ORION

RESEARCH REPORT

Voice in the Workplace

Every Minute Counts

"The beauty of voice as THE user interface is that the technology comes out when it is needed and remains invisible when it is not – key hallmarks of when technology is at its best."

Ramon Llamas, Research Manager, IDC

Report Highlights

Not only do people rely on voice communication to get work done, but effective voice communication can set companies apart. Professionals in today's workplace use a mix of communication tools and are starting to add voice commands, automations, and bots to their workflows. Push-to-Talk is a strong, versatile choice for industries like Retail, Construction, and Logistics.

85% of professionals want to use voice tools in the workplace, but common pain points often force people to switch devices or tools. Most of all, people who use traditional voice tools want improvements in device battery life and network coverage as well as reduction in costs.

Finally, voice recognition and automation is playing an increasing part in how businesses choose and use voice technology and services. As small businesses and enterprise companies continue their shift away from traditional technologies and implement digital transformation initiatives, more and more professionals seek voice technology that does more than simply transmit voice messages.

Background information

This report shares original research from Orion Labs based on **an independent survey of 900 professionals** in the industries of Retail, Healthcare, Construction/Contracting, Hospitality, Logistics and Transportation, and Manufacturing. Participants included business owners, CEOs, maintenance workers, engineers, information technologists, and other employees at all levels of their organizations. Additionally, this report includes direct data from Orion, a provider of real-time voice communication solutions across industries and organizations of all sizes.

Overview: how people use voice technology in the workplace

On average, respondents used **4.5 different communication tools** or methods to communicate with team members at work. These included mobile calling, carrier Push-to-Talk, consumer radios, professional radio with license, SMS, and other voice products.

Respondents reported that their team members are on the move: respondents said **31%** of coworkers they talk to are always in the field, and over **44%** of coworkers they talk to tend to divide work time between the field and the office. In-the-field work often requires a heads-up communication approach that minimizes time looking at devices. Many workers cannot afford to spend time in screen-intensive media like email and SMS messages from team members.

How many team members do you communicate with throughout the day?

Category	Percentage
0-1	1%
2-5	36%
6-10	29%
11-15	12%
16-20	10%
20-30	5%
40+	7%
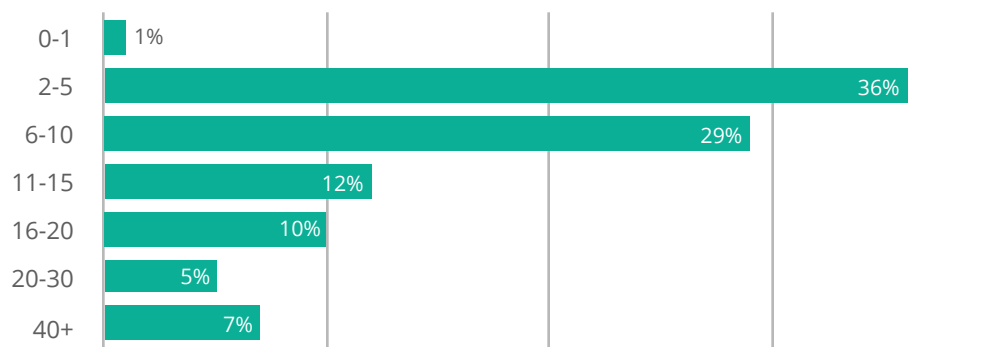
99% of respondents communicate with at least two coworkers using voice technology every day, with 63% talking to six or more coworkers. Survey data, 2017.

How often do you communicate with other team members at work throughout the day via voice, if at all?

Category	Percentage
Once a day or less	4%
A few times a day	31%
Hourly	15%
Constantly	50%
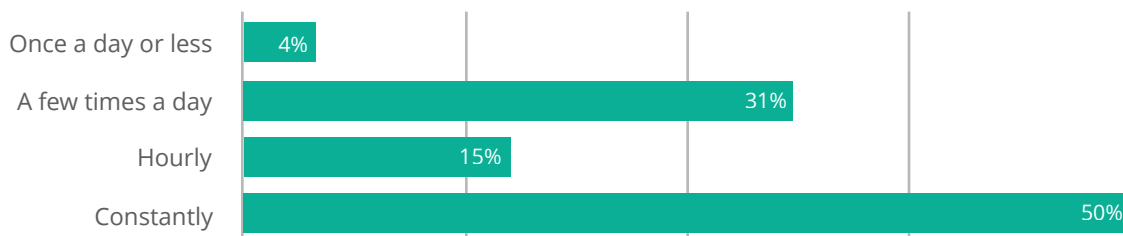
65% of workers use voice-based methods at least hourly. Survey data, 2017.
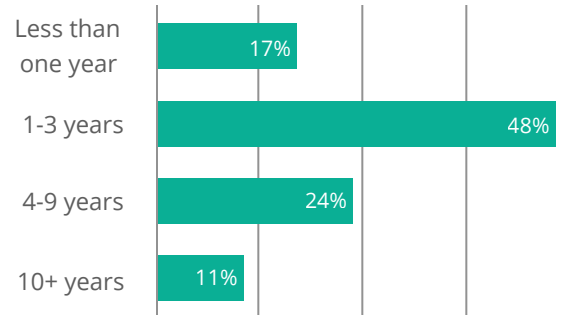
How do organizations choose voice communication tools?

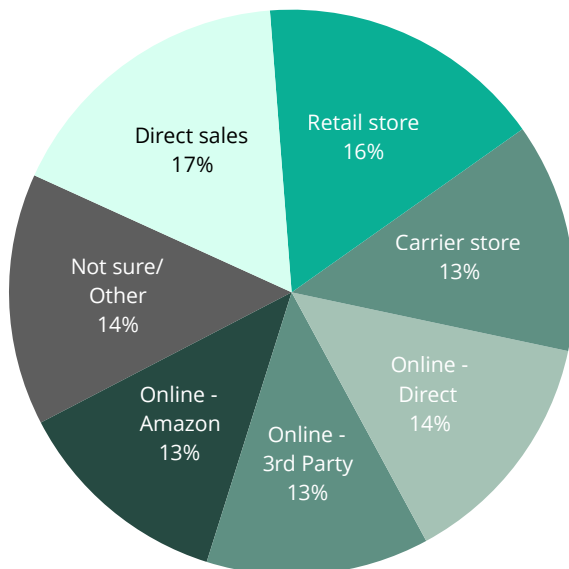Decision makers can improve their productivity and business outcomes with the communication tools they choose.

Over **50%** of Voice in the Workplace survey respondents had their primary communication tool provided to them by their company. Notably, Manufacturing employers were most likely to provide communication tools: **72%** of professionals used a company-provided communication tool.

However, people working in Manufacturing were least likely to use newer tools (less than 1 year old). In Construction, only **43%** of employers provide communication tools.

How old is your primary communication tool?

Less than one year	17%
1-3 years	48%
4-9 years	24%
10+ years	11%

How did your team/company purchase your tool?

Direct sales 17%
Retail store 16%
Carrier store 13%
Online - Direct 14%
Online - 3rd Party 13%
Online - Amazon 13%
Not sure/ Other 14%

Companies and organizations choose from many channels when purchasing their communications tools. Survey data, 2017.

Most important considerations when purchasing a communication tool

1 Saves time

2 Enhances productivity

3 Offers extended range

4 Secure

5 Affordable

The top three pain points for traditional voice solutions

People who use traditional voice solutions (mobile calling, carrier Push-to-Talk, consumer radios, professional radio with license, SMS, and other products) consistently pointed out a few common pain points.

Poor battery life

24.2% of all survey respondents said device battery life is a main pain point their company faces. Retail professionals reported this at a rate higher than average (**31%** named battery life as a top problem).

Poor range or network coverage

Communication range and network coverage is not sufficient for a significant number of workers. **23.2%** of respondents report that range/network coverage is a primary issue for team communication.

High device cost

The most popular devices are too expensive for **22.7%** of respondents, across all industries.

Other notable complaints:

20% of Healthcare professionals complained about missing messages.

38% of Hospitality professionals found it a pain to deal with monthly service fees for traditional comms tools.

14% of Logistics workers said inappropriate use of voice tools is a problem.

Workers switch traditional tools out of necessity

In addition to problems with devices, users of traditional voice solutions noted that adding more people to a conversation adds complexity. Frustrations with communication technology, including the pain points mentioned earlier, make people feel like giving up on their traditional tools.

42%

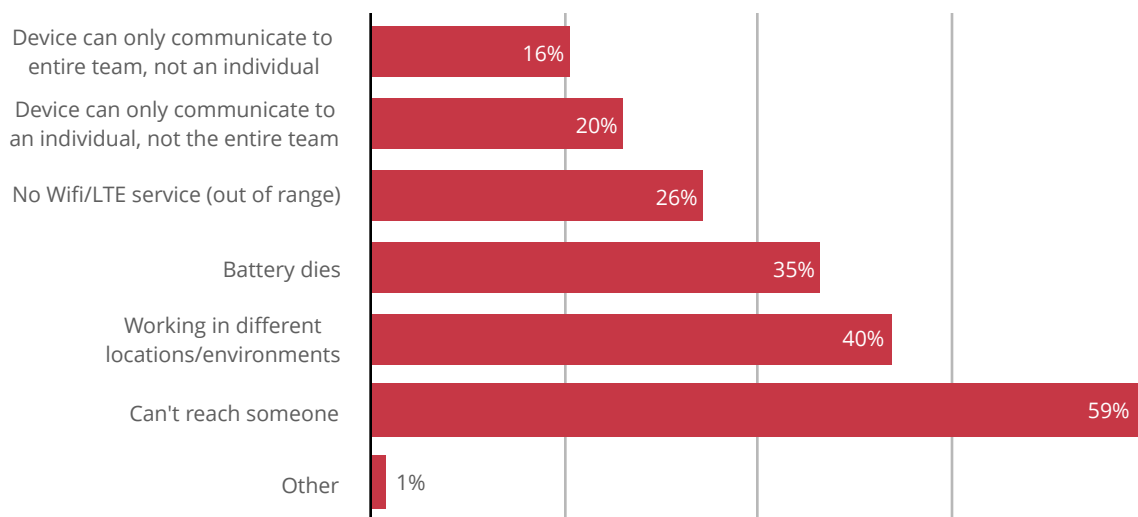of people using traditional tools must switch between them during their workday

The two most frustrating and anxiety-inducing work communication experiences are:

1) Realizing that one must immediately try to reach an individual or group
2) Trying to reach an individual or group

Almost half of survey respondents report having to switch communication tools multiple times a day, often because they can't reach someone.

Companies have the opportunity to choose tools that deliver a more reliable experience that meets workers' needs and that workers enjoy using.

Why do workers switch between communication tools throughout the day?

Reason	%
Device can only communicate to entire team, not an individual	16%
Device can only communicate to an individual, not the entire team	20%
No Wifi/LTE service (out of range)	26%
Battery dies	35%
Working in different locations/environments	40%
Can't reach someone	59%
Other	1%

Tool switching is triggered by common pain points as well as limitations of the device being used. Survey data, 2017.

# Push-to-Talk voice technology meets the needs of today's team

Push-to-Talk (PTT) technologies like realtime voice services, two-way radios, and consumer radios are the primary communication tool for Retail, Construction, and Logistics as well as small and large organizations (Survey data, 2017). Of the industries surveyed, Hospitality professionals were most likely to use PTT, at a rate of **47%.** Data below show how Orion service users (representing a range of industries and job roles) typically apply PTT technology.

Teams transmit as many as

645
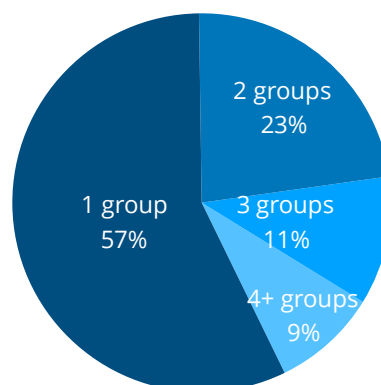
voice messages in a single day

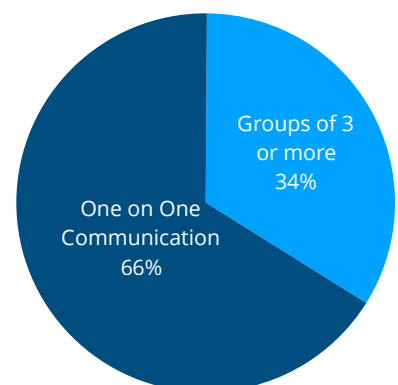### Average number of Push-to-Talk messages per team, per day
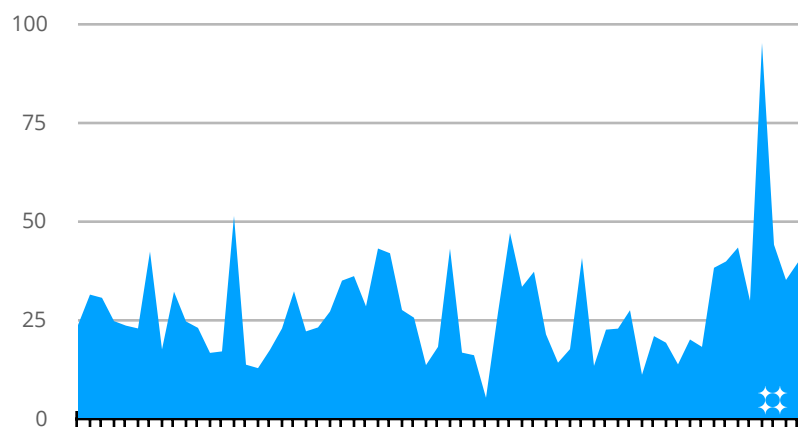
Average number of messages per team per 24-hour period. Orion Service data, Q4 2017.

Curious how teams using Push-to-Talk organize their PTT talk groups? The average PTT user tends to use only **one or two groups** to get work done. And PTT **groups don't have to be big to be useful**: many talk groups have only two members. Orion Service data, 2018.

Number of PTT groups per user

2 groups
23%

1 group
57%

3 groups
11%

4+ groups
9%

Typical group size

Groups of 3 or more
34%

One on One Communication
66%

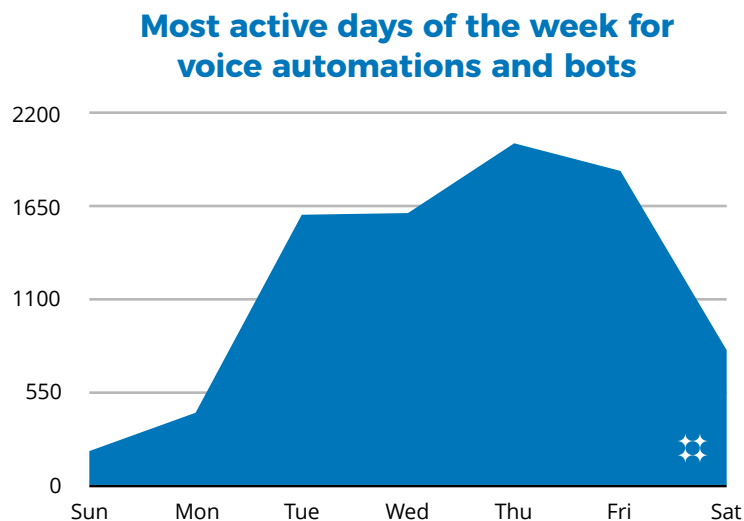# Voice-driven automation is on the rise

Businesses are seeking technologies and tools to help their employees operate more efficiently and please their customers while managing ever-tightening budgets and shorter timelines. Solutions like bots and custom applications can shorten the time required to conduct repetitive tasks like checking inventory, filling out forms, and tracking time worked.

How do these solutions work? **Speech recognition, natural language processing, and artificial intelligence** enable people to use simple voice commands and spoken questions to initiate processes and get answers.

Given that voice is a well-understood means of communication, perhaps it's not surprising organizations are starting to look at how voice technologies can improve efficiency within their processes and across their teams.

Using Voice Bots at work

Most active days of the week for voice automations and bots
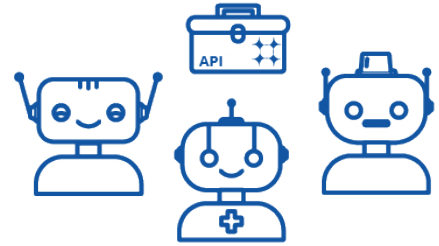
Number of times a voice automation or bot was triggered, per 100 users. Orion Service data, January 2018.

Workers are using voice commands, email, and saved calendar events to automate workflows.

Activity for voice-driven automation in early 2018 tracked traditional 40-hour, Monday-through-Friday work schedules, with **bot and automation activity peaking late in the week.**

Conclusion

Today's professional, at every level of their organization, depends on voice technology to get work done.

Technology and service providers should seek to relieve common pain points like battery life, network coverage, and total cost in addition to enhancing products with features that save time for users, enhance productivity, and offer extended range. Users are also increasingly seeking out voice-driven automations.

Purchase decision makers can greatly influence the success of their organization by choosing a communication tool for their team that's easy to use and integrates with their data and other tools.

"Users should not be distracted with operating the device, but instead remain focused on the message and its delivery. And at the end of the day, that's what users – both consumers and enterprise users – want."
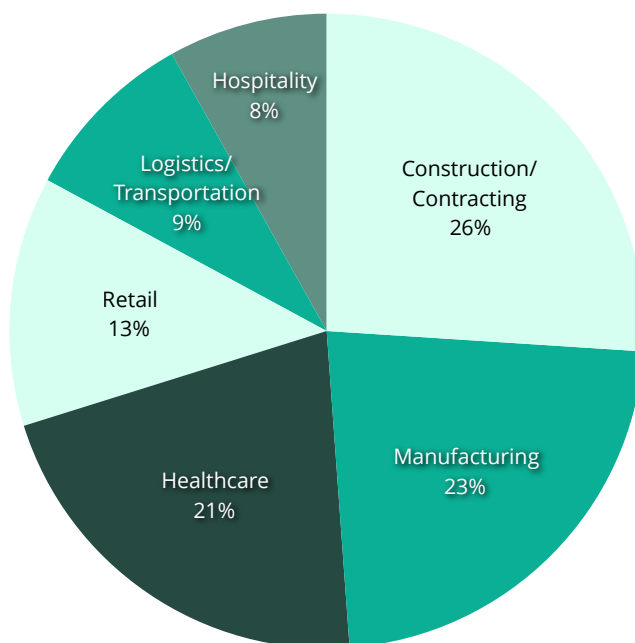
Ramon Llamas, Research Manager, IDC

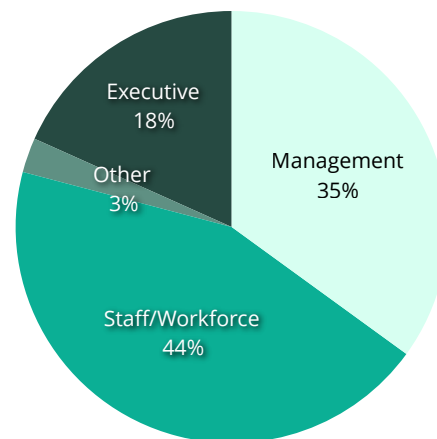# About Voice in the Workplace Survey Respondents

Orion's Voice in the Workplace survey offers insight into technology trends in business. Orion commissioned consultancy firm CMG to conduct the survey in the spring of 2017.

The survey reflects input from over **900** professionals in a nationwide cross-section of organizations. Of the respondents, **33%** of organizations had 99 or fewer employees, **33%** had 100-999 employees, and **33%** had 1000 or more employees. Survey participants represented a wide variety of professionals, including project management, health and safety, and plant/manufacturing operations.
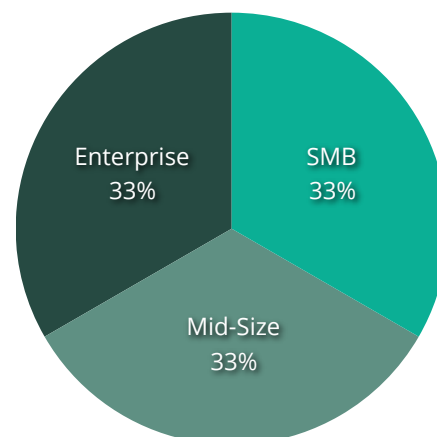
Survey respondents by Industry

Hospitality 8%
Logistics/ Transportation 9%
Retail 13%
Healthcare 21%
Manufacturing 23%
Construction/ Contracting 26%

Respondents by Role

Executive 18%
Other 3%
Management 35%
Staff/Workforce 44%

Respondents by Org Size

Enterprise 33%
SMB 33%
Mid-Size 33%

About Orion Voice Service and Bot Data

Orion Labs voice and bot data in this report was aggregated across all Orion Voice Service users during the period of September 2017 to January 2018.

Orion connects people to services, apps and wearables for real-time business productivity and efficiency. Orion delivers Push-to-Talk services over 4G/LTE and WiFi networks over any distance, with groups of any size.

Orion also offers voice-driven workflow services for organizations of all sizes and in all industries. Orion integrates with other products and services to help businesses automate communications and activities based on the input of their choice, whether it's voice, location, or other custom triggers.

The most frequently-used automations on Orion were: voice notifications for VIP emails (**38%**), push notifications for spoken keywords (**25%**), and audible meeting reminders (**19%**). Other bots in use by organizations: clock-in/clock-out, inventory lookup, man down/ lone worker workflows, smart device control, and real-time translation for up to 67 languages.

For more information

This research is part of an ongoing Orion Labs initiative to help identify and report on communications technology trends affecting small business, mid-size, and enterprise organizations. For more information on planning and deploying a voice solution to increase worker productivity, efficiency, and safety, visit orionlabs.io.

Sources:
1. Orion Voice in the Workplace Survey, CMG, 2017
2. Aggregate Push-to-Talk voice service use data, Orion Voice Service, 2017
3. Aggregate voice bot data, Orion Voice Service, 2018