



Empower Your Frontline Workforce to Drive Business Transformation

Elevating Worker Efficiency and Customer Experience with Next-generation Push-to-talk Capabilities

FROST & SULLIVAN VISUAL WHITEPAPER

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INTRODUCTION: Identifying Overlooked Gaps in Business Communications

Business transformation is a strategic imperative for organizations facing macroeconomic volatility and rapidly evolving business models, employee requirements, and customer preferences. To become more agile and promptly address market challenges, organizations are investing in digital technologies, including advanced communications and collaboration solutions, that power operational efficiencies and employee engagement.

However, digital transformation projects often fall short of delivering desired outcomes due to their limited scope or poor alignment with diverse employee requirements. **Digital tools must be tailored for different job roles, workflows, and environments to deliver strong benefits and a high return on investment (ROI).**

Frontline workers are the backbone of most organizations—they are responsible for ensuring top-quality products and services and excellent customer experiences. Yet they must often make do with business communications solutions designed primarily for desk-based knowledge workers. In fact, it has been commonly accepted that frontline workers are difficult to reach while performing their job tasks because of their limited access to business communications tools.

Providing underserved frontline workers with the right communications and collaboration solutions is critical to both improve their productivity and drive efficiencies throughout the organization. Purpose-built digital tools such as mobile push-to-talk solutions can bridge communication silos across job roles, departments, and locations to significantly boost business transformation success.





Frontline Workers Are Pillars of Organizational Success

Frost & Sullivan research shows that there are approximately 2.5 billion deskless workers (most of whom are frontline workers) in the global labor force. In a 2023 Frost & Sullivan global survey of IT/telecom decision makers (ITDMs), 80% of respondents report that their organization employs frontline workers.

Frontline workers are directly involved in key business and customer service processes, such as production, field services, and sales. As such, their performance is tightly correlated with company growth and competitive power. The frontline worker category consists of many essential occupations, such as nurses; drivers; postal workers; security personnel; and retail, hospitality, and manufacturing staff.

Frontline worker efficiency, productivity, and job satisfaction are critical for the success of most organizations and the advancement of entire industries.

Frontline workers must be well equipped to achieve business objectives that IT decision-makers identify as crucial or very important.

Important, Very Important, and Crucial Business Objectives



92%
Growing revenue



90%
Improving customer experience and satisfaction



89%
Improving operational efficiencies



88%
Rapidly responding to market demand and disruption



87%
Launching new products and services



Failure to Equip Frontline Workers with Appropriate Technology Is Costly

Deskless (typically frontline) worker job turnover can reach as high as 4 in 10 employees looking to quit their jobs within six months. Top reasons for quitting include greater job flexibility, career advancement, and higher pay.¹

Employee turnover costs significant resources to hire, train, and onboard new personnel and negatively affects overall workforce productivity in the short term. Frontline worker churn directly impacts product and service quality, workforce morale, company culture, and customer service and support, all of which can be detrimental to the organization's growth prospects, customer retention, and competitive strength.

Survey data show that lack of tailored technology is an important challenge for one-quarter of deskless workers—they must be equipped for success and job satisfaction. Deskless workers empowered with appropriate technology are twice as likely to be very satisfied with their job and over 50% more likely to stay at their job for the next five years.²

Appropriate digital tools that boost employee collaboration and ability to achieve performance targets are key enablers of employee retention.

Survey data show that frontline worker performance is dependent upon access to the right technology tools:³



96% say that they need more technology to improve communications.



78% say technology is an important factor when choosing a job.



75% of frontline workers spend most of their time at work using technology.



70% report that more technology would help them do their jobs better.



60% are unsatisfied with or believe there is room for improvement in the technology they are provided to do their work.

1 [Why Deskless Workers Are Leaving—and How to Win Them Back](#)
2 [Announcing 2022 State of Deskless Work Report](#)
3 [The State of Technology for the Deskless Workforce](#)



Effective Frontline Worker Communication Is Essential in Customer-centric Organizations

To maintain excellent end-to-end customer journeys and employee engagement, organizations must enable effective communication links among siloed work groups, including office workers, contact center agents, and frontliners.

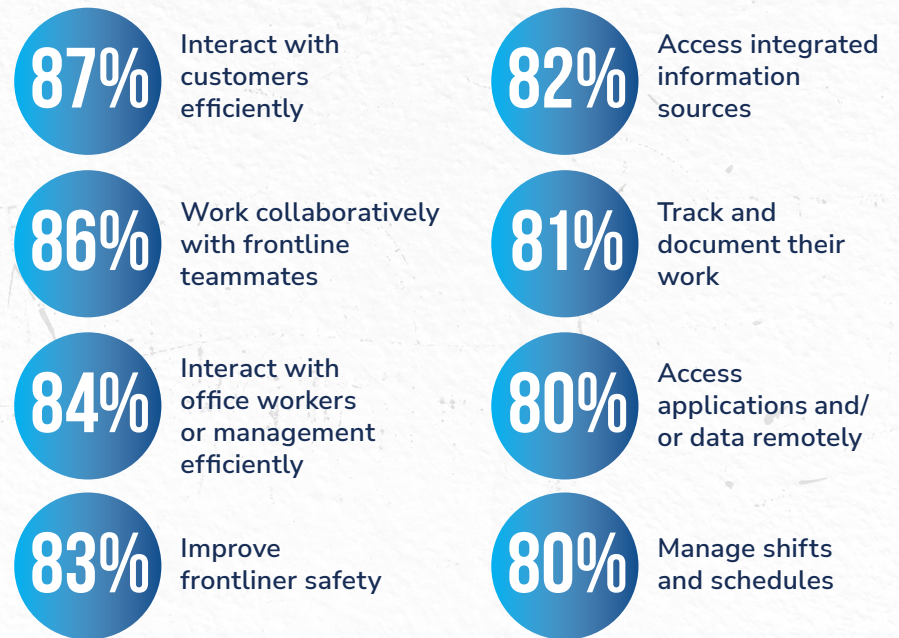
A highly collaborative workplace environment enables organizations to optimize business processes and better leverage diverse worker skill sets and expertise to increase product and service quality, improve safety, enhance customer service and support, and boost competitive power.

Frost & Sullivan survey data reveal that 78% of IT/telecom decision-makers consider empowering frontline employees as an important, very important, or crucial factor in their communications and collaboration solution investments.

Effective frontline worker communications with peers, desk workers, and external parties—customers, suppliers, or partners—are essential to align resources across departments and job roles to deliver excellent customer value.

Forward-thinking business leaders acknowledge the importance of properly equipping frontline workers to achieve key objectives.

Important, Very Important, and Crucial Capabilities to Empower Frontline Workers



Total n=1,004
Q14. How important is it to your organization to invest in the following capabilities to better support frontline workers by the end of 2025? Important, Very Important, and Crucial

Source: Frost & Sullivan



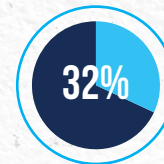
Frontline Worker Communication Challenges Abound

Business communications have evolved by leaps and bounds over the years, yet most communications technology advancements have focused on the needs of desk-based knowledge workers. Deskless frontline workers have lacked tools that suit their specific work styles and environments.

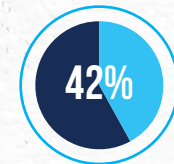
Frontliner workflows and communications requirements vary considerably across industries, but they also have much in common.

- Frontline workers are typically mobile—in the field, roaming campuses or hallways, or on manufacturing or retail store floors.
- To perform their job tasks, they often juggle multiple devices, many of which are bulky—radios, scanners, phones, and tablets—or have a single device with limited access to needed capabilities.
- Unlike desk-based employees, frontline workers often operate outdoors or in hazardous work environments and perform tasks that require hands free communications.
- They also frequently need instant access to information to assist customers or relay information to large groups in real time.
- They frequently pause their tasks to answer calls, make announcements on paging or overhead systems, and send and receive messages, which disrupts their workflow.

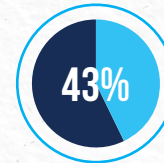
Survey data suggest that frontliner communications with headquarters and the rest of the organization are highly ineffective or severely lacking:⁴



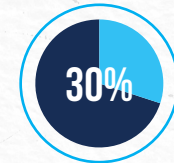
do not have time to read or act on HQ communications.



agree the communications they receive from HQ are often irrelevant.



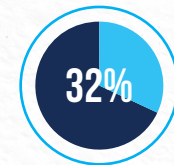
agree the communications they receive from HQ are not engaging.



say internal communication disrupts their way of performing their role and tasks.



believe there is no go-to communication channel for important updates in their workplace.



state that if there is a channel, it does not work well for their role.

⁴ Frontline workers say management feels “out of touch” with their roles and can do a better job of communicating



Technology Advancements Power Highly Collaborative Workplace Environments

Technology advancements are empowering organizations to better align and integrate different stakeholders and empower underserved frontline workers.



Cloud communications

Software-based cloud communications and collaboration solutions that are accessible anytime from any device can be powerful enablers of frontline worker productivity in education, healthcare, retail, utilities, and other industries.



Mobility

Fixed-mobile-convergence (FMC) enabling secure and reliable access to company communications applications is gaining greater appeal among distributed organizations. Mobile unified communications as a service (UCaaS) solutions provide anywhere, anytime access to business calling, messaging, meetings, and presence management to align frontline and office workers and optimize workflows.



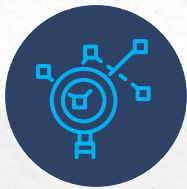
5G, broadband, and edge computing

Increasingly ubiquitous connectivity, including in traditionally underserved geographies and rural areas, enables access to real-time applications for mobile frontline workers. The high-bandwidth and low-latency promises of 5G and edge computing directly enhance the communication, coordination, and collaboration capabilities of frontline workers.



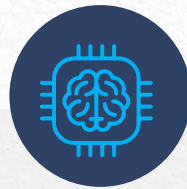
Technology Advancements Power Highly Collaborative Workplace Environments

Technology advancements are empowering organizations to better align and integrate different stakeholders and empower underserved frontline workers.



APIs and programmability

Communications application programming interfaces (APIs) are the engines for workflow automation and workforce innovation. From simple SMS notifications about shift changes or task assignments to more urgent on-demand collaboration during disruptive events, programmable communications embed communications into frontliners' daily work.



AI, ML, and NLP

Hands-free access to data and communications infused with powerful analytics, artificial intelligence (AI), machine learning (ML), and natural language processing (NLP) expand opportunities to surface relevant information at the right time, thereby enhancing frontline worker performance, safety, and job satisfaction.



Wearables, AR/VR

The next generation of tailored tools for frontline workers will be hands-free and wearable. Augmented reality (AR)/virtual reality (VR)-supported wearables featuring heads-up displays and see-what-I-see video capabilities will drive use cases, including fast inventory lookups and improved collaboration with other stakeholders within the organization.



Tailoring Communications Solutions for Frontline Workers

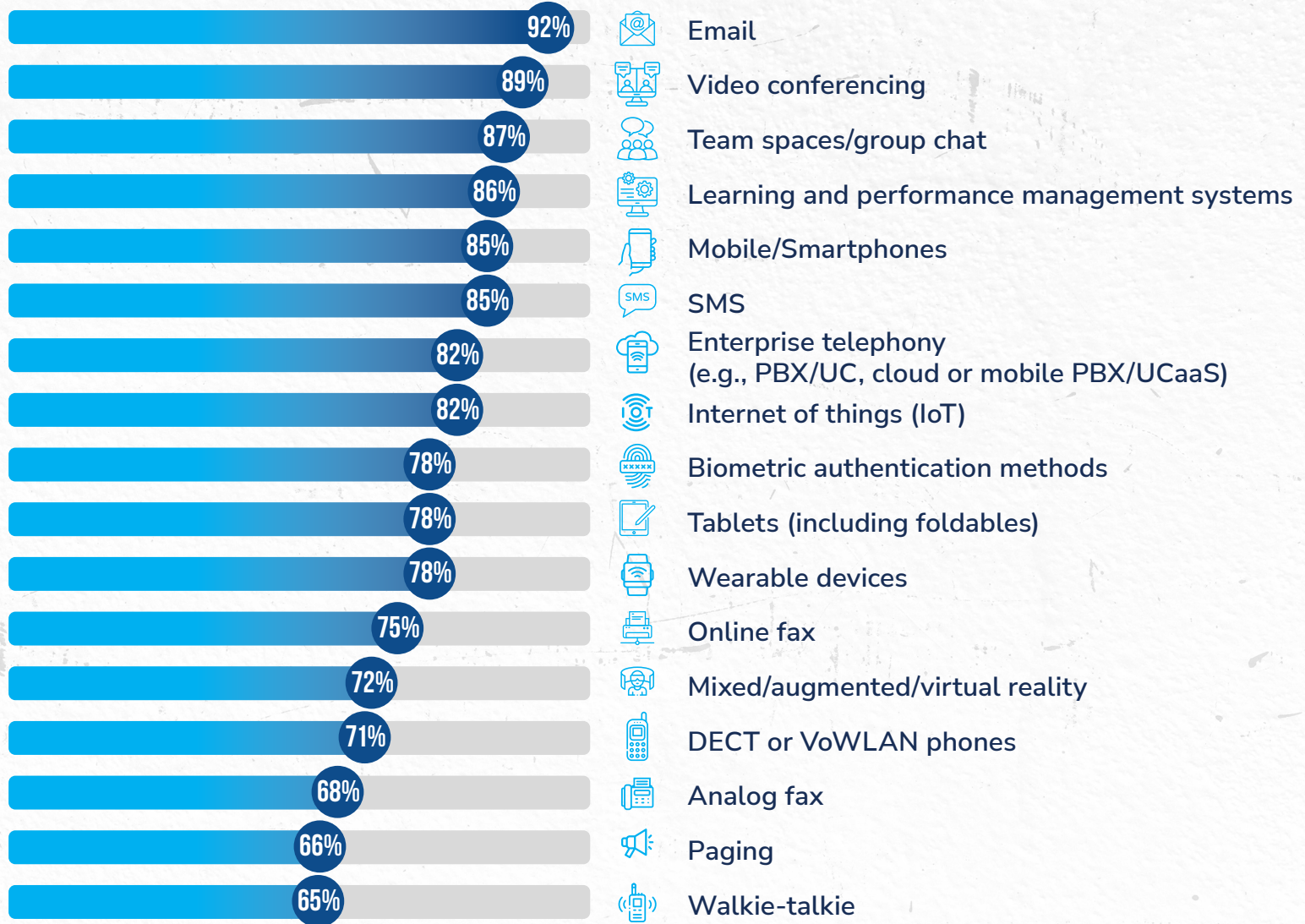
Advanced meeting and messaging solutions improve both internal collaboration and frontline worker interactions with external parties. Mobile/smartphones, SMS, enterprise telephony, tablets, and wearable devices enable collaboration on the go. Properly equipping frontline workers may also require unique devices and services, such as the following.

- ▶ **Devices and solutions for campus or field mobility:** DECT and/or VoWLAN phones, push-to-talk services, walkie-talkies, overhead paging, ruggedized and/or wearable devices
- ▶ **AI-enabled solutions:** Data reporting analytics, intelligent voice assistants, and/or tailored hands-free/voice-controlled applications
- ▶ **AR/VR-enabled tools:** Smart glasses, headsets
- ▶ **API/communications platform as a service (CPaaS):** API-enabled notifications and alerts and vertical-specific integrations and deployments
- ▶ **Industry compliance:** Health Insurance Portability and Accountability Act (HIPAA), General Data Protection Regulation (GDPR), Occupational Safety and Health Administration (OSHA), Payment Card Industry (PCI), USA PATRIOT Act, Sarbanes-Oxley, Basel II



Organizations are equipping their frontline workforce with diverse collaboration capabilities.

Technologies Organizations Provide to Frontline Workers Today or Plan to Provide by 2025



Total n=1,004

Q15. Which of the following technologies do you provide to the frontline workers in your organization today or plan to provide by 2025?

Source: Frost & Sullivan



Overcoming Barriers to Frontline Worker Empowerment

Organizations face multiple challenges when investing in digital tools to improve frontline worker productivity, collaboration, and information exchange with other employees and departments.

The cost of rolling out technologies to the broader workforce tops the list of investment barriers, which explains why frontline workers have remained underserved over the years. **Technology advancements and solution provider business model evolution are creating opportunities to improve the return on communications investments aimed at empowering frontline workers.** Innovative solutions, such as push-to-talk services and rich unified communications, clients leverage the already pervasive adoption of smartphones and mobile devices to make frontline worker empowerment more attainable.

Lack of skills internally to effectively implement and integrate technologies and limited availability of appropriate tools suggest the importance of finding a communications solution provider to not only deliver the right functionalities but also assist the organization on its communications transformation journey.

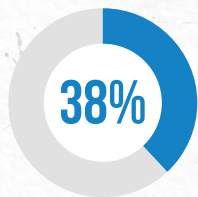
- BUSINESS
- NETWORKING
- SOCIAL NETWORK
- TECHNOLOGY
- MEDIA
- CREATIVE
- FINANCE
- INVESTMENT
- CULTURE
- ECONOMY

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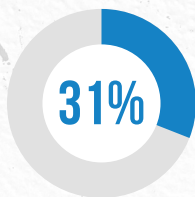



To reduce the barriers to frontline worker empowerment, organizations must align frontline worker digitization projects with broader digital transformation programs.

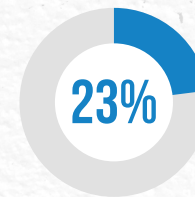
Factors Preventing Organizations from Meeting or Exceeding Frontline Worker Empowerment Goals



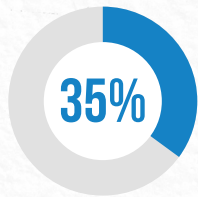
Cost of rolling out digital technologies to broader employee base



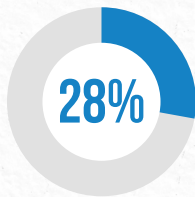
Lack of effective change management and adoption processes



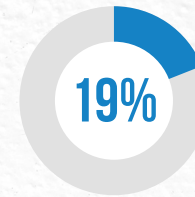
Lack of standards and interoperability



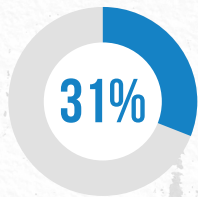
Lack of skills internally to effectively leverage technologies



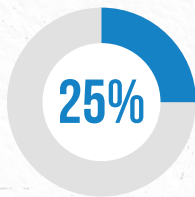
Available tools are too complex for frontline workers



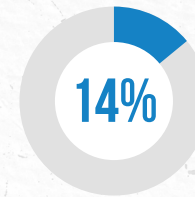
This is currently not a business priority for us



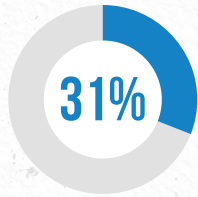
Limited availability of appropriate tools (e.g., ruggedized devices, tailored applications)



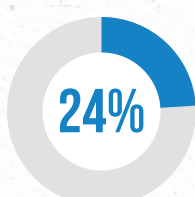
Lack of support from middle managers



Don't see clear ROI of such investment



Lack of adequate IT infrastructure (e.g., limited WiFi or cellular coverage)



Lack of commitment at the top

Total n=1,004
Q18. What factors are preventing you from meeting or exceeding frontline worker empowerment goals?

Source: Frost & Sullivan



The Right Frontline Communications Solution and Provider Accelerate ROI

To avoid creating technology silos and boost return on technology investments, forward-looking business leaders are addressing frontline worker empowerment as part of holistic communications transformation projects. Frontliner-centric solutions, such as push-to-talk, deliver better outcomes when they are integrated with broader cloud communications and collaboration suites.

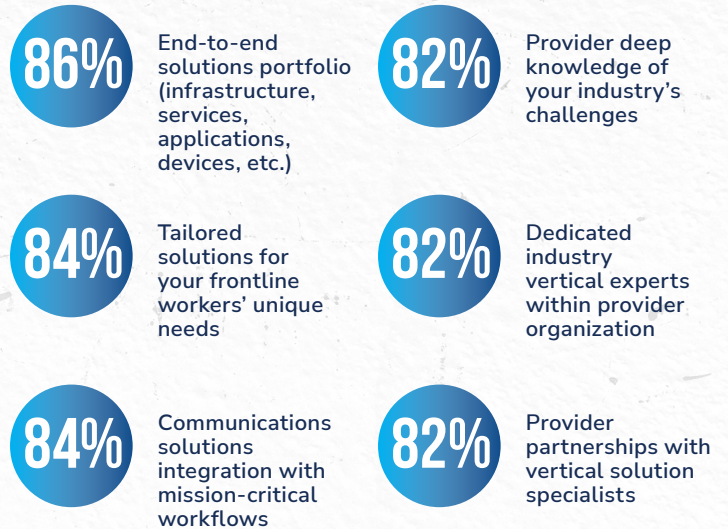
Modern UCaaS solutions provide the entire workforce, including desk-based and frontline workers, with a myriad of benefits, such as the following:

- ▶ Rich set of integrated business calling, messaging, and video meeting services
- ▶ Reduced upfront costs and affordable, predictable monthly charges
- ▶ Flexible capacity adjustments
- ▶ Rapid access to new features and capabilities
- ▶ Access to cloud services on any mobile or landline device of the user's choice
- ▶ Centralized management with AI-powered user and IT administrator capabilities

Adopting UCaaS is an important stepping stone to digitizing the broader workforce. It must be optimized by choosing tailored solutions for different workforce demographics.

Organizations must carefully select their communications transformation partner, taking multiple factors into consideration.

Important, Very Important, and Crucial Provider Capabilities when Selecting Communications Solutions to Support Frontline Workers



Total n=1,004
Q17. When you invest in communications and collaboration solutions to support your frontline workers, how important are the following?

Source: Frost & Sullivan



SOLUTION SPOTLIGHT

RingCentral Frontline Worker Solutions

Innovative technology developers are launching solutions that can considerably improve frontline productivity and integrate worker silos across the organization. RingCentral's next-generation Frontline Worker Solutions leverage Android, iOS, and multimodal devices to enable effective one-to-one and one-to-many communications for mobile workers in need of instant communication. They effectively transform mobile devices into walkie-talkie devices that enable push-to-talk capabilities, mobile AI-enhanced video calling, team messaging, and file sharing.

RingCentral's highly innovative solution addresses multiple frontline worker challenges, as follows:



Enables hands-free communications, which boosts productivity and improves worker safety.



Eliminates the need for frontline workers to carry multiple devices, which improves user experiences and costs the organization less.



Frees frontline communications from frequency static, crosstalk, or eavesdropping, which are characteristic of analog devices.



Leverages Wi-Fi or cellular data for reliable, secure communications over available networks.



Optimizes costs by consolidating calling, SMS, video camera-sharing, and group messaging in one subscription.



Enables users to elevate a voice call to AI-powered video collaboration, leveraging see-what-I-see technology for remote expert support, quality control, documentation, and more.



Provides AI-powered live transcriptions to enhance worker productivity and AI noise reduction to improve audio quality.



Tightly integrates with RingEX from RingCentral to enable internal collaboration and effective communications between employees and various external parties.



How RingCentral Can Empower Your Frontline Teams

RingCentral Frontline Worker Solutions provide value in a variety of industry use cases. They can be used to empower frontline workers in the healthcare, retail, manufacturing, and field services industries. In addition to increased productivity, the solutions improve worker safety while creating opportunities to enhance product and services quality and boost customer satisfaction.

 HEALTHCARE	 RETAIL	 HOSPITALITY	 EDUCATION
<ul style="list-style-type: none"> ▶ Reduce patient wait times through faster communications ▶ Improve care planning and caregiver coordination ▶ Enhance patient and staff safety through real-time emergency notifications 	<ul style="list-style-type: none"> ▶ Improve access to information ▶ Accelerate task assignments, inventory management, order fulfillment ▶ Keep staff in sync by broadcasting important announcements 	<ul style="list-style-type: none"> ▶ Improve customer service by keeping staff in sync ▶ Reduce costs by improving inter-departmental communication ▶ Enhance staff and guest safety through dynamic crisis management 	<ul style="list-style-type: none"> ▶ Improve student and staff safety by rapidly coordinating emergency responses ▶ Enhance supervision during field trips ▶ Coordinate administrative tasks, relay announcements, or request assistance on campus
 MANUFACTURING	 FIRST RESPONDERS	 EVENT MANAGEMENT	 FLEET MANAGEMENT
<ul style="list-style-type: none"> ▶ Reduce downtime through real-time updates ▶ Accelerate task and staff assignments ▶ Improve staff safety by sharing relevant information 	<ul style="list-style-type: none"> ▶ Improve service delivery time and quality of care ▶ Improve user experiences by enabling hands-free communications ▶ Enhance staff safety through timely alerts and notifications 	<ul style="list-style-type: none"> ▶ Improve staff coordination on site ▶ Enhance staff safety through effective communication ▶ Improve quality of services delivered through better staff coordination 	<ul style="list-style-type: none"> ▶ Improve operational efficiencies through improved staff coordination ▶ Enhance staff safety by enabling hands-free communications



CALL TO ACTION

Power Competitive Advantages with Next-generation Push-to-talk Capabilities

Frontline workers are fundamental to every organization's success. However, most frontline workers struggle to make do with communications tools designed for desk-based workers. It is imperative to equip frontline workers with appropriate digital tools.

Modern cloud communications and collaboration solutions boost productivity for frontline and desk workers alike. Advancements in cloud communications, mobile services, AI, and wearables are creating opportunities for organizations to empower their workforces to more easily access information, make faster decisions, and collaborate more effectively to boost organizational agility.

Purpose-built solutions, such as mobile push-to-talk services, can provide unique safety and productivity benefits to frontline workers in various industries, including healthcare, public safety, hospitality, retail, and manufacturing. By enabling instant, hands-free, one-to-one or one-to-many communications on users' mobile devices that are integrated with a company-wide UCaaS solution, push-to-talk services can greatly accelerate frontliner workflows as well as significantly improve the customer journey.

Organizations considering push-to-talk services are encouraged to evaluate RingCentral Frontline Worker Solutions, which integrate with RingCentral's proven RingEX solution to deliver powerful benefits to today's workforces.



Visit www.ringcentral.com/pushtotalk

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