

Critical Communications for Business Continuity: How to Ensure Employees, Partners & Customers Stay Connected



A Frost & Sullivan White Paper

TABLE OF CONTENTS

Executive Overview	3
Defining Business Continuity	4
Collaboration: Critical to Business Continuity	4
Leveraging Unified Communications Technologies for Business Continuity .	5
Voice over IP	6
Audio Conferencing	6
Video Conferencing	7
Web Collaboration and Content Sharing	8
Designing a Collaboration Plan for Business Continuity	8
Goals: Staying in Touch with Employees, Partners and Customers	8
Needs Analysis: Collaborative Tools for Every Knowledge Worker	9
Putting a Plan into Action	10
Training & Testing: Ensuring it Works	11
Additional Benefits & Long-term Gains	12
Polycom® Technology Overview	12
Conclusion	13

EXECUTIVE OVERVIEW

These days, any organization that doesn't have a business continuity plan in place is critically out of date. Everyone's aware of the big threats—terrorism, natural disasters, regional power failures, and so on. But with an increasingly remote workforce, more companies are open to more interruptions to their business—and in a virtual workplace, even if those interruptions hit on a local level, their effects reach far and wide.

It doesn't take much: A single building could experience a power failure or Internet outage; a single region could be under weather constraints (and not of hurricane proportions—snow, sleet, ice storms, even extreme heat can prevent employees from getting to work); a single team could be stranded far from where they normally work due to travel hiccups. In the virtual workplace, all these seemingly minor—or, at least, localized—issues can have broad effects on the larger organization, since most workers must interact and collaborate with a wide group of dispersed employees, partners and customers. If those peers are unable to “get to work,” the consequences will be felt throughout the enterprise—and might well impact customer satisfaction, and the company's bottom line.

As a result, more companies are taking a hard look at business continuity—essentially, the ability to keep the business running, customers served, and employees productive, regardless of any interruption to standard operating procedure.

One key way to ensure superior business continuity is to have a clear, well designed plan in place for keeping communications going, not just when an event occurs, but during its duration. This should go beyond simple notification procedures and include unified communications—specifically presence, audio and video conferencing and web collaboration—so that even when in-person meetings are not possible or practical, employees and partners can continue to communicate and collaborate to keep the business on track.

On Demand Conferencing tools that can help companies stay in touch with employees, and help employees stay in touch with one another, as well as partners, customers and suppliers, include:

- VoIP
- Audio conferencing
- Video conferencing
- Online collaboration
- Presence information

Although many companies use some or all of the above technologies during normal operations, they may not be leveraging them enterprise-wide, or for business continuity. But business continuity requires that employees be able to stay in touch with customers, and with each other, regardless of the circumstances. Indeed, customer continuity is as important as business continuity. Enterprises must ensure that customers continue to be served, regardless of any interruption; ideally, customers wouldn't even know an interruption has occurred.

Alternatively, many companies that want to deploy such technologies are looking for ways to justify the investment, both immediately and long term. Making on demand conferencing and collaboration tools a valuable part of the business continuity plan can help achieve that ROI goal.

This paper examines why companies should develop and implement an on-demand conferencing and collaboration plan that supports business continuity for both the enterprise and its customers. It outlines what technologies to use when; how to define and determine when to put a plan into action; and how to handle the specific needs of office-based and remote employees. It also looks at how companies can benefit from these critical communications technologies on a regular basis, to boost productivity, support the virtual workplace, dramatically improve ROI and positively impact the bottom line.

DEFINING BUSINESS CONTINUITY

Although the terms are often used interchangeably, business continuity is and always has been distinct from disaster recovery. Disaster recovery rightly implies the need to get business back up and running after a disaster has hit and, presumably, temporarily halted operations—the organization is literally recovering from the event. Significant natural disasters, severe power outages, terrorist and other malicious human acts are all potential “disasters” that can affect the ability of a company to maintain operations. What’s more, such disasters can threaten critical systems—and literally ruin them in the case of fire or flooding, for instance—and so disaster recovery often requires that companies have backed up critical data in the event such information is lost, for use when the business gets back up and running.

Business continuity, on the other hand, is key for companies that want to maintain operations in the face of interruptions large and small. It’s a much stronger, broader and more meaningful effort, and its focus is as much on customers as on employees—that is, the ability to support customers as though it were business as usual, even if it’s not.

The goal with business continuity is not so much recovery, but to prevent the need to recover in the first place—that is, to maintain business operations even as facilities, networks, and other IT systems and services are unavailable, for any reason. That reason might be a significant event, but it could also be a more limited or localized one; either way, companies want their employees to be able to continue to do their jobs with minimal change in processes, and little if any effect on customers and sales. Indeed, a successful business continuity plan will ensure that from the customer’s point of view, it doesn’t appear that an event has occurred at all.

Unfortunately, when mapping a business continuity plan, most companies forget about one key element of every business: conferencing and collaboration. But these capabilities are critical to maintaining seamless customer support and interaction; to pursuing sales and partnership opportunities wherever and whenever they arise; and to driving employee productivity.

COLLABORATION: CRITICAL TO BUSINESS CONTINUITY

It’s absolutely critical that in the face of a disruptive event, whatever the scale, companies ensure their employees can communicate with one another, and with the company’s

partners and customers. And there's more to it than simple person-to-person phone calls and e-mails (although those are important). In the face of any interruption to normal business, employees need to receive information about the event, and how they are to continue operating, often on a continuous basis. The goal is always to minimize confusion, so that employees spend as little time as possible figuring out how to do their jobs, and as much time as possible actually doing them.

Once that information is conveyed, those same employees must be able to meet in groups small and large, and continue to collaborate as they would under normal circumstances—with one another, and with partners and customers. If travel is restricted, the need to communicate over distances, virtually, is compounded; but even in situations where travel is possible, if employees who normally work together in an office suddenly find themselves working separately, from home or satellite sites, they'll need to come together virtually in a way that mirrors their normal working environment, to ensure maximum productivity.

Indeed, in times of disruption, employees must know that although they may not be located in the same place as usual, and with the same cohorts as usual, their business processes need not change. This is especially important for employees who are not normally part of a virtual workplace. Such employees are used to working next to their peers, meeting in person, and collaborating on the fly as needed. They will not be used to working together, or supporting customers, in a remote fashion.

For these employees especially, it's critical that they be able to see and interact with one another as they normally would, so that they can remain as productive as possible. On-demand technologies such as video conferencing are therefore critical to a successful business continuity plan. If employees are well prepared and comfortable collaborating remotely—even under unusual and disruptive circumstances—they are much more likely to stay focused and productive, allowing them to continue supporting customers and positively impact the company's bottom line.

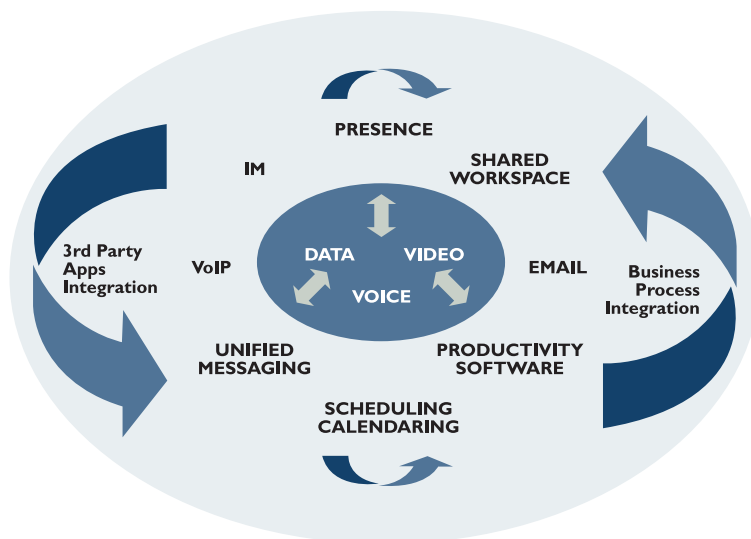
LEVERAGING UNIFIED COMMUNICATIONS TECHNOLOGIES FOR BUSINESS CONTINUITY

Companies should plan on having a range of on-demand technologies in place in order to support communications during an event that interrupts normal business flow. The good news is that many companies already have at least some of these technologies in place—they just need to make them available to all employees, and in times of immediate need. Even better, almost all companies will be able to leverage these same technologies during the normal course of business, making them wise investments not just for business continuity but for business in general, and thereby shortening the ROI cycle.

That's because many of the features that shape business continuity planning also shape ordinary business operations today, as companies face several critical business challenges brought on by the increasingly virtual nature of their workplaces. More and more, employees are scattered across regions, nations, and even continents—and yet they must be able to collaborate with one another, as well as with partners and customers, at any time and from anywhere. At the same time, companies are charged with boosting productivity

while simultaneously lowering costs. And both managers and employees want to keep travel to a minimum, since it's only getting more difficult and more expensive, both in real dollars and in terms of lost productivity.

The Unified Conferencing and Collaboration Paradigm



Voice over IP

Companies are deploying Voice over IP (VoIP) like never before, and they're seeing benefits that go way beyond simple cost savings. VoIP allows end users to essentially "take their number with them" and be reached wherever they are, at any number and on any device. Best of all, they can do that without any recurring action on their parts, which is especially valuable for business continuity.

VoIP's find me/follow me capabilities ensure that employees can be reached by callers inside and outside the enterprise, regardless of where those employees are working from. That means that if an employee is unexpectedly forced to work from home or a remote office, he will still receive calls dialed to his primary business number—and the caller will never know the difference. This is critical for continuity, allowing employees to be reached by key contacts without having to reach out to all those contacts and let them know about the change. And from a customer-service perspective, it ensures smooth, seamless operations regardless of any business interruptions.

Of course, these benefits aside, VoIP continues to offer companies significant cost savings and easier administration. That's one reason that IT executives quickly look to run other applications on their IP networks once they've successfully deployed voice capabilities.

Audio Conferencing

Almost all organizations have some form of audio conferencing in place, but most don't leverage it as part of their business continuity plans. And yet audio conferencing can be a huge benefit—nay, a necessity—during any business interruption.

Audio conferences are easy to use and cost-effective, making them a go-to technology for business continuity. Employees can simply dial into a pre-set phone number (via cell phone if landlines don't work), enter their pass-code if required, and immediately get updated on what's happening at the office, and elsewhere, in the face of an event. They can get information live via conference call, with the ability to ask questions and hear from their managers and co-workers in real time; or they can access pre-recorded messages on an as-needed or as-available basis. And, of course, they can use audio conferencing to meet and collaborate with their departments or smaller project teams, even if the people in those groups are disrupted and no longer working from their usual locations.

That's especially important during times of crisis, when employees from one or multiple locations may be unable to go into their usual offices. As a result, they may be forced to work from home, or from another office altogether. In either case, they need an easy, cost-effective way to regularly and effectively communicate with their co-workers and managers, for as long as the interruption and its effects last.

Video Conferencing

Video conferencing is a critical technology for business continuity for one simple reason: It enables face-to-face meetings even when people can't physically be in the same location—a common result of the events leading to business interruption. Being able to see the people you're meeting with is always beneficial, but it's never more important than in times of disruption. That's especially true for employees who normally work in the same location as their managers and co-workers—that is, employees who are ordinarily not “virtual workers.” Such people, working at home or a strange office, separately from their usual cohorts, are likely to spend a significant amount of time just getting up to speed on what's it's like to be a virtual worker. Cutting that time and allowing displaced employees to get back to business as soon as possible will drive their productivity and allow them to respond to customer needs quickly and effectively.

Indeed, it's important to remember that even in today's very virtual world, many employees still routinely work and collaborate with co-workers and customers live and in person. For them, any event that prevents them from doing so will be particularly disruptive; being able to see the faces of managers and co-workers will allow them to spend more time working, and less time wondering how they're going to get their work done. That can go a long way toward helping employees regain efficient work habits and stay productive during the crisis.

Furthermore, in the event of a disruption, video conferencing can be a business saver when travel is restricted. Meetings with clients and prospects that were supposed to be conducted in person can be conducted via video conference instead, with no loss of productivity or presence—and, therefore, no negative impact on the business. Companies can even turn the negative into a positive; customers who are aware of the disruption will be impressed by the organization's ability to continue with business as usual, at a level that really is the next best thing to being there. That agility and flexibility translates into customer confidence—the thinking goes, “if the company is this responsive in the face of crisis, they'll be able to support my changing business needs.”

In addition, depending on the nature of the disruptive event, the visual impact of video conferencing may be essential to resolving or troubleshooting issues related to the event. For example, being able to show a remote expert the manufacturing line, or a product defect, or the landscape of a physically damaged plant, gives real-time results that couldn't otherwise be achieved.

Web Collaboration and Content Sharing

When people who normally work together can no longer do so, it's critical that they still be able to share data and collaborate on files, projects and applications. Ideally during times of crisis, they can do so as part of a larger collaborative effort, via audio and video conference, so that they are able to interact with their co-workers on a more direct and intimate level even as they get the hard work done.

It's therefore critical that companies have in place the capability for employees to share content and applications as part of a broader set of unified communications tools, including as part of an audio or video conference. Companies will also want to ensure employees can continue to collaborate on data after they've participated in a real-time collaboration session, so that business can continue as normally as possible even if people can't work on documents or applications side by side or face to face.

DESIGNING A COLLABORATION PLAN FOR BUSINESS CONTINUITY

Many IT professionals neglect to incorporate collaborative communications technologies into their business continuity plans, but a well-prepared organization should make conferencing and collaboration a de facto part of any business continuity infrastructure.

Doing so is not difficult, but it does take some advanced analysis and preparation. To stay most effective during a time of crisis or outage, organizations must ensure their employees can connect to and collaborate with other employees, as well as partners and customers (an often overlooked part of the business continuity picture). The best solution is on-demand unified collaboration technologies that let employees meet and collaborate from anywhere, anytime, without prior planning (after all, you can't plan for an unexpected business interruption).

IT managers must also evaluate the types of employees they have—and consider which could be affected by a crisis—to ensure the right technology tool is offered to the right employee. Finally, IT and even line-of-business managers need to know when to use the new technology for the purpose of business continuity, and feel confident in its ability to perform as promised.

Goals: Staying in Touch with Employees, Partners and Customers

The goal of any business continuity plan—whether it involves communications or not—is to ensure the organization can continue with business as usual, even in the face of a disruptive event. It's critical that companies deploy appropriate conferencing and collaboration technologies for two reasons: to keep employees connected to one another and to their respective managers and reports; and to keep employees connected to their partners and customers. Because communications happen, for the most part, in real or near-real time, the pressure on communications and collaboration technologies is even greater.

Keeping employees connected to each other is obviously critical for business as usual, and for supporting and driving productivity. And we've discussed how and why technology can help when displaced employees must nevertheless collaborate with one another on projects and deliverables. But it's equally critical for companies to stay in touch with partners and customers, or they risk escalating costs and losing opportunities in the face of a disruptive event. What's more, those partners and customers may not even be aware of the fact that an organization has been interrupted. Anything IT can do to mitigate the effect on communications will be appreciated—although it may not even be noticed.

In situations where employees were supposed to meet with partners or customers in person and can't because of the interruption to their business, giving them the option of a video conference can be especially valuable. Customers will certainly understand if circumstances prevent employees from meeting them in person, but they will also be glad to learn that the meeting itself can still take place—face to face, and with no loss of productivity. That reflects positively on the business, and those positive effects will extend to the customer relationship well beyond the duration of the event.

Needs Analysis: Collaborative Tools for Every Knowledge Worker

When evaluating and devising a business continuity plan, IT managers must consider the types of employees they support: headquarters workers, remote-office workers, home-based workers and road warriors. Each will be affected differently by a disruption (some won't be affected at all, depending on the event), and each will have different communications and collaboration needs.

Regardless of where the normally work, all employees should have access to audio conferencing, PC-based video conferencing and web collaboration applications in the event of an emergency. Those that can make it into an office should also be able to use room-based video conferencing (including high-definition and/or telepresence systems) to communicate with other branches, as well as select partners and customers. But how ready and willing employees are to use those technologies will vary.

Headquarters and remote-office workers may not be located in the same place, but they are likely to be similarly affected by disruptions, whether they're widespread (affecting a number of offices, possibly including headquarters) or quite localized (affecting one office, headquarters or otherwise). These employees will be most severely affected by an event, because they will most likely be disrupted from their normal working habits—often, they won't be able to go into the office at all, and if they can, it may be under unusual circumstances. They may be the employees most likely to normally collaborate with one another live and in person, and therefore the employees least likely to be familiar with collaborative technologies such as desktop video conferencing and web collaboration. They are also most likely to be working under less-than-ideal working conditions from home, since that's not normally where they operate—expect lower-bandwidth Internet connections, for example. In the event of a disruption, these employees need to know what's going on at the office—starting from the not-so-small matter of whether they should even go in.

Home-office workers are least likely to be personally affected by a large-scale event, but they will still have to change their routine as a result of one, and depending on the scale of the event, they, too, might be affected by power, telephone and Internet outages, at least temporarily. Furthermore, they may not be clear on what's happening at the office once an event has occurred, and therefore prone to the same loss of productivity as their displaced co-workers. What's more, because they're likely to be working from the safety and security of their home offices, home-office workers may feel the need to—or be required to—take on significant amounts of extra work in the face of an event. They may therefore find themselves interacting and collaborating with employees, partners and even customers they're not familiar with, until their co-workers get back online. The good news: in many companies, regular home-office workers are quite comfortable with conferencing and collaboration technologies, since they already use them often.

Road warriors typically are based either out of an office or home location, but they spend the majority of their time on the road. Depending on the nature of the business

interruption, they, like home-office workers, may face little or no effects of a disruption; or, they may face significant stress, including being stranded on the road and unable to return not just to work, but to family and friends, too. And, if they're stuck in travel, these employees are least likely to have access to higher bandwidth Internet connections and video and web collaboration technologies.

Finally, many companies should take a tiered approach to technology deployments according to job roles, giving highest priority to senior managers and others who will need to respond quickly in an emergency. For instance, you might opt to outfit all executives with executive desktop video conferencing systems at home, so they will be able to collaborate with each other, as well as partners and customers, in the event of a disruption. Then you'll want to provide all line-of-business managers and knowledge workers with audio, desktop video and web collaboration capabilities, so they can coordinate with their supervisors and reports, and deliver any necessary customer support at the click of a mouse. Finally, you can deploy audio collaboration services on a hosted basis to all employees, so they can stay informed and collaborate with one another on an as-needed basis.

Putting a Plan into Action

One of the best things about integrating on-demand unified conferencing and collaboration technologies into a business continuity plan is that they can be leveraged right from the start to help employees manage the situation. To that end, organizations can take several steps to inform employees and help them stay in touch with one another immediately. The more planning you do up front, the smoother the continuity will be.

Offer employees an 800 number to call in the event of an emergency to ensure that everyone knows what's happening to the organization, regardless of where any given employee is located. If an event occurs and employees in or out of the region wonder what, if any, effect it had on the status of the business, they can call in and hear a recorded message letting them know. (And, of course, should the event not prove serious, employees would discover that, too; if, for instance, a snowfall isn't as dramatic as the weather channel predicted.)

Use your Web site to deliver information and links to conference calls and collaboration sessions. Your site is also the perfect place to deliver streaming video content, to employees as well as partners and customers.

Deliver an audio conference during the day of the event to ensure employees are well informed of the situation, and to allow them to ask questions. Once they've received the basic information on where to go and what to do, employees will want more details on the exact nature of the event, as well as what's expected of them in the hours, days, or even weeks to come. An initial audio conference call—followed by additional conferences as needed, all re-broadcast on an 800 number, as well as smaller sessions among teams and departments—can go a long way toward driving productivity and enabling ongoing customer care.

Deploy video conferencing and data sharing capabilities at headquarters, remote offices and the PC desktop (for those people who can't actually make it into an office). If a disaster prevents people from flying, but they are able to go into their own office, they'll be able to meet with far-flung co-workers, executives, partners and customers regardless of the event. Meanwhile, if certain employees can't make it into the office, they'll still be able to see their peers, and be able to share content with them and collaborate on key documents and deliverables, regardless of their location, or for how long they're displaced.

Training & Testing: Ensuring it Works

As with all technologies, it's critical to ensure conferencing and collaboration tools will work when people need them, especially in the event of a disruption. And because such events could take out the very infrastructure that's supporting the communications technologies themselves, it's also important that conferencing capabilities be available as needed.

Just as companies take measures to protect the availability of their data in the event of a business interruption, they should protect the availability of their communications. That may include backing up an IP network as they would any other data source; deploying audio, video and web collaboration technologies across multiple locations, to protect against an event in one location or another; and contracting with a hosting provider that can deliver conferencing and collaboration on demand (make sure that provider also has its own business continuity plan in place, to assure your access should something happen in their facilities as well as or separate from yours).

It's also important to make sure employees are up to speed on how to use and leverage conferencing and collaboration technologies, so that when they're forced by circumstances to do so, they're well prepared. You won't want (or likely to be able) to train users on the fly in the middle of a disruption, and you'll need to make sure people can use the tools at their disposal whenever, however and wherever they need to. That said, most organizations will want to take advantage of their conferencing and collaboration technology during normal business—that is, not wait for a disruption to leverage to power of real-time communications. Doing so has multiple benefits, including shortening ROI and ensuring workers are well versed in the technology, so they can be as productive as possible under any conditions.

ADDITIONAL BENEFITS & LONG-TERM GAINS

One of the best things about using conferencing and collaboration technologies as part of a business continuity plan is that unlike most other business continuity investments, these tools can be used every day—there’s no need to wait until disruption strikes. This is especially true for companies that deploy unified communications—including presence, audio conferencing, video conferencing and web collaboration tools—on IP networks, and when named user pricing ensures costs won’t skyrocket with use. Because the technology is viral, the more available it is to users, the more they’ll take advantage of it—and the faster companies will realize their ROI.

Organizations that make conferencing and collaboration a part of everyday communications will realize significant benefits, including shortened times to market, increased productivity and lower travel costs. And when and if it comes time for employees to use the technology in the event of a business disruption, they’ll be well trained and well versed on the technology, and ready to use it to keep operations running smoothly and productively.

One way to ensure familiarity with conferencing and collaboration tools is to deploy them within the enterprise on a routine basis. Certainly, this can include regular use by employees for conducting meetings and collaborative work sessions. But it can go beyond the ordinary, too, to prepare employees for how to use the technology during more significant events.

So, for instance, a company might launch a daily audio conference call and streaming video session, to which employees can call in live via phone or the web, or access a recorded version. The call can give updates on important business goals and issues for the days to come, housekeeping information, and so on. It can also link to training or other informational events, offered via audio or video conference and incorporating any relevant Web collaboration and streaming video. For example, a company might offer a link to benefit enrollment options and information; vacation, personal and sick day policies; instructions on filing T&E reports; and so on. That same routine conference call can then be used in an emergency to update employees for business continuity, with literally no change in business process or policy.

POLYCOM® TECHNOLOGY OVERVIEW

Customers seeking flexibility, choice, and investment protection for their business continuity needs choose Polycom solutions and our strong ecosystem of strategic and channel UC partners. Only Polycom has the Polycom Open Collaboration Network to give them the flexibility to choose from multiple mission-critical UC platforms and best-of-breed solutions. The Polycom Open Collaboration Network extends Polycom solutions to provide even more flexibility and scalability options—and greater investment protection—as their requirements evolve.

Polycom also offers open standards-based solutions, with a multi-vendor UC approach leveraging interoperable video, telepresence, voice, and content-sharing offerings. This makes Polycom the partner of choice—as opposed to other vendors that offer closed, proprietary single-vendor UC solutions. Polycom also protects IT investments and allows you to transition to UC at your own pace without replacing existing technology. Instead you maintain control and efficient use of your IT assets now and in the future.

For nearly 20 years Polycom has led the industry as an innovator. From the beginning, we have been committed to delivering innovative, standards-based solutions and giving our customers the absolute best communications experiences. Our commitment to our customers and to innovation continues with visionary UC solutions that empower people to connect and collaborate everywhere. Most recently, Polycom announced another first—H.264 High Profile video conferencing which delivers greater definition and higher clarity on half the bandwidth, giving our customers the ability to drive down UC costs—only from Polycom.

The Polycom Advantage will help you:

- Establish a foundation to meet your Business Continuity goals
- Increase your productivity with shorter, more effective meetings
- Build stronger team and partner relationships
- Achieve a fast ROI and help in controlling costs
- Find solutions for the way you work in your industry
- Enjoy flexibility, choice and investment protection

CONCLUSION

Most companies today take business continuity seriously, but many neglect to consider how to keep employees, partners and customers connected. But with a workforce that's increasingly virtual, more organizations face more business interruptions, even if they occur only on a local level.

Companies that have a clear, well designed plan in place for keeping communications open during and after an event will be better able to truly maintain continuous operations than those that don't. Tools that can help companies stay in touch with employees, and help employees stay in touch with one another, as well as partners, customers and suppliers, include audio conferencing, video conferencing, online collaboration and presence information.

Although many companies use many of those technologies on a regular basis, they may not be leveraging them for business continuity. But they should—to maximize the benefits of the tools themselves, and ensure that no disruption gets the better of their business.

CONTACT US

Auckland
Bangkok
Beijing
Bengaluru
Bogotá
Buenos Aires
Cape Town
Chennai
Colombo
Delhi / NCR
Dhaka
Dubai
Frankfurt
Hong Kong
Istanbul
Jakarta
Kolkata
Kuala Lumpur
London
Mexico City
Milan
Moscow
Mumbai
Manhattan
Oxford
Paris
Rockville Centre
San Antonio
São Paulo
Seoul
Shanghai
Silicon Valley
Singapore
Sophia Antipolis
Sydney
Taipei
Tel Aviv
Tokyo
Toronto
Warsaw

Palo Alto

2400 Geng Road, Suite 201
Palo Alto, CA 94303
Tel 650.475.4500
Fax 650.475.1570

San Antonio

7550 West Interstate 10, Suite 400,
San Antonio, Texas 78229-5616
Tel 210.348.1000
Fax 210.348.1003

London

4, Grosvenor Gardens,
London SW1W 0DH, UK
Tel 44(0)20 7730 3438
Fax 44(0)20 7730 3343

877.GoFrost

myfrost@frost.com
<http://www.frost.com>

ABOUT FROST & SULLIVAN

Based in Palo Alto, California, Frost & Sullivan is a global leader in strategic growth consulting. This paper is part of Frost & Sullivan's ongoing strategic research into the Information Technology industries. Frost & Sullivan regularly publishes strategic analyses of the major markets for products that encompass storage, management, and security of data. Frost & Sullivan also provides custom growth consulting to a variety of national and international companies.

The information presented in this publication is based on research and interviews conducted solely by Frost & Sullivan and therefore is subject to fluctuation. Frost & Sullivan takes no responsibility for any incorrect information supplied to us by manufacturers or end users.

This publication may not be downloaded, displayed, printed, or reproduced other than for noncommercial individual reference or private use within your organization, and thereafter it may not be recopied, reproduced or otherwise redistributed. All copyright and other proprietary notices must be retained. No license to publish, communicate, modify, commercialize or alter this document is granted. For reproduction or use of this publication beyond this limited license, permission must be sought from the publisher.

For information regarding permission, write:

Frost & Sullivan
2400 Geng Rd., Suite 201
Palo Alto, CA 943033331, USA