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Transforming the Workplace with Smart Video

How and Why Organizations Should Leverage Artificial Intelligence to Enhance the Management of Video in the Enterprise

Whitepaper commissioned by:

Content

Sitting on the Cusp of an Enterprise Video Revolution

Corporate users may never look at video the same way again. Work challenges imposed by the COVID crisis of 2020 and 2021 spurred individuals to use video in day-to-day work activities to an extent never before seen. More than two-thirds (68%) of end-users participating in a fourth-quarter 2021 survey of 2,001 individuals conducted by Wainhouse (WH) say they participate in video meetings more frequently than they did prior to COVID. Similarly, 62% of WH survey respondents report that they are watching on-demand online video more frequently than before the rise of COVID.

Growing awareness of video and the role it can play in enhancing business communications is fostering a new sense of urgency among organizations that – for the first time – are beginning to regard video as an essential tool for improving business performance. More than half of organizations surveyed by Wainhouse report plans to spend at least $100,000 on business video technologies in 2022, up from the 48% with six-figure budgets in 2021. Overall, 63% of the companies represented in the WH survey report that their spending on video technologies in 2022 will increase over prior-year levels.

Workers who are relatively new to the idea of using corporate video may be tempted to associate use of video technologies primarily with broader access to large-scale business communications events. After all, the typical workday is filled with events already taking place, such as corporate town-hall meetings and employee training sessions, that generate greater impact when large audiences can access them online.

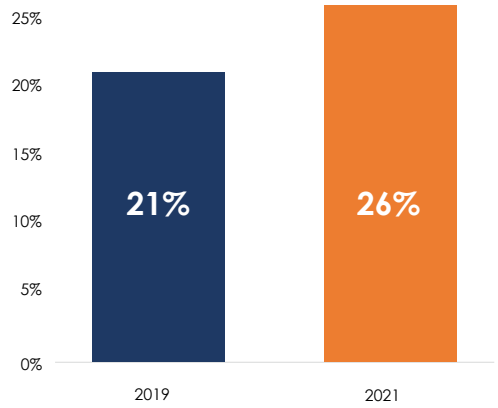
But regarding corporate video simply as a venue for broadcasting live events does nothing but sell video short of its potential. While live video does support a range of beneficial communications applications, organizations should not overlook the increasingly important role that on-demand video is beginning to play in the enterprise. Whether it's recording video meetings already taking place or creating videos specifically designed to share institutional knowledge and best practices with colleagues, on-demand video can play a key role in enhancing employee-to-employee communications.

Viewership rates for on-demand video already outstrip rates for live video among those watching via their work computer on the corporate network. Among all respondents surveyed by WH, 65% say they watch on-demand video via their work PC on a weekly basis, compared to 61% reporting weekly viewership of live video. On-demand becomes an even greater workhorse at daily viewership frequencies: 35% of all respondents report daily viewership of on-demand video on the corporate network compared to a daily viewership rate of 24% for live video.

Overall, 85% of organizations represented in the WH survey report they have archived at least some video content in 2021. And the proportion of organizations that are building sizable video archives has grown during the COVID crisis. As illustrated in Figure 1, more than one-fourth of all organizations represented in the WH survey (26%) report that they are recording and capturing at least 25 hours of video content monthly. In 2019 – the last full survey year prior to COVID – only 21% reported archiving video at a comparable rate.

FIGURE 1

% of All Organizations Archiving at least 25 Hours of Video Content Monthly in Specified Year



As video archives continue to grow, corporate demand increases for technology solutions that help organizations get the most out of their video investments. Certainly, respondents from companies that already record high volumes of video recognize the need to improve the way their organization deals with the content. Among respondents at companies with at least 100 hours of archived video content, 45% say they "strongly agree" that "my organization should do more to capitalize on currently available technologies to enhance communications." Among those from organizations without video archives, in contrast, only 15% say they "strongly agree" with the statement.

The implications are clear in a market where COVID challenges have sparked greater interest in corporate video than ever before: The more organizations use video, the more ways individuals will find to put video to use in the workplace. Moving forward, enterprise video platforms will be charged with more than simply distributing employee town-hall meetings on a one-to-many basis. Rather, these solutions will become strategic tools that will make it possible to use video in a wide array of information-sharing applications.

This new reality should prompt many corporate leaders to conduct a fundamental re-evaluation of how their organization manages its video assets and positions itself to squeeze the most value possible from the implementation of video-enabling technologies. In this report, WH will quantify the growing corporate need to develop a more comprehensive strategy for dealing with on-demand video in the workplace and will highlight how emerging artificial intelligence technologies will transform the way enterprises use video to create competitive advantage.

The Expanding Role of On-Demand Video in the Workplace

During the COVID crisis, video meeting solutions from the likes of Zoom and Cisco Webex grabbed many of the headlines as individuals working remotely leveraged these services to stay connected with colleagues. Certainly, usage of these solutions spiked during the past two years. In 2021, 61% of all WH survey respondents reported participating in video meetings via their desktop PC on at least a weekly basis. In 2019, prior to COVID, only 48% of WH respondents reported meeting via PC video weekly.

Usage of video meeting solutions has become so pervasive that it even sparked new workplace jargon. The term "Zoom Fatigue" gained traction to describe the weariness that some workers

experienced while taking part in video meetings that filled more and more of their working hours.

The widespread adoption of these online meeting services has led to some unexpected implications for video in the workplace. Once individuals become aware of the role that video can play in enabling meetings in real-time, they start thinking about other ways that video can be put to work to enhance business communications.

Specifically, many workers start exploring other ways to leverage video to share information from meetings on a time-shifted basis. Overall, 77% of WH survey respondents said they agree that "In the next year, I want to use my video meeting solution more frequently as a tool for recording content that my co-workers can view on-demand."

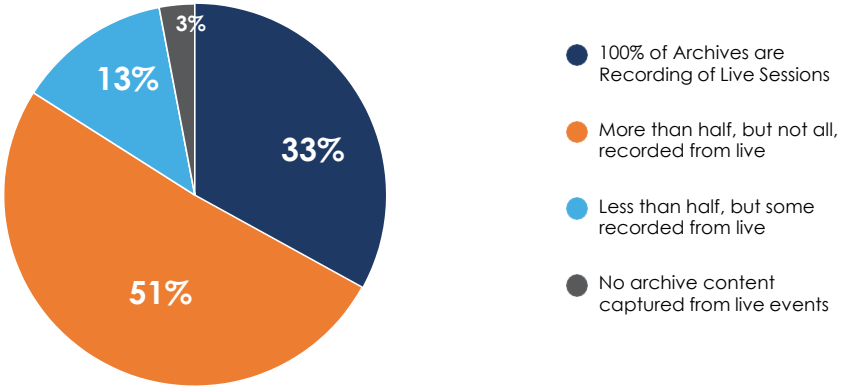
80% of all survey respondents say they agree that "In the next year, I would like more video meetings to be recorded and archived for later access."

The proliferation of video meetings, however, is not the only trend generating new content that is being stored in corporate video archives. Beyond small group video meetings, a growing cadre of organizations are using video streaming platforms that enable hundreds – or even thousands – of workers to watch an executive's presentation simultaneously online. Such event solutions increasingly are being put to work to enable online corporate townhall meetings, large-scale employee training sessions, presentations from the human resources department, and a host of other business communications applications.

More than half of the companies represented in the WH survey (52%) report that they produce at least 50 of these one-to-many webcasts annually. That's a jump from the 34% of organizations producing live online video presentations at a similar pace in 2019.

FIGURE 2

Proportion of Archived Video Derived from Capture of Live Streaming Events — Organizations that Have Implemented Video Archives



And – as is the case with video meetings – more webcasts provide more raw material for boosting the size of video content archives. Indeed, for many companies, repurposed webcasts are a primary source of content retained for video archives. As illustrated in Figure 2, one-third (33%) of companies with storehouses of video content say that 100% of their archives come from the recording of live webcasts. Another 51% of those at companies that use video archiving say

that more than half (but not all) of their archives are composed of recordings of live events. Beyond the capture of business meetings and live webcast events, more workers also are developing an interest in producing video content specifically for use as an on-demand reference source. At organizations that have implemented one-to-many video platform solutions, more than 90% report that they have implemented tools that make it possible for individuals to upload and share videos that they produce themselves.

Quantifying the Benefits of On-Demand Video in the Enterprise

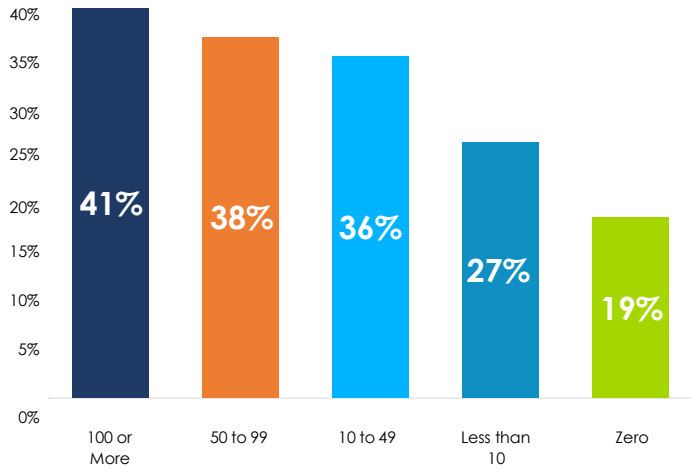
As the potential sources for generating video content continue to proliferate in the work setting, individuals increasingly are recognizing the value of well-managed video archives on the corporate network.

As illustrated in Figure 3, a strong correlation exists between the size of an organization's video archive and workers' belief in those video archives as a viable information resource. At organizations that have cumulative video archives with 100 or more hours of recorded business video, 41% of respondents say they "strongly agree" with the statement that "On-demand archives offer a valuable storehouse of institutional knowledge." That total drops to 19% among those at companies that do not archive video.

The survey results indicate that the perceived value of video as a corporate information resource increases as the size of an organization's video archive grows. This makes sense intuitively. Larger archives provide a deeper source of raw data that users can draw upon when trying to find relevant information.

FIGURE 3

% of Respondents from Organizations with Archives of Specified Size who "Strongly Agree" that "On-demand archives offers a valuable storehouse of institutional knowledge"



The advantages of building large video archives can manifest themselves in multiple ways, delivering tangible benefits to workers as they engage in day-to-day business tasks. Consider how WH survey results quantify the following ways that video is being put to work:

- **Share Information with Colleagues:** 58% of survey respondents agree that they would rather watch an explanatory on-demand video than ask a colleague for help.

- **Provide Updates on Meeting Results:** 77% of all respondents agree that "The ability to record and archive video meetings makes it easier for me to share important information with colleagues unable to attend."
- **Attract Prospective Employees:** 35% of all respondents "strongly agree" that "As a job candidate, I would be impressed by companies that offer on-demand training that helps employees to explore and prepare for different career paths."
- **Access Institutional Knowledge:** More than three-fourths of all respondents agree that "On-demand videos created by subject matter experts are a valuable resource when I'm working on a new or unfamiliar task."
- **Boost Productivity:** 76% of all respondents agree that "The ability to access instructional videos when needed would help boost my productivity."

The survey results illustrate that video is more than just a medium for making presentations. Rather, with the implementation of the right supporting technologies, video transforms into a type of data that enables – and enhances – a wide range of work activities. But the full benefits of using video more extensively can only be realized if organizations invest in the solutions that help them become nimbler in the ways that they manage and process video data.

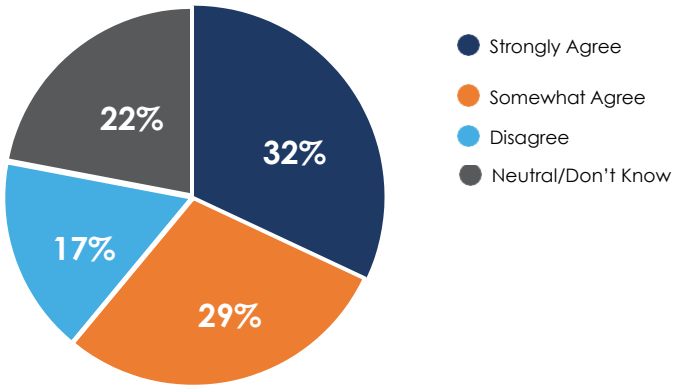
Video Archives: Finding the Proverbial Needle in the Digital Haystack

While the potential benefits of video would be appealing to any business leader, unlocking the value of video historically has not been an easy task. Video files, by their nature, consist of large pools of data that are not easy to manipulate. While videos capture nuance and meaning in ways not possible with text or graphics, the challenge for corporate users has always come in extracting the information needed from video files. The inability to get the right piece of video to the right person at the right time has long been a barrier to general acceptance of video platforms as a reliable, accessible source of important corporate information.

Indeed, workers have long recognized the challenges associated with retrieving relevant information from corporate video archives. As illustrated in Figure 4, among all respondents to

FIGURE 4

Agree/Disagree: When searching video archives, I find it difficult to find the information I want



the 2021 WH survey, 61% agree with the statement that "When searching video archives, I find it difficult to find the information that I want."

It's an issue that appears to become more pronounced as organizations boost their investments in video technologies. At companies planning to spend more than $100,000 on video streaming technologies in 2022, 42% of respondents say they "strongly agree" that searching video archives is a difficult task. Among those organizations planning to spend less than $10,000 on streaming in 2022, only 12% "strongly agree" with the statement.

Essentially, as corporate commitments to video increase – and workers' reliance on video expands in-step, frustration levels with the "searchability" of video archives can increase, as well. The traditional limitations of video search, if not properly addressed, can lead to a video adoption death spiral. Organizations have no motivation to invest in advanced video solutions if they believe that no one will be watching video at work. Like the tree falling in the forest that does not make a sound, video has no chance of delivering on its promise if workers are not watching it.

84% of all survey respondents working in organizations with at least 100 hours of archived video content say they agree that "The ability to use video in the workplace makes me a better communicator."

Accordingly, the linchpin for generating a suitable return from investment in video technologies is implementing solutions that workers actually use. And nothing drives the viewership totals of on-demand video quite like implementing effective content search solutions. Among all respondents surveyed by WH, 67% agree that "Our workers would use video archives more frequently if provided the ability to use specific search terms to find and retrieve targeted, relevant video passages."

It is important for technology purchase decision makers to remember that well-designed video archives can address real-world business issues. Solutions that simplify the process of finding and sharing video make it possible for workers to use video in the same way that they would use any text document, spreadsheet, or static image. When it becomes easy to pass along on-demand videos in everyday business workflows, individuals will find new ways to embrace video that help them work more productively. Consider, for instance, the idea of creating highlight clips of video meetings that could be viewed long after the meeting's conclusion. Among all WH respondents surveyed, nearly four-in-five (79%) say they agree that "In the next year, I would like to be able to create short video clip highlights from my meeting recordings to share with colleagues unable to attend."

While work experiences during COVID quarantines have opened the eyes of many regarding the potential role for putting video to work in the enterprise, it remains early days for those dreaming up new ways to leverage video to enhance business productivity. Many end users can agree that they see value in watching video content that is engaging, easy to share, and can be accessed at the click of a button. The challenge facing today's enterprise comes in identifying and implementing the technology solutions that transform this vision into an everyday business reality.

Investing in Technologies that Unlock Video's Hidden Value

58% of survey respondents who hold purchase decision authority for implementing enterprise communications solutions say the ability to "search content to find relevant videos" is a "very important" factor influencing their streaming technology purchase decision.

For more than two decades, vendors of various stripes have been developing online video platforms designed for use behind the corporate firewall. Recent innovations facilitated by artificial intelligence, however, are making it possible to transform video into a more nimble, flexible data type that can be put to work in ways not possible in the enterprise setting before now.

The historic challenge in finding viable uses for video in business applications has been the amount of up-front work required to make archived video accessible. After all, even the most informative video passages from a recorded meeting would be relatively worthless if you are not able to retrieve them when you need them.

In the past, the process of making video searchable required the painstaking effort of having individuals manually generate "content tags," associating specific video passages with key topic categories. Even with strong manual tagging of content, however, the job is never truly finished because it's difficult for any video librarian to anticipate every keyword or topic that will be the subject of an end-user query.

As video libraries continue to swell in size as workers use video more frequently, the stakes get higher for organizations needing to sort out their strategy for managing video in the workplace. Ultimately, this evolves into a corporate litmus test that grades an organization's capabilities for addressing data and knowledge management issues. Those companies that pass the test set themselves up as likely "winners" on the corporate battlefield, while those that do not pass find themselves falling behind their rivals.

Certainly, workers at organizations with large video archives recognize the potential benefits that come with having access to tools that aid in searching video libraries. Among WH survey respondents working at companies with cumulative video archives of 100 or more hours of content, 55% describe the ability to "make it easier to search – and find – specific content in video archives" to be "very useful." Among those at companies that do not use video archives, only 29% cited a similar outlook on video search capabilities.

The single best answer to addressing the search challenges that arise as video archives begin to grow is not to throw more manpower at trying to keep tabs on burgeoning sets of video data. The only viable approach to this challenge comes from identifying – and implementing – automated solutions that leverage artificial intelligence to aid in the management of sprawling, inaccessible caches of video content.

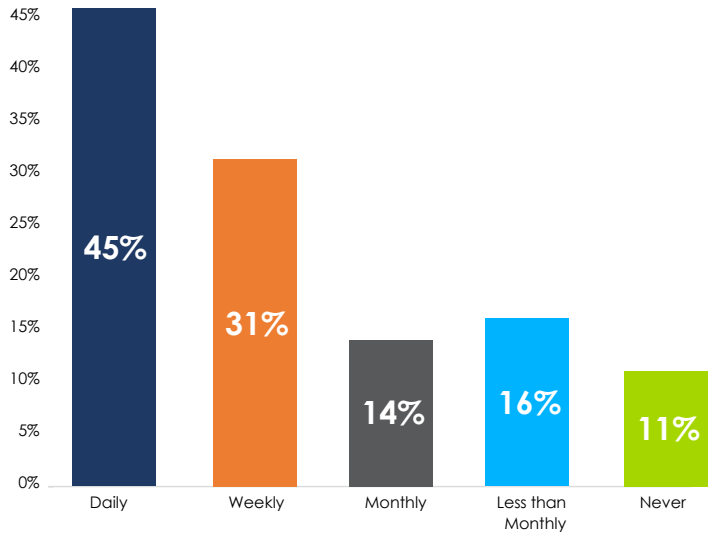
Speech-to-Text Serves as a Foundation for Automated Video Management

Emerging speech-to-text technologies serve as a focal point in the efforts to automate video management capabilities. These systems leverage computing power to analyze and interpret audio embedded in a video, converting the content into digital text that can be automatically linked with the passages of video where they are addressed. It's no stretch to view speech-to-text as a Rosetta Stone for unlocking insight that would otherwise remain buried in video vaults.

The value of such automated transcription capabilities may be lost on those who don't watch on-demand video at work on a frequent basis. But those who watch often certainly recognize the importance of high-quality archive search capabilities. Among those who already watch video daily, 45% say they "strongly agree" that "speech-to-text features that make it possible for me to search for – and jump to – specific video passages would encourage me to more frequently use on-demand libraries for reference." Among those who never watch on-demand business video, only 11% say they "strongly agree" with the statement (Figure 5).

FIGURE 5

% of Respondents Viewing On-Demand Video at Specified Frequency who "Strongly Agree" that "Speech-to-Text Features that Make it Possible for me to Search for — and Jump Directly to — Specific Video Passages Would Encourage Me to More Frequently Use On-Demand Libraries for Reference"



Respondents' Frequency of Viewership of On-Demand Business Video

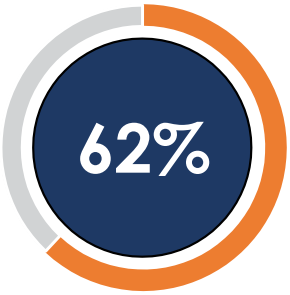
The survey results suggest that individuals reaching a critical mass of on-demand viewership (in this case, watching at least weekly) develop a deeper appreciation for tools that aid in the searchability of video archives. In a post-COVID world where more video meetings are being recorded for later reference and more workers are producing videos to share information with colleagues, it can be expected that demand for automated solutions to help in the searchability of video content will only grow with general video adoption trends in the enterprise.

The ability to generate text transcripts extends the value of video in applications beyond search.

Keywords from transcripts can be used to identify specific pieces of content that should be added to content portals tailored for specific users. For instance, an organization can create a portal of videos of specific interest to employees working in the sales and marketing

department. By filtering content based on keywords culled from digital transcripts, portals can help raise awareness of video content to prospective viewers likely to be most interested in it.

The demand is high for this type of automated content filtering. Half of WH survey respondents (50%) working at companies that produce at least 25 hours of archived video monthly describe the ability to "package content in customizable content portals" as a "very important" feature influencing the streaming technology purchase decision.



62% of survey respondents from organizations that use video archiving agree that "My organization would pay a premium for speech-to-text solutions that make it easier to search video content."

Beyond its role in enhancing searchability, the digital text can also be presented in closed-caption windows to enhance accessibility of the content for viewers with hearing limitations. Likewise, content producers can leverage text translation applications to convert the automated text transcriptions from video content into foreign-language captioning that can expand the reach of the video to international audiences. Almost two-thirds of WH survey respondents (63%) say they agree with the statement that "I believe my organization would be highly interested in leveraging "speech-to-text" output to generate foreign-language closed-caption content for our videos."

Emerging Frontiers for Smart Video

While speech-to-text capabilities are forging new ways to get more from video archives, other innovations from the realm of artificial intelligence also are poised to squeeze even more value from these storehouses of video data.

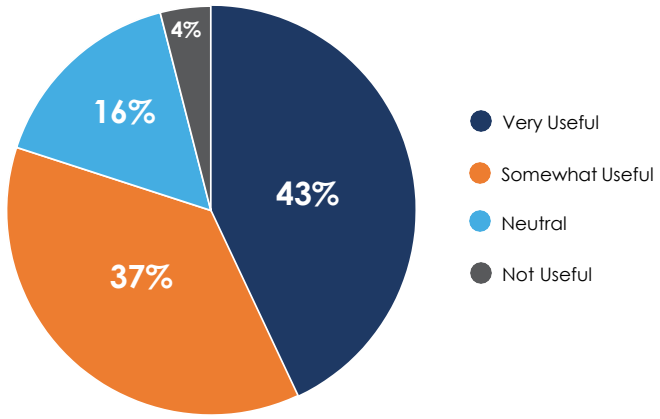
Facial recognition is one such technology with the ability to infuse greater value into video archives, leveraging previously stored images as a point of comparison to identify speakers in a presentation. The ability to validate the identity of a presenter in a video can be another factor that can be used to narrow search parameters in a way that leads would-be viewers more directly to the content that they want to watch. Among all WH survey respondents, 73% describe this type of application of facial recognition as a useful feature of video platforms.

Artificial intelligence also offers some content management shortcuts that help make information embedded in video more accessible. Emerging solutions, for instance, make it possible to automatically generate "highlight clips" of key themes in video meeting recordings. More than three-quarters of all WH survey respondents (78%) described this type of automated video clipping services as a "useful" feature of video technology platforms.

Beyond tailored content portals, end users also appear keen on using video recommendation engines that can guide them to the videos most relevant to them based on their profile and past viewing habits. Think of this feature as the workplace equivalent of a Netflix recommendation when picking a movie to watch on a Friday night. Among all WH survey respondents, 80% describe this type of recommendation feature as "useful."

FIGURE 6

How Useful Do You Find the Ability to "Automatically Organize Video Archives by Keyword, Topic or Attendee" — Overall Respondents



Indeed, end users appear to be receptive to just about any innovation that promises to organize video and present it to them on a silver platter. As illustrated in Figure 6, 43% of all respondents say that video platform features are "very useful" when they help to "automatically organize video archives by keyword, topic, or attendee."

In short, video platforms that incorporate technologies that help the right content bubble to the surface to reach the right person at the right time are seen by end users to be highly valuable.

CONSIDERATIONS FOR ORGANIZATIONS AIMING TO GET THE MOST FROM ONE-TO-MANY VIDEO

The key takeaway from the survey results presented in this report is that video flexibility plays a key role in unlocking the value of video in the enterprise. Effective data management tools can help make video highly malleable – and therefore more valuable – in day-to-day business use. Video information that is easier to access will be more likely to be viewed, increasing the likelihood that video platforms can deliver on their intended purpose of improved employee-to-employee communications in the workplace. WH presents the following recommendations for organizations looking to get the most from their video investments in a post-COVID world.

- **Treat Video as a Type of Data:** Video is not a medium. Rather, it is an increasingly common type of data that technology platforms are becoming increasingly adept at managing. Companies must begin managing video data with a clear-eyed IT strategy. Look to implement software solutions that can identify, store, and manipulate the wide range of data embedded in every video file.

- **Automate Where Possible:** No one can anticipate every end-user need. Automation offers the most efficient path to unlocking the value of video in the everyday business world. The adoption of speech-to-text capabilities and other artificial intelligence features can transform your organization's video platform from a solution for extending the reach of video meetings into a storehouse of corporate data that can help your business create competitive advantage.

- **Focus on Solutions that Enhance Video's Flexibility:** To encourage the most extensive use of video possible, focus investments on solutions that help make video "nimble." If end users can easily identify, package, and share elements from video archives, they are more likely to put video technologies to work when communicating with others. Remember, ease-of-use fosters extensive use. Your organization's investments in video-enabling technologies will only pay off if workers are actually leveraging platforms to create and share information via video.

- **Keep Your Platform Options Open:** Where possible, embrace solutions with an "open API" mindset. In a fast-changing video marketplace, open APIs help to "future-proof" the investments you make in video solutions today, improving the odds that they will work hand-in-glove with the rapidly evolving set of solutions infused with artificial intelligence that are likely to drive new advances in video management in the years ahead.

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