



Trusted Connections 2023

The workplace collaboration
index for **high-trust organisations**

Working together. *Everywhere*



Introduction

At Kinly, we work with some of the world's most trusted organisations. From banks to healthcare providers, energy suppliers to government departments — these organisations trade in trust.

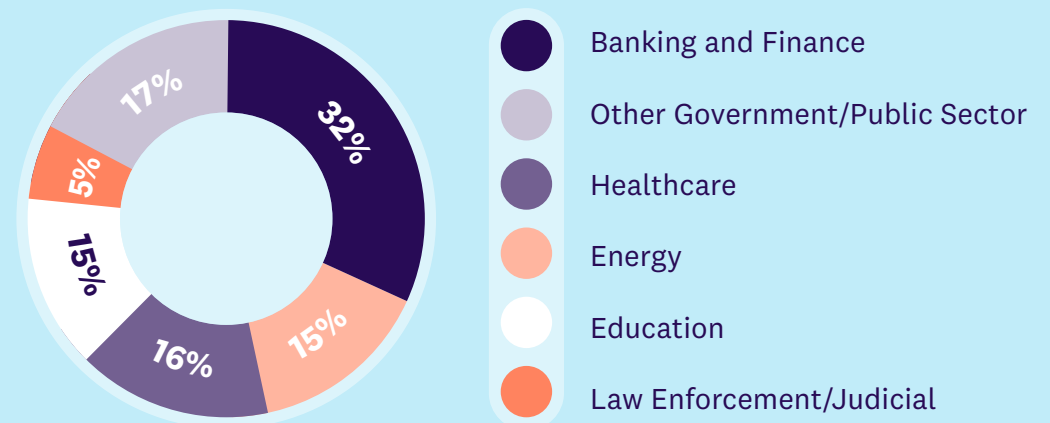
But behind every trusted brand is a commitment to great communication. Whether it's communicating with customers, employees, or public citizens, the right comms approach can make or break a high-trust organisation.

So how exactly are these organisations communicating in 2023? What are the challenges and opportunities they face, and how is hybrid working impacting the relationships that are so essential to their high-trust business models? These are just a few of the questions explored in this report.

The methodology

This report contains original research data from 150 AV professionals working inside 'high-trust' sector organisations in the UK. These organisations span banking and finance, healthcare, law enforcement, judiciary, energy providers, educational organisations, and the public sector.

Who we surveyed



Kinly surveyed **150 AV professionals** working inside 'high-trust' organisations across the UK's banking, finance, healthcare, energy and public sectors.



Collaboration — The key to customer trust

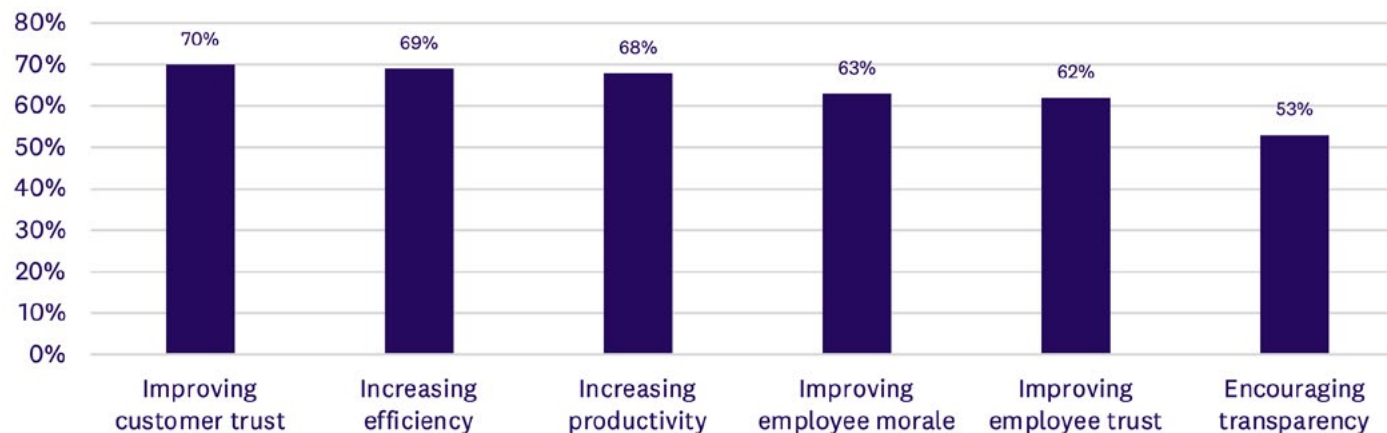
For those working in high-trust sectors **‘improving customer trust’ is the #1 priority** when installing new AV tech. While that may sound obvious, it goes to show the commitment to continuous improvement within this space.

For high-trust organisations, AV is not just about headsets, software and screens. It’s about building consistent, clear communication with both customers and employees.

In fact, 41% of AV professionals surveyed say that their choice of tech is a ‘vital part’ in securing customer trust. 44% also believe that the right communications technology can ‘make or break’ the customer experience.

For high-trust organisations — whether in finance, public sector, education, or healthcare — the message is clear: **collaboration is the key to customer trust.**

Priorities when selecting new collaboration and communication tech



41%

of AV professionals believe that **effective communications tech** is **‘vital’** for building customer trust



The impact of hybrid work

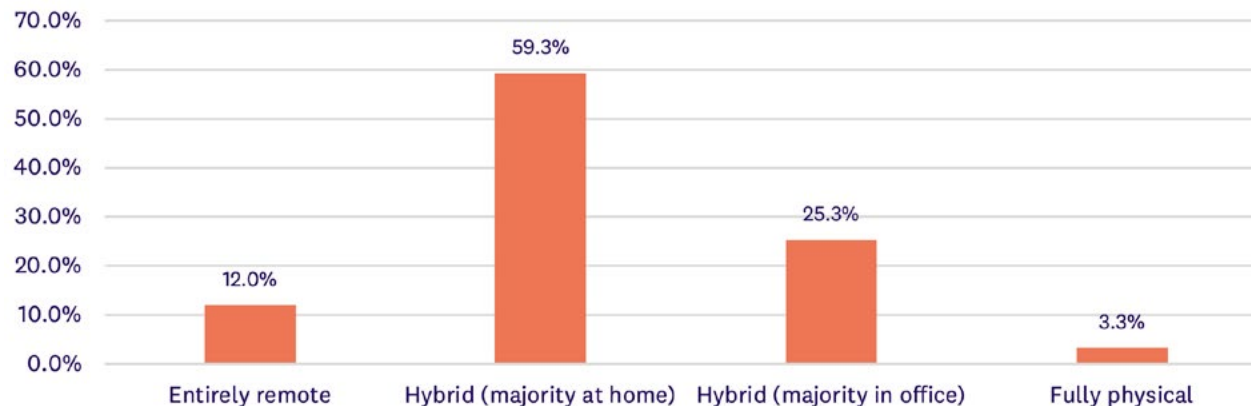
When the UK government first asked employees to work from home, no one could have predicted that it would trigger such a **lasting societal change**.

Three years on and hybrid work is the norm across nearly every industry, including for high-trust organisations. Here, nearly all (97%) have switched to some form of remote working, and more than half (59%) do the majority of their work from home. In fact, hybrid working is so common that 51% of AV professionals believe we should drop the word 'hybrid' and just call it 'work'.

Despite this widespread adoption, the move away from in-person communication is a complicated proposition for high-trust brands, with some worrying that it will undermine trusted relationships with customers and staff.

In fact, just over a quarter (27%) believe that customer trust has been weakened since the move to remote working. However, 73% believe they should be just as capable of building trusted relationships with customers without in-person contact... **as long as they have the right technology**.

Hybrid working set ups for 'high-trust' organisations



51%

of AV professionals
think we should **drop**
the 'hybrid' from
'hybrid work'



From high trust to high security

While the majority of high-trust organisations have been open to hybrid and remote working, many AV professionals do still flag security concerns.

Top concerns include employees communicating via open Wi-Fi networks, unauthorised saving and copying of documents, and the potential for webcam hacking. While AV professionals are keen to minimise these concerns, they don't want to damage or limit the employee experience in the process.

Nearly half (46%) of AV professionals believe the right communications workflow can 'make or break' the employee experience, while 47% also believe communications tech is 'vital' for building employee trust.

Biggest security concerns across the high-trust sector

- Communication via open Wi-Fi networks (89%)
- Unauthorised saving or copying of documents (88%)
- Webcam hacking (87%)
- Communication via unsecured home devices (87%)
- Unauthorised recording or saving of calls (86%)
- Unreliable remote network connections (85%)
- Data saved on unauthorised servers (85%)
- 'Video bombing' (Joining or overhearing calls by mistake) (81%)

46%

of AV professionals believe the right communications workflow can 'make or break' employees' experiences

With this careful balance in mind, the right workflows and collaboration technologies are more important than ever before.



Beyond 'working from home'

While it's one thing to worry about Zoom-bombing and unsecure Wi-Fi connections, the high-trust sector's **challenges go far beyond traditional home working environments.**



42%

must collaborate with
'front line' workers



47%

must collaborate with
teams in transit



38%

must collaborate with
those in **highly remote**
locations



34%

must collaborate with
those in **extreme**
environments

Collaborating with workers who are in transit or working from some of the most remote or extreme locations **adds another layer of complexity to high-trust organisations' tech stacks** and communications needs.



The great rollback

Despite high-trust organisations seeing the value of hybrid work — there are concerns about the speed at which these advances were rolled out.

Due to the Covid-19 pandemic, many businesses were forced to adopt new collaboration technologies virtually overnight. Now, AV professionals are having second thoughts, looking to swap out and improve their tech.

41% of those surveyed say that they ‘rushed’ their installations due to Covid-19, resulting in poorly designed and overly complex tech stacks and workflows.

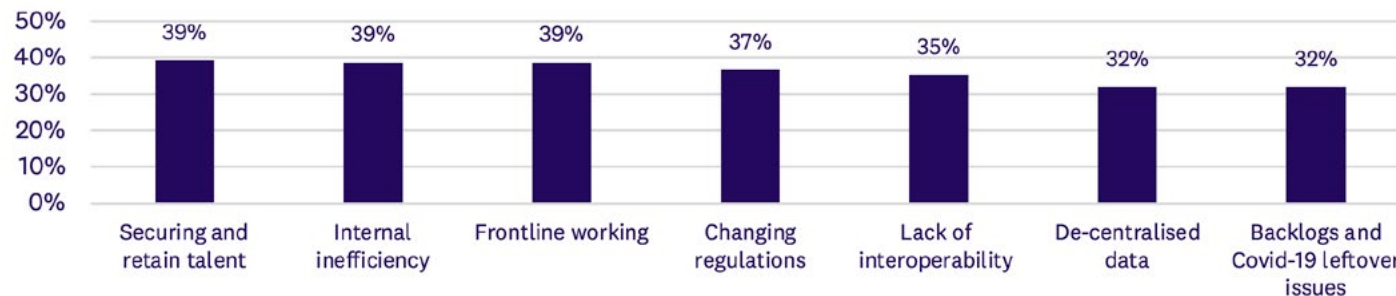
Over a third (39%) say they needed more time to ‘get the technology right’, while 32% believe the rush to adopt has potentially undermined their security.

This has led to a number of challenges including securing and retaining the best talent, ongoing inefficiencies, and a lack of interoperability.

As a result, some AV professionals are now looking to roll back their efforts with 1 in 4 of those working at high-trust brands (23%) are currently uninstalling the AV technologies introduced during Covid-19.

This ‘great rollback’ is only expected to grow as ever more high-trust organisations look to **simplify and streamline their systems.**

Biggest challenges impacting communication at high-trust organisations



23%

of high-trust organisations are rolling back the hybrid working tech they installed during Covid-19

41%

of high-trust organisations ‘rushed’ their communications approach



The solution – Simplify and streamline

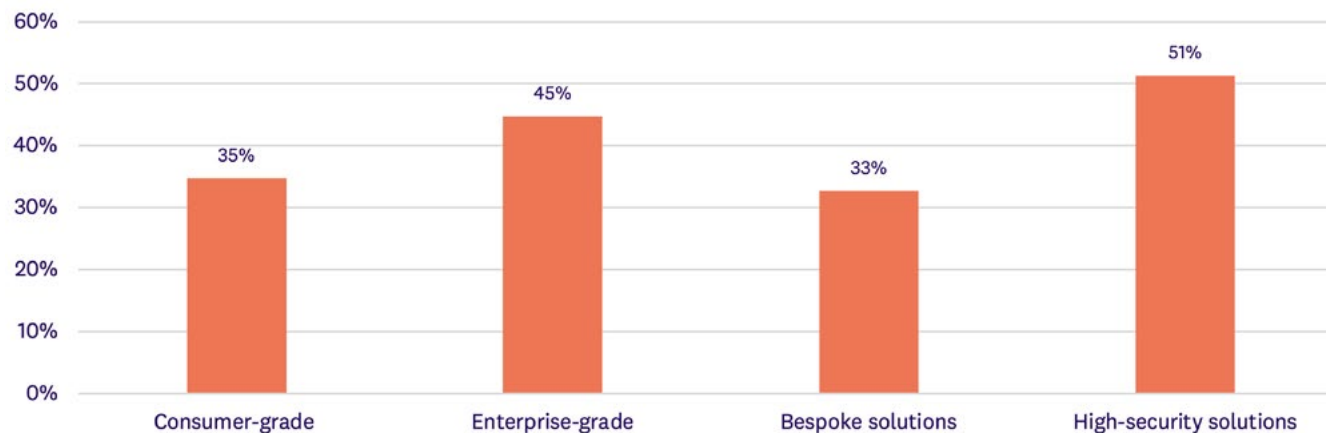
As they roll back rushed hybrid working initiatives, high-trust organisations are looking to **simplify and streamline their technology stacks.**

Most are having to combine a baffling array of different technologies, many of which are disjointed and of varying quality. A third (35%) of high-trust organisations are relying on consumer-grade tools such as WhatsApp and Facetime, while another third (33%) have had to build their own bespoke comms solutions from the ground up.

While the use of consumer-grade tools may be perceived as a security threat, using recognised consumer-facing technologies can actually help with customer experiences. For everyday consumers, a WhatsApp message or FaceTime call can feel familiar and easy to use, strengthening — rather than weakening — their trust.

Combining these different grades of technology however, remains a challenge. Interoperability and efficiency are key concerns, with nearly three quarters (73%) of AV professionals believing their comms workflows still have ‘room for improvement’ when it comes to interoperability. 64% also feel their workflows could be more efficient.

What grade of technology is being used in high-trust brands



Investing in the future

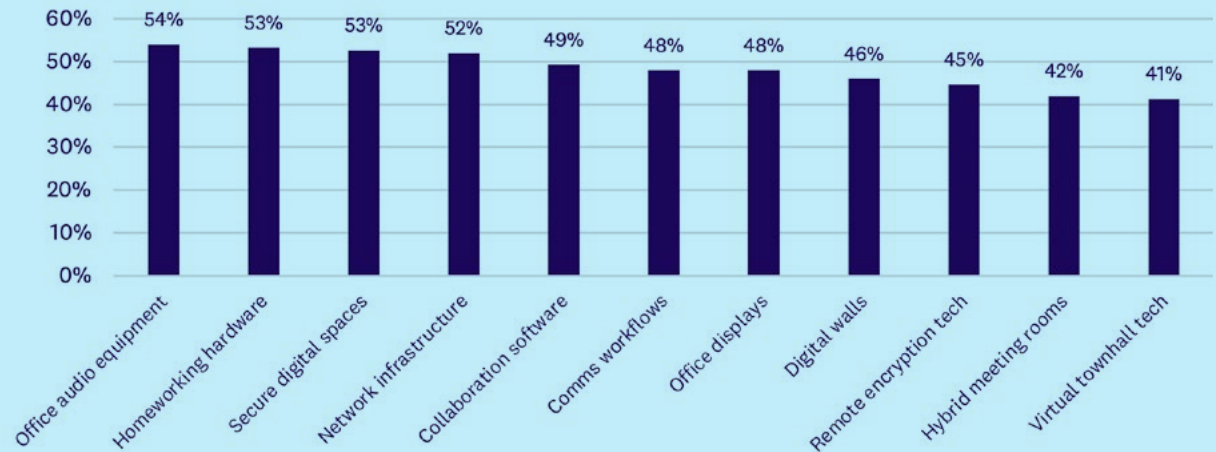
As high-trust organisations look to fix the issues left from Covid-19 and further build customer trust, **technology investment is key.**

In recent years, AV professionals working in high-trust sectors have invested heavily in both remote and in-office systems, specifically office audio equipment and homeworking hardware.

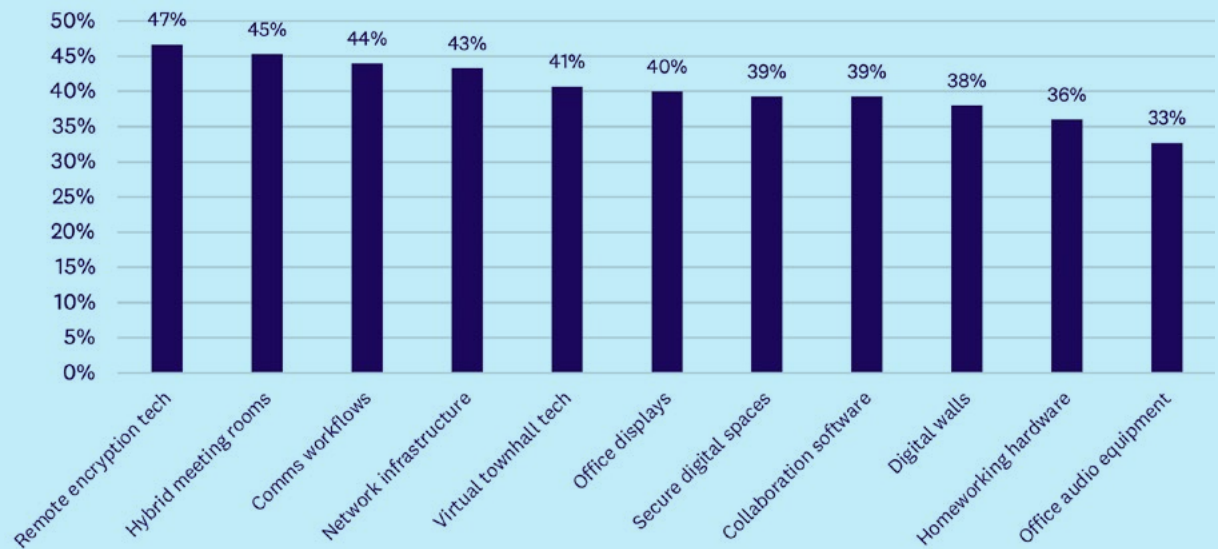
Now, as we look ahead to 2023, demands are becoming more sophisticated and the focus is shifting.

With a renewed focus on security, remote encryption is the #1 technology being invested in. This is closely followed by increasingly advanced in-office tech including hybrid meeting set ups and investments in the entire physical-digital communications workflow.

What have high-trust brands already **invested in**?



Where are high-trust brands **investing in 2023**?



From complexity to simplicity

As workplace communication evolves, AV professionals have their work cut out for them. Nowhere is this truer than in high-trust sectors. Whether in finance, government, energy or healthcare, **trusted institutions don't have the luxury of making mistakes.**

This report has demonstrated the complexity of collaboration in this environment, and the risks involved in rushing installations or selecting the wrong tech. As a result of this complexity, 30% of high-trust organisations struggle to find technologies and suppliers that can meet their needs.

That's where Kinly comes in...



A partner you can trust

At Kinly, we work with the world's most trusted brands, combining the best technologies for the job to create truly bespoke, secure, and intelligent communication workflows.

We don't believe in the mythical 'one size fits all' tool that so many companies are still searching for. **That's why we take a flexible approach** that combines the very best tools and insights for your organisation's needs.



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