



Migrating Voice to the Cloud: Realizing Greater Business Effectiveness and Outcomes



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In This InfoBrief

The data in this presentation includes recent IDC survey data on a range of topics regarding the migration to cloud-enabled voice communications, including IDC's *Cloud Communications and Datacenter Services Survey* (August 2024) and an IDC July 2023 survey of 200 decision-makers in midmarket and enterprise companies, sponsored by Lumen.

Survey respondents included IT and line-of-business management with decision-making roles in IT and, where specified, in unified communications and collaboration (UC&C) solutions across various vertical industries.

The research provided insights into the goals and benefits of using cloud-enabled voice solutions and the objectives and benefits of a seamlessly managed migration.



Executive Summary

- ✓ Many businesses continue to struggle to stay competitive, responsive, and innovative with their cloud-enabled voice solutions, including their cloud-based UC&C solutions.
- ✓ Today, companies fall somewhere along the continuum of having entirely legacy solutions to a mix of legacy and cloud-based solutions to a full medley of cloud-based solutions.
- ✓ All businesses want to reap the rewards of transitioning to cloud communications, such as business process efficiencies, business resiliency, employee productivity, and better customer experiences.
- ✓ Businesses experience higher productivity, revenue growth, and other tangible benefits when they make thoughtful transitions to cloud communications with the support of providers that have expertise in managed services and the seamless integration of communications services.
- ✓ Top cloud-enabled voice providers deliver comprehensive solutions, focusing on security, quality, reliability, and managed services.

Businesses Are on the Path to Cloud Voice Communications

Seventy-seven percent* of companies indicate that cloud-based voice is currently part of their communications landscape, but many have further to go in their migration.



Wherever a company is on its cloud migration journey, charting a path that helps it stay competitive, responsive, and innovative while navigating the skills and resource implications to the business is a big task.



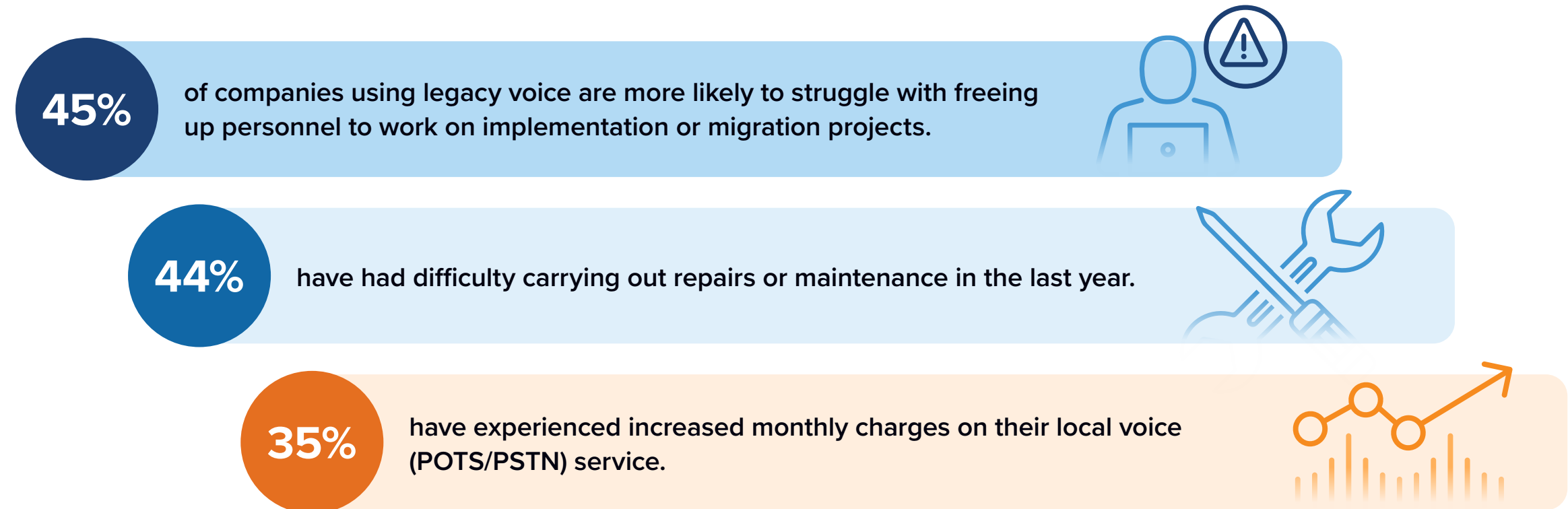
When asked about migrating to cloud voice ...

- ▶ **Up to one-third of businesses** feel unprepared or underprepared for the transition to cloud communications.
- ▶ **1 out of 3 of these businesses** said they feel they need help with planning, solution design, and technical resources.
- ▶ **1 out of 4 stated that they need help with the implementation**, including handling of the network connectivity.
- ▶ **1 in 5** said they worry that **migration to the cloud will be too complex and difficult.***

Source: IDC's Lumen Cloud-Based UC&C Survey, July 2023; IDC's Enterprise Communications Survey, 2024; *IDC's Enterprise Communications Survey, 2024

Organizations Using Legacy Communications Systems Face Resource, Maintenance, and Cost Challenges

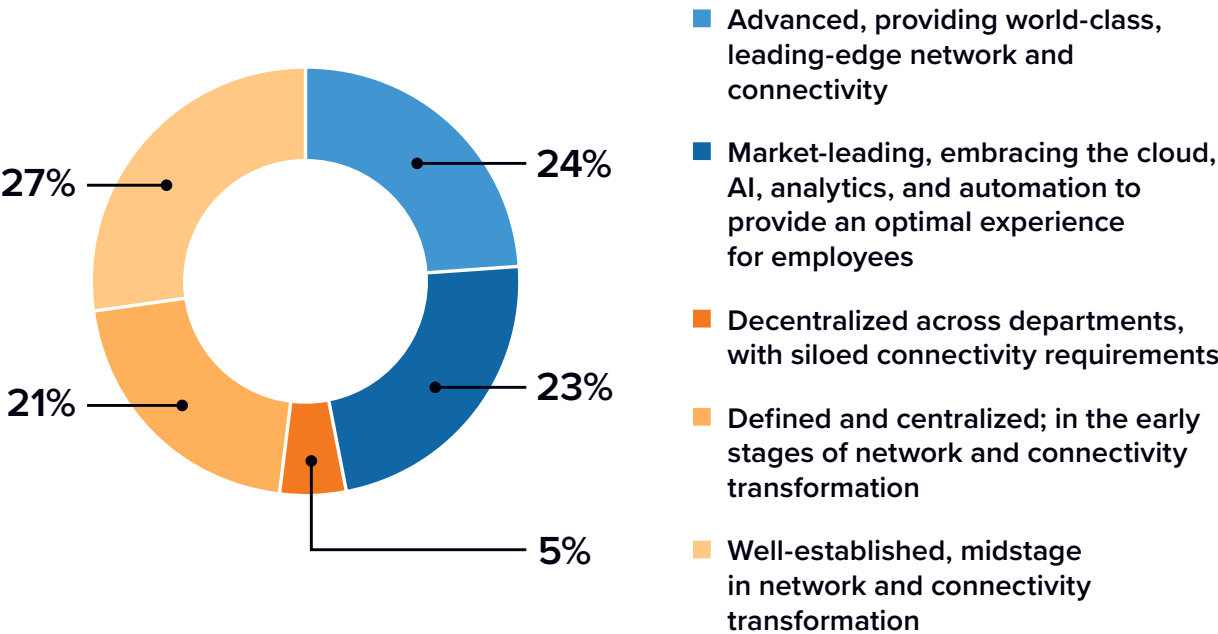
Compared to organizations using cloud voice communications:



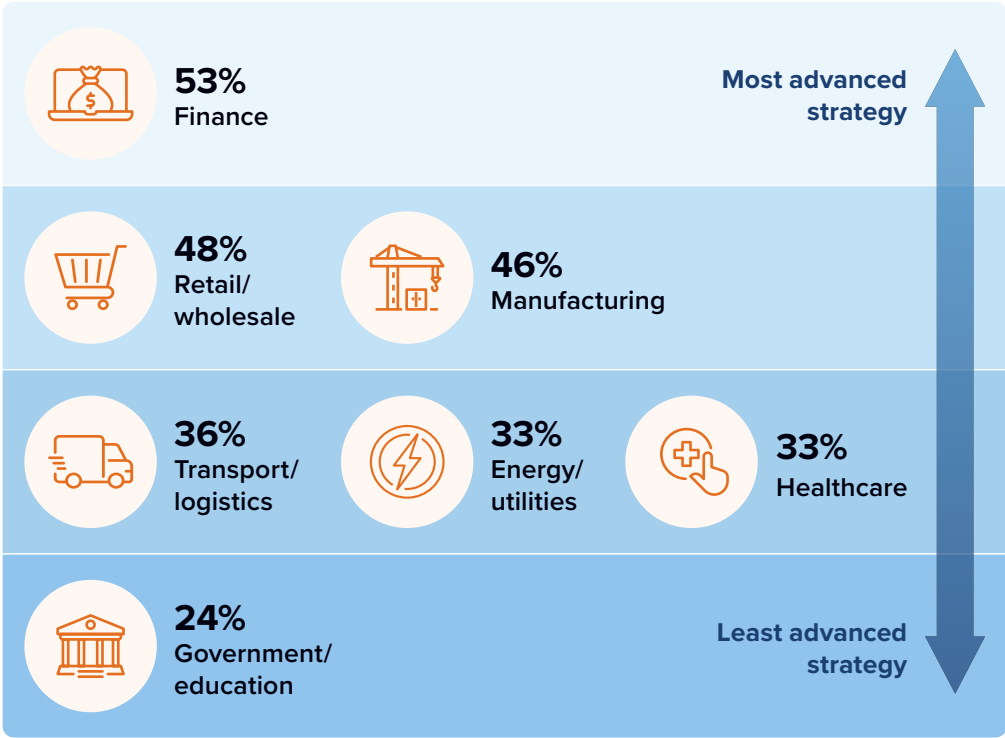
Source: IDC's *Lumen Cloud-Based UC&C Survey*, July 2023

Less Than 50% of Businesses Are Past the Midpoint in Their Cloud-Based Connectivity Transition

How would you describe your organization's current strategy and approach to connectivity?



Strategy is advanced or market-leading




n = 751; Source: IDC's 2024 Future of Connectedness Survey, September 2024 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

The Growing Complexity of Voice and the Added Challenge of AI

The number and type of cloud-based employee and customer communications continue to bring complexity to IT departments, business administration, and users. **AI in communications solutions is only adding to businesses' complex environments, impacting the connectivity road map and the transformation plan.**

1 in 3 businesses identify the most critical problem in adopting UC&C solutions as the **difficulty of integrating different solutions and applications to ensure they work together seamlessly.**



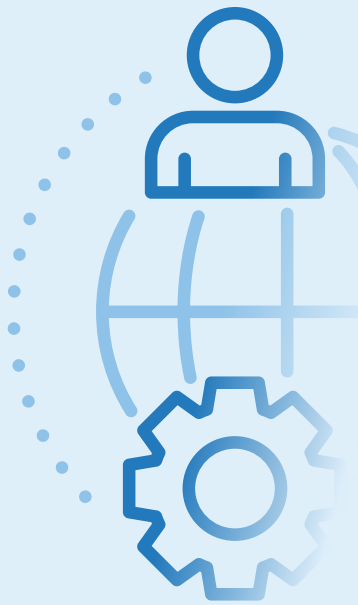
Among businesses that are already using a cloud-based voice solution, 42% have two or more solutions.

Source: IDC's *Cloud Communications and Datacenter Services Survey*, August 2024

Businesses Agree on Cloud-Enabled Voice Migration Goals

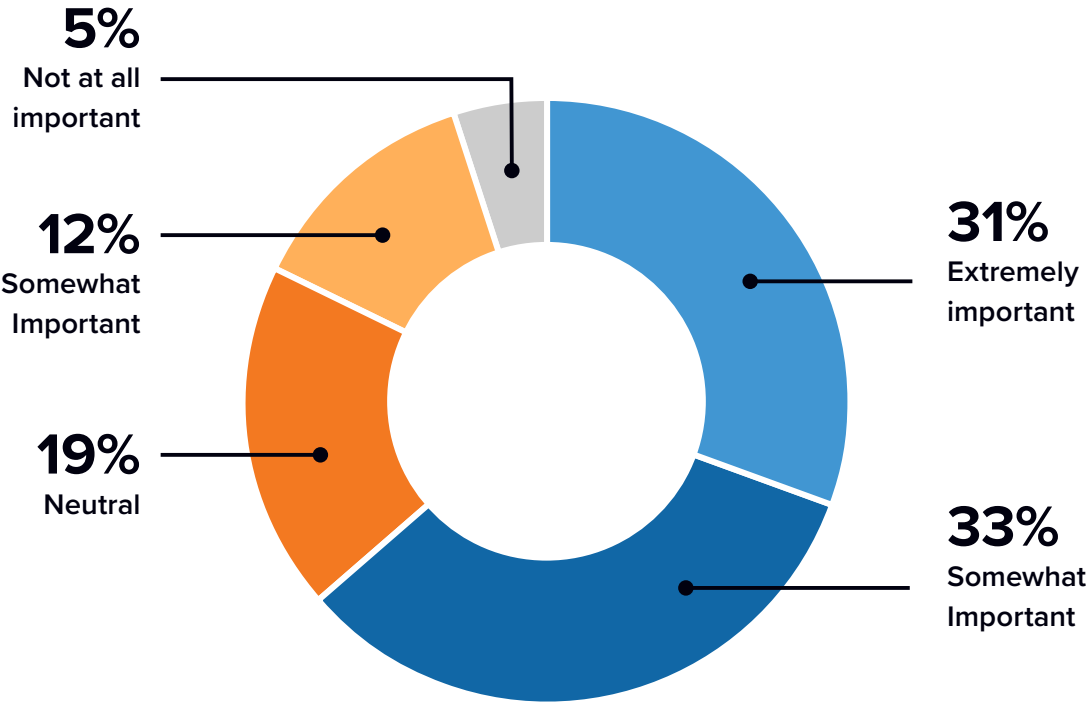
Businesses of all sizes primarily seek to enhance the efficiency of their business processes, improve business resiliency, boost employee productivity, and optimize interactions with customers through their cloud-enabled voice solutions.

Businesses require robust security, cost savings, managed services, and, most importantly, support and consultation during periods of change. **This is especially crucial as they migrate from legacy, premises-based voice solutions to AI-enhanced cloud-based systems.**



The Goal for All is Unified Business Communications

With AI increasingly in the mix, **64%** of businesses say it is important to work with a unified platform approach for all business communications.



Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024.

Businesses Have Various Specific Goals for Cloud Voice



55%
of businesses that want their UC&C solution to include some contact center capabilities prioritize the need to improve the flow of communications.*



45%
of companies who use or have used legacy voice solutions are looking to cloud voice solutions to improve the efficiency of business processes.



37%
want to scale voice, messaging, and collaboration services as business needs change.



36%
want a greater ability to improve customer satisfaction and customer experience.



36%
want to improve employee productivity.



35%
hope to improve business resiliency and adaptability to handle unpredictable events.



35%
want to improve workflow management between employees on the customer-facing side of the business and backend employees.*

Base = currently use local voice (POTS/PSTN) or used to use local voice (POTS/PSTN); Source: IDC's Lumen Cloud-Based UC&C Survey, July 2023; *IDC's Cloud Communications and Datacenter Services Survey, August 2024

Ultimately, Businesses Aim to Benefit from Cloud-Based Voice Solutions and Observe Positive Outcomes

Benefits Sought

With employee communications being the most common telephony use case, followed by customer engagement, it is easy to see why **enterprises focus on optimizing their approach to telephony.**

What is the primary use case for your organization’s telephony solution?



46%
Employee-to-employee communications



35%
Employee-to-customer communications



14%
Employee-to-external users communications (with vendors, suppliers, students, etc.)



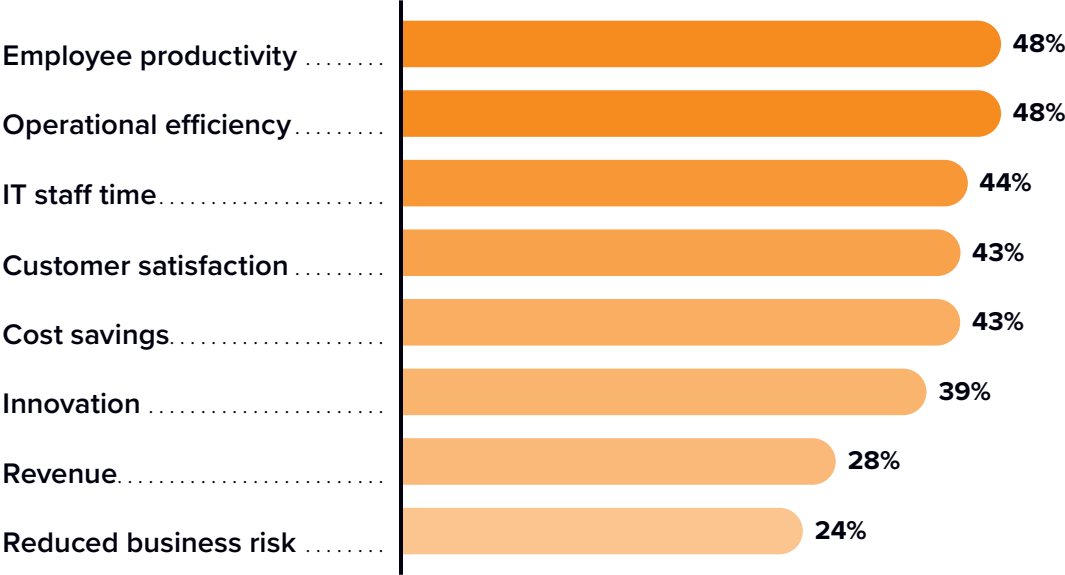
5%
Employee-to-audience communications (events/webinars)

n = 203, Base = all respondents; Source: IDC’s *Cloud Communications and Datacenter Services Survey*, August 2024

Benefits Achieved

When businesses thoughtfully **implement cloud voice solutions**, they reap a **variety of rewards.**

Has your organization experienced any of the following benefits as a result of implementing a cloud-based UC&C solution?



n = 120, Base = respondents who indicated their organization has been using a cloud-based UC&C solution; Source: IDC’s *Lumen Cloud-Based UC&C Survey*, July 2023

Cloud Voice Solutions Drive Tangible Savings and Cost Optimizations

Companies free up staff time and can better support new business initiatives.

When asked about the degree of impact that the organization experienced in savings and cost optimizations, businesses said they’ve had very/significant impact.

(Percentage of respondents rating 4 or 5 on a scale of 1 = Negligible to 5 = Significant impact)



n = 120, Base = respondents who indicated their organization has been using a cloud-based UC&C solution; Source: IDC’s *Lumen Cloud-Based UC&C Survey*, July 2023

Cloud Voice Solutions Drive Improved Quality, More Reliable Communications, Agility, and Higher Productivity

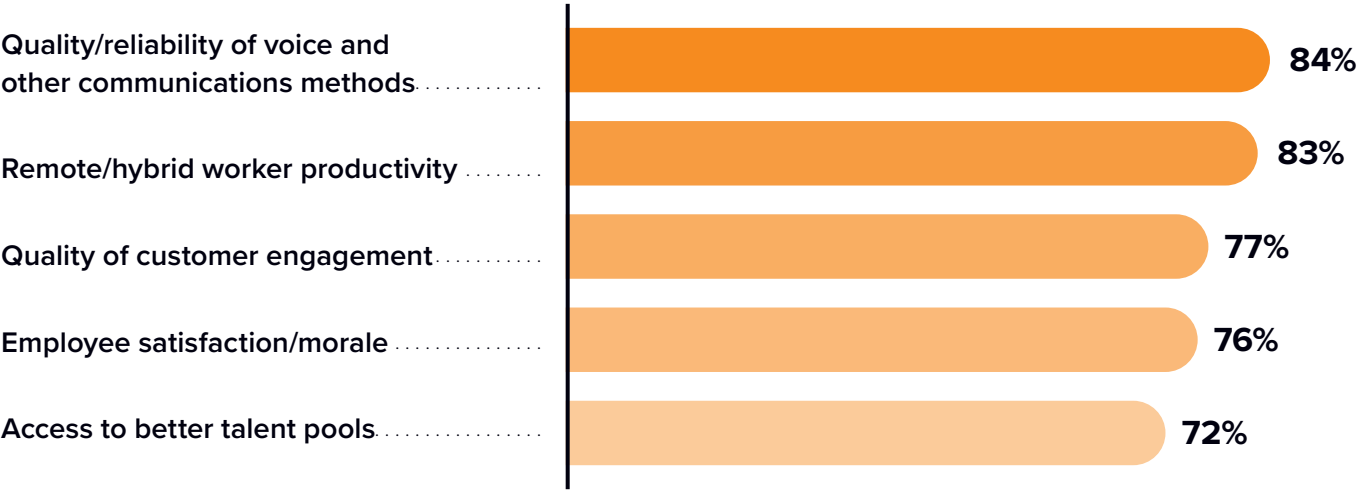


Today, more than three-quarters (77%+) of enterprises say that cloud voice is a core part of their primary telephony approach — and this trend is growing. The benefits are impressive for an evolving technology environment that is becoming increasingly complex with AI solutions in the mix.

Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024

For each of the following types of employee and customer experience, please indicate the degree of impact your organization has experienced from implementing a cloud-based UC&C solution.

(Percentage of respondents rating 4 or 5 on a scale of 1 = Negligible to 5 = Significant impact)



n = 120, Base = respondents who indicated their organization has been using a cloud-based UC&C solution;
Source: IDC's Lumen Cloud-Based UC&C Survey, July 2023

Top Cloud-Based Voice Providers Deliver Comprehensive Solutions, Emphasizing Security, Quality, Reliability, and Managed Services

When IDC asked businesses what the top 3 decision-making factors were for their primary unified communications solution, they said:
(Factors driving purchase decisions)



Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024

Key Takeaways

1

If you're new to cloud-enabled voice communications, look to a trusted provider to design and manage complexities such as integration requirements and AI enablement in the solution.

**2**

If you're not new to the cloud-enabled voice migration journey, clearly identify a partner to help you optimize the complexities in your current solution, including integrating or reducing your extensive list of standalone solutions and ensuring you reap benefits from your employee and customer communications.

**3**

Evolve with cloud-enabled voice solutions. Generative AI and integrations with omnichannel communications solutions can significantly benefit your business. The best cloud voice migration partners will take your current and future voice solutions to where they need to be.



Appendix: Supplemental Data

The tables in this appendix provide accessible versions of the data for the complex figures in this document. Click “Return to original figure” below each table to get back to the original data figure.

SUPPLEMENTAL DATA FROM PAGE 7

How would you describe your organization’s current strategy and approach to connectivity?

Strategy and approach to connectivity	
Advanced, providing world-class, leading-edge network and connectivity	24%
Market-leading, embracing the cloud, AI, analytics, and automation to provide an optimal experience for employees	23%
Decentralized across departments, with siloed connectivity requirements	5%
Defined and centralized; in the early stages of network and connectivity transformation	21%
Well-established, midstage in network and connectivity transformation	27%

n = 751; Source: IDC’s 2024 Future of Connectedness Survey, September 2024

[Return to original figure](#)

About the IDC Analyst

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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](#)

Message from the Sponsor



Lumen communications and collaboration solutions offer businesses the flexibility to adapt to a changing workplace. 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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