

# Communication & collaboration in the new normal



# Contents

Executive summary	3
Who completed the survey	6
Key findings	9
Results	26
The evolution of the public sector workplace	28
Covid-19, cloud adoption and customer services	31
Dealing with data sovereignty	35
A modern education in shadow IT	38
The impact on staff wellbeing	42
Conclusion	44

1 2 3 4 5 6 7 8 9 10

# Executive summary



# Executive summary

Communication & collaboration in the new normal is a 2020 public sector survey created from a partnership between RingCentral and GovNewsDirect. The survey engages 724 participants from 587 organisations, with Central Government, Local Government and the NHS representing over half of the responses (63%).

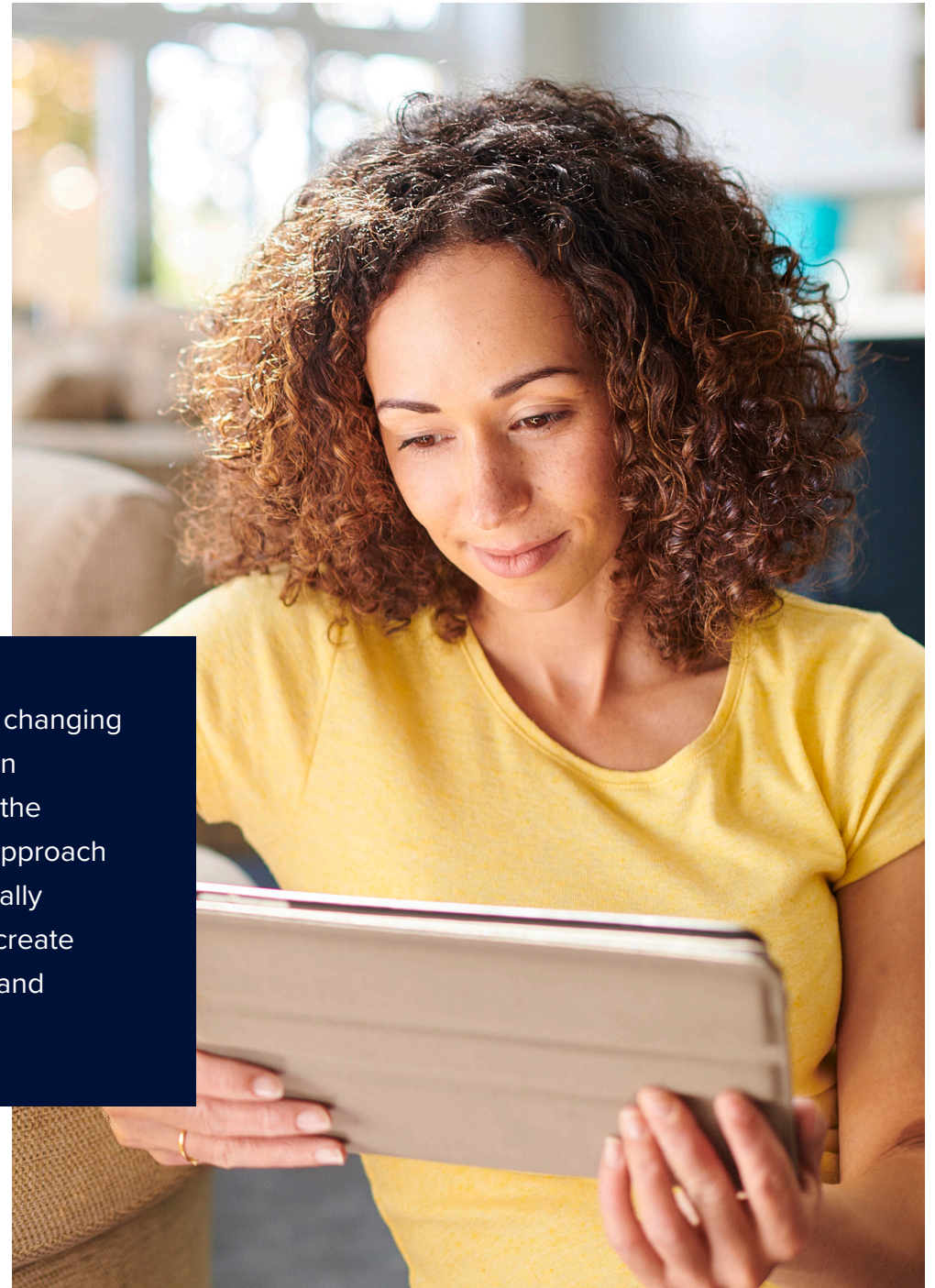
The survey explores how COVID-19 has impacted remote working, communication and the use of technology in government and the public sector. It also identifies how the public sector is evolving to meet the changing needs of staff and service delivery as it supports 'the new normal' in working practices.

COVID-19 has brought upheaval and disruption at many levels, but it has also acted as a catalyst to enabling flexible and remote working. It has brought great opportunity and new appreciations for digital technology to enable better communication across teams.

According to research by the Office of National Statistics (ONS), only 30% of UK employees worked from home during 2019. Now, as a national health necessity, government is encouraging remote working to reduce the risk of transmission and have made it clear that staff should work from home wherever possible. Guidelines and remote working toolkits have been rolled out, establishing the safe and secure use of technology and data, as well as advice on wellbeing and staying connected.

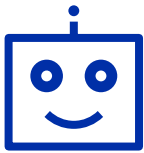
As remote working increases and cloud applications grow in popularity, the survey aims to gauge government's use of cloud technology to support new working practices. It also seeks to offer a valuable opportunity to benchmark and capture insights as to how government and public sector teams are currently operating and how they can pursue technological innovations to be fit for the future.

Against an uncertain and changing backdrop, leaders have an opportunity to reimagine the physical workplace and approach this “new normal” holistically to support communities, create organisational resilience and improve service delivery.



# Executive summary

Our analysis of the survey data identifies the following key findings:



87% of respondents say COVID-19 has triggered a new focus on improving customer experience



98% of respondents say COVID-19 has made a huge impact on their working practices



Almost half of all respondents (45%) do not know their company policy on data storage



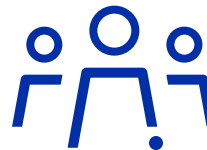
55% of respondents say that budget pressures are a top inhibitor to moving services to the cloud



A majority of respondents (59%) say they use 'non-work' technology to communicate with colleagues



54% of respondents say that improving business continuity plans is a main motivation for moving to the cloud



82% say staff wellbeing and mental health is a key focus and a top priority



81% say that integrating voice into other business apps is preferred

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# Who completed the survey

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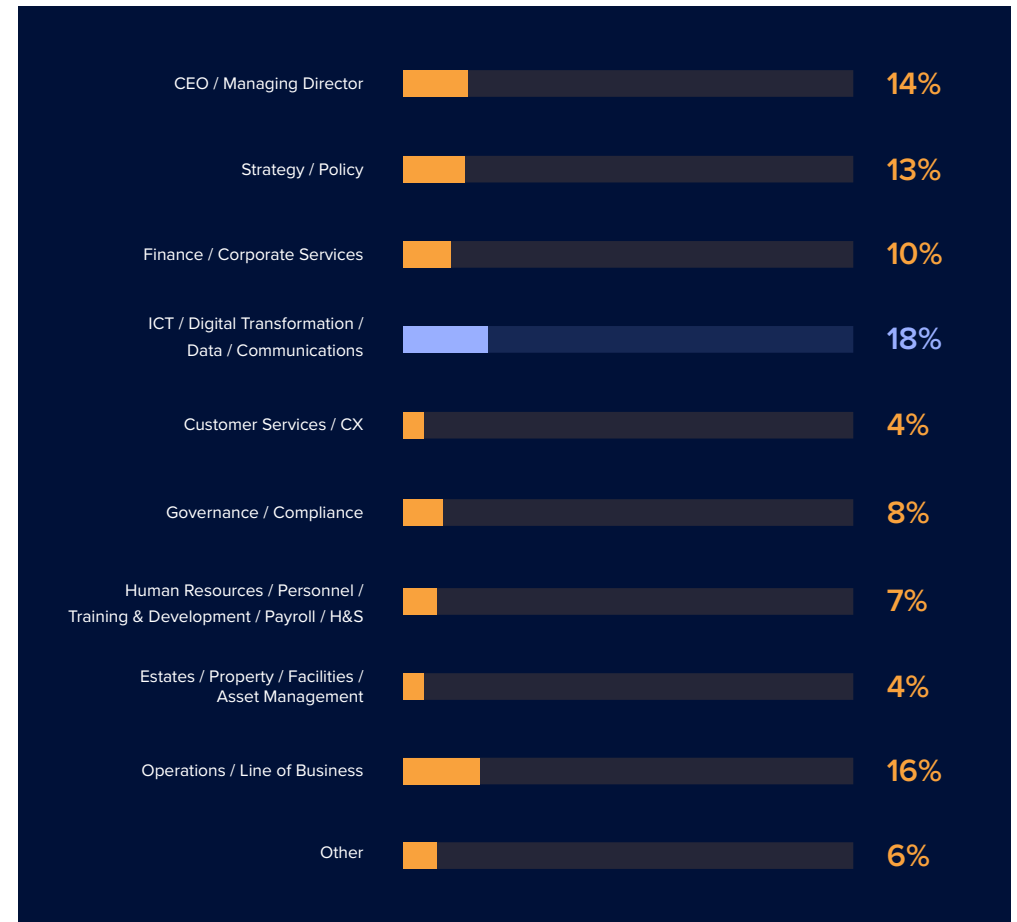
## Seniority



## How many employees work within the organisation?



## Principal Role / Responsibility





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# Key findings

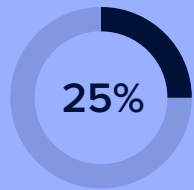
# Key findings

How has COVID-19 impacted the following in your organisation:

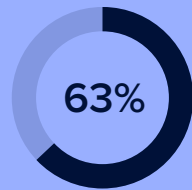
	New Strategy Required	Significant Change	Some Change	Stayed the Same	Don't Know
Digital Transformation Strategy	12%	50%	26%	7%	5%
Internal Communications (Staff)	6%	54%	32%	7%	1%
Customer Engagement & Communications	13%	55%	27%	4%	1%
Working Practices (Remote Working & Mobility)	25%	63%	9%	2%	0%
Office & Estates Management	14%	46%	27%	6%	7%
Stakeholder, Vendor & 3rd Party Engagement	8%	42%	35%	6%	10%
Leadership	8%	35%	38%	16%	2%

# Key findings

## Working Practices (Remote Working & Mobility)



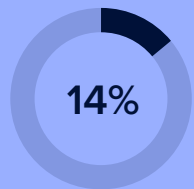
New Strategy Required



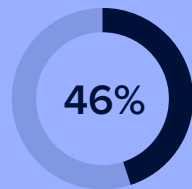
Significant Change

COVID-19 has impacted working practices (remote working & mobility) with 88% of respondents saying their strategies have significantly changed or a new strategy is now required. Leaders are now in a position where they must reimagine how they engage, communicate and collaborate with staff as many colleagues move from the physical office to the virtual space. With workforces dispersed and the need for remote working becomes a predominant working practice, organisations have the opportunity to establish new structures, processes, cultures and identify their technology needs.

## Office & Estates Management



New Strategy Required



Significant Change

Office & estate management is a primary concern for public sector organisations and has experienced a significant impact as a result of the pandemic. 14% of respondents say that a new strategy is required to support the management of their offices and estates and 46% say they are looking to make significant changes. COVID-19 is, undoubtedly, bringing opportunity for organisations to critically review their property portfolio and navigate a way forward to improve staff engagement with the physical office.

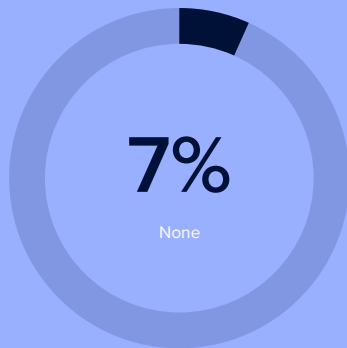
# Key findings

To what extent has the shift in working methods (caused by COVID-19) exposed shortcomings in the following aspects of your organisation:

	Substantial	Considerable	Some	Very Few	None	Don't Know
Technology Infrastructure	10%	22%	40%	19%	6%	3%
Cloud Adoption	6%	11%	30%	18%	16%	19%
Applications and Work Systems	6%	22%	40%	18%	8%	6%
Communication Platforms	8%	25%	38%	18%	7%	4%
Data Management and Accessibility	5%	16%	36%	23%	12%	8%
Offices, Estates and Workspaces	12%	30%	28%	16%	7%	7%
Staff Mobility	11%	26%	29%	21%	8%	4%
Working Practices & Processes	14%	33%	33%	14%	4%	2%
Adaptability and Service Delivery	11%	31%	29%	21%	6%	3%
Leadership and Management	8%	20%	37%	21%	12%	2%

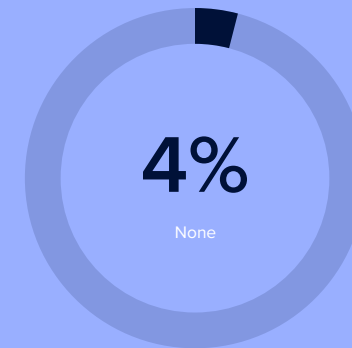
# Key findings

## Communication Platforms



From remote education to video-conferencing in healthcare, cloud communication platforms have proved indispensable in delivering services to citizens. The survey results, however, indicate that, whilst pockets of success have been achieved, there remains a large gap in preparedness. 89% of respondents say they have experienced some level of shortcomings in their communication platforms and only 7% have not experienced any, revealing that public sector organisations require higher levels of commitment to being equipped for better communication. Communication in the public sector is vital not solely for customers, but for civil servants, as the very foundation to productivity, wellbeing and public service delivery.

## Working Practices & Processes



When asked what extent shortcomings have been exposed in relation to the shift in working practices and processes, only 4% of respondents say that they have not experience any failings. This illustrates how much of an impact that COVID-19 has had on the public sector in changing the way they work. This is an anticipated result; working practices have required great change, mostly due to the need for remote working, but also due to the ripple effect that new working patterns have created. Leaders must give attention to ensuring digital tools and processes are fostering collaboration. The survey results identify the scale of the challenge in propelling the public sector towards change and moving into its mission of smarter working, meeting the demands of the pandemic.

# Key findings

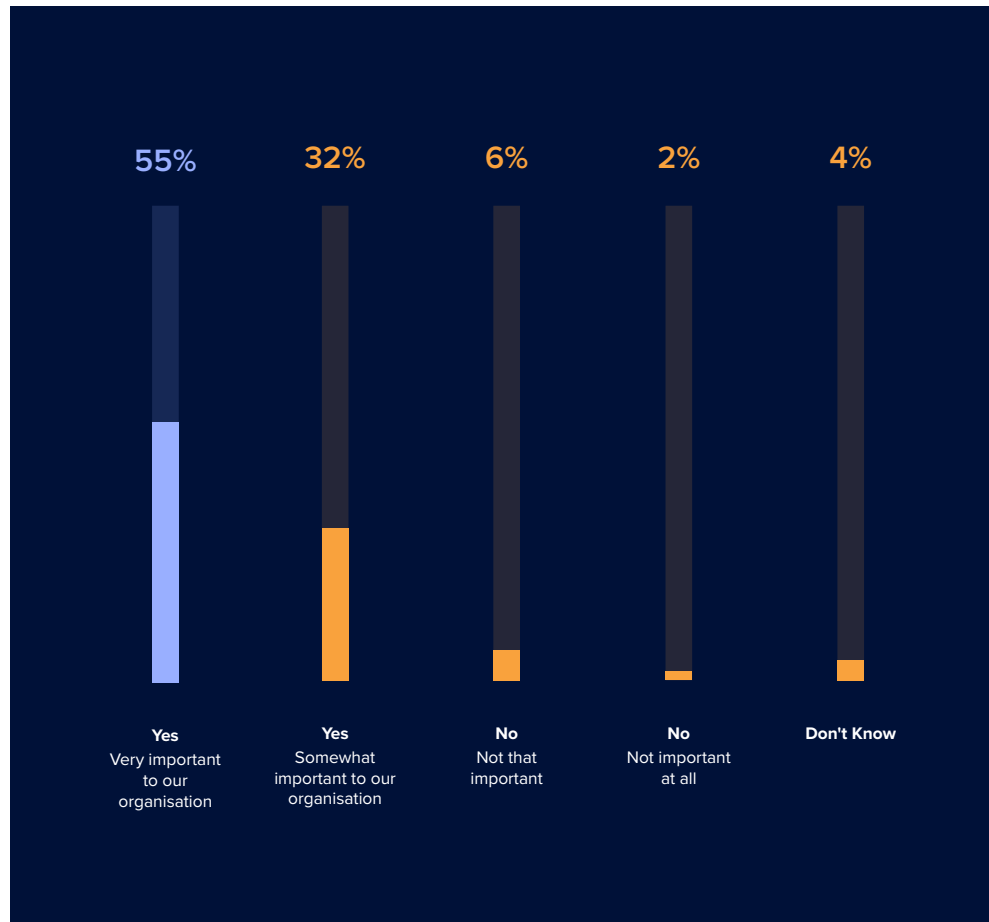
Now that lockdown measures are lifting, what are your organisation's views on the following issues:

	Top Priority	Key Focus This Year	Important But Not A Focus Now	Not Important	Don't Know
Improving Communication Tools Across the Organisation	12%	43%	35%	4%	6%
Improving Communication Channels with Customers / Users	15%	49%	28%	2%	6%
Addressing Customer and User Experiences	18%	44%	28%	3%	7%
Enabling Staff Mobility and More Remote Working	17%	45%	24%	9%	5%
Reducing Office Usage	10%	35%	28%	21%	7%
Reducing Costs in Line with Budget Pressures	32%	31%	23%	7%	5%
Addressing Business Continuity	23%	42%	24%	5%	5%
Operational Efficiency	21%	47%	24%	3%	5%
Outsourcing	2%	6%	23%	50%	19%
Staff Wellbeing and Mental Health	40%	42%	12%	2%	4%

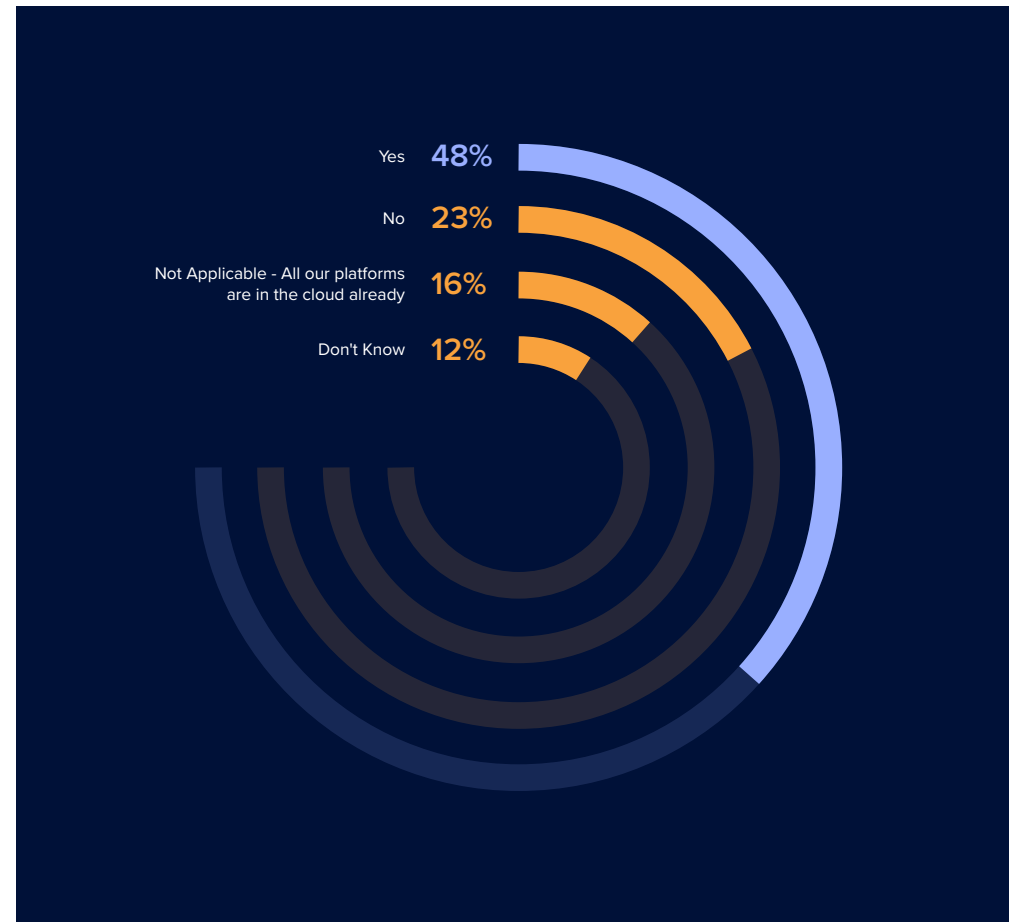


# Key findings

Has COVID-19 caused a new focus on improving customer experience, to help your customers continue to use and increase the use of your services?



Has the pandemic accelerated adoption of cloud services within your organisation?

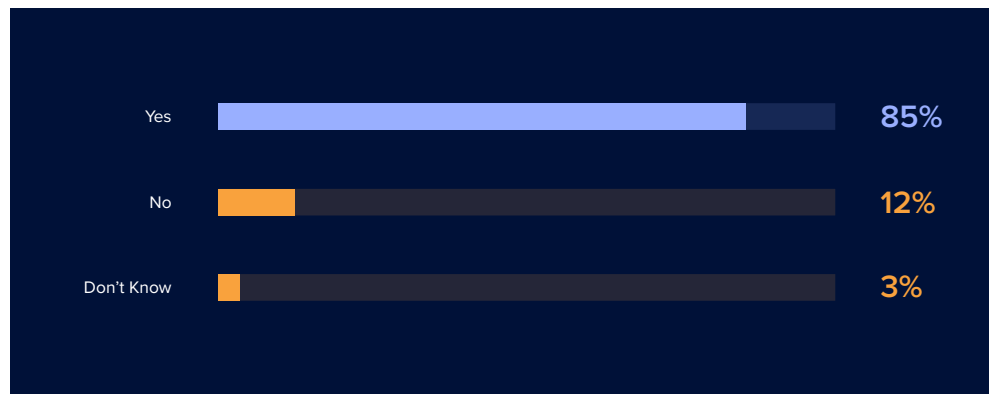


# Key findings

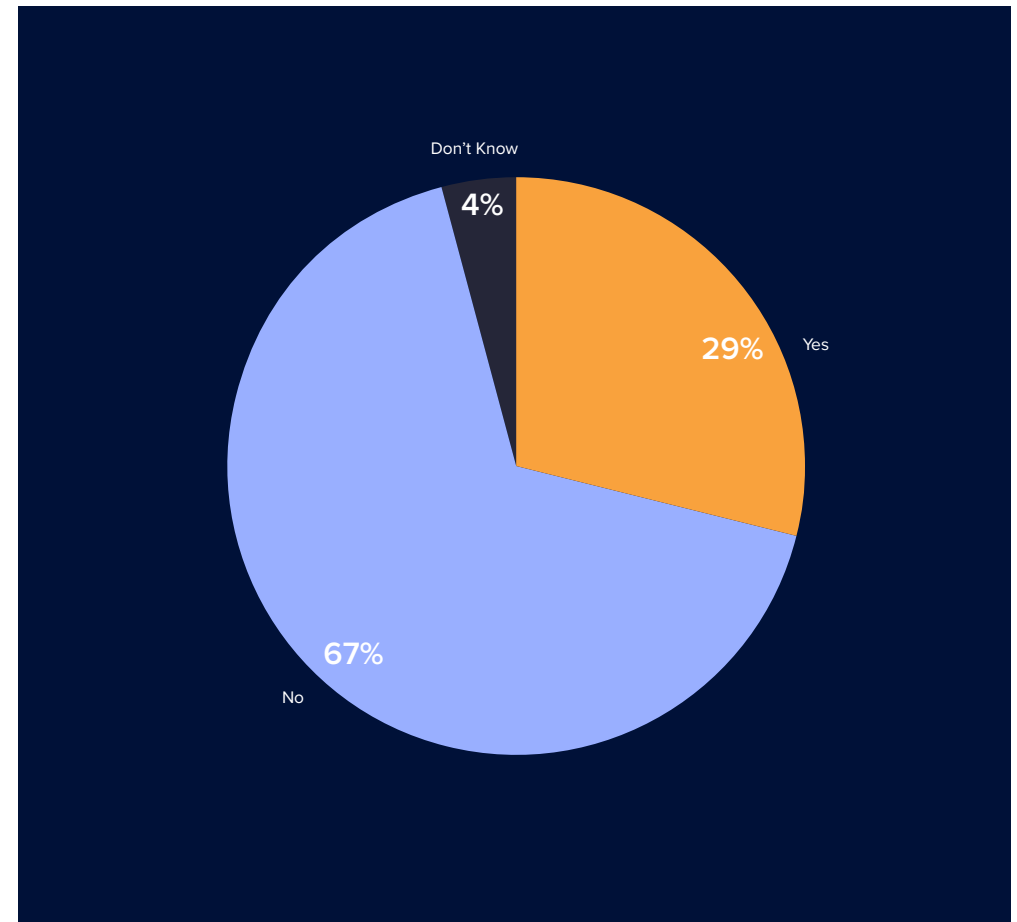
Is storing your data in the UK (in a UK data centre) a deciding factor when adopting your cloud solutions?



Does your current ICT infrastructure enable staff mobility?

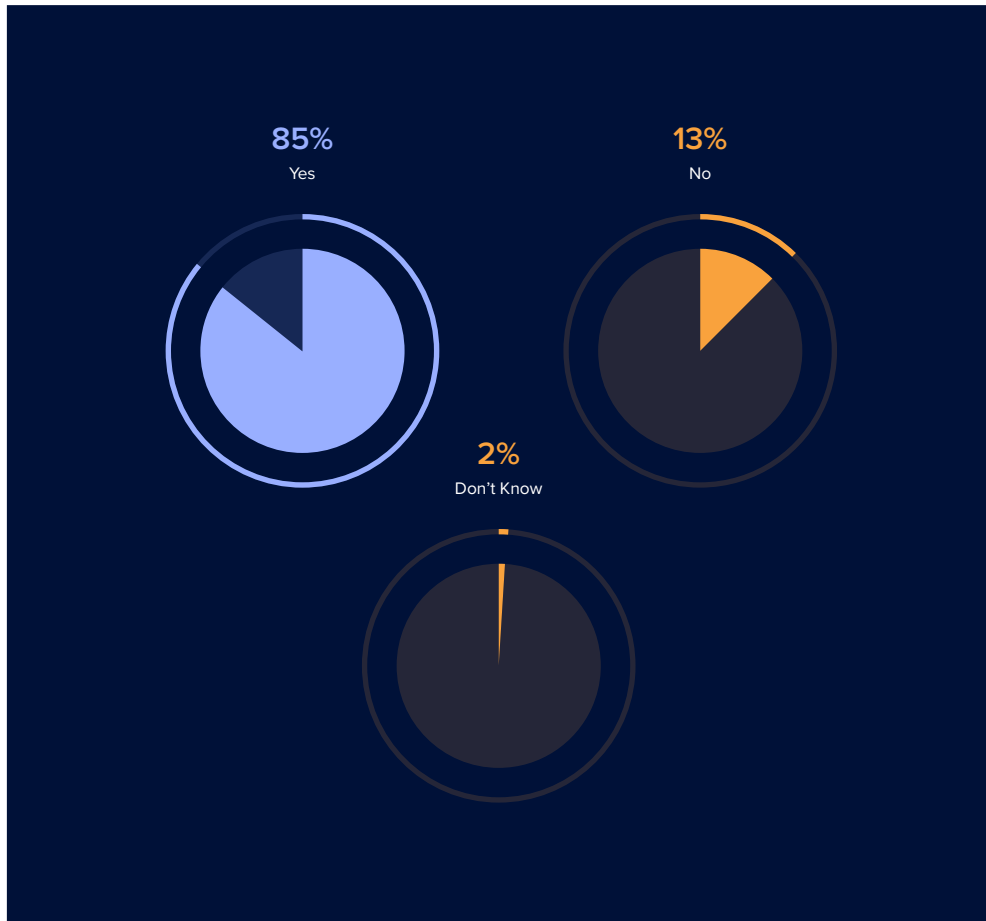


Was the enablement of remote working a problem for your organisation?

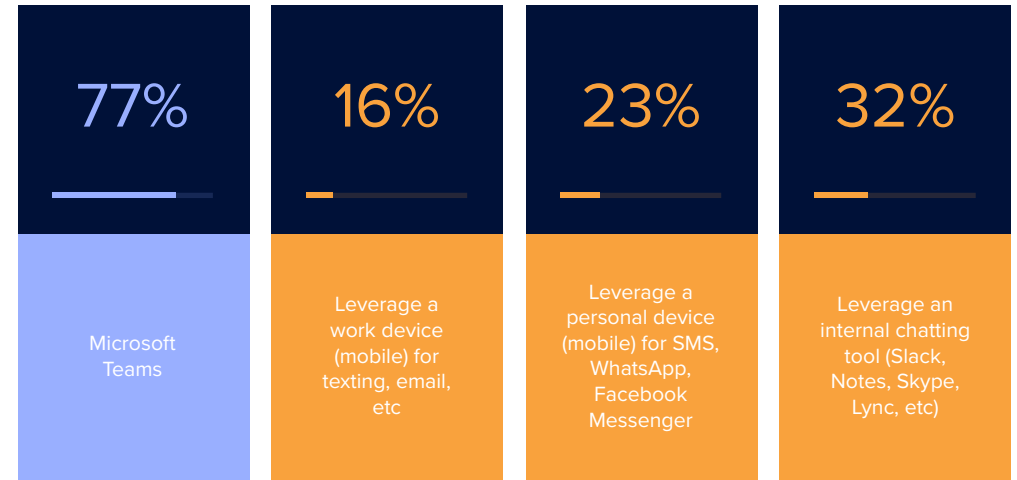


# Key findings

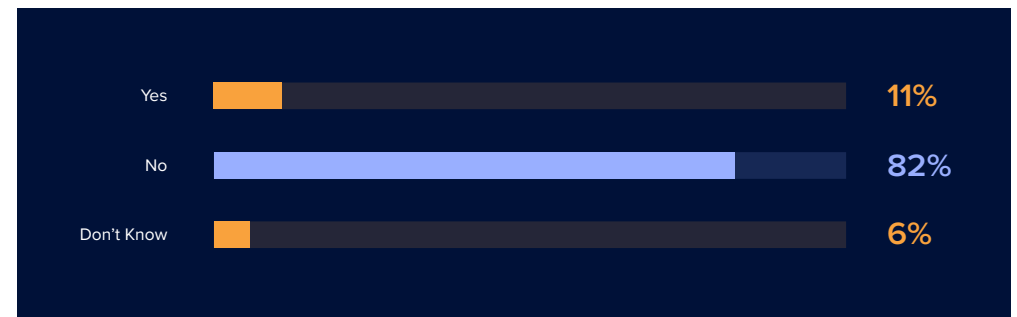
Has your organisation's attitude to staff mobility and remote working changed as a result of COVID-19?



If you and/or your colleagues want to start a group chat for a department, a team or a project, what do you use?



Are these available on desktop and mobile?



# Key findings

Do you and your colleagues ever utilise 'non-work' communication apps (WhatsApp/Facebook Messenger etc.) to communicate and collaborate regarding work issues?



Do you and your colleagues ever utilise 'non-work' hardware to work from?

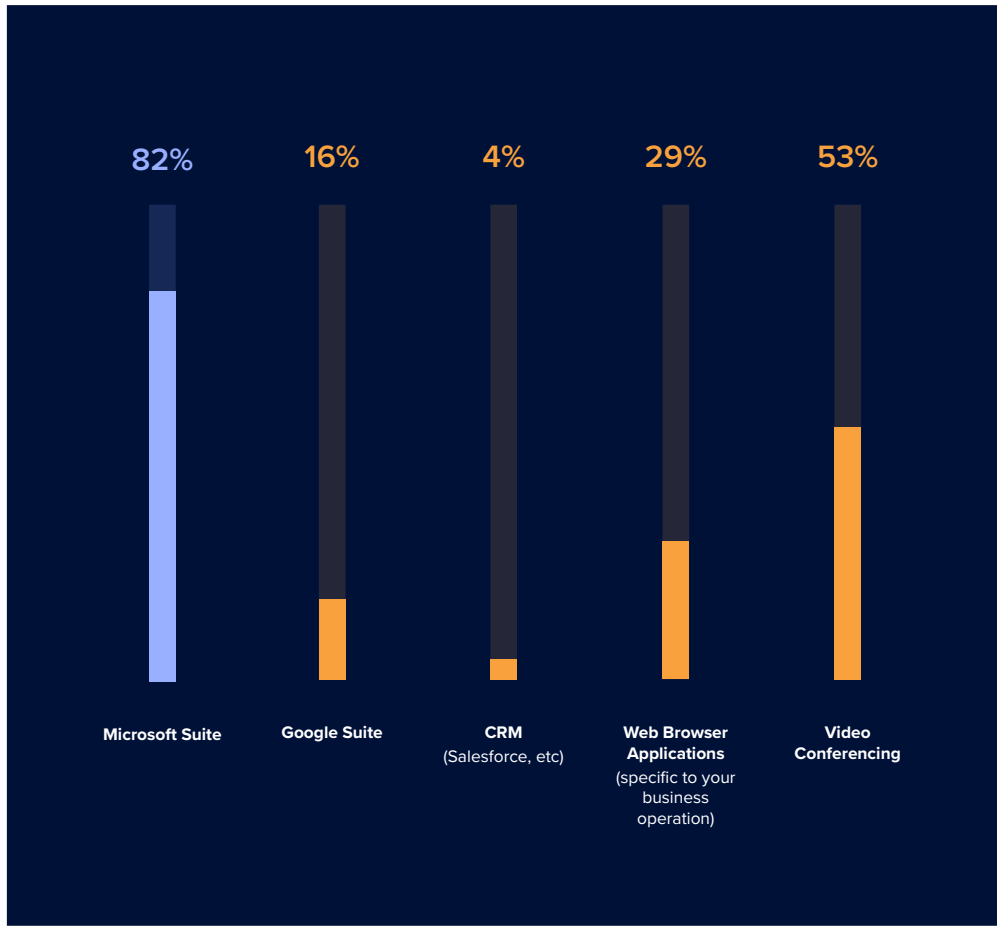


If you use your personal computer or mobile for work, choose the statements that describe why you use it:

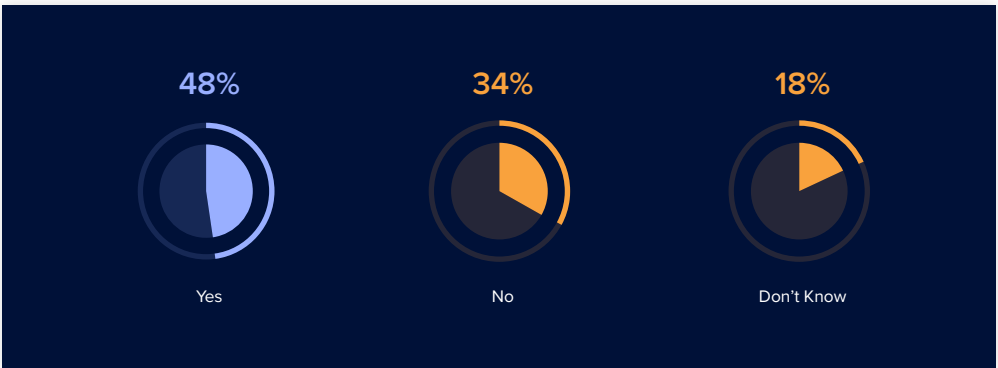


# Key findings

Choose which applications you use most whilst working:



Does your main call, voice and text communication solution currently integrate with these applications?

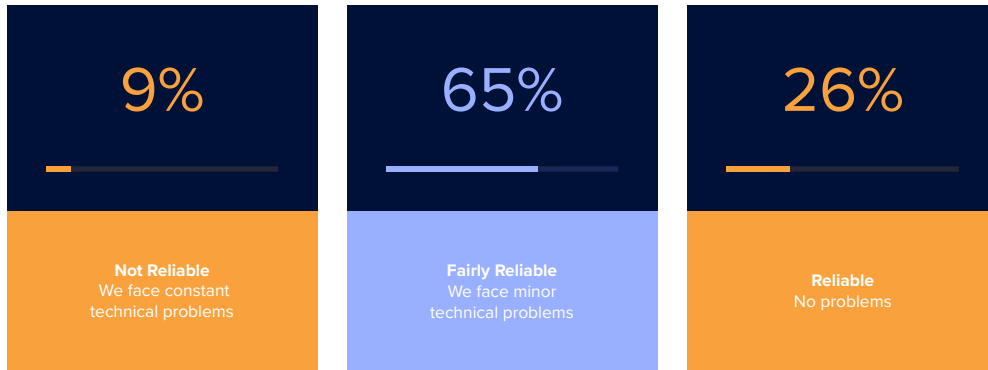


If no, would you prefer your communication tools to integrate into your other applications so you can do a simple one-click to dial?



# Key findings

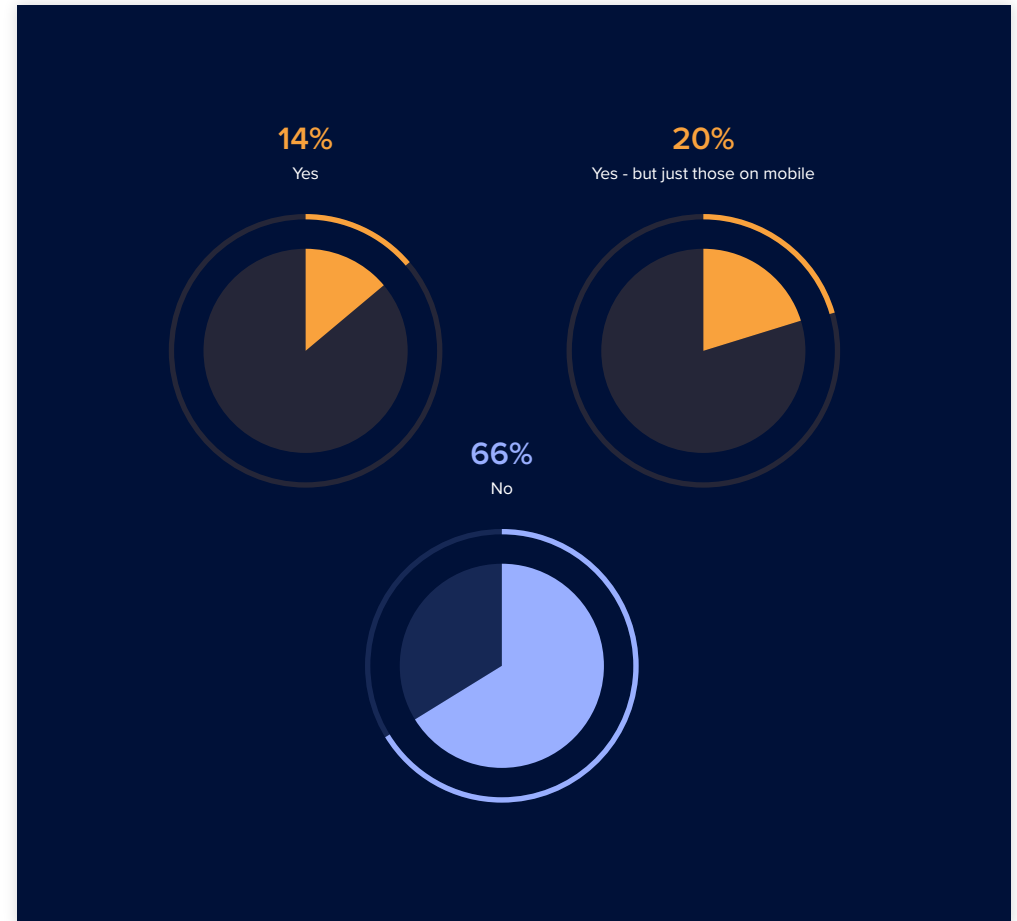
## How reliable are your communication tools?



## When you experience technical problems with your communications tools, what happens usually?



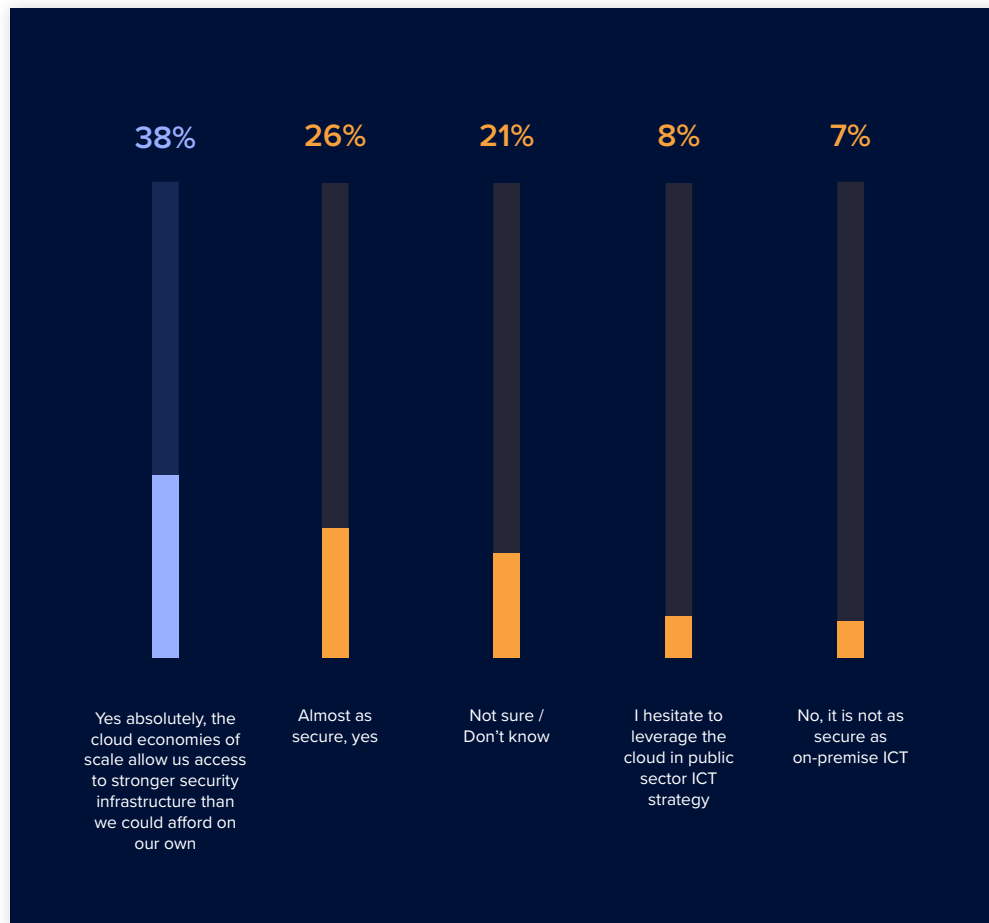
## Do you have any security concerns regarding your communication tools?



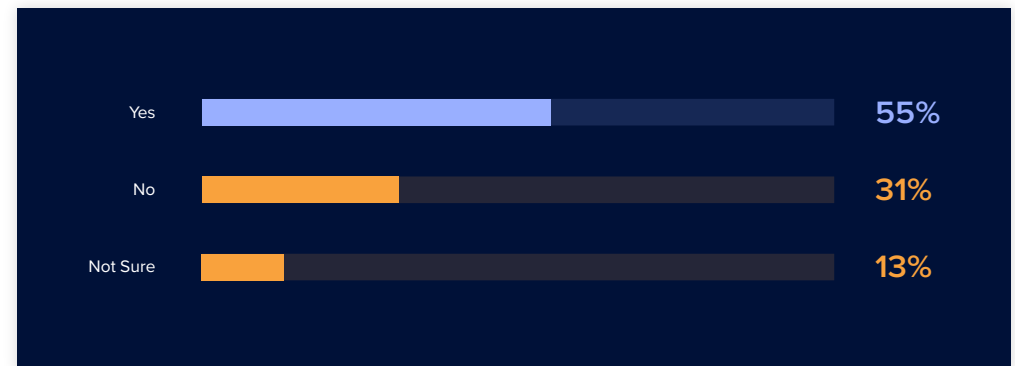


# Key findings

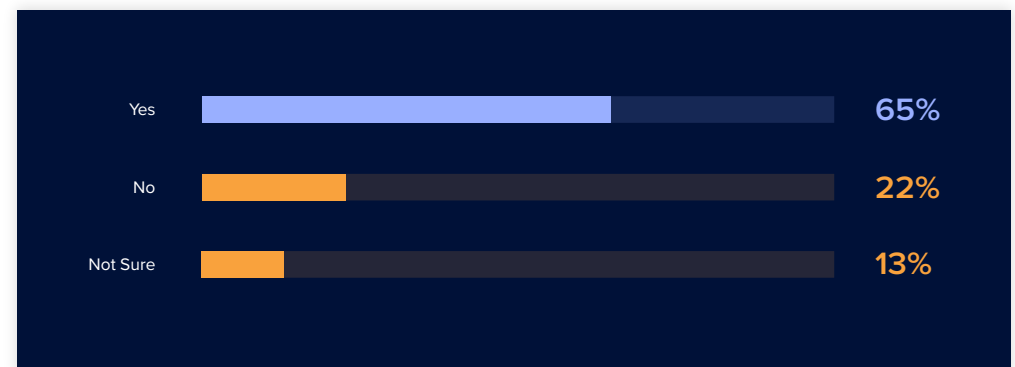
Do you feel the cloud is as secure as on-premises ICT solutions today?



Did COVID-19 present a challenge to your organisation's contact centre?

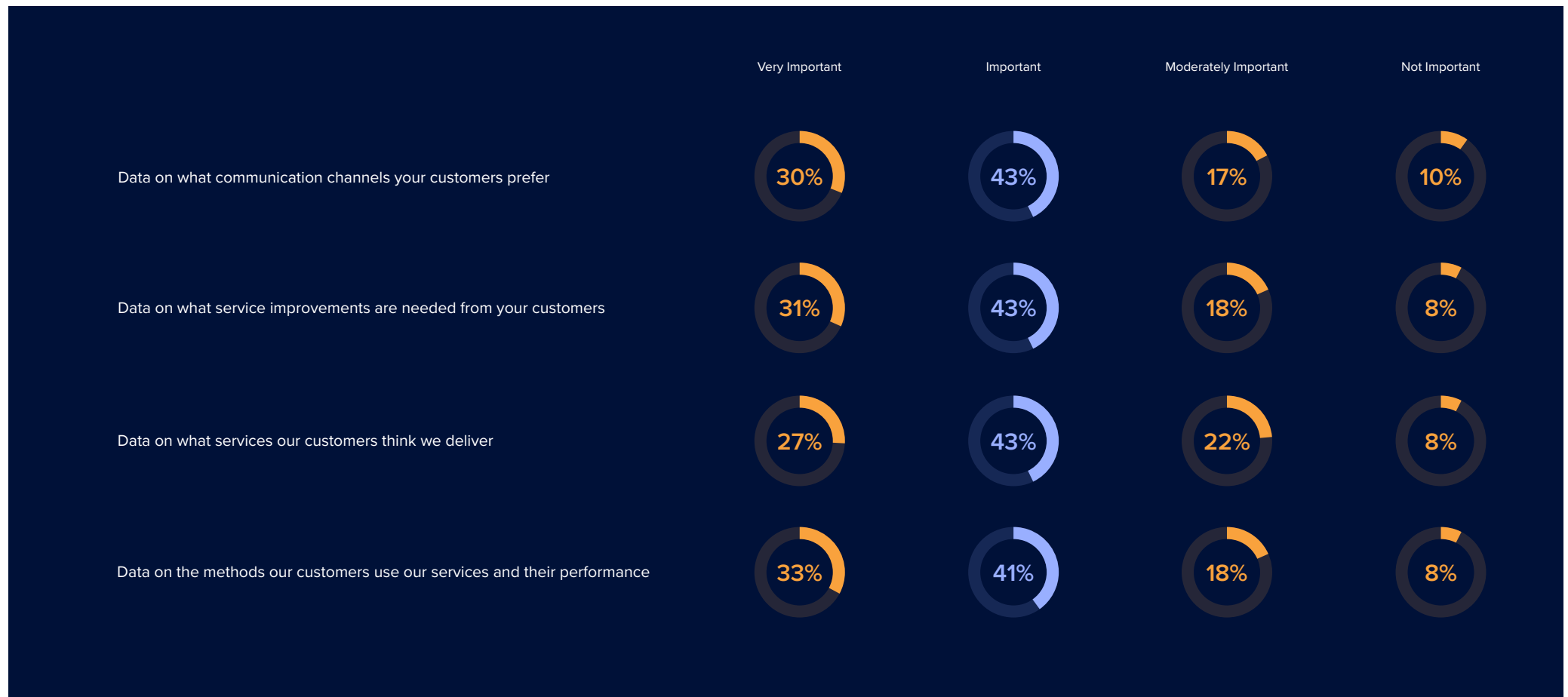


Has the current pandemic increased your use of omni-channel platforms with customers?



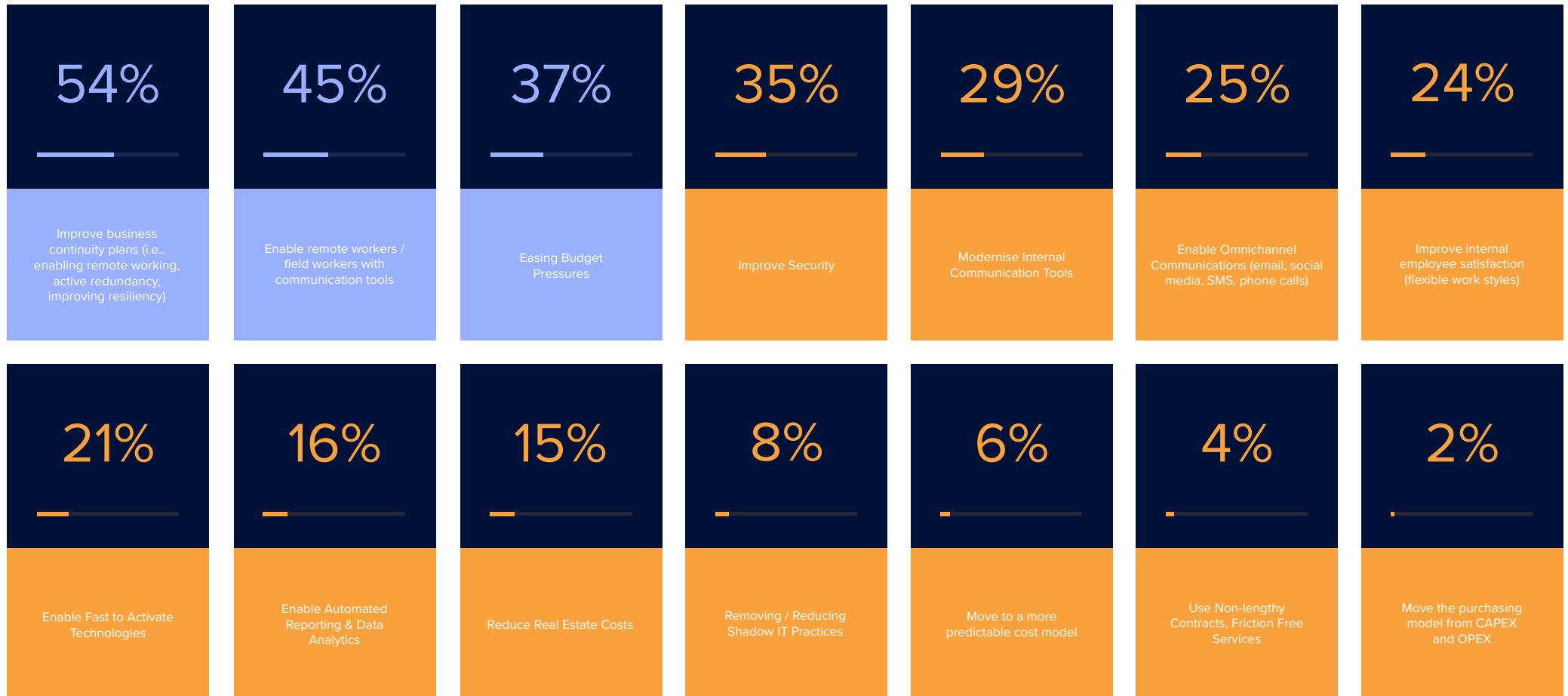
# Key findings

How important are the following to your organisation since the start of the pandemic:



# Key findings

What are the three top motivators to consider cloud for public service ICT infrastructure?



# Key findings

## Top 3 motivators to move to cloud UC:



Improve business continuity (54%)



Enable remote working (45%)



Ease budget pressures (37%)

## Top 3 inhibitors to move to cloud UC:



Budget pressures (55%)



Security concerns (46%)



Total cost of ownership (41%)

The UK GDP is forecasted to decline by 11.5% in 2020, resulting in fewer taxpayer-funded initiatives for the public sector. When asked on barriers to migrating to cloud applications, survey respondents said budget pressures (55%) and total cost of ownership (41%) were among the top 3 reasons. In fact, 63% of respondents said reducing costs is the top priority for the remainder of the year. While budget pressures was listed as a barrier to adopting cloud, it was also listed as a motivator to adopting cloud as 37% said changing to a pay as you go, predictable, lower cost model was a key factor.

# Key findings

What are the top inhibitors to consider cloud for public service ICT infrastructure?



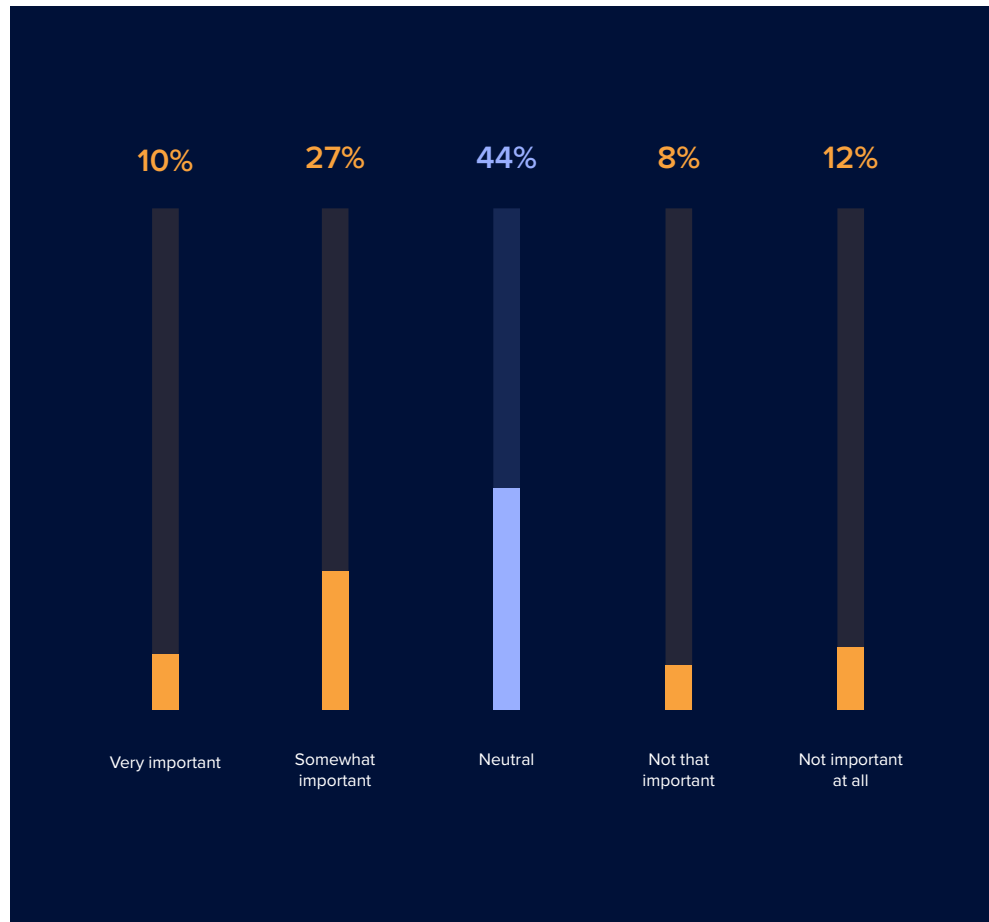
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# Results

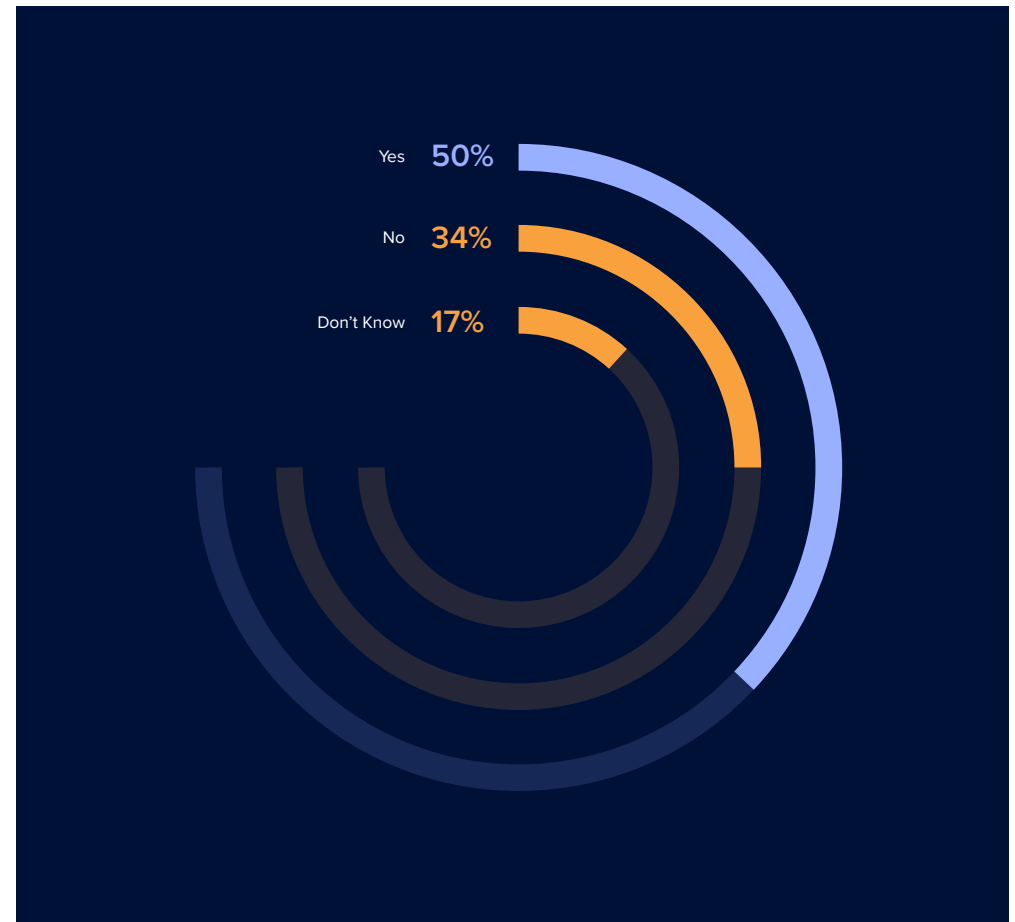


# Results

How important is changing your purchasing model to a pay as you go, pay for what you use, predictable, lower cost OPEX purchasing model in which you “rent” products and services from companies and are not bound by contracts?



Is developing a new digital service model a priority for your organisation in 2020 - 2021?



1 2 3 4 5 6 7 8 9 10

# The evolution of the public sector workplace

It does not come as a surprise that the onset of COVID-19 has seen significant change across many areas of the public sector. However, the survey highlights three main areas that have experienced the most change: working practices, internal staff communication and digital transformation strategies.

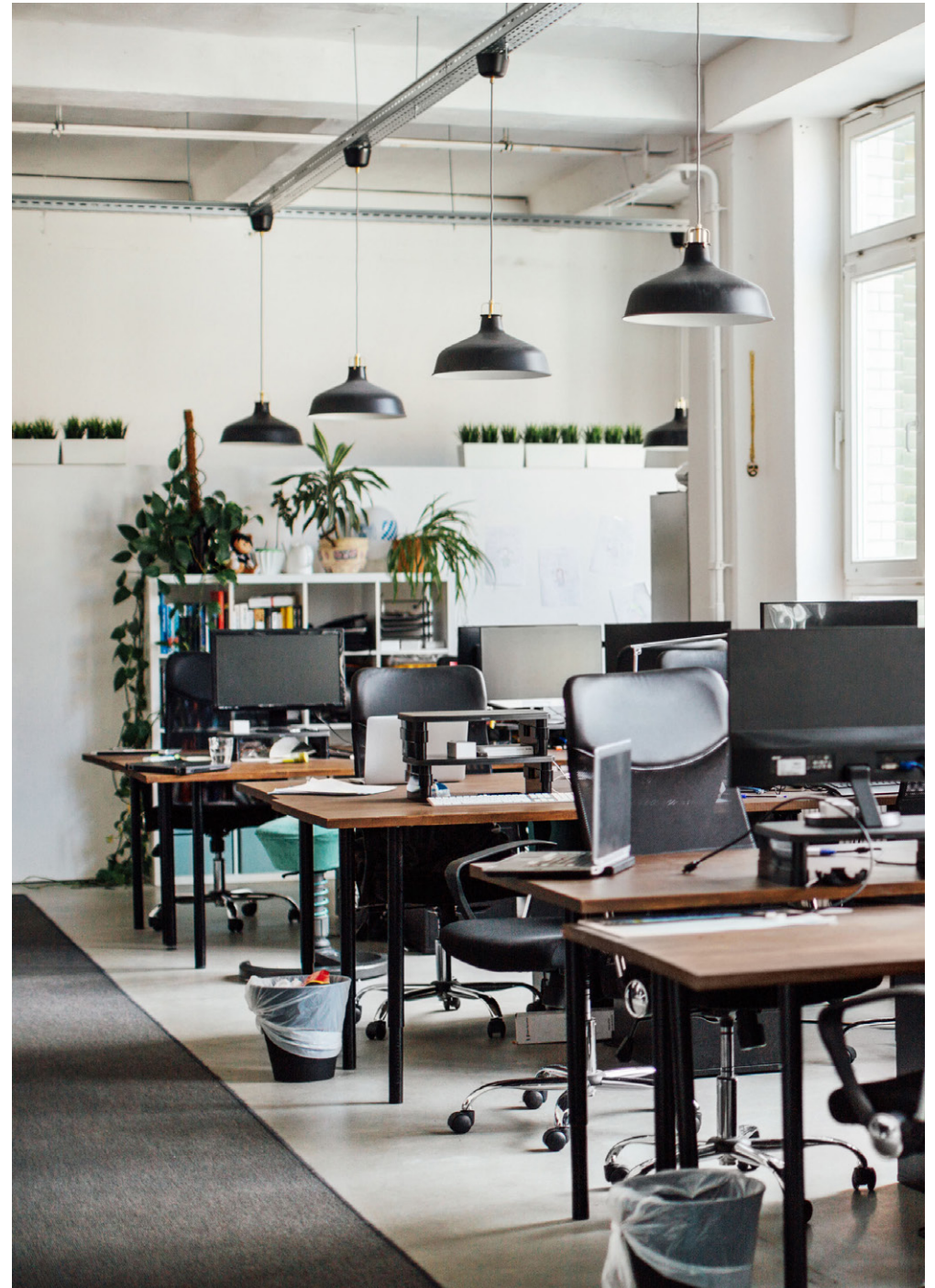
# Survey analysis

**Public sector offices and estates have been heavily impacted this year, with 46% of respondents saying that the use of their physical spaces has experienced significant change as a result of COVID-19, compared with only 6% who say that there has been no change.**

Interestingly, when asked if there have been shortcomings to working methods with regards to offices, estates and workspaces, only 7% of respondents say they have not experienced any shortcomings. This result highlights the fact that, as the demand for new working practices has increased, an overwhelming majority of respondents have been unprepared for this transition. It is evident that, despite the transformation of offices and estates being under the government spotlight in recent times, there is still a long way to go with efficiently managing its physical spaces.

Across government, many civil servants are working from home by default, whilst others are continuing to work in office spaces only where necessary. Evidently, technology is supporting social distancing and enabling remote working at higher levels than ever before.

Connectivity is a top priority as the use of public sector offices and estates shift and, as staff increasingly work from home, cloud communications are gaining more appreciation in tackling the effects of the pandemic.



# Survey analysis

## Takeaways

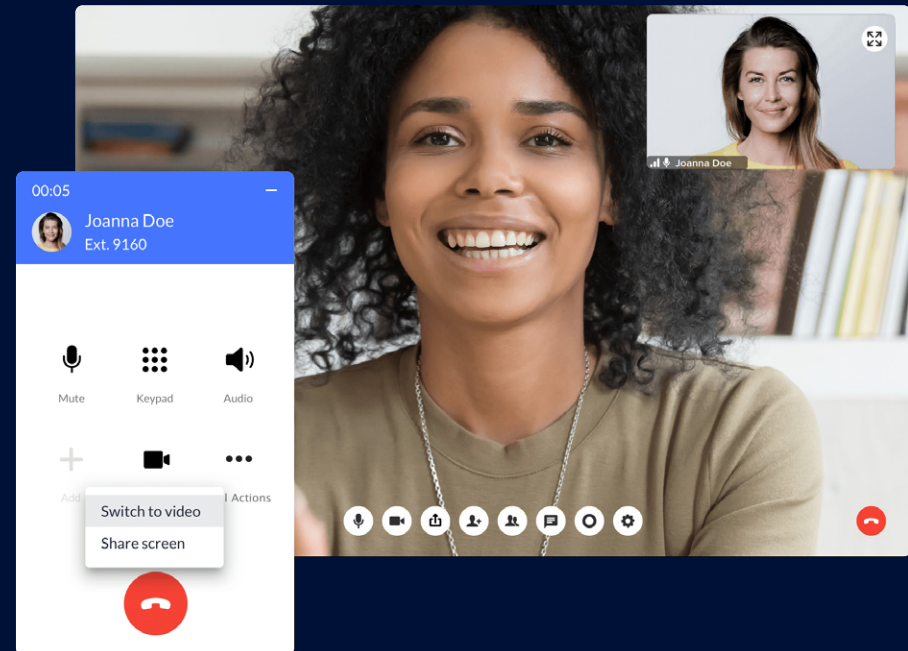
Since the government's smarter working initiative has been introduced, there has been a new focus on supporting a more agile and dynamic working environment. Within the Government Property Agency (GPA), one of its priorities is the Smarter Working Programme, a cornerstone of the Government Estate Strategy. The goal is to create 'great places to work' for civil servants, in a way that goes beyond just focusing on the workspace, by encompassing culture, leadership and technology.

In light of this, government workplaces have already been changing. NHS Property Services have highlighted how the transformation of their estates, in the midst of COVID-19, have been achieved in a matter of months, when originally, these foundational levels of change were given a timeframe of up to 10 years.

Kate Richardson, Head of National Office Programme at NHS Property Services (NHSPS), has stated that smarter working involves choice, where remote and office working is utilised to suit the individual needs of staff, and where flexibility and collaboration are enabled. Richardson also acknowledges that technology is a key enabler of smarter working and has outlined how the NHSPS has accelerated the use of technology, even against a challenging backdrop.

The increase in remote working may be permanent for some members of staff, placing government in a strong position to review their property portfolios and rationalise their estates. Now, the government workplace is being seen as more than an overhead but as an agent of change that can deliver financial savings and ease budget pressures.

Even as the guidelines for social distancing change, the government office will not look the same as it did six months ago. Digital technologies such as video conferencing, mobile and desktop apps, call monitoring and recording and team collaboration tools are now more critical than ever, in keeping staff connected and delivering business continuity for the benefit of the public. Organisations must now look to communication technologies as more than infrastructure, but as a core business application. This is where the benefits of cloud technologies can help the public sector to meet the demand for smarter working.



**“Technology is a key enabler of smarter working.”**

Kate Richardson, Head of National Office Programme at NHS Property Services

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# COVID-19, cloud adoption and customer services



# Survey analysis

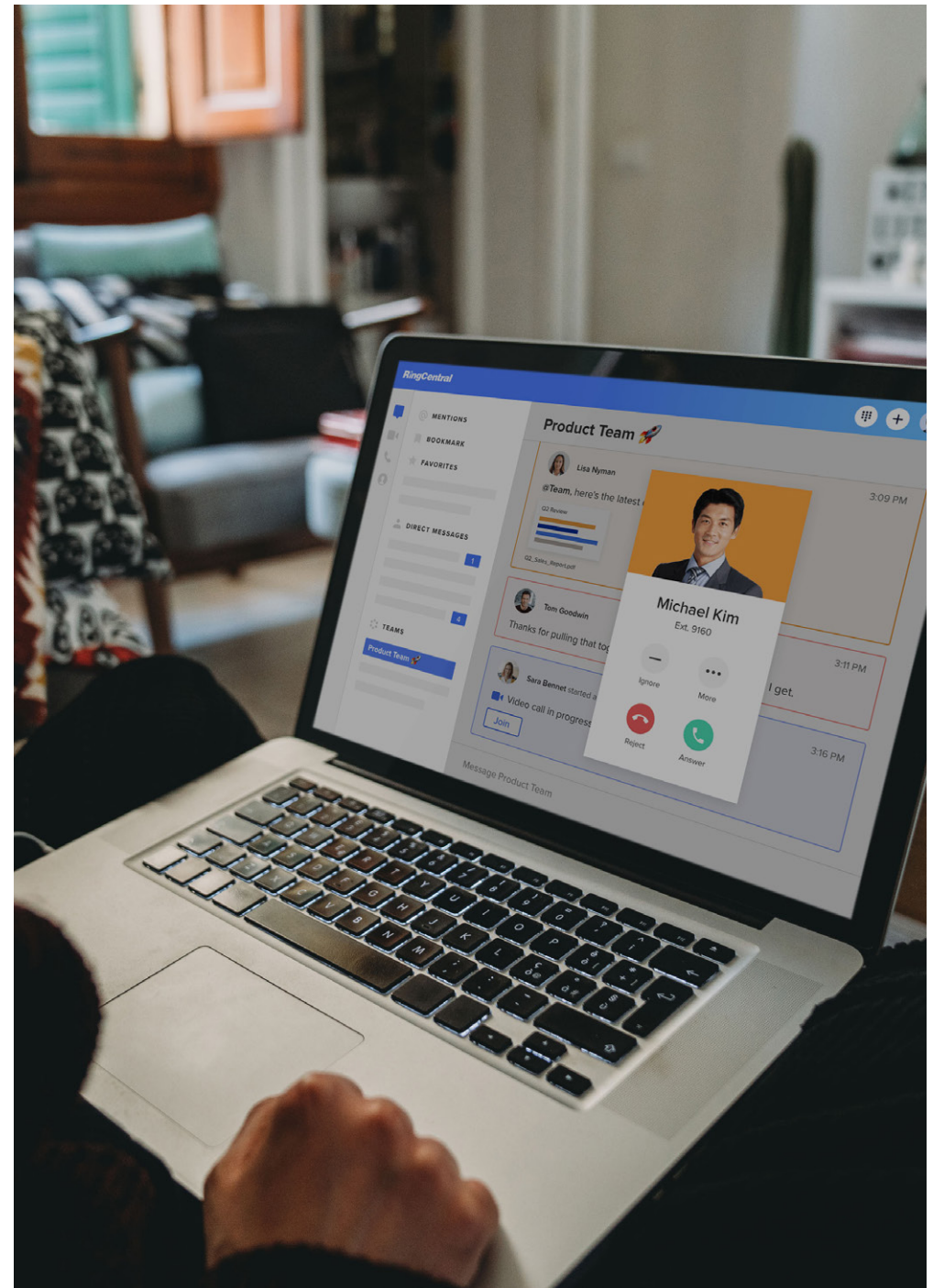
COVID-19 has been a game changer in the way we all use technology and cloud systems. Since lockdown, as staff have started working remotely, there is an increased need for communications technology and the cloud services it offers. Communication and collaboration tools have taken centre stage and set the backdrop as part of government's "new normal" working practices.

## Over half of our survey respondents (53%) are utilising video conferencing technology.

The survey presents that, since lockdown measures are lifting, over half of respondents (58%) view improving communication tools across the organisation as a "top priority and a key focus this year". Furthermore, over two thirds (64%) state that improving communication channels with customers/users is equally as important.

Over half of our respondents (55%) say that COVID-19 has caused a new focus on improving customer experience.

48% of respondents say that COVID-19 has accelerated cloud adoption. 23% however, say that the pandemic has not accelerated their adoption of cloud services. *Could this mix of results indicate that there are concerns around using cloud services? And if so, what are they?*





# Survey analysis



## 77% of respondents use Microsoft Teams for communicating at work.

Although there is a clear increase in the use of cloud technology for better communication, it is interesting to note that, when asked if these communication applications integrate with their organisation's main call, voice and text technology, we collected a diverse range of results. Less than half of the respondents (48%) say that their chief technology solutions integrate. Bearing in mind that integration is a key focus of government strategy, it should be questioned why this percentage is not significantly higher.

It is encouraging to illustrate that, when asked if COVID-19 has caused a new focus on improving customer experience, over half of our respondents (55%) agree that it has. Moreover, 65% state that the pandemic has increased the use of omni-channel platforms with customers.

As people's everyday lives are impacted, it is vital that public sector organisations utilise the communication technologies available to meet customer needs. Digitising public services will increase efficiencies, improve the speed of service delivery and foster strong citizen engagement. It is the ideal time for the public sector to establish communication strategies that are not operated in silos for each channel but that are delivered in a unified way, across multiple channels to best engage with their customers.

73% state that understanding the communication channels customers prefer is important.

# Survey analysis

## Takeaways

COVID-19 has presented government with an opportunity to communicate in more sophisticated ways. One of government's prime objectives is to promote integration and communication between teams and departments, modernising the working environment.

In view of this, it is a concern that public sector organisations are not enjoying higher levels of integration between the applications they are utilising. Moreover, as government and the public sector are the largest operators of contact centres, it is fundamental that organisations provide seamless opportunities for cross-channel customer engagement.

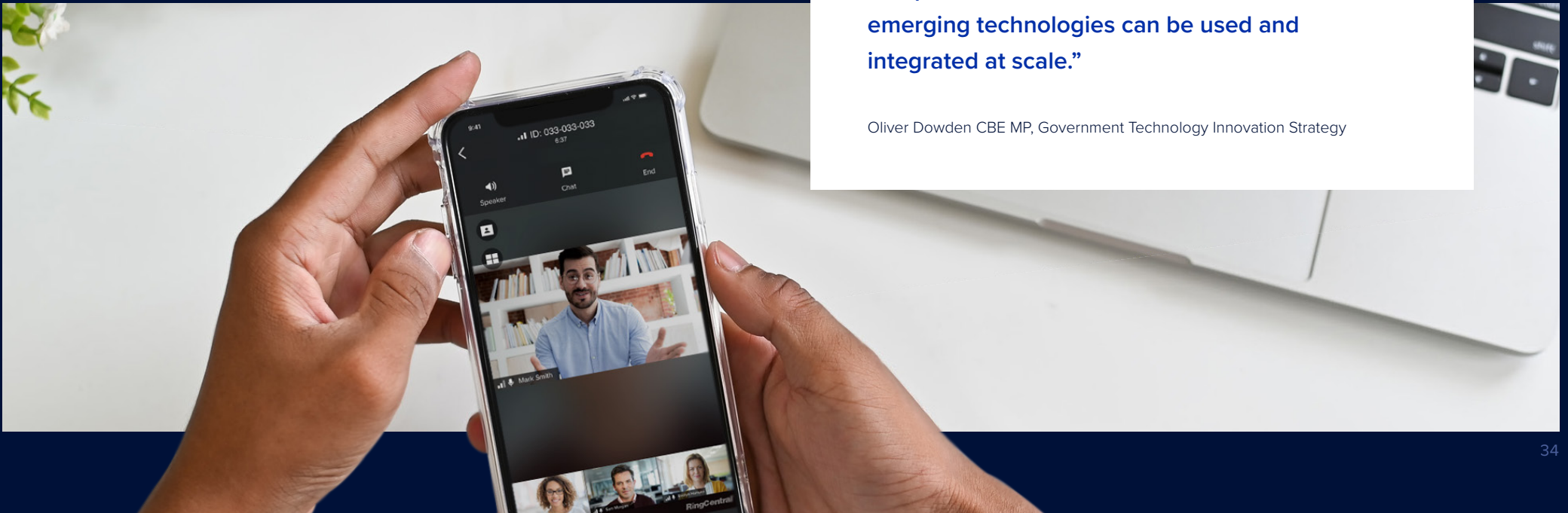
Communication tools including video and audio conferencing, team messaging, chat apps, file and web sharing and the full array of cloud apps from Google and Microsoft etc. should be easily available to staff from desktop and mobile apps to support business continuity and enhance customer services. Having multiple channels available for staff and citizens should be a core element of any public sector strategy and no other time has existed before where an integrated communications model has been more critical.

The Government Technology Innovation Strategy, published in 2019, confirms the importance of using flexible technology components and platforms to create an environment where “emerging technologies can be used and integrated at scale.” It outlines the government's focus to integrate emerging technologies with the systems that government already have in place. In light of this, our survey illustrates that, despite it being a focus for government, there remains a lack of technology integration. It is vital to understand the barriers to achieving integration in order to address these issues – and overcome them.

Integration, flexibility and omnichannel transformation needs to be very high on the government agenda. With cloud communications, government can prioritise the digital customer experience, reducing response times on any digital channel and ensuring operational efficiency.

**“We need to use flexible technology components and platforms to create an environment where emerging technologies can be used and integrated at scale.”**

Oliver Dowden CBE MP, Government Technology Innovation Strategy



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# Dealing with data sovereignty

# Survey analysis

Perhaps one of the most significant findings from our survey lies around the issues surrounding data sovereignty. When asked if storing data in a UK data centre is a deciding factor when adopting cloud solutions, only 8% say that their data can be stored in any secure centre globally.

35% of respondents said their data must absolutely reside within the UK. Since 46% agreed security concerns are a top inhibitor to cloud adoption, the anxiety over data storage is likely to form part of that reticence.

Furthermore, a concerning high percentage of respondents (45%) were unsure of their policy around data storage. *Is the lack of knowledge around data storage a principal inhibitor to why many organisations are reticent to uptake cloud technologies?*

The survey responses clearly indicate a need for clear, realistic and forward-thinking data management policies to be established and communicated throughout the public sector.

One respondent's comment outlines a key concern which may be a highly common outlook across government and public sector organisations. *"As we deal with highly personal data from clients ...we are reluctant to use any cloud-based tech. At some point 'the cloud' will be hacked and we don't want our data there."*

35% of respondents said their data must absolutely reside within the UK.



# Survey analysis



**46% of respondents say security concerns are a top inhibitor of cloud adoption.**

## Takeaways

After micro-analysing the hierarchy of respondents, we found that a majority of the responses were primarily from individuals in positions of leadership. This sparks obvious concerns as government guidelines highlight the importance of leaders preparing their business for the changes ahead and ensuring that all members of the organisation are aware of the changes. In stark contrast to these headlines is the overwhelming majority of respondents who are not aware of their policy on data storage.

The dialogue surrounding data sovereignty is ongoing and complex. Boris Johnson has stated that, with regards to Brexit negotiations, the goal is for the UK to “restore data sovereignty”. However, questions persist over data protection, restrictions of data flow and, rather than transparency on this issue, a myriad of complexities have surfaced.

As the UK transition period comes to an end in a few months, every organisation must navigate new rules around data, so the survey’s results on data sovereignty do not come as a surprise. Clarity is required on the impact that Brexit will have on data laws which will, perhaps, be causing a period of paralysis when it comes to adopting cloud technologies. Now government and public sector organisations need to navigate a changing landscape, and with regards to data, choose a cloud provider that uses only UK data centres.

Re-establishing control of data, and ensuring data is stored on home soil, will bring deeper levels of confidence to government and the public sector, a feeling that is currently lacking. If, however, organisations find themselves immobilised in the adoption of cloud technologies due to concerns over data storage, the use of shadow IT will no doubt pervade government and create damaging consequences.



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# A modern education in shadow IT

# Survey analysis

A majority of respondents (59%) say they use 'non-work' communication apps such as WhatsApp and Facebook Messenger etc. to communicate and collaborate with colleagues. For government organisations, who hold masses of sensitive data, and with the intricacies of its compliance and governance rules, this result is somewhat concerning.

## **A majority of respondents (59%) use non-work applications, software and hardware to work and communicate with other members of staff.**

'Unapproved' software is clearly enhancing speed, flexibility and productivity, but it also carries great risk and security concerns. From a security perspective, leaders must regain control and provide staff with the ability to be productive whilst addressing the threat of 'shadow IT'. It is critical that public sector organisations have effective communication and collaboration tools in place that would reduce the need for employees to use 'unapproved' apps.

Our survey results demonstrate a lack of efficiency with core government tools where functionality is not up to par with what is expected - and required - from staff.

Less than half of respondents (48%) say that their main communication solution integrates with the application they use in work the most.



# Survey analysis



Furthermore, just under a third of respondents' work computers 'do not always have the tools they need to do their jobs' and 40% state that communication tools on their personal devices are faster and more efficient for getting their work done. It does not, therefore, come as a surprise that 81% state that they would prefer their communication tools to integrate into their other work applications.

## **Only 26% say their communication tools are reliable.**

Despite concerns, the damaging effect of not using the cloud far outweigh the consequences which can invariably lead to shadow IT pervading throughout an organisation.

## **Only 38% are confident that the cloud is as secure as on-premises ICT solutions.**



# Survey analysis

## Takeaways

**Public sector organisations can't afford to ignore the threat of shadow IT, but that threat can be mitigated with the help of cloud technology.**

With evident mixed feelings around the use of cloud technology, our survey illustrates that addressing this problem will require a modern education in cloud technology. Organisations must understand the importance of choosing a cloud provider that prioritises security. The best cloud providers provide transparent, up-to-date information on network operations, security, privacy and compliance.

Given the financial benefits, security, compliance and innovation that can be enjoyed from cloud computing, it's time for government to embrace the use of cloud services. In not delivering the unified and flexible tools afforded by cloud technology, public sector bodies risk the creep of shadow IT. That loss of control undermines data security and can lead to breaches in compliance.



1 2 3 4 5 6 7 8 9 10

# The impact on staff wellbeing

# Survey analysis

As working practices, staff culture and technology change, it is important to highlight that an encouraging 82% of respondents state that staff wellbeing and mental health is a key focus and a top priority.

As mentioned, COVID-19 has impacted many areas of the government workplace and mental health has also come under the spotlight. COVID-19 has, unsurprisingly, taken an emotional toll on many people, with isolation being a primary factor in depression, anxiety and other significant mental health issues. The need for physical and social distancing has only intensified this struggle.

Communication with staff is key and it is vital that leaders ask themselves whether they have a communication strategy in place and, whilst working remotely, ensure that staff feel a sense of community, value and purpose.

Moreover, the financial benefits of spending money on staff health and wellbeing far outweighs the cost. The enabling role of communication technologies can give staff the opportunity to use channels of communication to bridge the gap between physical connectivity and foster better morale, creativity and productivity.

82% say staff wellbeing and mental health is a key focus and a top priority.



1 2 3 4 5 6 7 8 9 10

# Conclusion

Communication & collaboration in the new normal 2020 survey has taken place at a highly unsettling time, where whole government strategies are being reformed, working styles radically changed and new remote working technologies are being utilised to maintain public service delivery. It is a time of transition, where behaviours, cultures and perspectives are being challenged. Challenge, however, can be viewed for the positive and, for the most part, our survey has highlighted a broad range of responses at a time where COVID-19 is altering our world in unforeseen ways.



# Conclusion

The pandemic has demonstrated that, through communication, collaboration, prioritising wellness and making strategic investments in technology, any challenge can be overcome.



It reveals severe gaps in knowledge that could have damaging consequences if not addressed with some urgency. It is not only technological transformation that needs a re-vamp, but the transformation of mindsets, cultures and behaviours that require real change.

As the face of work alters, it is best practice for government to approach this new landscape as a means for new opportunities and embrace all that is available to it. Organisations are now in a strong position to begin constructing the technological foundations to minimise the maze of ill-effects resulting from COVID-19 on customers, staff and their wider communities.

Communications are the foundation of the digital world, and cloud communications are the cornerstone to fighting the pandemic. It is critical that, as alternative ways of working become more common, every investment in technology is viewed as less of a sticking plaster and more of a long-term benefit.

Often, out of the most testing times, the most innovative solutions emerge. The right technology and people-driven responses to COVID-19 can strengthen the public sector's common goals for better data management, greater connectivity and wellbeing, promoting digital transformation.

Our survey findings highlight opportunities to spread good practice and, as we all move through these current challenges, there is opportunity for new ways of thinking and greater space for innovation to flourish.

# About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of unified communications (message, video, phone), customer engagement, and contact centre solutions for businesses worldwide. More flexible and cost-effective than legacy onpremises PBX and video conferencing systems that it replaces, RingCentral empowers modern mobile and distributed 535441716 08/2020 workforces to communicate, collaborate, and connect via any mode, any device, and any location. RingCentral's open platform integrates with leading third-party business applications and enables customers to easily customise business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.

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