

Citation

A Forward-Thinking Switch to Cloud Communications Made All the Difference for Citation Professional Solutions

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Citation

INDUSTRY:
Professional Services

YEAR FOUNDED:
1991

HQ:
Cheshire, UK

EMPLOYEES:
400+

“Because we’re able to do our new-client installations remotely, using RingCentral Video and sharing our screens, we’re able to cover more ground than we did pre-COVID—and we’ve boosted productivity by 30%.”

– Lee Mills, Service Director

Running a successful business takes more than just creating and selling a profitable product or service. There’s also a maze of complex legal, regulatory, and administrative details to manage. Citation Professional Solutions was founded specifically to reduce those headaches for businesses.

Citation Professional Solutions is a leading provider of consulting support and expertise in employment law, human resources, health and safety, and other administrative services for organisations across the UK.

For 25 years, Citation has been helping UK organisations navigate the increasingly complex maze of legal and administrative responsibilities to keep their businesses running. The highly trained experts at Citation are available 24/7, dispensing more than 300,000 pieces of advice

each year to help clients make sure their health & safety policies meet compliance standards, receive fast answers to tricky HR or employment-law issues, and that they're testing for fire and electrical safety to ensure their facilities don't put the public in danger.

The company is clearly doing something right. With more than 50,000 clients across the UK, Citation has become one of the country's most sought-after consultancies for HR and health & safety support. They lead the industry in client retention, with a 92% rate. The company has earned a near-perfect overall rating on client-review sites such as TrustPilot. The Sunday Times even listed Citation on its "100 Best Companies to Work for" list.

But as the company's growth accelerated in recent years, and Citation acquired several businesses in short order, the organisation found its telecom infrastructure stretching to the breaking point. Their decision to move to a more modern, flexible communications solution proved to be a smart strategic move right away—but it would prove invaluable when the COVID-19 lockdowns went into effect.

"We wanted to give our employees the flexibility to work from home when it suited them, and our phone system was just too limited to allow this."

– Beccy Weeks, Chief Information Officer

The limits of a legacy phone system

Citation's telecom infrastructure created a number of operational challenges even before the company's accelerated growth phase. But Chris Haltof, Citation's Head of Technology Technical Services, recalls that the company's rapid expansion only amplified the system's many shortcomings—and made replacing it a top priority.

"The phone system didn't allow simple auditing," Chris explains. "If someone went in and made an administrative change, we had no way of finding out who it was." He also points out that their phone service was extremely limited in its call-record capability—a function that was central to Citation's service to their clients.

"We had only a couple months of call recording, but we needed at least five years' worth of recording for archiving purposes. That forced us

to build our own internal workaround solution to capture and archive calls—a process that consumed a lot of time and resources.”

Additionally, the phone system offered no mobile capability, requiring all employees to be in the office, using a physical hardline phone, to make and take business calls. As CIO Beccy Weeks explains, this presented an obstacle to an important new contribution Citation wanted to add to their company’s culture.

Finding the right solution, and the right partner

As they researched the field of cloud-based communication solutions, the technology team gravitated to RingCentral for a number of reasons. As Lee Mills, Citation’s Service Director explains, the system—and the company itself—checked a lot of boxes.

“RingCentral brought together so many of the functions we needed into a single solution: mobile and desktop apps, call center functionality, AI analytics, video conferencing, security auditing, and call recording,” he says. “At the same time, we all had the sense right away that RingCentral was going to be more of a partner than a vendor, a company that would get to know what Citation needed to succeed and help us innovate to get there.”

“Here was a very intuitive solution, something our staff could just start using easily, right away, and without much training. More than 70% of the hundreds of people on our Service Team are mobile—they’re out in the field every day. So being able to give them a full communications solution right on their laptops or personal cell phones was a big advantage.”

"Even during this disruptive time, our client feedback has been exceptional. That’s a combination of the capabilities of RingCentral and the commitment and talent of our team. And that’s what a great partnership looks like."

– Chris Haltof, Head of Technology Technical Services

The ideal communications technology for a lockdown

Before the pandemic, Citation had already begun rolling out RingCentral and experiencing many of the benefits of a cloud-based communications solution. But when the quarantines went into effect across the UK, Citation suddenly had to figure out how to transition its entire staff to remote work. That's when the technology team accelerated their RingCentral rollout—and when the rest of the company discovered what a smart decision it had been to switch to the new system.

“We're using RingCentral Video to do remote inspections of our clients' facilities,” says Lee. “It's easy, nonintrusive, and our clients really appreciate that we can continue serving them without having to be onsite and potentially put their teams at risk.”

“Our consultants are able to take client calls so easily from home,” says Chris, “just by logging into the RingCentral app on their laptops or their own smartphones. That means we're able to continue delivering outstanding service, day and night, even though everyone is quarantined at home.”

“We're also leveraging RingCentral to allow our sales teams to have face-to-face conversations with prospects and clients,” explains Beccy. “RingCentral is really helping to keep the sales engine going even through the lockdowns.”

And as Chris points out, having RingCentral in place when the shelter-in-place orders were issued made all the difference from both a business and IT standpoint. Because they had a work-from-anywhere solution ready to go, they didn't need to worry about setting up hundreds of employees with complex home-based equipment. All they needed was a laptop and the RingCentral app, and they could start making calls and hosting videos straightaway.

For more information, please contact one of our solution experts. Visit ringcentral.co.uk or call 0800 098 8136.

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact centre based on its Message Video Phone™ (MVP™) global platform. More flexible and cost effective than the on-premises PBX and video conferencing systems it replaces, RingCentral helps employees communicate across devices from wherever they are. RingCentral offers three key products. RingCentral MVP™ combines team messaging, video meetings, internet phone and other functionalities in a single interface. RingCentral Video™, along with its team messaging feature, enables Smart Video Meetings™. RingCentral Contact Centre™ gives companies the tools they need to connect with customers across channels. These are available on an open platform that integrates with hundreds of third-party apps and makes it simple to customise workflows. RingCentral is headquartered in Belmont, California, USA, and has offices around the world.



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