



AS THE WORKPLACE CHANGES, DON'T LEAVE FRONTLINE WORKERS BEHIND

Leverage Technology to Boost Security, Productivity, and Performance

FROST & SULLIVAN VISUAL WHITEPAPER

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Frontline Workers in the Spotlight

For decades, companies have focused their enterprise-communications attention on information workers, rolling out increasingly sophisticated tools that make collaboration among the office set easier, smarter, and more intuitive. In the process, most companies have left their frontline workers behind. These essential workers are often given second-rate technology (if they're given any at all) that fails to address their needs and which doesn't properly integrate into the organization's broader communications fabric. As a result, office and frontline workers within the same organization frequently operate in silos. Limited communication and coordination prevent speedy and effective decision making and adversely impact workflows and business performance.

This needs to change.

Driving value in industries with a large number of frontline workers (including manufacturing, retail, healthcare and financial services) requires deploying new technology to the people actually doing the work.

That means identifying the specific constraints and demands that frontline workers face, and then giving them tools that will drive innovation and productivity, safely and securely.

Frontline workers are employees within an organization who must be physically present at a business or customer location to perform their job duties.

They share certain common characteristics:

Often perform essential job functions

Directly interact with customers, clients or the general public

Usually shift-based

Typically do not have dedicated desks

Sit at the end of a given production chain or customer journey

Require tailored IT and communications tools—ruggedized, hands-free, mobile devices and integration with vertical-specific systems, services, and purpose-built devices

Are indoor or outdoor mobile (campus roamers, field force, retail, manufacturing-floor)

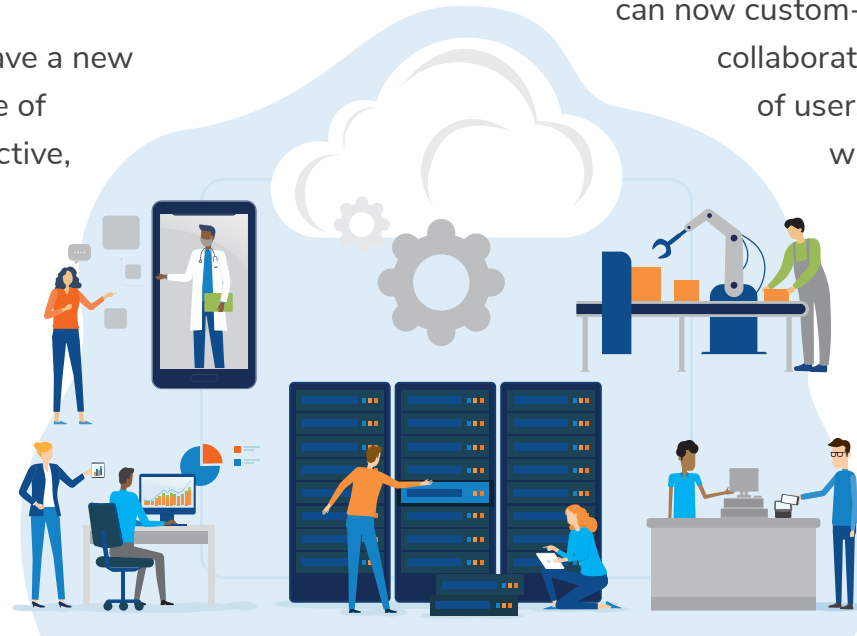
Work in environments that can present physical challenges



Collaboration Must Extend Throughout the Entire Organization

You know how vital collaboration is among information workers, management, and the executive suite. But to ensure an excellent end-to-end customer journey, it is imperative that businesses facilitate and actively enable secure, effective communication among siloed work groups, including office workers, contact center agents, and frontline workers.

Today, many business leaders have a new understanding of the importance of keeping frontline workers productive, safe, and well connected to the rest of the workforce. Frost & Sullivan data show that empowering frontline workers with the right technology tools will be a top priority and a key part of business transformation programs among forward-thinking



organizations around the world for the next several years.

Technology advancements—including the rise of cloud meeting, messaging, and calling services, APIs, and programmability—are enabling organizations and their technology partners to more effectively empower both office and frontline workers. More specifically, businesses can now custom-tailor communications and collaboration solutions for different types of users and integrate software tools with mission-critical workflows to automate business processes, streamline decision making, improve workforce management (WFM), and increase both employee and customer satisfaction. And they can do so with all the necessary security and compliance protocols in place.

A highly collaborative workplace environment lets organizations optimize business processes and better leverage diverse worker skillsets and expertise to increase the quality of product and services, improve safety, enhance customer service and support, and boost competitive power.

Do Your Frontline Workers Have the Right Tools for Today's Workplace?

According to the Frost & Sullivan research, nearly one-third of surveyed organizations do not consider their frontline workers fully empowered and digitally well-equipped.

These workers have a wealth of devices, from pagers and two-way radios to ruggedized tablets and purpose-built handhelds. But secure, mobile-ready solutions that introduce teaming and collaboration will change how they do their jobs—for the better. **Clearly, these companies need to make additional investments in digital technologies.**

A combination of legacy and next-generation tools, tailored for specific verticals, can provide the greatest value to different frontline workers. Because while these employees may require unique devices and services, they—and their employers—can benefit significantly from the communications and collaboration tools typically used by office workers.



The Right Tools for Today's Workplace

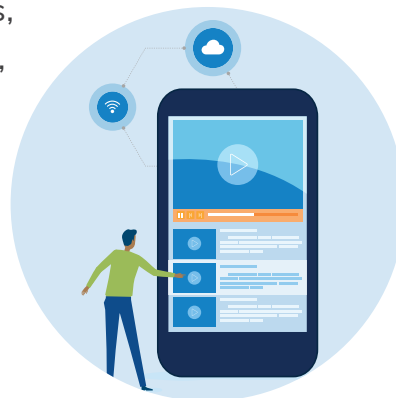
Cloud Services

Over the years, cloud services have proved their value in enabling business agility and operational continuity—capabilities that became even more critical during the pandemic. Software-based communications and collaboration solutions that are accessible on demand from any device are the best option for service workers, teachers, healthcare staff, and other essential employees.



Mobile-ready Solutions

The increasing availability of mobile-ready communications and collaboration solutions creates opportunities to empower frontline workers. By providing business-class communications and collaboration capabilities on mobile devices, modern cloud-based meetings, messaging, and calling solutions greatly enhance mobile worker productivity, align frontline and office workers, and optimize customer workflows. And if you add WFM into the mix, you get a better, more accurate way to make sure you're staffed appropriately in every situation.



Vertical Integrations

Integrating industry-specific business applications with communications and collaboration tools can boost productivity. To do so, businesses must leverage pre-built integrations and use flexible application programming interfaces (APIs) to enable custom integration of communications solutions with third-party software, services, and devices. Communications-enabled software (think inventory and property management systems, shift scheduling, safety alerts, etc.), IoT devices, and equipment can help improve safety, increase efficiencies, reduce costs, and improve product quality in manufacturing, retail, healthcare, and financial services. Also important: Integrated solutions create opportunities to leverage data analytics on a much greater scale.



The Data Are Clear: Companies Must Do More to Empower Frontline Teams

When asked about the performance of frontline workers, **the ability to work collaboratively with teammates is considered crucial or very important by 74% of business leaders**, as is remote access to applications and/or data that they need for work and the ability to interact with customers effectively.

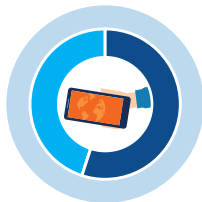


88% of organizations employ frontline workers. As a unique workforce demographic, frontline workers have an important impact on company communications and collaboration needs.



In 45% of companies, email is the most commonly used tool among frontline workers, followed by phone and video calls. Only 30% use group chat, and just 22% routinely use team collaboration tools.

55% already give frontline workers access to communications and collaboration tools—but another 37% expect to do so in the coming year.



Security and protection is also a top priority.

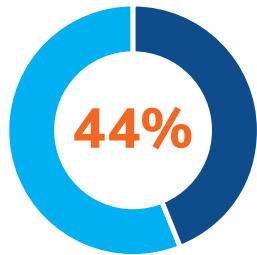


The **high costs** of digital technologies and inefficiencies related to change management and adoption processes **prevent almost one-third of organizations from meeting or exceeding their frontline worker goals and objectives.** They want simple solutions that are easy to learn and use.

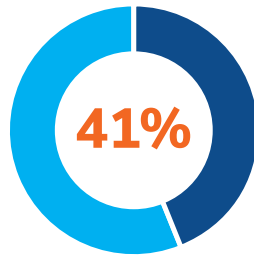
Almost one-third of organizations do not consider their frontline workers fully empowered and digitally well-equipped.



Spotlight on Change



of companies cite “insufficient security and governance practices as more data and decision making are pushed to frontliners” as the reason they hesitate to deploy the tools to these employees.



worry that frontline employees lack the necessary skills to make appropriate use of technology-enabled insights, and more than one third say that frontliners are either not qualified or not interested in making more decisions.

We believe companies are undervaluing their frontline workers. With the right training and experience, these employees are just as capable as anyone—and they are better positioned than most to address immediate customer needs, since they interact with customers more than any other workers. In fact, we recommend that companies leverage the vast knowledge base frontline workers possess to make better decisions, faster, on the frontlines of their operations.



Disrupting Manufacturing

Industry Challenges

- ▶ value-chain (supply/ distribution) compression
- ▶ cyber security
- ▶ raw materials and components prices and shortages
- ▶ customer and worker safety
- ▶ disconnects between frontline and enterprise workers
- ▶ weak automation of the field workforce
- ▶ productivity, efficiency highly correlated with communication and information access and velocity
- ▶ need for robust data analytics at the point of service/field maintenance

Industry Trends

- ▶ smart factory using IoT and AI
- ▶ business process/workflow automation and digitization
- ▶ digital platforms enable scalable, agile supply chains
- ▶ product personalization
- ▶ demand-driven production
- ▶ first-time-right field service
- ▶ 360-degree customer analytics
- ▶ products as a service

Important Workflows

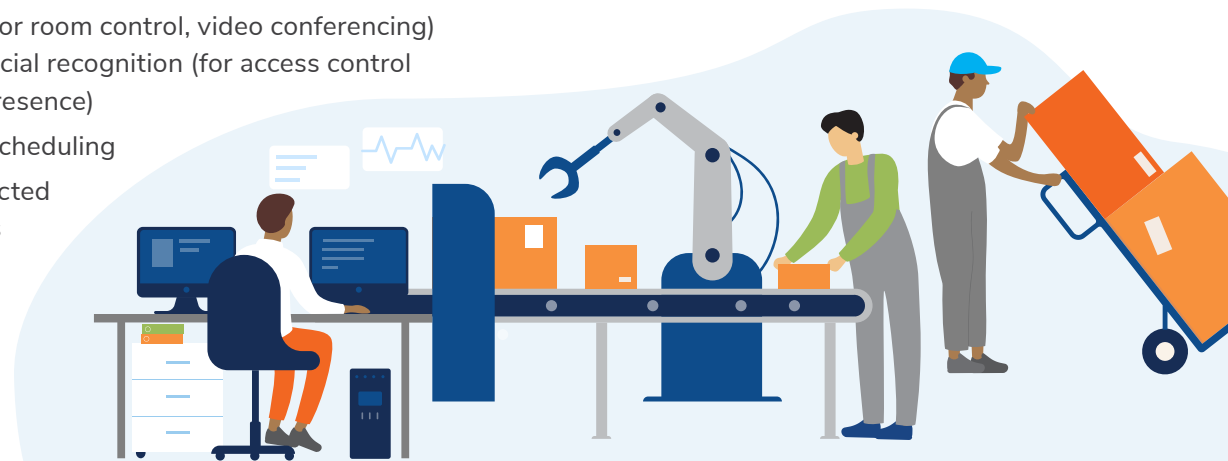
- ▶ materials and components procurement
- ▶ R&D
- ▶ engineering
- ▶ manufacturing
- ▶ equipment maintenance and repair
- ▶ manufacturing and supply-chain integration
- ▶ shift scheduling, resource planning and workforce management
- ▶ workforce safety

UCC and Customer Engagement Use Cases

- ▶ on-site communications
- ▶ inbound and outbound customer and supplier/distributor engagement
- ▶ sanitization protocols leveraging IoT devices
- ▶ emergency notifications
- ▶ mass broadcasts
- ▶ contactless control via voice commands (e.g., for room control, video conferencing) and facial recognition (for access control and presence)
- ▶ shift scheduling
- ▶ connected assets

Communications Technology Requirements

- ▶ safety alerts and other notifications: overhead paging, push-to-talk, dispatch, mobile apps
- ▶ ruggedized wearable/hands-free devices (e.g., headsets, DECT)
- ▶ video meetings and screen share
- ▶ team collaboration
- ▶ API/CPaaS integration with IoT devices, shift-scheduling, inventory, design, field-service, SAP and vertical apps
- ▶ AI-enabled data analytics and reporting: asset uptime, work orders, throughput/ yield, workforce availability
- ▶ digital operations, computer-aided design (CAD) and project management and logistics platform integration
- ▶ CPaaS-enabled notifications and alerts (e.g., repairs, maintenance)



Disrupting Retail

Industry Challenges

- ▶ online shopping threatening brick-and-mortar businesses
- ▶ large chains displacing small retailers
- ▶ worker and customer safety concerns
- ▶ difficult to hire, retain talent
- ▶ supply-chain disruptions
- ▶ inconsistencies across locations and management teams
- ▶ fractured digital and onsite customer experiences
- ▶ sub-optimal in-store communication

Industry Trends

- ▶ shift to ecommerce
- ▶ enabling physical stores with digital experiences
- ▶ curbside pickup and localized delivery options
- ▶ virtualized physical shop floors
- ▶ IoT leverage to enhance customer experiences, optimize business processes, improve safety
- ▶ personalized in-store and digital customer experiences
- ▶ gamification

Important Workflows

- ▶ supply-chain/inventory management
- ▶ order management
- ▶ product shelving and display arrangement
- ▶ in-store customer assistance and checkout
- ▶ online sales
- ▶ shift scheduling, resource planning, and workforce management
- ▶ loss prevention
- ▶ marketing

UCC and Customer Engagement Use Cases

- ▶ on-site communications
- ▶ third-party communications
- ▶ sanitization protocols leveraging IoT devices
- ▶ emergency notifications
- ▶ mass broadcasts
- ▶ contactless control via voice commands (e.g., for room control, video conferencing) and facial recognition (for access control and presence)
- ▶ shift scheduling, resource planning, and workforce management
- ▶ digital customer experience

Communications Technology Requirements

- ▶ mobility: DECT, paging, mobile apps, tablets, smartphones, push-to-talk, walkie talkies, two-way radios, wearables, global positioning system (GPS), cellular technologies
- ▶ API-enabled integrations with shift scheduling apps, inventory management, workforce engagement solutions
- ▶ IoT devices: motion sensors, LCD screens, smart cameras, RFID tags, beacons, animated content, WiFi chip, flash read-only memory, microcontroller
- ▶ digital displays
- ▶ headsets
- ▶ video kiosks
- ▶ AI-enabled reporting and data analytics
- ▶ API/CPaaS-enabled digital customer journey



Disrupting Healthcare

Industry Challenges

- ▶ staff and equipment shortages
- ▶ inefficient sharing of medical knowledge
- ▶ need for greater focus on prevention versus treatment
- ▶ supply-chain disruptions
- ▶ staff health and safety concerns
- ▶ increased need for effective remote patient monitoring and treatment
- ▶ need for “digital front door strategy”
- ▶ effective collaboration and workflow orchestration

Industry Trends

- ▶ mainstream adoption of telehealth and hybrid (in-person and remote) patient care
- ▶ need to exchange health information across expanding range of venues of care
- ▶ limited interoperability among pure-play solution vendors
- ▶ AI: more use cases & more ethical challenges
- ▶ adoption of more patient-facing technologies for engagement, screening, education, etc.
- ▶ focus on “patient” as the north star in building software solutions
- ▶ reimbursement and regulatory adjustments to enable accelerated adoption of virtual visits and remote patient monitoring
- ▶ budgets diverted towards digital infrastructure upgrades

Important Workflows

- ▶ triage and admission
- ▶ clinical documentation
- ▶ inbound and outbound patient communications
- ▶ remote consultations, patient monitoring, and assistance
- ▶ on-site patient care and assistance
- ▶ coordination among stakeholders within the ecosystem (e.g., provider, employer, payer, regulators)
- ▶ shift scheduling, resource planning and workforce management
- ▶ billing and claims management

UCC and Customer Engagement Use Cases

- ▶ clinician-clinician consultation and care coordination
- ▶ inbound and outbound patient and third-party communications
- ▶ telehealth use cases: remote patient-doctor consultations, remote patient monitoring and treatment, remote-assisted surgery, etc.
- ▶ sanitization protocols leveraging IoT devices
- ▶ emergency notifications
- ▶ mass broadcasts
- ▶ multimodal patient engagement
- ▶ remote staff training and new protocol rollouts

Communications Technology Requirements

- ▶ HIPAA compliance
- ▶ Mobility: DECT phones, mobile apps, voice-activated badges, two-way radios, walkie talkie, paging, ruggedized devices, video meetings
- ▶ dispatch services
- ▶ integration with electronic health records and other healthcare systems and devices
- ▶ intelligent routing and workforce optimization tools
- ▶ AI-enabled transcription, translation, conversational intelligence and analytics
- ▶ CPaaS-enabled patient/member portal, notifications, and alerts
- ▶ multimodal patient engagement solutions



Disrupting Financial Services

Industry Challenges

- ▶ increasing competition affecting customer retention
- ▶ rising cost of capital combined with low interest rates
- ▶ shift to digital and mobile banking among some customers
- ▶ managing increasing amounts of digital data
- ▶ security and compliance
- ▶ need for personalized customer experiences
- ▶ worker safety (e.g., COVID-19, crime)
- ▶ antiquated applications, legacy IT, and communication systems

Industry Trends

- ▶ Fintech
- ▶ Blockchain
- ▶ improving CX while reducing costs
- ▶ proactive versus reactive, highly personalized approach based on data analytics
- ▶ enhanced focus on cyber security
- ▶ business process automation
- ▶ digital platforms and omni-channel single customer view
- ▶ regulation driving digitization (regulated exchanges for digital securities)

Important Workflows

- ▶ client onboarding
- ▶ depositing and withdrawal
- ▶ financial advisory services
- ▶ risk management
- ▶ policy acquisition and servicing
- ▶ claims processing and benefit disbursements
- ▶ customer support and complaint management
- ▶ regulatory reporting

UCC and Customer Engagement Use Cases

- ▶ on-site communications
- ▶ remote-worker collaboration
- ▶ onsite and digital customer services automation
- ▶ mobile banking
- ▶ inbound/outbound third-party communications
- ▶ emergency notifications
- ▶ mass broadcasts
- ▶ compliance (call recording, archiving)

Communications Technology Requirements

- ▶ video meetings with content sharing, audio fallback, multimedia recording, audio transcription with storage and retrieval
- ▶ webinars and virtual events
- ▶ threaded conversations, group and topic-based channels, archiving
- ▶ multi-party, rich messaging, media sharing, and files linked to chat and private messages
- ▶ call recording, archiving and search
- ▶ secure voicemail and unified messaging
- ▶ API-enabled integrations with customer data, financial systems, self-service, transcription, translation, and analytics
- ▶ API/CPaaS-enabled customer portal

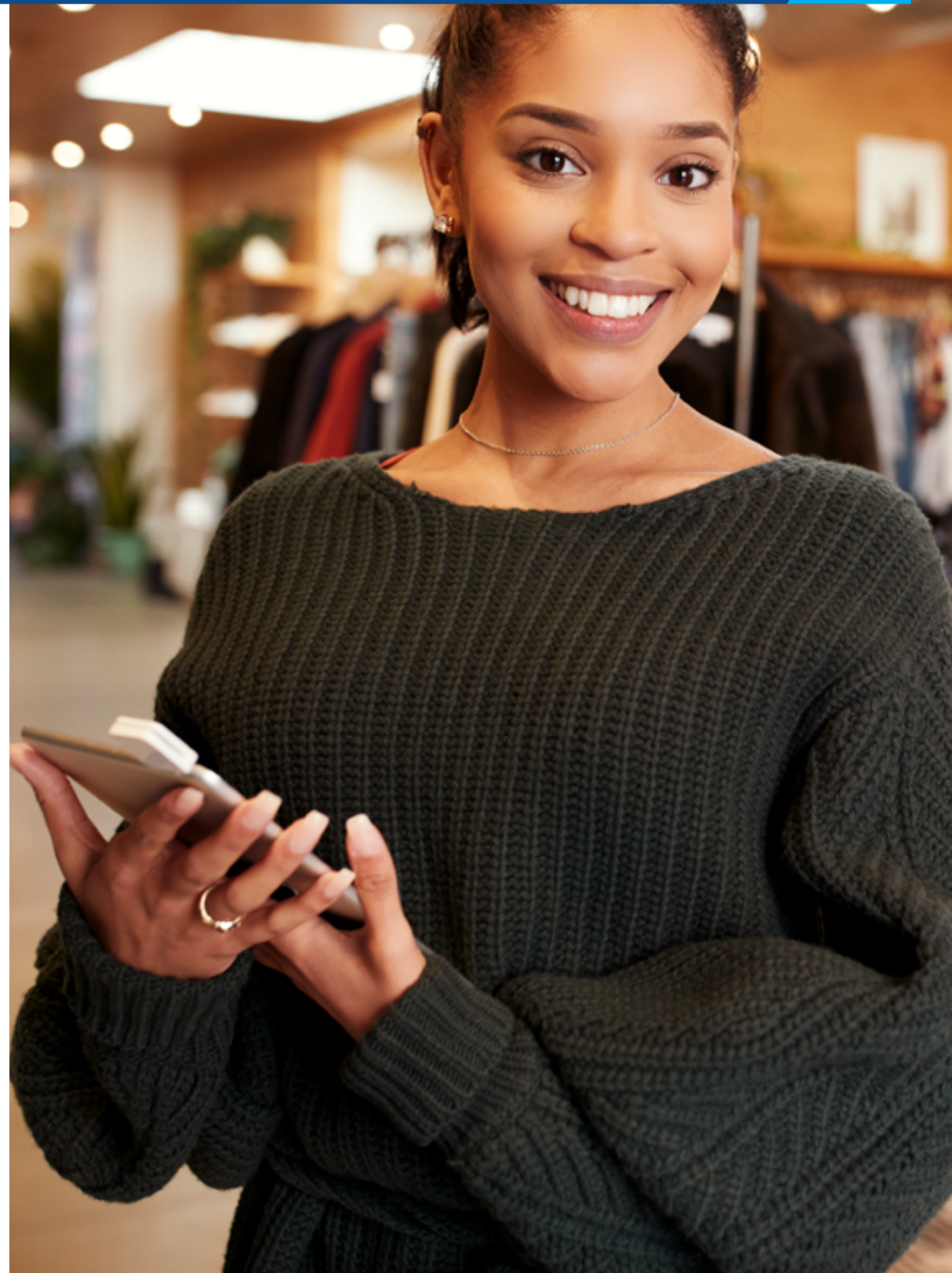


Microsoft Leads the Way

Few technology developers and service providers have launched robust solutions or strategies for frontline workers. Microsoft stands out with its well-articulated vision and tailored packages for frontline workers in different industries.

Microsoft Teams' messaging-first approach is well suited for frontline workers who often prefer asynchronous communications due to the nature of their jobs.

Microsoft has incorporated several features within Teams to directly address frontline workers. Through the Microsoft Teams desktop or mobile apps, those on the frontlines can connect with the rest of the organization via chat, voice or video, access their work schedules, clock-in for shifts, and complete tasked assignments. Cognizant of the fact that many workers will access business tools such as Microsoft Teams from personal devices, the company includes provisions to prevent non-exempt workers from accessing the tools outside of their scheduled work hours.










Frost & Sullivan Recommends

To prepare for a new, post-pandemic reality, businesses must give all employees access to communications, collaboration, and other software and services from anywhere, anytime, and on any device. Frontline worker technology requirements need to be front and center as businesses design the digital workplace of the future. Almost every organization relies on its frontline workers to achieve its goals, but exactly how they do so differs according to the industry.

- ▶ **Start by looking for a vendor that takes an industry approach to helping companies truly empower their people**, ensuring frontline workers can act fast and make better decisions for all. Look for a full suite of communication and collaboration tools that also includes WFM capabilities.
- ▶ **Second, choose a provider that fully embraces partnerships** with industry-leading independent software vendors and system integrators to ensure you'll get the solutions you need to address your specific business challenges.
- ▶ **Finally, confirm that your chosen provider demonstrates a deep commitment to security and compliance**. All solutions should incorporate industry-recognized standards across the deployment.

How to spot a vendor with industry expertise:

-  Key vertical expertise on staff and dedicated vertical teams
-  Deep understanding of important workflows and industry-specific challenge
-  Ability to offer turnkey integrations with popular vertical software and customization via flexible APIs
-  Tailored solution packages for different worker personas: frontline worker, campus roamer, road warrior, etc
-  Effective technology and reseller partnerships that focus on specific verticals
-  Ability to elevate sales conversations to address transformation and align all customer stakeholders
-  Robust security, reliability, QoS, management, governance, and compliance with regulatory requirements.



Growth is a journey. We are your guide.

For over six decades, Frost & Sullivan has provided actionable insights to corporations, governments and investors, resulting in a stream of innovative growth opportunities that allow them to maximize their economic potential, navigate emerging Mega Trends and shape a future based on sustainable growth.

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