

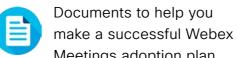
Planning for Webex Meetings success



How to use this toolkit

This toolkit is designed to help you encourage adoption of Webex Meetings in your company.

In this book, you can find



make a successful Webex Meetings adoption plan.

Documents made to inspire knowledge workers to use Webex Meetings in their lines of business.

At the bottom of each document, find a download link to access each individual file to share as you need.

Made for you

If you want to customize the files for use in your company, no problem. At the end of each section, find a link to all editable file types. Make changes as you please.

To leave feedback or to request more of this content, click:



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Unlock your productivity by joining Cisco Webex Quick Classes. You'll learn best practices and top tips through live, interactive product demonstrations.

Get on-the-spot answers to your questions from a Cisco expert. Learn more and register at <u>cisco.com/go/quickclass</u>

Join the <u>Cisco Collaboration</u> <u>community</u>, where you can ask questions, find all of the great content discussed in this playbook, and more.



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Welcome to Webex Meetings

Thank you for choosing Cisco Webex Meetings for your collaboration service. We're passionate about creating simple, intuitive collaboration experiences for businesses just like yours. In this book, we'll discuss the considerations for getting the most value from your investment in Cisco Collaboration based on thousands of successful customer deployments.

Every business is unique, however many of the tools and techniques we share can help any business drive successful adoption.

Collaboration is about changing the way people work. To start, we recommend you agree what your business wants to achieve, what success looks like and have a plan of how to get there, together. Knowing these details before your deployment will help you design a thoughtful on-boarding process and create content that enables specific business workflows. Put together with a clear message of the value to individual employees and lines of business, we're confident you'll see high levels of adoption, and have a clear idea of the business value you are delivering back to the business.



Planning

Webex planning is about capturing a wide range of information to help you understand, plan and successfully execute a launch of Webex Meetings and change the way people work. By following this guidance, you will have clarity on what you want to achieve and how to get there. You will ensure high levels of adoption only by knowing what success looks like, designing a reliable on-boarding process and providing content that sells the benefits of Webex Meetings.

Planning will capture key insights from key people to understand:



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Why do you need to plan?

"Webex Meetings is a much better way of working, so people will jump at the opportunity to use it... right?"

Having great technology is only half of the adoption equation. All behavior changes need employees to buy into the benefits of new tools at a deeply personal level. More so than any other technology, deploying collaboration requires a thoughtful, targeted approach.

Of course, people want better ways of working, but the challenge we all face is the customer experience environment IT now operates in. Your users expect the same amazing technology experiences they get from consumer applications. For that reason, we encourage you to ensure their very first experience of Webex Meetings is delightful. It's the deciding moment for each user on whether they will go on to use Webex Meetings in their daily work routines.

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Who conducts Webex Meetings planning?

Typically change managers and/or IT project managers conduct planning activities, although we encourage you to work with people from across various departments, managing different parts of the business.

What format?

Planning sessions are meetings with key stakeholders that capture the operational, technical and change process information to instruct delivery teams on how to prepare and execute the launch of Webex Meetings.

Getting everyone together in person is best, but if that isn't possible, use a series of short meetings and questionnaires. Whatever medium you choose, we recommend that you share individual contributions with the whole group, so that everyone can review and comment. For you, this means fewer surprises during deployment.



Who should participate? Try and get input from the following representatives:

Executive sponsors

can guide on the organizational benefits they seek and business metrics for meeting their goals.

IT infrastructure teams

can advise on the technical aspects of getting Webex Meetings to large numbers of people and devices in a timely, reliable fashion.

Webex service owner

is responsible for the operation of your Webex Meetings service and should be able to provide advice on how Webex Meetings can transition to a 'business as usual' service.

Human resources

can advise on a wide range of policy issues from policies around employees working from home to country specific regulations

related to employment laws and practices.

Internal communications

is a key resource for authoring and distributing communications for launch and can advise on the best channels.

Service desk / Technical support

are essential partners who can create a simple employee support experience when people need help, or when something is broken.

Legal teams

should be involved as early as possible, when applicable. They may need to write legal copy for Webex Meetings invitations and assist with other compliance matters.

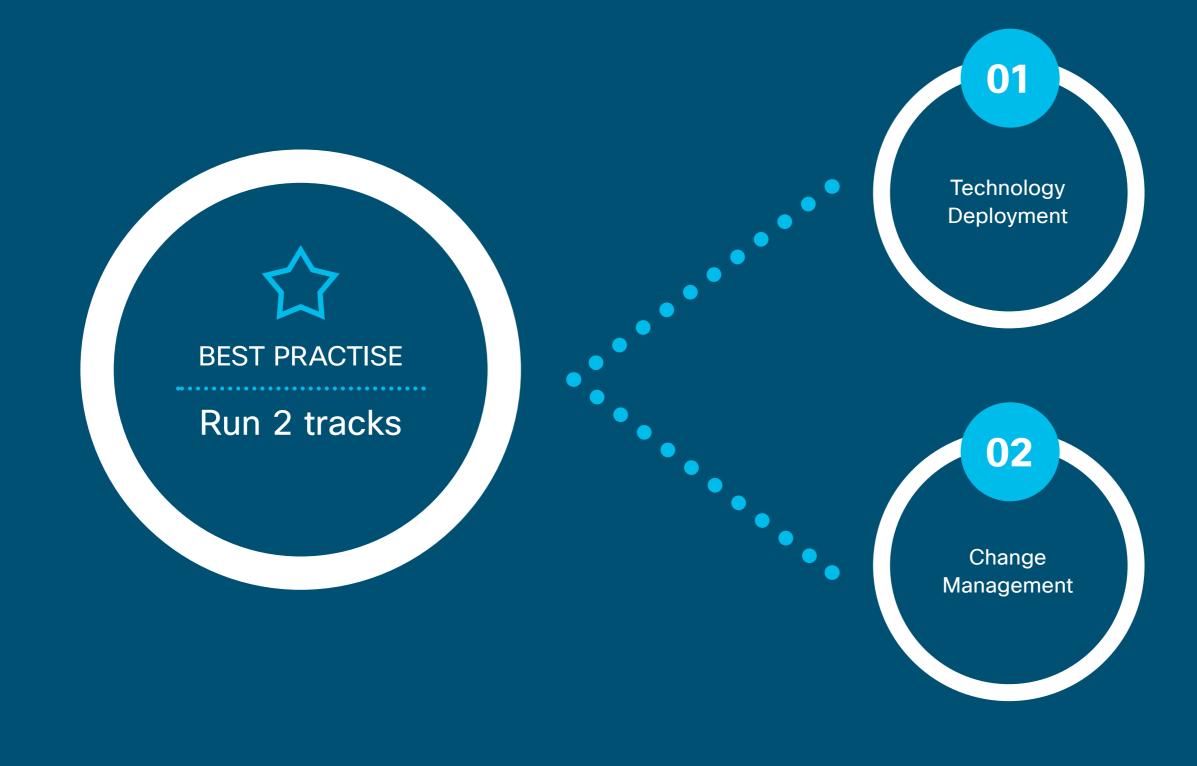
Line of business

can advise on who needs Webex Meetings by when and which high-value workflows it can improve. For larger organizations, we recommend contributors make themselves available for between 1-3 hours

(depending on the size of your business and complexity of the workflow you're targeting)



How do I set up planning meetings and workshops?



Technology deployment

The purpose of this track is to capture and define business and technical requirements for the configuration and governance of Webex Meetings. These may impact the user enablement processes, service desk procedures and how Webex licenses will be managed and distributed.

Typical contributors

- IT/Change Manager
- IT Service/Support Desk Lead responsible for Webex Meetings service acceptance into service/ support.
- IT Service Introduction Lead/ Analyst – responsible for service introduction.
- IT Desktop Services Lead to provide details of desktop real estate, Active Directory/identity services and application delivery processes.
- IT Service Owner your nominated Webex Meetings service owner.
- IT Reporting Analyst someone who can provide usage reports and billing data for existing conferencing services used by your business.
- IT Information security (InfoSec)

 to guide on account expiry issues, password strengths, compliance and audit policy for your business.

Agenda ideas

- Webex Meetings licensing: Establish owners and review process for enablement.
- Site administration: Joint review of core, relevant areas of Webex Meetings Site Administration and agree settings that will improve adoption.
- Single Sign-on (SSO) requirements: If SSO is not being used agree how accounts will be bulk uploaded using Webex Meetings admin tools and who will be responsible for account creation.
- Service introduction process:
 Understand what agents need to resolve issue tickets.
- Distribution: Review and establish device real estate, software and hardware (headsets, webcams) deployment process and user account creation process.
- Information security requirements: Establish if penetration testing is required before launch.

- Reporting and analytics: Design and agree what analytics are required to monitor and measure adoption. Review Webex Meetings reports/analytics and agree high level reporting requirements (other than the dashboard.)
- Testing and UAT procedures: How long they will take and who will manage and conduct testing.

The output of this type of workshop is usually a document describing the technical delivery and support requirements, recommendations and an overall deployment plan. These can also serve as inputs to any change management workshops you choose to hold that will drive your communications plans, training needs, and self-learning content.

Cisco Webex Meetings

Technology deployment: Questions to cover

A

User populations

- How many people are getting Webex Meetings? Where are they based?
- How can we best segment them? By role, region, or something else?
- Is Webex Meetings replacing another meeting service? Who are the most frequent users?
- 4. Who are the priority groups for receiving Webex Meetings first?

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B

User devices

- What is the split between desktop and laptop machines? Are they PC or Mac? Do we have standalone or virtualized desktops? (e.g. Citrix)
- How many people have been issued with USB headsets?
 What brand and model? Do we have enough?
- If we know what we need, can we purchase the required number of devices and send them directly to users?
- 4. Do we use a Mobile Device Management (MDM) system? If so, how can we introduce the Webex Meetings app?
- 5. How many employees have company-issued mobile or tablet devices? What brand and model?
- 6. Are people permitted to use their own mobile devices at work?

С

Deploying Webex Meetings

- Are we automatically provisioning accounts from our master employee directory (for example Active Directory 'AD') or managing this manually from within Webex Meetings?
- Do we have multiple domains? Do we wish to consolidate these? What is the impact, if any, on user experience?
- 3. Are there any other cloud-based applications to which all employees are provisioned? How are they authenticated?
- 4. Do we have a single sign-on service (SSO)? Are all users able to login via SSO? Do we want users to authenticate using Webex Meetings with SSO?
- If we do not have SSO, what are the security considerations for logging into Webex Meetings?
 E.g. password complexity.
- 6. How will users schedule meetings? Do we need to enable the calendar connector to enable @Webex scheduling?
- 7. If we aren't using @Webex, how can we package and deploy Webex Productivity Tools to everyone who will have a Webex Meetings account?

Change management

The purpose of this track is to provide business stakeholders with a detailed understanding of Webex Meetings. It captures the change management requirements of the business and how it needs to prepare itself for transforming the way people work.

Typical contributors

- IT/Change Project Manager

 responsible for the Webex
 Meetings project change
 management overall.
- Internal Communications
 Lead to understand comms
 channels, content, tone of voice
 and options for content and/or
 training delivery.
- Business Case Owners responsible for calculating individual lines of business, or workflow-based return on investment, if required by your business.
- Human Resource (HR) Lead to understand the regulatory and policy landscape in the various locations of your Webex Meetings roll out.
- Intranet Lead (if applicable) to advise on how self-learning content can be published and maintained.
- Brand Lead to advise on customization and branding of content and communications materials.

Typical agenda

- Project overview: An introduction to the key capabilities of the Webex Meetings and the intent of deploying it at your business.
- Case studies: An opportunity for you and your customer success manager to present/ discuss Webex Meetings case studies from similar organizations.
- What's in it for me: Time to co-create the value proposition for your employees – think about tone of voice for communications you send about Webex Meetings.
- Regulatory and policy considerations: Understand any policy changes required, for example if your company is using Webex Meetings to enable employees to work from home.
- Communications plan: Co-create the high-level plan (email, intranet micro-site, road shows, floor walking).
- Webex Meetings champions: Agree how to source early adopters, champions and advocates from various lines of business.

- Webex Meetings visual styling: Discuss options for customizing the look and feel for end users (for example, any headers, color schemes etc).
- Key messages: This is your opportunity to re-enforce the value for employees and your business partners.
- Training: Agree how people will be trained both on core features, and in depth on those specifically of value to their role or workflow.
- Q&A: What are some of the questions you expect employees to have, and what answers can you prepare in advance of launch?
- Measuring success: Review the analytics, measurements and reporting requirements. What will you track to know you're successful? How will these metrics be published and distributed?
- Governance: Agree a governance regime. You may wish to create a steering group and agree, terms of reference and meeting frequency.

Cisco Webex Meetings

Change management: Questions to cover

B

A

Business drivers

- What are our key strategic objectives as a company for the next 1-3 years?
- Are there existing initiatives that Webex Meetings can tie into?
 E.g. flexible working, wellness, employee engagement.
- Are we primarily concerned with reducing costs, driving revenue or making work better for our people?
- 4. Are there specific processes we want to improve first?

Creating awareness

- Considering our business drivers and goals for Webex Meetings, what are the key benefits we want to highlight in our communications to various lines of business?
- What is the value proposition for our employees? What will resonate? Is it different depending on employee type?
- How do we answer the question "what's in it for me?"
- 4. What communications channels do we have open to us? How can we exploit all of them?
- Who will create a communications plan? Who will sponsor and/or send communications?

С

Teaching Webex

- How will we direct users to Webex Meetings learning content?
- How will we upskill our internal trainers? (If applicable)
- 3. How will users register for training? (If applicable)
- 4. Where can users ask questions about using Webex Meetings?
- 5. How can we identify enthusiasts to act as pioneers and champions?
- How will we induct and train our champions? How will we recognize and reward them?
- How will users find their nearest/organizational Webex Meetings champion? (If applicable)

Supporting Webex

- How do we inform service desk agents and local IT teams about Webex Meetings? How will we train and prepare them?
- How will we capture common issues and share troubleshooting steps?
- How will we escalate issues to our delivery partner and/or Cisco?

E

Timeline

- When will we launch Webex Meetings?
- Will we roll out to different groups in phases? In what order? How many users per phase?
- What needs to happen first? What are the milestones and dependencies?
- 4. Are we retiring another meeting service at the same time? When must this happen by?
- 5. What dependencies do we have from elsewhere in the business?
- Do all of the activities in our timeline have owners? Do we have sufficient resource to deliver on time?



•

Bringing it all together

Gather the findings of this exercise into a report with your recommended actions and delivery plan. See the "Planning for Webex Meetings success report" template that accompanies this guide.

Download the report template here

Cisco Webex Meetings Webex Meetings success playbook

So, you want to launch Webex Meetings in your business

Use this checklist and guide to get support from your leaders, create awareness, and stimulate demand. Your time is precious so you don't have to do everything, just what you have time for that makes the biggest impact. Ask your colleagues to help you and phase it out over several weeks. Equip your team with tools to learn how Webex Meetings can help them get their work done.

Cisco Webex Meetings

Adoption toolkit

What?	How?	Effort
Has everyone got Webex Meetings?	Ask your IT teams to confirm everyone has a Webex Meetings account and the calendar plug-in. Find out how new joiners get a Webex Meetings account and instructions on how to log in.	1 hour
Enlist the support of senior leaders.	Write to senior leaders asking them if they can send an email to everyone announcing the launch of Webex Meetings. Attach one or more of the use cases in this section that explains why it's so useful.	20 mins
Get some links to 'how to' guides.	Ask your IT teams for links to getting started, hosting a meeting, joining a meeting and how to get an account. Use these links in all your communications. <u>Here's Cisco's Collaboration Help Portal.</u>	10 mins
Cook up a simple timing plan.	Get some of your colleagues together and come up with a communications plan that describes when each promotion will go out and who does what. See Communications Planning for guidance.	1 hour
Share a snappy tag line using a banner ad - Make Webex Meetings appeal to your departments.	Within the playbook, you will find posters and banners which target several departments. Find a space on your intranet to place a banner e.g. the HR section. You can also use it in emails and PowerPoint. Change the sting to suit your organization's personality and link it to a 'how to' guide.	2 hours
Show you care. Print a poster or flyer.	Print the poster or flyers. Put the poster up in the office, the rest room, meeting rooms and the flyers on colleagues' desk. If you've got digital signage in your buildings use that as well.	4 hours
Make the change you want to see. Add your Personal Room link to your email signature.	Webex Meetings gives everyone their own unique address for meetings. Find out what yours is, add it to your email signature so everyone sees it from now on and ask your colleagues to do the same.	10 mins
Write an email for your senior leader to send to the whole team.	We've written an example. Just adapt it for your own culture and organization's personality.	30 mins



Coming soon email

When to use

Let employees know what Webex Meetings is, why you invested in it, when it will be available for everyone to use and a high-level value proposition that articulates 'what's in it for me' for end users.

Best practices

Format

Your email should have the following sections:

1 What should the subject line be?

Having a great subject line is important to drive a high level of open and response rates. Think about what would make you open an email. Test ideas with colleagues you trust. If available, seek advice from PR, marketing or internal communications teams for creative, impactful subject lines.

2 What is Webex Meetings?

Introduce Webex Meetings and the reason why you have chosen it. If it's replacing an older or existing service, be clear on how Webex Meetings is an improvement to how they work today.

3 Why?

Talk about the business goals and strategies you have and why enabling employees with rich Webex meeting experiences will help you achieve them.

4 How

Let users know what they can expect over the next few weeks, and actions they have.

Who should send this?

A recognized figure in the organization, ideally a senior member of staff or someone who is widely respected and known to most employees.

5 Who should sign off?

Most executives prefer emails to have been reviewed and edited by their internal communications team to ensure they reflect the company's tone of voice, culture and values.

What should the reply address be?

When sending emails to large numbers of employees, be sensitive to the chances of people replying. Most executives don't have time to reply to questions and comments coming back from employees. Depending on your software, try and configure the email to have a different reply address, ideally a mailer that many people can monitor and respond to. That way the project manager and/or IT Service owners can keep track and respond appropriately.

Test before sending

Send this email to yourself and a few colleagues to get feedback on how they think it will land with people. Check that all the hyperlinks work.

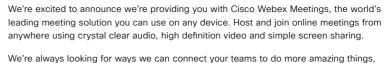
1 Inbox Meet brilliant. Meet Webex. Your new virtual meeting solution.

Ryan Jones - Digital Marketer to me

Cisco Webex

Meet brilliant. Meet Webex. Your new virtual meeting solution.





We re always looking for ways we can connect your teams to do more amazing things, regardless of where you work, improve our relationships with customers and partners and offer more flexible ways of working for our employees.

Over the next few weeks, we'll send you information on how to get started, login details, training sessions and some self-learning material so you can learn at your convenience.

If you have questions or need more information, please contact [NAME OR TEAM]

Thank you for all you do,

Regards,

5 [EMAIL SIGNATURE]

Download email banner image

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Webex Meetings launch email

When to use

This email is used to announce to employees that their Webex Meetings account is ready to use with detailed instructions on how to start using the service and where to get support. Use links to online guidance rather than writing details in an email. That way, if something changes, you can quickly edit your content online, rather than send another email.

Best practices

Format

Your email should have the following sections:

1. Warm welcome

A friendly opening statement, announcing Webex Meetings availability.

2. How to get started

Provide steps on how to log in, get Productivity Tools and links to self-service content, including training sessions.

3. How to get support

Provide clear instructions on who to contact to get training and technical support when and if they need it.

Who should send this?

A best practice is to set up a shared inbox or distribution list with a clear identity and use it for all emails to employees e.g. Webex_Support_ Team@yourcompany.com.

Subject line

Create short, impactful sentences that capture the value of Webex Meetings and grab attention.

Test before sending

Send this email to yourself and a few colleagues to get feedback on what they think. Double check all the hyperlinks work. Inbox Welcome to Webex Meetings. It's great to meet you.

Ryan Jones - Digital Marketer to me

Cisco Webex

Welcome to Webex Meetings. It's great to meet you.



Dear Colleague,

Today is the day. Webex Meetings, our new meeting solution is ready for you to use.

Get started by following this guide <LINK> with steps on how to log into Webex Meetings.

We've created Self Service Content for Webex Meetings <LINK> for you, with guides on how to use Webex Meetings on a desktop, Apple Mac and the mobile application.

If you have questions or need help with Webex Meetings, contact your Webex Support Team at <email_address>.

We hope you enjoy using Webex Meetings.

Regards,

[EMAIL SIGNATURE]



Webex Meetings follow up email

Inbox Are you joining? Your Webex Meetings account is waiting for you!

When to use

This email is used to remind employees who have not yet used Webex Meetings of its benefits and how other colleagues are already using it in their daily work. We recommend checking your company email policy first, and recommend sending reminders at one week, one month, three months and then six months.

Best practices

Who do I send this to?

It's important you only send this email to people who have not used Webex Meetings since you launched. You can find this information by running a report using Webex administration tools. If you're unsure, your Customer Success Manager from Cisco or your partner can show you how.

Format

Your email should have the following sections:

1. What is Webex Meetings?

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A summary of what Webex Meetings is and its key benefits. No one likes to feel like they are missing out. A great way to drive interest is to let users know how many colleagues are using Webex Meetings.

2. How to get started.

Share steps on how to log in, get Productivity Tools and links to self-service content, training sessions.

3. How to get support

Provide clear instructions on who to contact to get training and technical support e.g. Learning and Development team/site, IT contacts.

Who should send this?

Set up a shared inbox or distribution list with a clear identity and use it for all operational emails to employees e.g. Webex_Support_Team@ yourcompany.com.

What should the subject line be?

Create short, impactful sentences that capture the value of Webex Meetings and grab attention.

Test before sending

Send this email to yourself and a few colleagues to get feedback on what they think. Check that all the hyperlinks work.

Ryan Jones - Digital Marketer to me

Cisco Webex

Are you joining? Your Webex Meetings account is waiting for you.



Dear Colleague,

We've noticed you haven't used Webex Meetings. Since we launched, more than 2,000 of us have run a Webex meeting. We've conducted 5,000 meetings with a total of 15,000 attendees!

Your colleagues are telling us they're saving time through shorter meetings, working from home to avoid the rush hour, and even cutting back on travel because of the HD video features. Join them today.

Here's how to get started <LINK>

We've created Self Service Content for Webex Meetings <LINK> for you, with guides on how to use Webex Meetings on a desktop, Apple Mac and the mobile application.

If you have any other questions or need help with Webex Meetings, please contact the Webex Support Team <email_address>.

We hope to meet you soon

Regards,

[EMAIL SIGNATURE]

Planning for success invitation email

Planning for Webex Meetings success invitation email

(for extended IT stakeholders)

Inbox We need your help launching Webex Meetings in <org_name>. This is your 'Planning for Success' technical workshop invitation.

Ryan Jones - Digital Marketer to me

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We need your help launching Webex Meetings in <org_name>. This is your 'Planning for Success' technical workshop invitation.

Hello <name>,

We're excited to invite you to a workshop to discuss and agree the technical aspects of our Webex Meetings deployment. Your participation will help us capture the information we need to provide the best possible service to our people.

The format is informal and conversational, conducted as a Q&A session and won't take more than a couple of hours of your time.

We've invested in Webex Meetings to improve the way we work. This transformation can't happen without high levels of adoption. This means being thoughtful about the way Webex Meetings is deployed to users, the software required to make it easy to use, and how training and support are provided.

Please respond and confirm who from your team should attend the workshop and we shall coordinate a date and time. We are happy to meet beforehand to provide a short summary of the workshop purpose, format, and agenda.

We appreciate your partnership,

[EMAIL SIGNATURE]

When to use

Many organizations are moving from an audio only meeting experience to a rich content, video and clear audio experience on desktop, mobile and video conferencing devices. That means asking people for greater levels of concentration, focus and participation. This email is used to invite key stakeholders to planning discussions and workshops. It's important because this is a big change that's less about technology and more about changing the way people work.

Best practices

Preparation: We recommend you approach stakeholders individually and ask for their support. Use this time to set their expectations of what you need from them, and why.

Format

Your email should have the following sections:

1. What is this meeting/ workshop about?

Purpose, objectives and goals of the meeting.

2. Why do we need it?

An explanation of the role they can play in achieving high adoption. Webex Meetings adoption increases significantly when many areas of the business prepare and take action, not just IT.

3. What do we ask for?

Set expectations of the commitment required from each person/area.

Who should send this?

Service Owner or Project Manager.



Planning for success invitation email

Planning for Webex Meetings success invitation email (Business/Change Management)

Inbox We need your help launching Webex Meetings in <org_name>. This is your personal 'Planning for success' business workshop invitation.

Ryan Jones - Digital Marketer to me

> Cisco Webex Meetings

We need your help launching Webex Meetings in <org_name>. This is your 'Planning for Success' technical workshop invitation.

Hello <name>,

We've invested in Webex Meetings to dramatically improve the way we work. This transformation can't happen without high levels of adoption. Your IT team is working hard to make this launch a technical success. Help us make sure our investment works for you and your business.

We're inviting you to a meeting/workshop to discuss and agree change management aspects of the Webex Meetings deployment. Your participation will help us capture the information we need to provide the best possible service to our people.

The format is informal and conversational, conducted as a Q&A session and we'll be sure to respect and make use of your time.

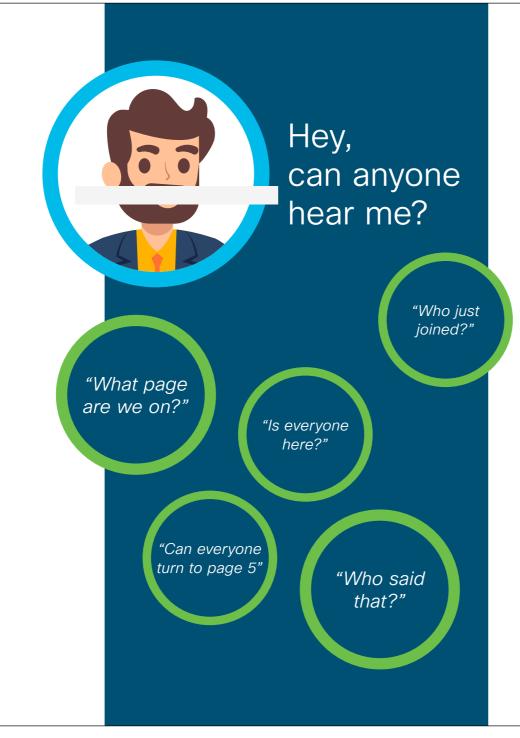
Please respond and confirm who from your team should attend the workshop and we shall coordinate a date and time. We are happy to meet beforehand to provide a short summary of the workshop purpose, format, and agenda.

Thank you for your partnership in making Webex Meetings successful,

[EMAIL SIGNATURE]



General use case 1



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If you've joined audio conference calls, you'll know how difficult it is to join without disrupting the flow, or understand who's on the call, who's speaking, or which slide the speaker is talking about. These disruptions mean minutes of your team's time are wasted during every meeting.

There's a better way. Hello Webex Meetings

Joining a Webex meeting is easy. Click the green join button from any device. You're in control.

Joining a Webex meeting

Controls you can trust

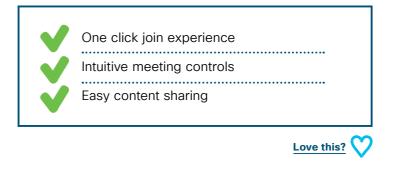
Webex Meetings allows hosts to mute everyone, so they can present without interruptions, in crystal clear audio.

Find out more

Get on the same page

With easy sharing, even from your IOS device, there's no need to send content in advance of your meeting. Leave time for those last-minute changes and share your application on screen in real time. No more coordinating which page of pre-shared content to go to.

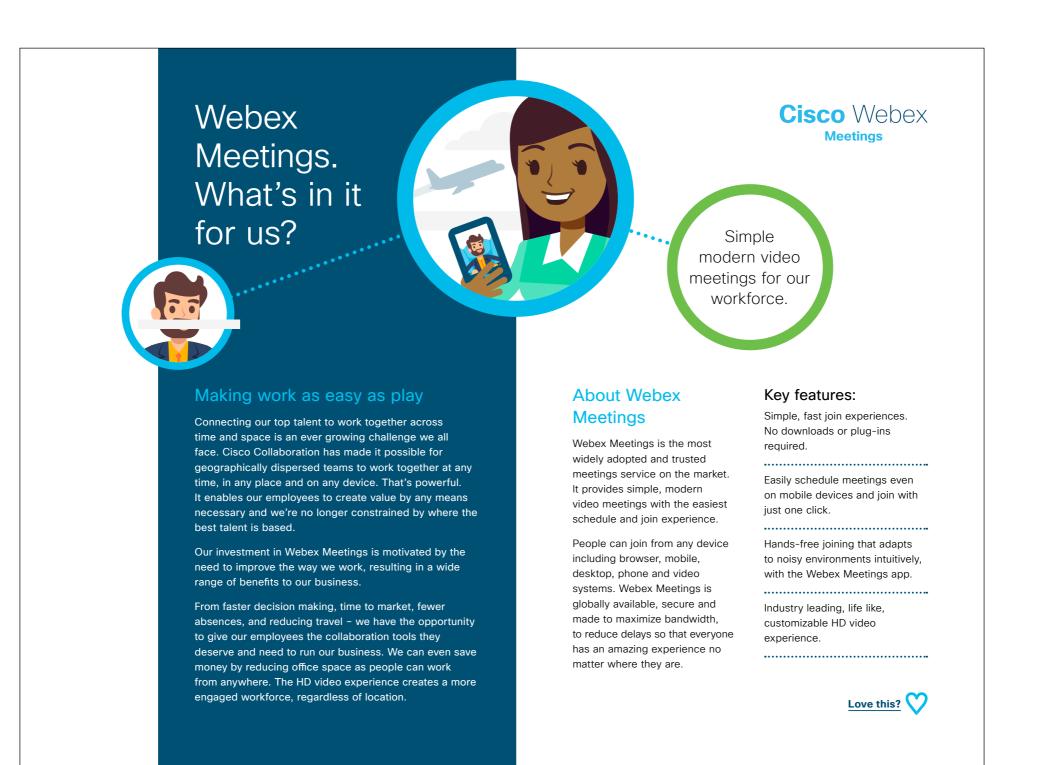
Find out more



Download use case



General use case 2



Download use case



General use case 3

I've got Webex Meetings. Now what?



Make work as easy as play

What if you could gain two hours back every day?

What if you could travel less, avoid rush hour and get home in time for dinner?

What if you could give clear guidance to a colleague from home, have better customer conversations from a coffee shop, or share a video interview of a new hire from the train?

Putting the power of Webex Meetings in your pocket, on your desk and in your office means you're ready for whatever the day throws at you, without worrying about your meeting schedule.

Cisco Webex Meetings

Webex Meetings

Saves time

- Easy dial back.
- No numbers to dial or PINs to remember, we'll call you.
- One-click meetings make it easy to join from any device.

.....

Delights colleagues

- Recording. Send a meeting recording to someone who couldn't make it.
- Mobile. Achieve everything from your mobile or tablet just as easily as from your laptop.

Avoids travel

- Screen sharing.
- Communicate from your screen with large and small audiences from wherever you are.
- Remote controls. Let someone take control of your screen, or take control of theirs.

.....



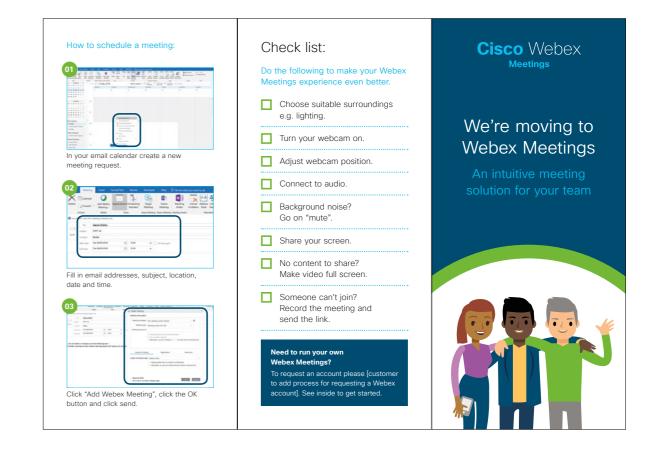
Download use case

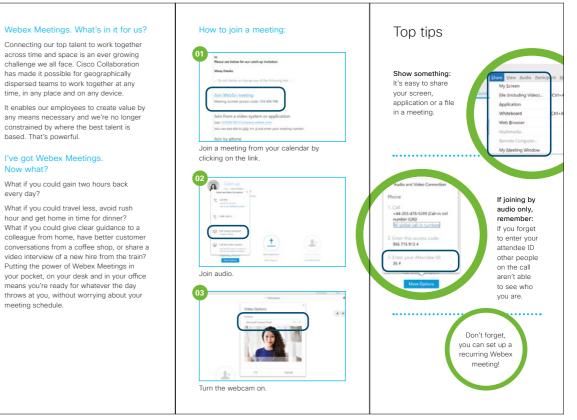






Download flyers





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Going the extra mile



Join the conversation

Would you like to meet and learn from Webex Meetings champions around the world? Come join us in the <u>Cisco Collaboration community</u>, where you can ask questions, find all of the great content discussed in this playbook, and more.



Want to put your stamp on it?

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