Box Solutions Good Or Bad?

Off-the-shelf solutions are changing the customization-driven AV industry.

By Carol Zelkin

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The AV and IT industries are involved in a spirited debate about the relative value of packaged visual communications systems versus custom-designed solutions. Centered around issues of cost, scalability and quality of user experience, the outcome of this conversation has big implications for the future of systems integration, manufacturing investments and, of course, the increased productivity of knowledge workers around the world. Although the democratization of technology, BYOD, telecommuting, flex-space workplaces and the ability to connect from any device anywhere are all important aspects of this discussion, what we're *really* debating may be cost-effectiveness and the definition of "good enough."

"Good enough" is one of those terms that only has real meaning in a relative sense. A solution that's good enough for one application may be awful when applied to another. Without linkage to what the specific AV/IT user really needs, it's impossible to make any really useful judgment. A system that's great for a unified desktop application in marketing, for example, may be a total flop for a huddle room used primarily for remote collaboration by business analysts.

Which brings us to this issue's Viewpoint topic: Will off-the-shelf audiovisual and videoconferencing systems be good or bad for the commercial AV/IT industry? In some cases, the off-the-shelf solution offered is cheaply made; in others, the solution is simply misapplied. The only possible result from these extremes will be a black eye to the industry caused by disappointing user experiences.

On the other hand, there are some really slick systems available that can save end users from "headaches," and save money spent on custom integration. What's clear is that, like any tool, even the best all-in-ones are only good when they are used in appropriate situations. Like a colleague of mine likes to say, "A hammer is a great tool, but not if you're cutting glass." Each solution should be evaluated based on end-user needs and circumstances.

We'll certainly be seeing a lot more non-customized, all-in-one solutions in the near future. They offer significant cost savings, and this can speed the adoption of visual communications across a wide range of applications. Separating the good packaged systems from the bad, and applying them appropriately, will be the key to success.
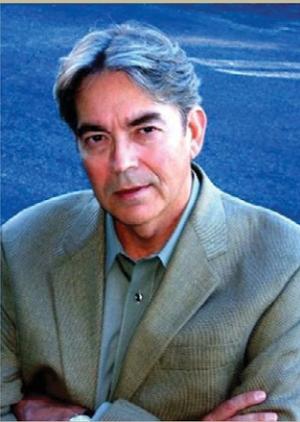
We asked manufacturers, systems integrators, service providers and enterprise leaders to share their thoughts on this subject and received some fascinating responses.

SYSTEMS INTEGRATOR

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We have seen a tremendous amount of change in the workplace over the past five to eight years. In the past, internal teams, business partners and clients were mostly regional. The people we worked with were typically within our building, or within driving distance. Most meetings were conducted face to face. We leveraged large rooms for group meetings. These were typically deemed to be the "important" meetings, and organizations wanted the ability to bring remote participants in via videoconferencing when necessary. With that, most organizations only enabled their boardroom. Organizations invested a lot of money in AV to ensure that there was a quality user experience.

As we fast forward to today, the world is virtual. Remote working has become the norm. Our internal teams, business partners and clients might not even be in the same country, much less within driving distance. The virtual world has caused us to change the way we meet. Meetings have moved from face-to-face and the boardroom to being conducted via audio or web conferencing. Most meetings only have one to three people attending from a single location. I see this every day when I visit different organizations: The large conference room is empty, but the smaller huddle rooms are always full and in high demand. If you believe in the notion that 60% to 70% of communication is non-verbal, videoconferencing is a necessity for organizations to maintain the same level of collaboration as they did when we could meet face to face. To align with the way people work today, organizations should look to adopt a "do more with less" mentality. This means having less videoconferencing investment in the large boardrooms, but more in smaller conference and huddle rooms. This provides videoconferencing to the masses, not just the executive team.

The boardroom will never go away. There will always be a need for AV professionals to ensure a good user experience in those rooms. However, out-of-the-box offerings will be key for a successful "do more with less" strategy. They are simple and easy to deploy, they provide a consistent user experience no matter where the end user happens to be in the world, and they reduce overall operational cost because there is just a single maintenance SKU. The out-of-the-box solutions are then a key component in an organization's strategy to support the new virtual world of how we actually meet and collaborate.

SYSTEMS INTEGRATOR

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The Last Time I Saw Paris…was on a video call with a classroom for a university based in the US, with extension campus facilities in several other countries. The HD codecs, cameras and displays were provided according to standards and specifications that allow teams to deliver, install and program the system, with involvement from local teams. We are seeing the future of education, medicine and commerce changing before our Googled eyes.

Although some aspects of the work went smoothly, others were more complicated than anticipated, mostly due to scheduling complications and cultural differences regarding holidays, local unionized labor practices and other non-technological challenges. The network data cable system, provided by others (that the client was responsible for managing) was incomplete and behind schedule, requiring adjustments to the room-ready plan for occupation.

I'm getting that stuff out of the way first, before telling you that simplified deployment of distance learning or any type of communication using video according to a plan that is created (and funded) without regard to the reality of how buildings are constructed, often will become a disaster scenario. The UC providers who want their prospective customer to believe they can buy group video communications technology that just shows up in a box one day, gets hung on a wall by unskilled labor and then operates flawlessly the next day, are taking a dangerous gamble.

The trend toward packaging simplified room systems for easy deployment has become the mindset of product development for manufacturers of videoconferencing hardware and software: They all want the big score. Will that trend deliver the successes expected, or will the culture of enterprise-wide video communication further shrink most meetings to desktop and personal devices? These preloaded software solutions may make the need for even a wall-mounted system (that still costs as much as a new Mercedes) less desirable than anticipated. I'm actually seeing multi-use meeting space allocation with associated control-based integrated audio and video more than ever, both in the architecture and technology design for new facilities.

So what does that mean for the near term? I think that the blended approach for most end-user companies will continue, with opportunity for all. However, a distinction has to be made between those who just sell video and those who do that, but are also capable of building according to facility requirements and maintaining a healthy workforce of Engineering and Project Management appropriate to the tasks involved (both expected and unforeseen).

MANUFACTURER

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Off-the-shelf solutions have come a long way over the past few years, and will fundamentally change the customization-driven AV industry. As always, it ultimately comes down to what's in the box. The better solutions focus on an excellent user experience, while keeping the cost down and providing quick and easy setup. Lesser solutions will focus on price and one or two performance metrics. The fact that a system is "off the shelf" isn't as important to integrators as whether it gets the job done right, so they aren't constantly making service calls for which they can't charge.

Our complete systems are a great example of where the technology is going. They are designed to provide companies using a Microsoft desktop collaboration platform with a drop-in-place "collaboration + AV system" that functions right out of the box, yet provides companies with the ability to evolve and expand the system over time as required. These are not just one-piece solutions. They contain an onboard video switcher, a sound mixer and an intuitive user interface. Integrators have total flexibility to customize the system for control of room lighting, shades, CATV STBs, AV sources, and other functions through integration with a control system—all

without the risk or challenges associated with traditional "custom" AV systems.

The all-in-one system concept also makes it easier to sell into different spaces, expanding the market for AV. We're seeing firsthand how integrators that have traditionally deployed all customized solutions are changing their strategy and moving to a complete system as their base offering. They then still have the ability to customize with accessories, including such items as wireless connectivity, PTZ cameras and panels for room status and scheduling.

We're seeing a changing client too, moving from facilities to IT, therefore requiring integrators to adapt to more IT-centric technologies. Customization and the traditional skillsets won't completely go away, for now. However, the push into the IT realm will continue and force those manufacturers and integrators that want to stay in the game to evolve.

MANUFACTURER

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There is growing resonance to the statement, "Video is the new voice." A majority of the global human population has already adopted the likes of Skype or FaceTime, or one or more of the several other video platforms available on their "own devices." These devices are now entering into enterprise doorways every day. The next wave heralds the mass adoption of BYOD use in the enterprise. Security and "enterprise-class quality of experience" are the two key challenges, both of which are being resolved rapidly.

The software-based video codec has gone mainstream, and it's only a matter of months rather than years before a universal web-based system (possibly Web RTC) will emerge and replace the need for installing proprietary software client codecs. Also, the prohibitive price point of proprietary hardware-based systems is plummeting in favor of enterprise-wide mass deployable systems.

At Arrive Systems, our view is firmly focused on the fact that a unified system can provide an enterprise-class, globally deployable and centrally managed platform that supports delivery on every software-based BYOD device app *and* interoperates with room-based systems. Our platform demonstrates the capability of zero-configuration endpoints that are centrally set up and managed. Our in-room solution then fully supports the idea of a single-box trend, providing platform-independent video collaboration, AV control, and wired and wireless BYOD interaction.

Discerning enterprise decision makers and integrators who are embracing AV/IT will find it convenient to migrate their services to this new model. Systems like ours completely eliminate the need for have-to-do, in-room configuration and programming. This provides a significant opportunity for integrators to offer rapid mass deployment and standardize the enterprise-wide user experience, while continuing to offer value-added custom programming services, as well, and managed services for new revenue opportunities.

SERVICE PROVIDER

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Undoubtedly, off-the-shelf visual collaboration box solutions will be good for the businesses of end users. With greater functionality, more intuitive interfaces and less complication, it's clear that off-the-shelf box solutions will do more for businesses and be used by more people to collaborate.

I think it is indisputable that off-the-shelf box solutions will impact the customization-driven AV industry. The pace and the degree to which the industry will be impacted has yet to play out, primarily because the rate of change and adoption typically is very slow in the real world of business and government enterprises. Just look to the videoconferencing market since 2011 as an example. With the emergence of the tablet, software codec and the cloud, we got a pretty clear picture of the new direction of the market, and many proclaimed the immediate death of hardware.

In reality, the actual adoption of those disruptive technologies has greatly lagged their arrival. According to leading analysts, four years later, video endpoint sales are still growing (while revenues are declining) and infrastructure sales are still within about 20% of their peak levels. We still believe to varying degrees in the death of the "traditional" hardware-based, single-purpose videoconferencing endpoint and infrastructure, but it's proving to be a very slow death.

For the most part, we haven't seen many truly disruptive technologies yet in the AV industry…although certainly we expect them to come. They definitely will change the landscape of AV manufacturers, integrators and service providers. We should expect to see hardware

sales prices drop, systems that are easier to deploy and use, and much more powerful and functional devices at the eager fingertips of end users. The key for the survival of industry players is to embrace and welcome disruptive technologies and understand how to get their businesses ready to thrive in a new environment. The collaboration room of the future will be much easier to deploy, use and manage, which should be a significant win for everyone.

SERVICE PROVIDER

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A few years ago, many predicted that video-enabled laptops and mobile devices would kill demand for the videoconferencing room system. Videoconferences would feature "Brady Bunch" layouts, with every participant shown in a head-and-shoulders view. Who wouldn't prefer this picture to that of a camera pointed down a long conference room table? And yet, unit sales of room systems continue to grow. What's the explanation?

Lower room system prices and the advent of affordable off-the-shelf systems only account for part of this story. First, the trend toward the open-office floor plan has all but eliminated privacy in the workplace. Those of us without walls work in a noisy environment, surrounded by "hallway conversations" and foot traffic. Recognizing this, facilities managers are adding huddle rooms and other places for workers to conference without distractions. These huddle rooms are perfect places for an off-the-shelf video solution.

Second and perhaps most obvious, when a videoconference includes several people in the same location, they generally prefer to gather in the same place, rather than connect from their desks. Although remote attendees might prefer that all participants sit in front of their own camera (the "Brady Bunch" layout), co-located participants have strong incentives to join together from a quiet, dedicated conference room.

One of our channel partners recently deployed a dozen inexpensive, out-of-the-box solutions (with our service embedded) to a customer who already owned a handful of beautifully inte-grated but seldom-used room systems. Thanks to more physical places to conference and the multipoint flexibility of services like ours, the network effect has kicked into high gear. Video utilization has skyrocketed, not only from the huddle rooms, but from the traditional systems in the office and the computers and mobile devices used by remote participants. The result: increased demand for systems and service.

Although off-the-shelf systems might squeeze prices and margins for traditional room sys-tems, AV/IT integrators have a great opportunity to "go big and broad" within their accounts, especially when they package solutions with a cloud-powered infrastructure that supports unlimited growth.

ENTERPRISE LEADER

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If integrators and service providers don't catch on, somebody else will fill the gap in our industry.

We're observing the blend of consumer and enterprise products at every level of the AV/IT industry. We have seen this in the collaboration space over the past few years. My users are constantly pushing me on the "freemium" vs. "premium" issue. The question I'm constantly fielding is, "If I can have free video calls on 'platform X,' why can't we have them in the enter-prise space?"

There are many reasons for picking one over the other: quality of service, monitoring, control, etc. But the reality is that, when your users are telling you the "freemium" is good enough, it's hard to continue to justify the high cost of a premium platform.

This crossover will continue into the physical space, and the demand will continue, as well. My users want small collaboration spaces, and they want them everywhere. In the tech world, we're seeing executives move out of their offices and turn them into huddle areas. The proliferation of these huddle spaces makes cost a priority. My engineering team is currently working on easily deployable modular designs that can be implemented widely and installed at a price point that will allow us to make every space an AV-integrated huddle space.

My goal is to have the price point somewhere in the $1000 range. I know that's a big ask, but it's one that's achievable, especially as we look at these new off-the-shelf solutions. AV has always been a highly customizable space and, as with any custom solution, the cost goes up. Using an off-the-shelf solution, as well as tight standards and efficient engineering, will lower the cost of design, engineering, programming and installation. This engineering concept can

be scaled to larger rooms and more diverse offerings. This is where an integration partner can add value.

The key for integrators is to understand that budget can no longer be spent on customizing every room, but building a low-cost, widely deployable solution for their customers. This solution will most certainly leverage the off-the-shelf products we're starting to see from manufacturers. I think these solutions will soon integrate easily with cloud-based collaboration platforms and services that are already bringing down the total cost of ownership.

ENTERPRISE LEADER

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Many have heard the adage, "variety is the spice of life." If you have ever been part of a large company or organization, that saying typically doesn't hold much merit. As most companies or organizations work to control their IT environments due to fiduciary, security or technology requirements, it is important to understand why and how that impacts change in those environments.

Variety within AV and videoconferencing systems has certainly expanded over the past number of years. Originally, it was all about the hardware solutions. Companies had to invest a lot of money to install these systems, and although many still do, recently there has been a general shift to software-driven tools. Now, with the penetration of lower-cost hardware solutions, both from established manufacturers and new startups, it seems the ship is righting itself. Although it has taken the AV arm of IT much longer to fully embrace the consumerization of its products, it truly is inevitable. With it comes solutions ranging from great to mediocre to poor. As service owners of these solutions, it is our job to filter the great from the poor. Enterprises, today and in the future, will continue to evaluate the need for both hardware- and software-based solutions. The most important thing to remember is to try and best implement the technology that is right for your company. It may be a blended mix, but the key is to keep your users and customers satisfied.