

# Instant Messaging Tough Enough for Business: No Server Required

**An Osterman Research White Paper  
Prepared for WebEx**

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## Why You Should Read This White Paper

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Instant messaging (IM) is widely used in North American workplaces today and is becoming increasingly popular. The technology provides a number of important benefits, including the ability to communicate with others in real time, the ability to know someone's presence status and the ability to improve organizational decision-making and information flow.

Unfortunately, most use of IM in the workplace consists of consumer-grade IM clients that do not provide the level of security organizations require in order to adequately protect their networks. As a result, it is extremely important that IT managers implement a plan to deploy an enterprise-grade IM solution while at the same time minimizing the impact of this change on end users and on their IT staff.

This white paper discusses the important benefits that business IM can provide to any sized organization, the risks that organizations face from unmanaged use of IM, and the factors that must be addressed as organizations plan their upgrade to an enterprise-grade IM capability. This white paper also discusses the solution offered by WebEx and the advantages that their capabilities can provide to any organization.

## IM Can Make Organizations More Efficient

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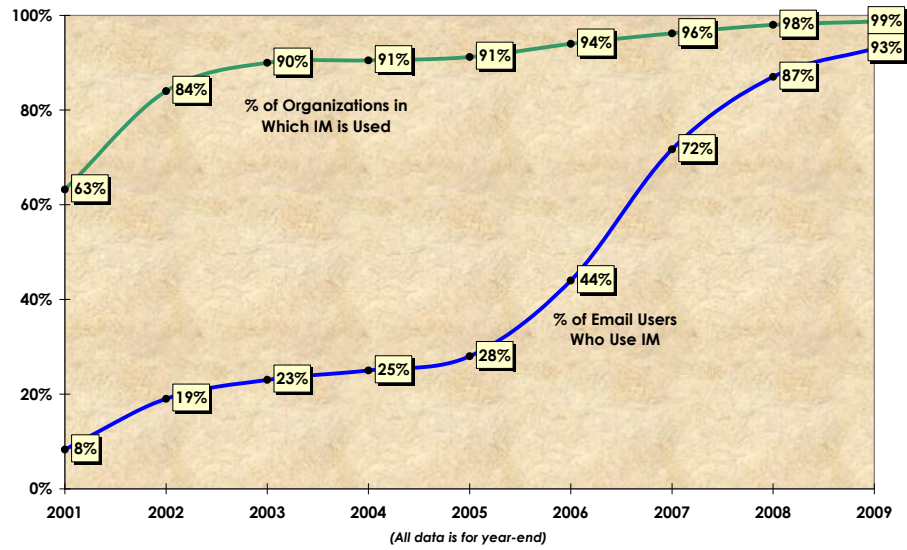
### **IM Use is Steadily Increasing**

IM is one of the most useful technologies available to information workers today because it provides information on a contact's availability and the tools to communicate with that contact in real time.

Osterman Research's semi-annual tracking survey of IM use in the workplace reveals that the use of IM has been increasing steadily over the past several years. As of mid-2006, IM can be found in 93% of North American organizations and is in use by 34% of individuals who use email. Osterman Research anticipates steady growth in the use of IM for the next several years, resulting in almost complete penetration of IM into the email user base by 2009, as shown in the following figure.

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### Historical and Forecasted Penetration of IM in the Workplace



Unlike email or the telephone, IM provides users with the significant advantage of knowing who is available for a conversation and providing the tools to conduct that conversation.

#### The Business Benefits of IM

There are a variety of benefits associated with the use of IM, not least of which is the ability to communicate more efficiently. Unlike email or the telephone, IM provides users with the significant advantage of knowing who is available for a conversation and providing the tools to conduct that conversation. The result is the ability to make faster decisions, respond to customer inquiries more quickly and efficiently, and an acceleration of the overall information flow within an organization.

Perhaps more important than IM itself, however, is the underlying technology that enables IM – presence. While IM is the most widely used application of presence, there are a number of potential applications that can make use of presence information. Integrating presence with online collaboration capabilities, for example, can permit employees to conduct ad hoc meetings more efficiently, allowing them to resolve issues and make decisions more quickly by using a rich set of online meeting tools.

The advantages of IM are particularly important for geographically distributed organizations. For example, In *An Empirical Study of Global Software Development: Distance and Speed*, a research paper written by Lucent Technologies, the University of Michigan and Xerox PARC, the authors discuss the results of their research into problems caused when people who must work together are separated geographically. An interesting finding from the

study came from questioning professionals, mostly software engineers, about delays in their work caused by the need for information from other people. The study found that when these people needed information from others at local sites, there was an average of 2.1 delays per month and the average length of delay was 0.9 days. However, when they needed information from others at geographically separate sites, the mean number of delays was 1.9 per month with an average length of 2.4 days. In other words, there were 1.9 local delay-days per month when needing information from others at the same site, but 4.6 delay-days per month when the information was needed from people who were geographically separated, a difference of more than 140%. IM can mitigate much of the disadvantage of geographical separation and can allow organizations to operate more efficiently and reduce delays in making important decisions.

The number of IM-related worms, malware and other threats increased by anywhere from 1600% to 2200% during 2005 compared to the previous year. While the rate of increase in the number of these threats has slowed during 2006, there are an enormous number of threats that can penetrate corporate networks from unfettered use of IM.

### **Business Use of IM Must be Managed Well**

While IM provides a number of important benefits for organizations large and small, the technology and the infrastructure must be managed. Most IM use in the workplace today consists of consumer IM clients that individuals have downloaded and installed without IT involvement. While many of these people installed IM clients for personal use, business use often ensues because of the viral nature of IM and its utility in a business setting.

However, improperly managed IM use presents organizations with a variety of risks and problems. For example:

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- Most consumer IM clients send data in clear text, not encrypting IM communications between parties. This can expose confidential data to interception by unauthorized third parties.
- Most consumer IM clients do not provide for local routing, meaning that if people in adjacent cubicles are communicating via IM, their IM traffic is leaving and re-entering the corporate firewall.

- The ability for users of consumer IM to choose their own IM handle/screen name can have serious negative consequences for an organization, since these handles can present an unprofessional image. Further, users who leave a company can still use the same IM handle to communicate with their former customers, colleagues and vendors.
- Unmanaged use of IM can lead to a loss of intellectual property, since employees can send sensitive or confidential information via IM.
- Unmanaged IM use can run afoul of corporate governance requirements, since most consumer IM systems do not natively retain conversations for archival purposes. This is particularly important in certain segments of the financial services industry, at various levels of government, and in the healthcare field.

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### **Business Needs and IM Threats Must Be Addressed**

The ability of IM to improve communications in any organization must be balanced with the need to secure this increasingly important communications channel. The bottom line is that organizations need to invest in enterprise IM capabilities to address both issues: to allow IM to be used when and where needed and to protect organizations from the threats that are inherent in unmanaged IM use. Such an enterprise IM capability must provide four key elements:

- **Secure, cross-company communications**  
IM users must be able to communicate internally and externally with supply chain partners, customers and other third parties.
- **Manageability**  
A business IM solution must be easy to manage and require only a minimum investment in infrastructure and IT staff time to administer.
- **Compliance with policies and regulations**  
An IM solution must be compliant with corporate policies, government statutes, legal counsel's recommendations and industry best practices. For example, if an organization has a policy about archiving email, it must also be able to archive IM conversations.

- **Threat protection**

Just as with email, IM systems must be protected from the growing array of threats that can cause loss of data, infection of networks and other problems.

It is also important to retain the communication tools to which its users have become accustomed. For example, Osterman Research's IM tracking survey continually finds that AOL Instant Messenger (AIM) is the most widely deployed IM client currently used in the workplace. To prevent users from continuing to use AIM and instead replacing it with another solution is potentially disruptive, since many users employ AIM to communicate with customers, vendors and others outside the organization. In short, the deployment of an enterprise-grade IM capability should have as little negative impact as possible on the way that users do their work.

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### **Selecting the Appropriate Enterprise-Grade Capability**

As organizations decide how best to implement an enterprise-grade solution, there are several factors that must be considered as part of the decision process:

- The solution chosen must **minimize investments of time** by IT staff. IM, just like email, is part of the communications fabric that must be managed efficiently and with a minimum of management time.
- The solution must **minimize out-of-pocket expenditures**, including investments in infrastructure. This is particularly true for smaller organizations, since the cost of providing messaging services on a per-seat basis is significantly higher and more prohibitive than it is in larger organizations.
- The solution must be **reliable** and provide as close to 100% uptime as possible. Even if a system can achieve 99.9% uptime, this still means that there is 44 minutes of downtime per month – an unacceptable level of downtime, particularly for real time communications.
- The solution must be **scalable**. Although an organization may have only a handful of IM users today, IM use can spread quickly in an organization. Any IM capability must be able to handle all of the current and future users in an organization and it must be able to handle increasing demands for bandwidth, particularly for

applications like voice, video, file transfer, Web meetings and other collaborative applications.

- The solution must be **easy to deploy and manage**. Because IT staff members are already typically fully involved in managing email and other systems, an IM capability must minimize the impact on their time in order to be effective.
- It almost goes without saying that the solution must be **affordable**. IT budgets are often strained and adding a new and expensive IM system to the list of things that IT must purchase and manage is unlikely to be an effective route to implementing this much needed technology.

## The WebEx Value Proposition

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WebEx AIM Pro Business Edition improves business productivity by enabling everyone in an organization to communicate securely and share information directly from their desktops—instantly. While increased productivity is the obvious result from the use of business IM, IT managers require a solution that will not only satisfy collaboration needs, but will allow for control and ease of deployment and management.

WebEx AIM Pro offers IT managers four distinct capabilities:

- The solution is designed for business
- It offers security and control
- It offers compliance and threat protection
- It can be deployed cost-effectively

### Designed for Business

With WebEx AIM Pro, users have available to them advanced functionality designed for business. An ad-free console, plus the tabbed interface for one-click access to an Outlook directory, calendar and upcoming schedule, multiple individual chats, group chats, VoIP, video, and file transfer all offer the ease of use and extensive functionality. The end user's IM experience can even be enhanced through collaboration on documents or applications during a chat using instant desktop sharing capabilities.

Add to this rich, multi-point online meeting capabilities. Pair WebEx business applications with WebEx AIM Pro and the integration with an organization's unified collaboration strategy is seamless.

*IM and other collaboration tools provide important benefits that can make an organization more efficient, allow its employees to make decisions more quickly and with better information, and improve the overall flow of communications.*

### **Secure and Manageable**

WebEx AIM Pro allows IT to control usage for individuals, groups, or the entire enterprise, while maintaining a uniform, professional image for an organization by assigning screen names based on an organization's email addresses.

WebEx AIM Pro delivered on-demand over the WebEx MediaTone™ Network, a private global network, ensures that all sensitive communications stay private with end-to-end, 128-bit SSL encryption.

WebEx AIM Pro creates a standardized profile of all enterprise IM use and authenticates every user. The system automatically scans file transfers, blocks SpIM to reduce the spread of viruses and worms and protects against IM and P2P threats.

To mitigate risk and prevent the loss of intellectual property or confidential information, IT can also configure URL and content filters.

### **Compliance and Threat Protection**

WebEx AIM Pro provides a single compliance and threat protection solution to secure, manage and control usage policy for IM in an organization. An integral piece of the WebEx AIM Pro Business Edition compliance module is ensuring adherence to corporate policy guidelines with flexible security-level configuration. The system can be used to set and enforce compliance policies like monitoring, logging, and archiving instant message content in a time-stamped, audit-ready format – from relatively open to highly secure. WebEx AIM Pro helps organizations fulfill requirements like SEC 17a-4, HiPAA and Sarbanes-Oxley.

With the WebEx AIM Pro compliance module organizations are also able to simplify their IM monitoring through sophisticated workflow capabilities and extensive reports. In addition, organizations that have already invested in archiving and compliance systems can seamlessly integrate the WebEx AIM Pro solution into their current WORM storage systems.

### **Cost-Effective Deployment**

Since all WebEx applications are delivered on-demand, there is no up-front investment and no maintenance or upgrade costs for WebEx AIM Pro, just a monthly subscription fee. The software-as-a-service model brings business IM within reach and makes it affordable for companies of all

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sizes. On-demand capabilities also minimize the time pressure and increased infrastructure requirements on IT departments that on-premise alternatives require. The system is easy to implement and easy to scale as IT needs change.

## Summary and Conclusions

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The use of IM in the workplace continues to grow at a steady pace – Osterman Research anticipates that by 2009, virtually all organizations in North America and more than 90% of email users will be using IM as a normal part of their suite of communication tools.

*Unmanaged IM use carries with it serious threats that must be addressed in order to protect an organization from liability and to protect its network from harm.*

IM and other collaboration tools provide important benefits that can make an organization more efficient, allow its employees to make decisions more quickly and with better information, and improve the overall flow of communications. However, unmanaged IM use carries with it serious threats that must be addressed in order to protect an organization from liability and to protect its network from harm.

While the significant and growing number of IM threats must be addressed, organizations must do so intelligently and continue to provide users with access to the IM and related tools that they need to be productive. Organizations must choose an enterprise-grade IM solution that minimizes the impact on their IT function while providing the level of reliability and capabilities that users need.

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