Market Insight Report Reprint

Voice user interfaces set to play a key role enabling digitization of frontline operations

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We look at how ConverseNow, Deltapath and Orion Labs are making inroads with voice user interfaces to enable a 'hands free, heads up' user experience to address critical requirements for the frontline workforce, including productivity, safety concerns and customer engagement.

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Introduction

We have previously looked at how factors such as social distancing and workflow automation are driving adoption of voice and contactless interfaces in the wake of COVID-19. In this report, we provide an update showing how this trend has evolved over the past two years. We also provide an overview of recent deployments in healthcare organizations, quick-service restaurants (QSRs), and a luxury resort and club from vendors including ConverseNow, Deltapath and Orion Labs that highlights how voice user interfaces can address critical frontline worker requirements, including productivity, safety concerns and customer engagement.
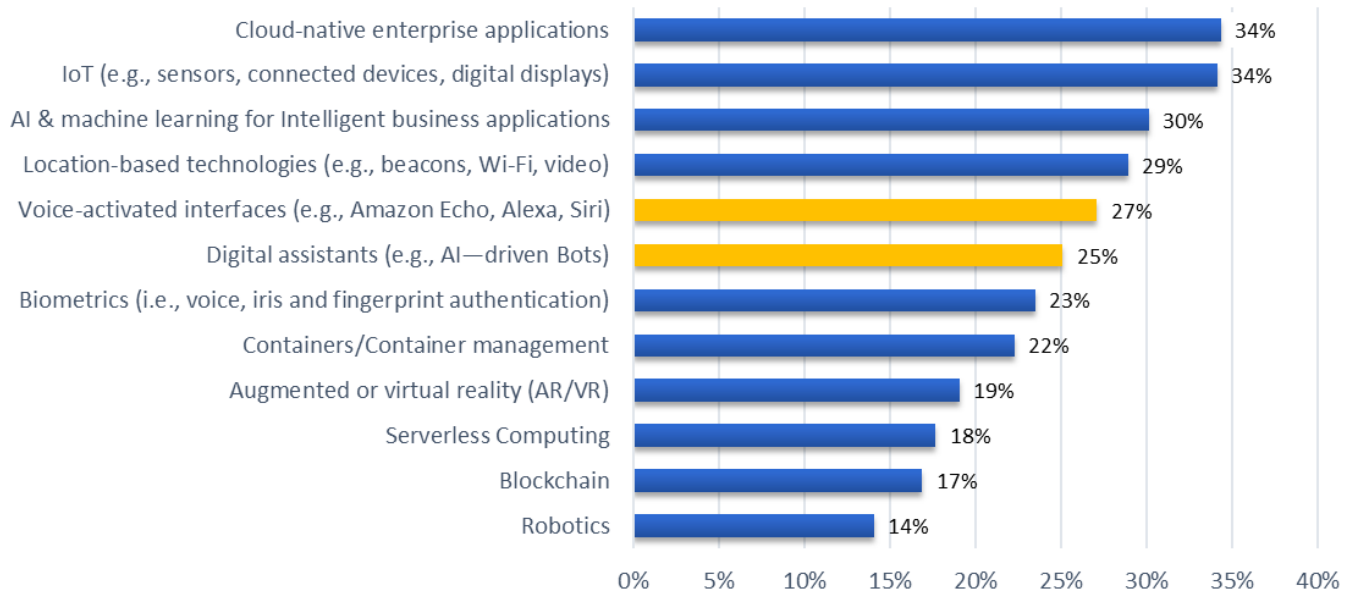
THE TAKE

Encompassing those employees who deal directly with customers or are closely involved in the production process, frontline workers have increasingly been in the spotlight for digital transformation and IT and business communications investments across practically all industries. The use cases outlined in this report highlight the criticality of enabling a 'hands free, heads up' user experience for frontline workers. They also highlight how voice interfaces – coupled with real-time communications, back-end systems integration and location management services – can support the digitization of frontline workers, helping organizations further automate and optimize their frontline operations.

Workplace adoption of voice user interfaces is growing

Although lagging the consumer segment, in the past five years we have seen increased interest in the use of voice interfaces in the workplace. According to 451 Research's Voice of the Enterprise: Workforce Productivity & Collaboration, Technology Ecosystems 2021 survey, voice-activated interfaces and digital assistants are among the top disruptive technologies that organizations plan to adopt over the next 24 months (see figure below).

There are several factors influencing this trend. Voice-activated interfaces and digital assistants have become ubiquitous in crossover devices targeting consumers and businesses, including laptops, tablets, smartphones, smartwatches and voice-only devices such as smart speakers. However, in the past three years, we have seen a growing number of speech-enabled devices designed specifically for the workplace, including desk phones, meeting room equipment, and hearable devices from vendors such as Cisco, Microsoft, Poly and Zoom. We have also seen voice-enabled workplace-only digital assistants, such as AWS's Alexa for Business, Cisco Webex Assistant and Microsoft Cortana.

Planned Adoption of Disruptive Technologies

Technology	Percentage
Cloud-native enterprise applications	34%
IoT (e.g., sensors, connected devices, digital displays)	34%
AI & machine learning for Intelligent business applications	30%
Location-based technologies (e.g., beacons, Wi-Fi, video)	29%
Voice-activated interfaces (e.g., Amazon Echo, Alexa, Siri)	27%
Digital assistants (e.g., AI—driven Bots)	25%
Biometrics (i.e., voice, iris and fingerprint authentication)	23%
Containers/Container management	22%
Augmented or virtual reality (AR/VR)	19%
Serverless Computing	18%
Blockchain	17%
Robotics	14%

Q. Which of the following disruptive technologies does your organization plan to adopt over the next 24 months? Select all that apply.
Base: All respondents (n = 498)
Source: 451 Research's Voice of the Enterprise: Workforce Productivity & Collaboration, Technology Evaluations 2021

Enabling the frontline digital experience with voice user interfaces

Most of the devices previously listed target desk workers and meeting-room environments, and the most widespread use cases involve supporting collaboration workflows with the use of voice commands for tasks such as managing meetings, controlling conference room devices and controlling conference room settings (i.e., lightning and temperature). These use cases are, for the most part, a 'nice to have' option for desk workers. There are, however, numerous examples where voice-activated interfaces and digital assistants can be critical for frontline employees.

Below, we outline use cases and representative vendors exemplifying how the use of voice interfaces can be critical for enabling a 'hands free, heads up' user experience for frontline workers.

ConverseNow drives productivity with voice ordering at Domino's Pizza and Fazoli's

ConverseNow automates and personalizes orders for QSRs on high-volume voice channels including phone, drive-thru, self-service kiosks, voice assistants and voice-assisted chat on mobile.

Domino's Pizza, a US-headquartered multinational pizza chain operating over 14,000 restaurants in over 85 countries, faced numerous challenges stemming from the COVID-19 outbreak and an industry-wide labor shortage. Looking to keep understaffed stores open without compromising service, the company sought to leverage voice AI to modernize phone-ordering operations, eliminate busy signals and missed calls, and ensure it was capturing every phone sale.

Domino's has deployed ConverseNow in over 1,000 stores across 40 states, at both the franchise and corporate levels. It uses voice AI technology not only to keep understaffed stores open during the pandemic and labor shortage, but also as a long-term solution to enhance guest experience, boost staff performance, and drive bottom-line results for franchise owners and operators. Domino's sales data, tracked by a third-party provider, indicates up to 20% sales growth and 30% average ticket increases, driven by dynamic, automated upselling. Furthermore, stores have doubled their output during peak hours by allocating staff to focus entirely on fulfillment and in-person service, rather than spending time answering the phone. Additional benefits include scalability for an improved experience, with guests no longer experiencing busy signals or missed calls.

Fazoli's, a 'fast casual' restaurant chain operating over 220 locations across the US, was struggling to keep its restaurants staffed amid a national labor shortage. It sought a solution to assist with order fulfillment without compromising the guest experience. Key requirements included support for both drive-thru and phone channels – drive-thru is a critical business driver for Fazoli's, while phone orders are an important revenue stream that had previously been shut down due to bandwidth issues.

Fazoli's deployed ConverseNow to revive its phone sales and for a growing number of drive-thru locations. The company reports that automating the order process has been key for maintaining its margins, despite rising food and labor costs. Furthermore, ConverseNow did not require additional hardware investments, as it could integrate with existing Fazoli's operations.

Deltapath enables 'hands free, heads up' real-time communications

Unified communications provider Deltapath supports hospitals, urgent-care centers and clinics with a vertical-focused approach. It combines UC capabilities such as presence, team collaboration, real-time texting and video calling, and push-to-talk (PTT) communications with third-party integrations that include nurse call systems and sensors for real-time patient monitoring.

The company's comprehensive offering combines PTT, nurse calls, phone calls, integration with electronic medical records and instant messaging functionality in a single App. It has also incorporated the use of hearable devices designed specifically for frontline healthcare providers such as nurses and doctors. These include hands-free and ear-free wireless headsets that avoid common problems with over- and in-ear headphones, which make it hard for users to hear anything or anyone around them, as well as with wired headsets, which tend to get in the way.

Orion Labs drives productivity and worker safety for Hamilton Princess & Beach Club

Orion provides an enterprise voice services platform with artificial intelligence (AI) bot-enabled PTT 2.0 functionalities delivered over mobile networks and Wi-Fi to a smartphone mobile application or web browser. The company also provides a wearable device called Onyx – a clip-on round-button walkie-talkie that pairs via Bluetooth to the Orion mobile app on the user's smartphone. Orion operates via voice-enabled commands, and provides integration to business systems and third-party platforms, including Google Assistant, Microsoft's Cortana and Amazon's Alexa.

Key verticals and use cases for Orion include those that have traditionally relied on two-way radios, including transportation, retail, security, manufacturing and hospitality organizations. The Orion Voice Platform connects deskless workers across value chains, from inside facilities to adjacent or distant sites – including transportation and logistics between sites. It connects and enables real-time collaboration, location management, dispatch and voice-activated bots, workflows, and data retrieval for broadly disparate use cases, including workers who deal directly with guests and customers, transport goods or people, provide security, or are closely involved in the production process. The platform connects, coordinates and provides visibility to frontline teams that otherwise would have no ability to communicate as part of their mission-critical jobs. It provides cloud-managed connectivity from inside to outside the four walls of an organization's facilities, and to any LTE- or Wi-Fi-enabled point of service.

Hamilton Princess & Beach Club, a Fairmont managed luxury resort and club in Bermuda, selected Orion's collaboration platform to enhance team communication, improve productivity, and support worker safety for its housekeeping, security, engineering, spa, grounds, transportation, and front-desk teams.

Hamilton Princess sought an alternative to radios to better support collaboration resort-wide, with intelligent collaboration capabilities to support resort staff's ability to provide the highest level of safety, care and comfort to guests in dynamic environments. It uses Orion's web dispatch console to centralize visibility, management and decision-making in an effort to simplify cross-departmental coordination and enhance productivity across the property. The platform also enables staff to instantly communicate using language translation, 1:1, in groups or with all-call workflows.

The Orion platform also provides emergency and panic alerts, with advanced location services to enhance the safety of the resort's distributed workforce, identifying emergency situations and automatically triggering workflows that alert security and management. Additionally, advanced location services show management the exact location of staff in real-time, allowing managers to deploy resources to team members in duress.