of a category earn the designation of Leader. Microsoft, RingCentral and Zoom have done so in six of the seven categories, and Google in two.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines their placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Digital Comms Overall			
Overall			
Vendors	Grade	Performance	
RingCentral	A-	Leader	86.8%
Zoom	A-	Leader	86.5%
Microsoft	A-	Leader	86.0%
Cisco	A-		83.3%
Google	B++		77.9%
8x8	B++		75.5%
Avaya	B+		72.2%

Source: Ventana Research
Digital Communications Overall Buyers Guide
© 2024 Information Services Group, Inc.

The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers’ overall weighted performance.



Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Microsoft, RingCentral and Zoom.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The provider rated Innovative is: Cisco.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The provider rated Assurance is: 8x8.

Merit: The categorization of software providers in Merit (lower left) represent those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Avaya and Google.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise



or for a specific process. Although there is a high degree of commonality in how enterprises handle overall digital communications, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise’s needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise’s life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise’s requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research based on the methodology of expertise identified the weighting of Product Experience to 80% or four-fifths of the overall rating. Importance was placed on the categories as follows: Usability (15%), Capability (20%), Reliability (15%), Adaptability (15%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. Zoom, RingCentral and Microsoft were designated Product Experience Leaders as a result of top-ranked weighted performance. While not a Leader, Cisco closely followed and was found to meet a broad range of enterprise overall digital communications requirements.

Vendors	Grade	Performance
Zoom	A	Leader 70.6%
RingCentral	A	Leader 70.1%
Microsoft	A-	Leader 69.1%
Cisco	A-	68.8%
Google	B++	64.7%
8x8	B++	61.3%
Avaya	B+	58.8%

Source: Ventana Research
Digital Communications Overall Buyers Guide
© 2024 Information Services Group, Inc.

Many enterprises will only evaluate capabilities for workers in IT or administration, but the research identified the criticality of Usability (15% weighting) across a broader set of usage personas that should participate in overall digital communications.



Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring marketing of this commitment is made abundantly clear on the website and in the buying process and customer journey.

Our Value Index methodology weights Customer Experience at 20% of the overall rating, or one-fifth, as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Microsoft, RingCentral and Zoom. These category leaders in Customer Experience best communicate commitment and dedication to customer needs. Software providers such as 8x8 and Cisco were not overall Leaders, but demonstrate a high level of commitment to the customer experience.

Many software providers we evaluated could have had more information available through the website and presentations. While many have customer case studies to promote success, others lack depth in articulating the commitment to customer experience and an enterprise's overall digital communications journey. This makes it difficult for enterprises to evaluate providers on the merits of commitment to customer success. As the commitment to a software provider is a continuous investment, the importance of supporting customer experience in a holistic evaluation should be included and not underestimated.

Vendors	Grade	Performance
Microsoft	A-	Leader 16.7%
RingCentral	B++	Leader 16.2%
Zoom	B+	Leader 15.0%
8x8	B	13.6%
Cisco	B	13.2%
Avaya	B	12.8%
Google	B-	11.7%

Source: Ventana Research
Digital Communications Overall Buyers Guide
© 2024 Information Services Group, Inc.



Appendix: Software Provider Inclusion

For inclusion in the Ventana Research overall digital communications Buyers Guide for 2024, a software provider must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two countries, and have at least 100 customers. The principal source of the relevant business unit's revenue must be software-related and there must have been at least one major software release in the last 12 months.

The 2024 Buyers Guide for Digital Communications Overall consists of three parallel evaluations that result in the following: Platforms, Basic Suite and Premium Suite, the latter being an overall assessment that includes platforms and premium suites.

For inclusion in the Buyers Guide, a software provider's primary source of revenue must be software related. The actual or projected annual revenue must be at least \$25 million in USD or equivalent for digital communications platform providers, also referred to as communication platform as a service (CPaaS); or at least \$25 million for software providers of exclusively digital communications suites. The firm must operate across at least two countries and have at least 50 customers.

All software providers that offer relevant products and meet the inclusion requirements are invited to participate in the Buyers Guide evaluation process at no cost to them. If a provider does not respond to or declines the invitation, a determination is made whether to include it in our analysis based on our defined set of inclusion criteria. These criteria are designed to ensure we include in our evaluation providers' geographic operations, customer base and revenue as well as all relevant aspects of the products' fit for the particular category being evaluated. If a software provider is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Buyers Guide, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant providers whether or not they choose to actively participate.

Software providers with premium digital communication suite functionality will be evaluated based on the capabilities that include:

- Digital Phone–(basic and premium)–Required functionality.
- Meetings–(basic and premium)–Required functionality.
- Collaboration–(basic and premium)–Required functionality.
- Chat–(basic and premium)–Required functionality.
- Plan Support (basic and premium)
- Analytics and Insights (basic and premium)
- Communication Administration (basic and premium)
- Communication Integration (basic and premium)
- Sophisticated Worker Use Case (premium)
- Intelligence and Workflow (premium)
- Marketplace (premium)



- Webinar (premium)
- Training (premium)
- Platform (premium)

To qualify for inclusion in the digital communication platform as a service evaluation, a software provider's offering must include embedded support for chat, analytics and insights, intelligence and workflow, communications administration and integration, and have additional platform support for the following:

- Cloud Platform–Required functionality.
- Routing–Required functionality.
- Programmable numbers–Required functionality.
- Communication API–Required functionality.
- Authentication and management API–Required functionality.
- Low code/no code
- Language and protocol
- Developer Studio
- Encryption
- WebRTC API
- Emergency Call API
- Social Messaging API
- Mobile identity
- Notification API
- IoT Thing API

To qualify for inclusion in the digital communication suite and platform evaluation, a software provider's offering must include:

- Digital Communications Suite (premium)
- Digital Communications Platform (could be referred to as CpaaS)

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant overall digital communications products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them. Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and rating, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
8x8	8x8 Experience Communications Platform	March 2024	March 2024
Avaya	Avaya Communication and Collaboration Suite	March 2024	March 2024
Cisco	Webex Suite & Webex Connect	March 2024	March 2024
Google	Google Workspace	March 2024	March 2024
Microsoft	Microsoft Teams, Copilot for Microsoft 365	February 2024	February 2024
RingCentral	RingEX, RingCentral MVP, RingCentral Rooms, RingCentral Business SMS, RingCentral Events, RingCentral Phone, RingCentral Rooms, RingCentral Video, RingCentral Webinar	March 2024	March 2024
Zoom	Zoom One & Zoom Events	March 2024	March 2024



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	Platform	Basic Suite	Premium Suite	Revenue
Dialpad	Ai Communication, Dialpad Ai	No	Yes	No	Yes
GoTo	GoTo Connect, GoTo Meeting, GoTo Webinar, GoTo Training	No	Yes	No	Yes
Mitel	MiCollab, MiTeam Collaboration, MiTeam Meetings	Yes	Yes	No	Yes
Talkdesk	Talkdesk Omnichannel Engagement, Talkdesk Phone	Partial	Partial	No	No
Vonage	AI Acceleration Suite, Vonage Business Communications	No	Yes	No	Yes
Zoom	Zoom One & Zoom Events	March 2024	March 2024	Zoom	Zoom One & Zoom Events



About Ventana Research

Ventana Research, now part of Information Services Group, provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through the Ventana Research community, and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premiere service, Ventana On-Demand (VOD), provides structured education and advisory support with subject-matter expertise and experience in the software industry. Ventana Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored Assessment Services and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

About ISG Research

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value. For more information about ISG Research™ subscriptions, please email contact@isg-one.com.

About ISG

ISG (Information Services Group) (Nasdaq: [III](#)) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit isg-one.com.