



# Winning Employees, Customers, and IT with AI in Business Communications



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# In this InfoBrief

The data in this presentation is from IDC's *Survey of Midmarket and Enterprise Companies*, fielded in December 2025 of 207 decision-makers, sponsored by Lumen. Respondents weighed in on their preferences, experiences, and business outcomes resulting from the implementation and management of business communication solutions.

Respondents included IT and line-of-business management with decision-making roles in managing business communication solutions across a range of industries. Each respondent's business is headquartered in the United States and employs a minimum of 250 full-time employees.

The research provided insights into the goals, benefits, outcomes, and management approaches toward AI-powered cloud voice and UC&C solutions, including insights into their cloud migration journeys.



U.S. businesses are rapidly adopting secure, AI-powered, cloud-based voice and UC&C solutions to enhance competitiveness through improved productivity, user experience, and simplified IT administration.”

Jitesh Gera  
IDC

# Executive summary

## Managed AI-powered cloud communications drive better productivity, experiences, and IT



### Situation

- Voice is the primary mode of business communications for over half the companies in the United States, and this share is expected to grow to ~80%.
- 86% companies use multiple vendors, but 79% would rather consolidate business communications with an integrated, complete platform.



### Challenge

- Integrating AI and enterprise applications with the communications solution is a key challenge, hindering productivity and experiences.
- IT issues persist due to a lack of skills, security management concerns, and the complexity of managing multiple vendors.



### Solution

- Rising trust in cloud-based solutions and the demand for AI-driven productivity and experiences are accelerating cloud migration.
- 42% of U.S. businesses are already using AI in business communications, and another 52% plan to use it by year's end.



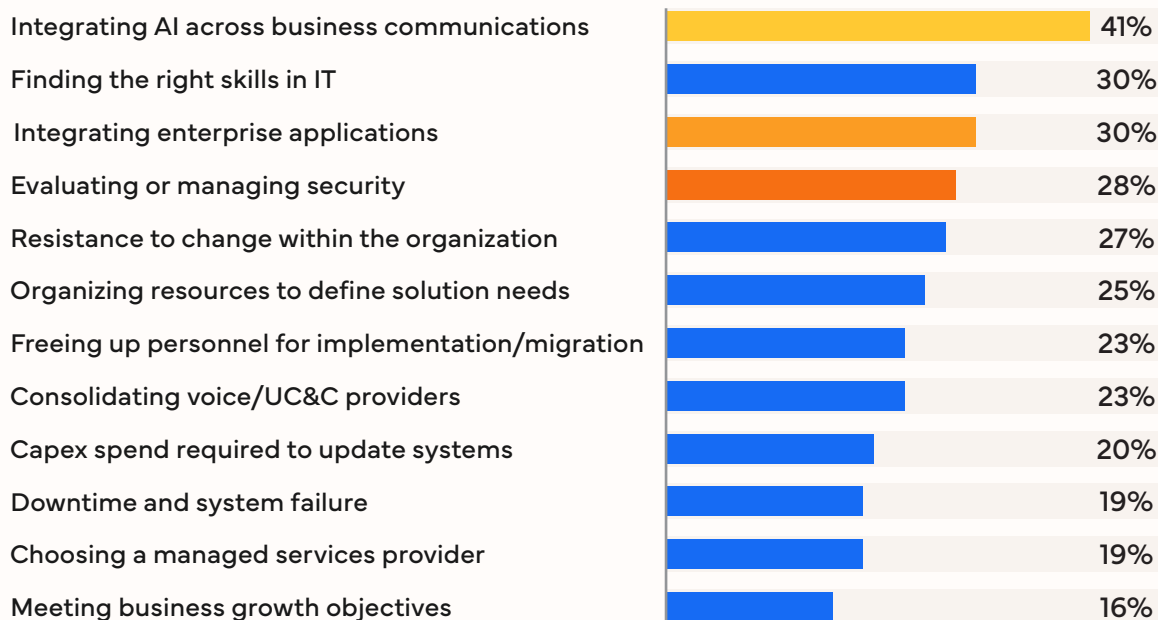
### Execution

- Complexities remain high, pushing 92% of organizations to use managed service providers for their business communication solutions.
- Integration, analytics, security, and expansion support are some of the key managed services highly valued by U.S. businesses.

# Integrating AI across the entire business communications stack is now the biggest challenge

## Key challenges organizations face with the deployment/management of communication solutions

(Percentage of respondents)



n = 207; Source: IDC's Lumen Cloud Communications Survey, December 2025

1

### Incorporating AI

AI is top of mind across industries, and organizations are struggling to effectively integrate AI across their communication tools due to the complexities of the multi-vendor communications environment.

2

### Integrating enterprise apps

Patchy integrations with contact center, CRM platform, IT ticketing tools, and office productivity tools lead to inefficiencies and broken experiences.

3

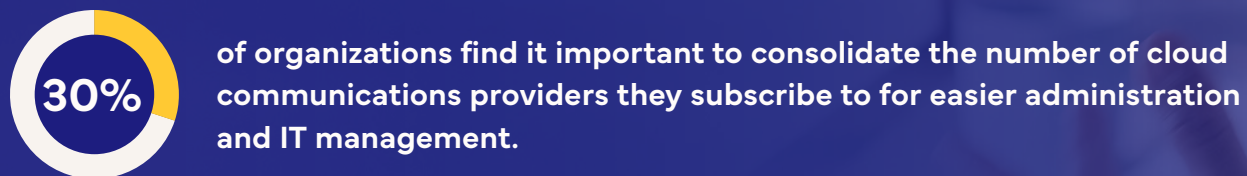
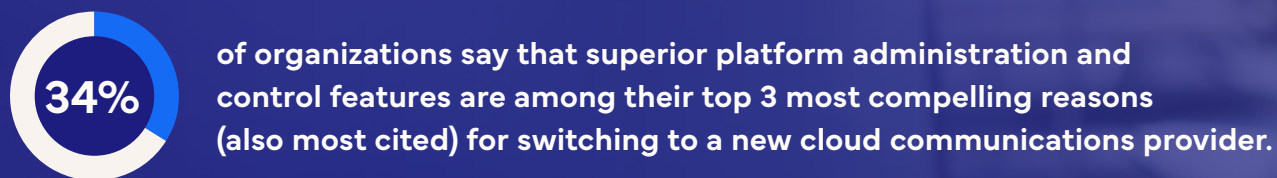
### Ensuring security and resources

AI is top of mind across industries, and organizations are struggling to effectively integrate AI across their communication tools due to the complexities of the multi-vendor communications environment.

# IT complexities are forcing companies to consolidate and/or switch business communications providers

IT operations have become increasingly complex due to the rapid adoption of multiple hybrid working solutions, including calling and meeting platforms, as well as videoconferencing devices.

Now, IT organizations are strongly focused on simplifying their processes by consolidating business communications on unified, integrated, and interoperable platforms for all internal and external interactions.



n = 207; Source: IDC's *Lumen Cloud Communications Survey*, December 2025

# Most U.S. companies are shifting to integrated, unified platforms for all business communication needs

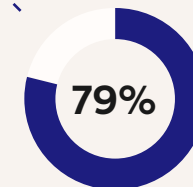
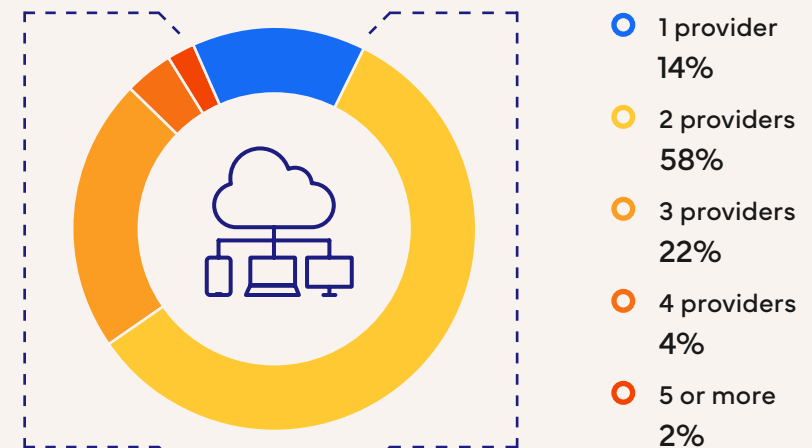


**86%** of U.S. businesses subscribe to two or more cloud communications providers, but **79%** of those consider it important to consolidate on unified platforms serving all business communication needs.

## The following are the top 5 reasons why:

- 1** Improve communication between front-end and back-end employees
- 2** Deliver consistent experiences for both employees and customers
- 3** Simplify administration and IT management
- 4** Secure feasible managed services on the entire stack
- 5** Reduce the cost of subscriptions

## Share of U.S. businesses by the number of cloud-based communication providers they subscribe to



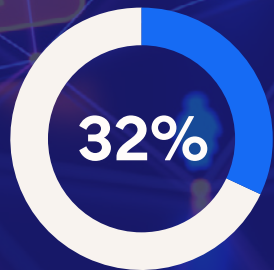
of those with multiple providers find it important to reduce the number of solutions in use.

n = 180; Source: IDC's Lumen Cloud Communications Survey, December 2025

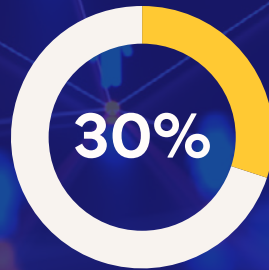
# Cloud-based solutions are expected to enhance AI adoption, integrations, productivity, and experiences

Percent of organizations saying cloud-based communications solutions:

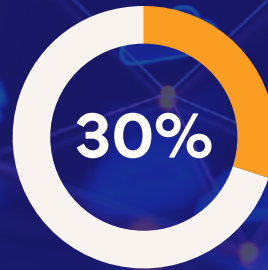
Drive wider usage of AI capabilities across business communications.



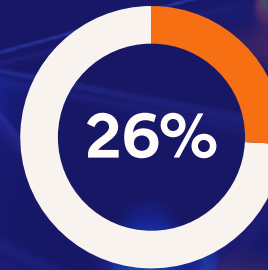
Deliver seamless integration with enterprise applications.



Help improve employee productivity (primarily driven by AI).



Help improve both employee and customer experiences.

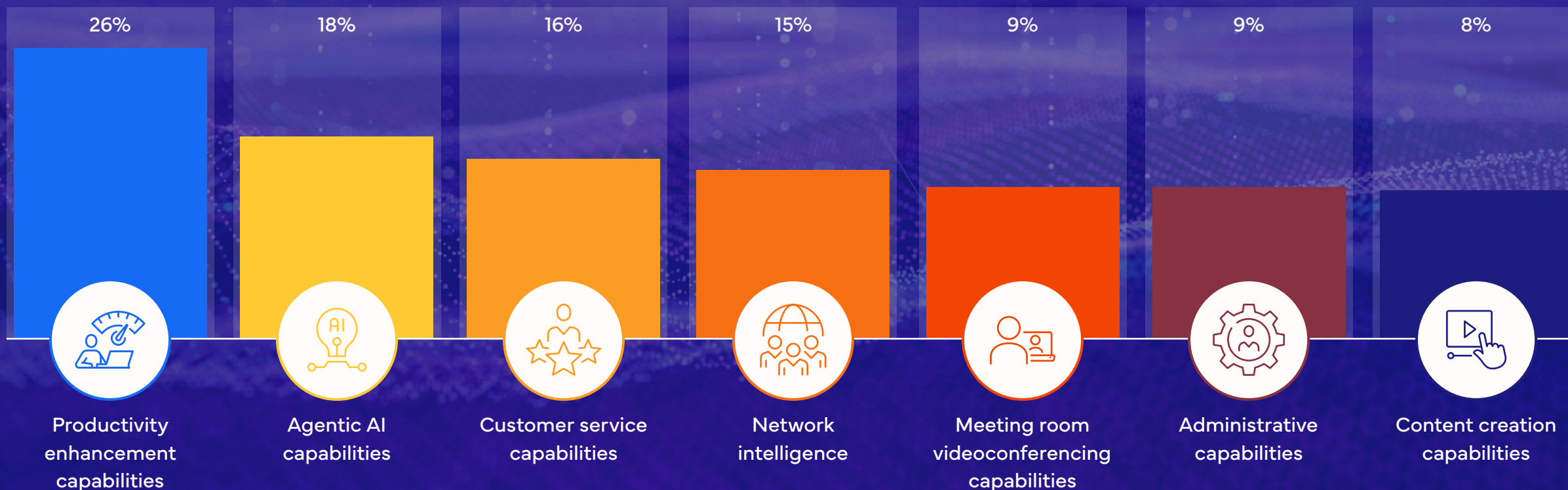


n = 178; Source: IDC's Lumen Cloud Communications Survey, December 2025

# Productivity, agentic task execution, and customer service are the top three AI goals

## Primary goal for using AI

(Percentage of respondents)



n = 204; Source: IDC's *Lumen Cloud Communications Survey*, December 2025

# AI adoption will reach 94% within two years

AI is now the core driver of productivity and user experience.

- Capabilities such as meeting summaries, note-taking, task management, content creation, and generative AI-based answers to user queries help improve employee productivity through automation.
- In customer communications, AI helps improve CX through capabilities such as automated call handling and routing, sentiment analysis, live agent coaching, real-time analytics, and automated resolutions.
- When integrated into a broader enterprise network, AI helps improve business continuity and resilience through proactive network management and automation of administrative tasks.
- Going forward, agentic AI will drive enhanced productivity and personalization of communication experiences.

## Status of AI adoption in business communications

(Percentage of respondents)

- Plan to use in 1–2 years  
52%
- Not sure  
6%
- Currently using  
42%



The majority of current AI users are from cloud and hybrid deployments; just 15% of those on premises are currently using AI, but 78% plan to within 1–2 years.

n = 204; Source: IDC's *Lumen Cloud Communications Survey*, December 2025

# AI is accelerating cloud migration despite high satisfaction with existing on-premises and hybrid solutions

In the United States, both pure cloud and hybrid cloud models of deployment are equally prevalent, but rising demand for AI capabilities is now accelerating the migration of communications to the cloud.

#1

Faster access to innovative AI capabilities is the top driver for cloud migration.

79%

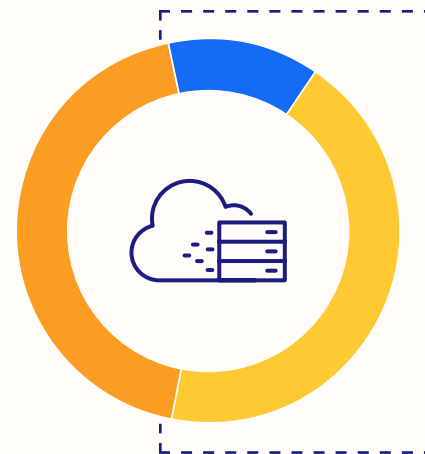
of organizations say that driving higher user productivity through AI is their biggest reason for using a cloud-based solution.

79%

of those using the hybrid model and 85% of those purely on prem are satisfied with their business communication solutions.

## Share of U.S. businesses by deployment model for business communications

- Purely on-premises 13%
- Hybrid (mix of on-premises and cloud based) 44%
- Purely cloud based 44%



62%

of those on the hybrid or on-prem model are increasing their share of cloud-based seats.

n = 207; Source: IDC's Lumen Cloud Communications Survey, December 2025

# AI-driven cloud communications that boost security, productivity, and customer experience

U.S. organizations reported significantly high year-on-year improvements in three key business metrics due to the implementation of cloud-based communication solutions and their AI enablement.



## Security/compliance

- About a third of U.S. businesses reported an “extremely high” improvement, while over 50% reported a “high” improvement in security and compliance on account of the implementation of AI-enabled cloud-based communication solutions.
- Businesses are increasingly gaining trust in the security, compliance, and risk management capabilities of cloud-based communication solutions, and their AI enablement further enhances these outcomes.



## Customer experience

- While all the companies reported some level of improvement in CX owing to the implementation of a cloud-based communications solution, 82% said they witnessed “extremely high” or “high” levels of improvement over the past year.
- AI enablement of cloud communication solutions further enhances CX, with 75% of companies reporting “high” to “extremely high” improvements purely due to AI.



## Employee experience and productivity

- 75% of the companies reported “high” to “extremely high” improvements in both employee experience and employee productivity due to the implementation of a cloud communications solution.
- However, AI is the true differentiator for employee outcomes; employee experience and productivity were the top 2 metrics businesses improved by adopting AI in business communications.

AI-powered cloud communication solutions also led to significant improvements in other business outcomes, including revenue growth, operational efficiency, cost savings, and time to market. While cloud offers a secure and trusted foundation, AI catalyzes improvements across the enterprise.

n = 180 (for use of cloud communications solution), n = 86 (for AI enablement of cloud communications solution); Source: IDC's *Lumen Cloud Communications Survey*, December 2025

# Managed services help reduce complexity and achieve optimal productivity and experience outcomes



**92%** of the organizations are either currently using or have used a managed services provider in the past for their business communications solution.

Another 8% report planning to leverage a managed services provider within the next year, leaving virtually none of the U.S. businesses with over 250 employees managing business communications without the support of managed services providers.



**78%** of the businesses reported finding it either "extremely critical" (21%) or "critical" (57%) to work with a managed services provider for their business communications solution.

The remaining either felt undecided or reported that it was slightly critical for their business to use managed services.

## Top 5 managed services valued by U.S. businesses:

- 1 Integration of AI capabilities, analytics, and enterprise apps
- 2 Network quality and reliability analytics
- 3 Management and mitigation of security risks
- 4 Usage analytics for features and functionalities of the solution
- 5 Support and consultation at times of scale for business expansion

n = 207; Source: IDC's Lumen Cloud Communications Survey, December 2025

# Key takeaways

## Create a unified, AI-powered communications environment

### Evaluate complexity in communications

- Assess the vendors in use for their seamlessness of integrations with one another, in-office meeting equipment, and enterprise applications.
- Identify the potential productivity and customer experience improvements through AI-enabled voice and UC&C.

### Engage a managed service provider

- It is critical to engage a partner that understands your operating environment and the needs of your user groups (e.g., front desk, knowledge workers, customer service) to help manage the complexity of integrations, manage networks, and gain insights into your systems.

### Consolidate communications workload

- Create a unified, voice-first communications environment that delivers consistent experiences for both employees and customers and integrates natively with enterprise applications for seamless flow of information and AI-based insights.

### Manage AI adoption at scale

- AI will propel user productivity through the automation of time-intensive manual tasks and enhance user experiences through capabilities such as AI front desk management, live agent coaching, and personalized assistance from AI agents. Companies must treat AI as an ongoing initiative.

# About the IDC analysts



## Denise Lund

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Denise Lund is a research vice president on IDC's Worldwide Telecom team. Her research focuses on advanced communications services, including VoIP and unified communications as a service. In this position, she provides coverage of voice communications, including fixed and legacy voice (local, long distance, and PRI ISDN) and IP voice (hosted VOIP with/without UC, SIP trunking, IP phone), as well as emerging migration and usage trends occurring in the voice market. In addition to fixed telecom research, Lund's research has a strong emphasis on the unified-communications-as-a-service market, particularly from the perspective of telecom and cable providers and OTT vendors.

[More about Denise Lund →](#)



## Jitesh Gera

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Jitesh Gera is a Research Manager within IDC's UC&C continuous information service (CIS) research practice. He tracks developments across the UC&C market including conferencing and UC collaboration solutions integrated with unified communications as a service (UCaaS), internet protocol (IP) telephony, including a broad range of software/SaaS and hardware solutions. His research and advisory work is focused on technology buyers and suppliers, as well as service providers covering trends, technologies, innovations, investment priorities and market forecasts. Jitesh also assists clients with custom consulting and go-to-market initiatives, including user surveys, spotlight papers, and buyer case studies, collaborating closely with IDC Insights and other research groups to assist clients with their specific requirements.

[More about Jitesh Gera →](#)

# Message from the sponsor

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Lumen's portfolio helps your company stay competitive as your voice and collaboration services evolve. We are there at every point of the journey, helping ensure your digital transformation has a smooth transition to the new environment.

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