wainhouse
real.objective.insight.

Zoom's New Whiteboard in the Meeting Room

August 2022

Meeting Space Challenges

During the past two years, information workers have made a shift in expectations when meeting with colleagues. The days of just having meeting access have fallen out of favor when contrasted with full meeting participation. For many workers, audio-only calls are a thing of the past, as is restricted access to content. Instead, workers look to have full participation in the meeting, regardless of location. This shift, along with the ever-changing in-room dynamics of local COVID regulations, has created the need for persistent, interactive content for synchronous and asynchronous work.

As teams return to the office and use meeting spaces, the need for workflow parity comes into focus. As users leverage tools and workflows to share content into a meeting, any deviation from the remote workflow increases the learning curve. The greater the differences between the personal-device and shared-space solutions, the greater the risk of confusion and abandonment. Collaboration platforms are well-positioned to deliver the streamlined experience that teams need to address the transition back to the office in a hybrid world.

To address these changes, organizations are looking for solutions that can flex with the workforce and enable productivity regardless of in-room or hybrid environment. This translates to software platforms that enable co-creation in addition to voice, video, and screen sharing. With organizations across the globe signaling they are ready to make the long-term investments needed to address user expectations, Zoom's all-in-one collaboration suite is positioning itself to capture the market.
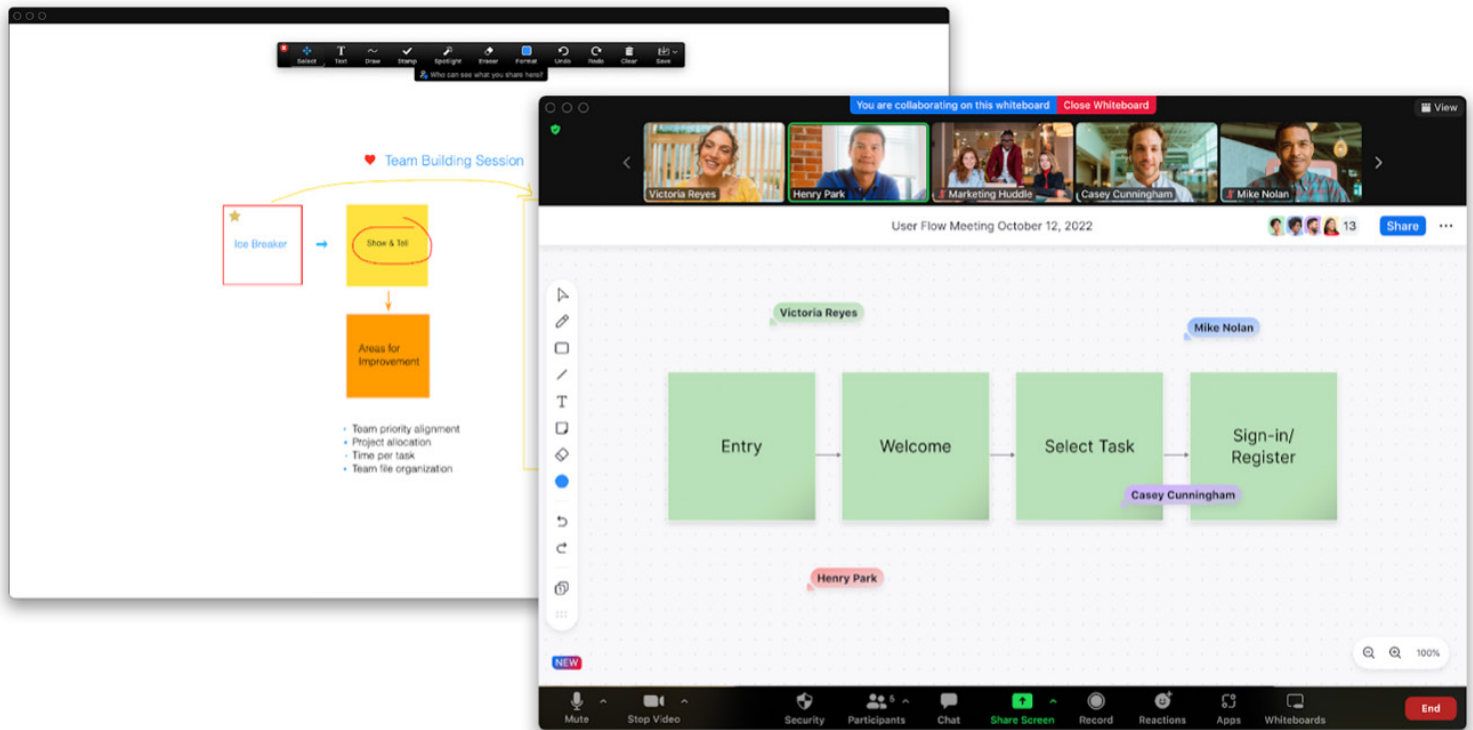
The New Whiteboard

For years, teams that leverage Zoom Rooms and Zoom for Home have been whiteboarding in meetings, with remote participants watching from the sidelines. This method worked well prior to the pandemic, but with the rise of hybrid work came the need for full parity for both in-room and remote attendees. To address these shifting work patterns, Zoom introduced a new whiteboard earlier this year.

This new offering isn't tethered to a device, but rather a cloud-based platform that users iterate on regardless of location or software variant. In addition to the ideate-from-anywhere approach, this new whiteboard is persistent and accessible to users in synchronous and asynchronous environments. With new functionality and architecture to address how teams now operate, the new Zoom Whiteboard is working to deliver on the vision of a single collaboration tool for the workplace.
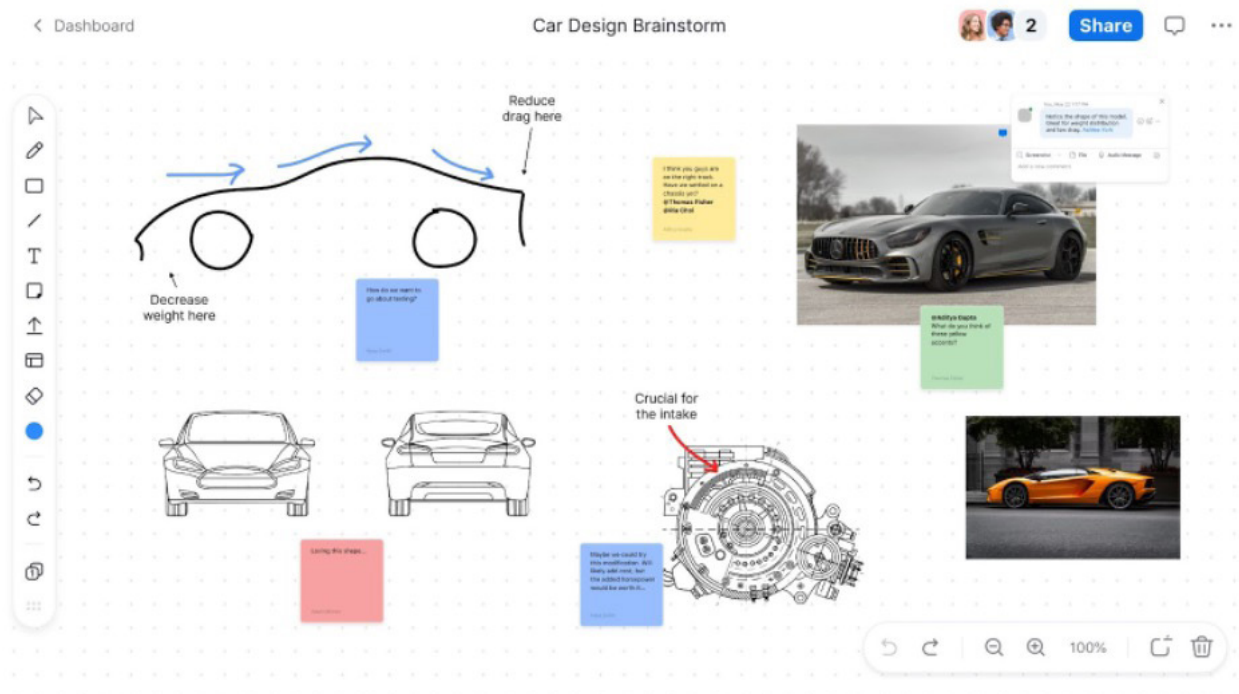
At release, the Whiteboard was accessible through the Zoom desktop application, in browser, and in meetings. Zoom Rooms and Zoom for Home devices quickly followed, but instead of replacing a well-loved function, devices offer both the Classic and the new Whiteboard. The "new" offering enables persistence for whiteboards, making it easy to build on ideas and iterate over time. While this may sound like an incremental improvement in a world where digital whiteboards abound, it creates an integrated experience for teams that's hard to duplicate. It represents a shift which we've seen across the industry, from content being a secondary consideration in the meeting, to a more equal pillar of collaboration.

With new functionality and architecture to address how teams now operate, the new Zoom Whiteboard is working to deliver on the vision of a single collaboration tool for the workplace.

3

**Zoom's Classic Whiteboard is on the left, and the New Whiteboard is featured on the right**

Zoom Rooms' new Whiteboard features a canvas to brainstorm and lay out ideas, similar to a static whiteboard. The power of Zoom's Whiteboard is seen when you fill the canvas, as a static whiteboard would require erasing while Zoom can add additional canvases and save them together as a single project. Teams can easily share the canvases with colleagues regardless of location, eliminating the need for blurry pictures from mobile devices. Adding to the functionality of Zoom's new Whiteboard is the ability to grow the canvas as content is added, usurping another inherent limitation of the static whiteboard. The tools provided within Zoom Whiteboard are designed to be simple and easy to use, incorporating everything from templates and sticky notes to text boxes and shapes featuring connecting lines. Contributors can also draw or write with inking functionality that mimics static whiteboard interactions. Building on the initial release, Zoom is continuously introducing new features and functionality to the new Whiteboard.

Collaborating With Zoom Rooms

Within the Zoom portfolio, Zoom Rooms extend the meeting experience to shared spaces. Leveraging the meeting-room display, microphones, cameras, speakers, and sensors, Zoom Rooms provide enterprise-grade meeting experiences regardless of the number of in-room participants. As one of the only vendors attempting to address all the elements of collaboration at scale, Zoom is differentiated in its aspiration to deliver the end-to-end meeting workflow. Adding to the value proposition is flexibility around devices; where others offer costly branded hardware for in-room whiteboarding, Zoom works seamlessly with a wide range of hardware vendors. An open approach to the hardware ecosystem lowers costs associated with switching, in addition to minimizing impacts on meeting-room hardware refresh cycle times. The new Zoom Whiteboard works within the pre-existing hardware requirements, enabling all current touch-enabled Zoom Rooms to leverage the synchronous co-creation capabilities.

Users can access the new Zoom Whiteboard from a Zoom Room through the same icon as earlier versions of Whiteboard, followed by selecting the "New Whiteboard" option. With some teams more comfortable using the ad-hoc "Classic Whiteboard," Zoom has retained this version as well. While user interactions are similar, the "New Whiteboard" makes a fundamental shift to persistent, shareable, and scalable digital spaces. When accessing a pre-existing board, team members can share to the Zoom Room display through a sharing key found at the top right of the lobby screen (as seen below). The sharing key is entered in the Zoom application on the user's device by clicking the pairing icon in the top right of the window. Alternatively, the owner of a board can share into an ongoing meeting, with immediate access to participating Zoom Rooms. The combination of ad-hoc and persistent functionality within a single platform for meeting and sharing is what the majority of teams require to adopt a digital whiteboard.

On-screen option between a classic or new whiteboard session
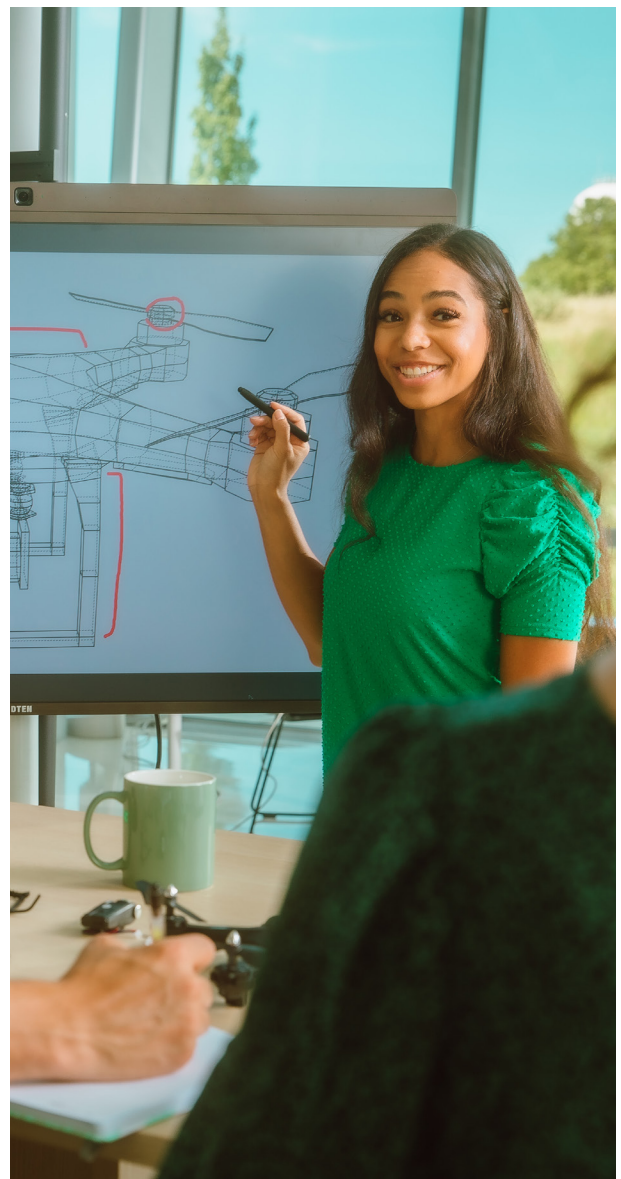
Zoom has enabled access to the new Whiteboard for all Free and Pro license holders, with a standard limitation of three concurrent whiteboards and an option for unlimited whiteboards. Business and Enterprise users have access to unlimited whiteboards included in their subscription. In making canvases available to all users, Zoom completes the all-in-one collaboration suite. By providing digital whiteboarding capabilities to all license holders, Zoom increases the chances of casual users testing and adopting the solution. Over time, Zoom Whiteboard is expected to increase the visual literacy within an organization, and slowly chip away at lingering end-user resistance to visual collaboration tools. The ability to integrate whiteboard functionality with already-implemented online meeting services is likely to appeal to corporate users, potentially prompting teams to re-evaluate the need for stand-alone digital whiteboard solutions. This isn't to say that purpose-built visual collaboration platforms will fade, but simple digital whiteboard offerings will find it hard to compete with an integrated, streamlined approach to collaboration. As reported in Wainhouse's 2022 State of the Market for Visual Collaboration, this strategy can be seen across the market, with the most notable meeting services now offering basic whiteboard functionality at no cost to the user.

> In making canvases **available to all users,** Zoom completes the all-in-one collaboration suite.

The Zoom Approach

Teams leveraging Zoom Rooms benefit from the same functionality as found in the web, app, and in-meeting experiences. While Zoom is adding new functionality regularly, the mix of tools, templates, and sharing capabilities address the core tenets of content collaboration. As the examples below highlight, the Zoom Rooms Whiteboard has been built to address the end-to-end hybrid workflow.

Easily share canvases in a meeting to ideate and co-create with the team. Draw, add text, and interact with canvases shared in the Zoom Room without an arduous permission process. Even when hybrid meetings are not needed, whiteboards can be shared to a Zoom Room through a simple PIN interaction. The flexibility of persistent and shareable content makes Whiteboard a natural fit for distributed teams.

Human factors research shows that visual communication requires consistency to build trust. If each interaction with the software is different, requiring additional training to use, it becomes nearly impossible to adopt across an organization. By creating parity between the experiences, Zoom is working to build trust with casual and new users. Solutions offering parity across experiences will onboard new users faster, and with a better ability to leverage the tool.
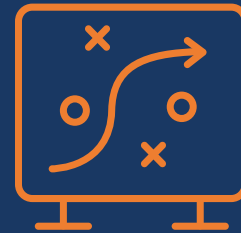
While simply drawing a shape or typing a note is helpful to teams, it is the ability to leverage a digital space for all types of meetings that accelerates the outcome. Templates and connecting line functionality expand the applications of digital whiteboarding, working to make visual-based workflows a core pillar of collaboration in the process.
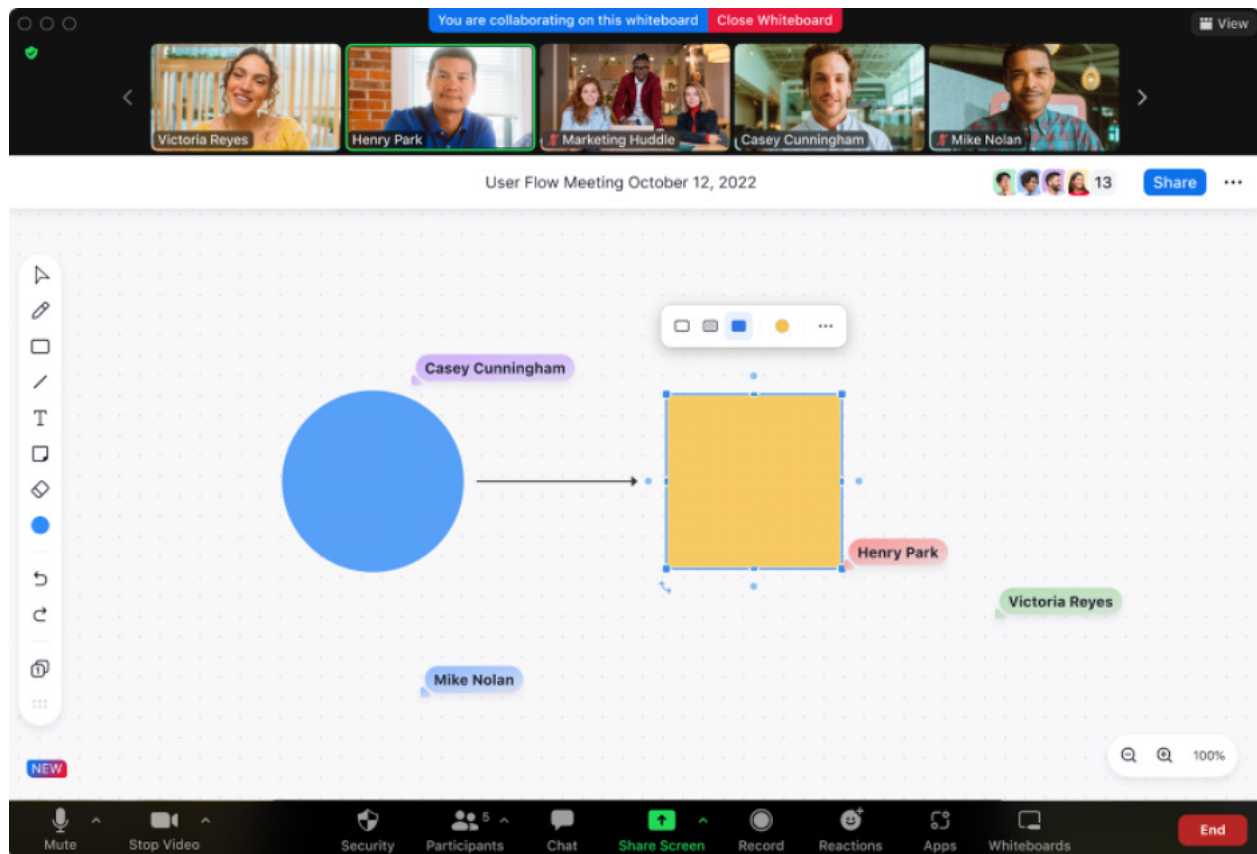
Between intuitive interactions and overall ease of use, the Zoom Whiteboard is well-positioned as the tool for teams looking to familiarize themselves with digital whiteboards and visual collaboration. Once adopted, teams can easily participate from meeting rooms or remotely in ideating, organizing, planning, and iterating workflows.

The Wainhouse Take

Zoom's approach to digital whiteboarding is well-founded, building off the basic workflows of share, present, and ad-hoc content capture. The persistent nature of Whiteboard means teams can rely on the platform throughout a project or engagement, making the tool set an integral part of the meeting workflow in addition to asynchronous work. Between the current feature set that Zoom has released to date, and the short-term roadmap that is planned for 2H 2022, Whiteboard will be very well-positioned to raise the level of visual literacy across organizations, and capture the attention of existing and new Zoom users.

8

ABOUT ZOOM

Zoom is for you. Zoom is a space where you can connect to others, share ideas, make plans, and build toward a future limited only by your imagination. Our frictionless communications platform is the only one that started with video as its foundation, and we have set the standard for innovation ever since. That is why we are an intuitive, scalable, and secure choice for large enterprises, small businesses, and individuals alike. Founded in 2011, Zoom is publicly traded (NASDAQ:ZM) and headquartered in San Jose, California. Visit zoom.com and follow @zoom.

ABOUT WAINHOUSE RESEARCH

Wainhouse Research provides strategic guidance and insight on products and services for collaboration and conferencing applications within Unified Communications. Our global client base includes established and new technology suppliers and service providers, and enterprise users of voice, video, streaming, and web collaboration solutions. The company provides market research and consulting, produces conferences on technology trends and customer experiences, publishes a free weekly newsletter, and speaks at client and industry events.

ABOUT THE RESEARCHER

Daniel C. Root, Senior Analyst. Located in the Boston, MA area, Dan focuses on workplace communications & collaboration technologies, with an emphasis on the intersection of cloud-based collaboration software and hardware deployments (e.g., whiteboard-style co-authoring) necessary for adoption. He has close to a decade's worth of experience in enterprise hardware and software with roles in business development, partnerships, product growth, strategic planning, and product development.