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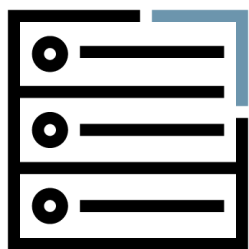
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eBook

Connected Education: Driving Transformation and Safety Through Modern Communication

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Learning Environments Today: Demand for Seamless Connectivity



As is the case in other industry verticals, the education sector in North America, encompassing both K-12 and higher education, is increasingly adopting unified communications as a service (UCaaS) to address their digital transformation goals. In fact, educational organizations studied by Metrigy^[1] are ahead of the curve on full migration to UCaaS-only setups:

62.5% vs. **50.4%**
for education for all sectors

In the case of education, the shift toward hybrid learning models, personalized student experiences, and digital-first administration is rapidly redefining the communications and collaboration landscape. No longer confined to physical classrooms, the modern learning environment is a distributed ecosystem that demands seamless connectivity for students, faculty, staff, and parents alike regardless of location.

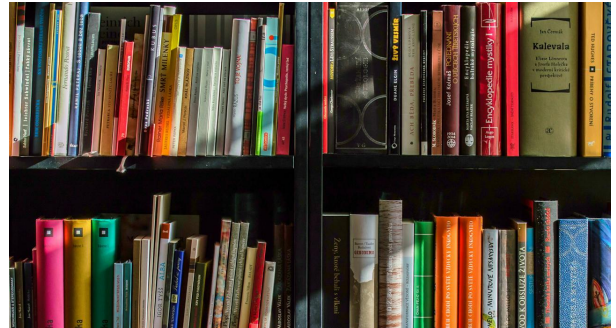
IT decision-makers face the strategic imperative of unifying disparate communication tools—from aging phone systems to multiple video conferencing and messaging platforms—into a cohesive whole that is highly secure and readily scalable as needed. The pressure is on within education as elsewhere to support diverse communication needs, enhance safety with robust emergency response capabilities, and ensure operational efficiency, often against tight budgetary constraints. This is where the adoption of the right cloud-based solution becomes not just an upgrade, but a critical driver of an institution's digital transformation.

[1] Metrigy's "Workplace Collaboration MetriCast: 2024-25"

A Stepped Approach to Unifying Communications

Despite the interest in cloud services adoption, transitions take time. So, while the ultimate goal may be to go UCaaS all the way, a significant number of educational organizations today are taking a stepped approach. That is, they are first moving to a hybrid environment of on-premises and cloud communications systems before going all-in on UCaaS. Here's a full look at phone/UC architecture in place for education compared to all sectors:

	Education	All Verticals
UCaaS only	62.5%	50.4%
On-prem only	8.3%	10.4%
Both	29.2%	39.2%



As they implement UCaaS, whether in a hybrid or full deployment, critically important is selecting the best platform for education's particular requirements. According to Metrigy's research, the most important UCaaS evaluation criteria for education are:

Top 5 Most Important UCaaS Evaluation Criteria for Education

(According to Metrigy's research)

- 1 Reliability**
- 2 Security**
- 3 End-user ease of use**
- 4 Voice quality**
- 5 Value (bang for the buck)**

Comparatively, technical features factor into the Top 5 for all verticals, vs. value (bang for the buck). The importance of "value" for education reflects the unique budget and funding constraints they face, and UCaaS can be an attractive approach in this regard.

4 Ways UCaaS Addresses Budget Constraints

1 Shift from CapEx to Opex

UCaaS does away with the heavy spending lift required for keeping physical phone systems (PBX, servers, hardware) up to date with a predictable, subscription-based OpEx model.



Value prop: Increase in budget accuracy, easier cash flow management, no need for large, upfront funding requests

2 Elimination of maintenance and upgrade costs

The UCaaS provider carries the onus of keeping the system humming. In other words, the UCaaS provider handles hardware maintenance, software upgrades, patching, and security updates.



Value prop: Reduced operational expenses and IT staffing costs associated with on-prem system maintenance

3 Ability to scale on demand

Institutions only pay for the services and users as needed, rather than needing to invest in costly, underutilized infrastructure.



Value prop: Add or remove licenses to accommodate seasonal fluctuations in student enrollment or the hiring of temporary staff

4 Reduces redundancy

Consolidating multiple communication tools (voice, video, messaging, and emergency features) into a single UCaaS platform eliminates the need for separate contracts and software licensing for disparate tools.



Value prop: Lower total cost of ownership

Messaging, Meetings, Calling, AI: UCaaS Use Cases

No matter whether K-12 or higher ed, those school systems that stay married to on-premises/dedicated hosted platforms or mired in a hybrid architecture will find themselves lagging further behind, students, and parents; administration and faculty; or others—with the most desired capabilities. The following use cases demonstrate how UCaaS capabilities translate into direct value for the education sector.



Hybrid learning and work

With cloud access to a UC system, students, faculty and staff can connect and collaborate from anywhere. Use cases include virtual classrooms, remote office hours, and distributed staff meetings.



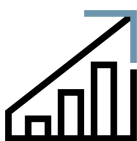
Collaborative work

UCaaS features such as team messaging, meeting/video conferencing, screen sharing, and virtual whiteboards can facilitate group sessions and project work among students, students and teachers, athletes and coaches, and others.



School safety

UCaaS platforms are crucial for school safety. They provide emergency broadcast tools, real-time paging, and Enhanced 9-1-1 (E-9-1-1) capabilities, which can pinpoint the location of a 9-1-1 call on campus and alert on-site personnel.



Administrative efficiency

Integrating AI with UCaaS can boost faculty efficiency by automating tedious administrative tasks. For example, during a video faculty meeting, AI can automatically transcribe the discussion, generate a concise meeting summary, and extract a list of action items with assigned owners, freeing up time that would otherwise be spent on manual note-taking and follow-up. This allows faculty to spend less time on administration and more time focusing on curriculum development or student support.

Which is Most Important^[2] to Your Organization?

1. Meeting apps
2. Team chat/messaging
3. Phone

Phone system third in importance, but still hugely critical for all companies. Among those in education:

54% say phone systems will remain a critical part of communications

[2] Metrigy's "Employee Engagement Optimization: 2024-25" research study

School Safety and Emergency Preparedness: Are You There?

Meeting 9-1-1 compliance is critically important, but fraught with complexity. Selecting the right UCaaS system can help schools of all sizes and levels meet regulatory mandates at the federal, and sometimes, state level. Metrigy's research shows a woeful negligence on a significant portion of organizations that fail to do so, in part because understanding the nuances of each relevant law can be challenging.

3 Key U.S. Regulatory Requirements at a Glance



Kari's Law

- Direct 9-1-1 dial (without prefix or access code)
- Notification of 9-1-1 call to a central site, along with the provision of a valid callback number
- Compliance date for new installs/sales: February 17, 2020



RAY BAUM's Act (Section 506)

- Must provide “dispatchable location” to PSAP and on-site personnel for any 9-1-1 call
- Compliance dates:
 - January 6, 2021, for fixed MLTS, fixed VoIP services
 - January 6, 2022, for non-fixed services



State Mandate: Alyssa's Law

- Created to improve school safety by requiring public elementary and secondary schools to be equipped with silent panic alarms that are directly linked to law enforcement
- Goal is to eliminate delays that could occur with calling 9-1-1
- Currently law^[3] in 10 states, and under consideration in almost 20 more

[3] <https://makeourschoolssafe.org/>

9-1-1 Compliance: Your Attention Needed, Now!

As noted on the previous page, Metrigy's research shows that a significant portion of organizations aren't fully compliant on 9-1-1. Here's a look at the problem, by the numbers.

9-1-1 Compliancy for Kari's Law and RAY BAUM'S Act Among All Companies: 64% are compliant with both.

Education Watchpoint



Among **education** study participants:

55% are compliant with both Kari's Law and RAY BAUM'S Act

Risks of Non-Compliance

1. Safety

Risk of loss of life or physical harm by inability to respond to an emergency quickly

2. Regulatory environment

Kari's Law, up to \$10,000 per day; RAY BAUM'S Act – undefined

3. Civil liability

Lawsuits and reputational harm

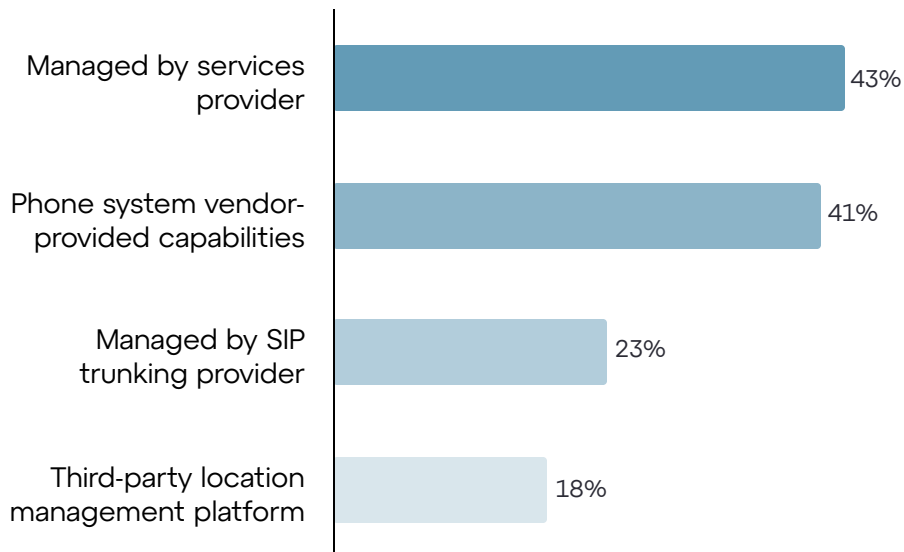


How UCaaS Platforms Can Help with School Safety and Emergency Preparedness

A variety of UCaaS features and capabilities can help K-12 schools and higher-ed institutions meet regulatory requirements and address safety and emergency concerns. Depending on platform, they include:

- **Direct 9-1-1 dialing:** Allow users to dial 9-1-1 directly from any device on the network without any prefixes, eliminating potential failure points and delays in an emergency
- **Text or email alerts:** The system can be set up to notify designated security personnel or administrators when a 9-1-1 call is placed
- **On-screen pop-ups:** Similarly, a notification can be set to pop up on the computer screens of staff, administrators, etc.
- **Paging system alerts/alarms:** Alerts can be sent over a connected paging system
- **Conferencing:** Automated conference bridging between 9-1-1 caller and internal security personnel, for call monitoring and assisting responders
- **Dispatchable location and dynamic location tracking:** System automatically and dynamically determines a user's location, no matter whether they're calling from a desk phone, a softphone, or a mobile device
- **Dedicated panic buttons on IP phones, desktop apps, mobile apps:** Initiates emergency protocol, including 9-1-1 call, when activated
- **Integration into emergency response and management systems:** Integration triggers automated actions in the event of a 9-1-1 call or other emergency
- **Supporting Next Generation 9-1-1 (NG 9-1-1):** Enables sharing of additional information, including video, floor plans, and sensor data, with first responders

How does your organization manage 9-1-1 locations?



Education Watchpoint

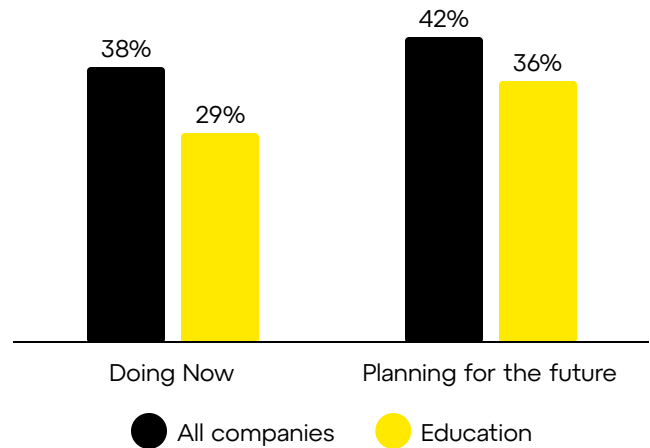
For education, reliance on phone system vendor-provided capabilities in use most often, for

45%

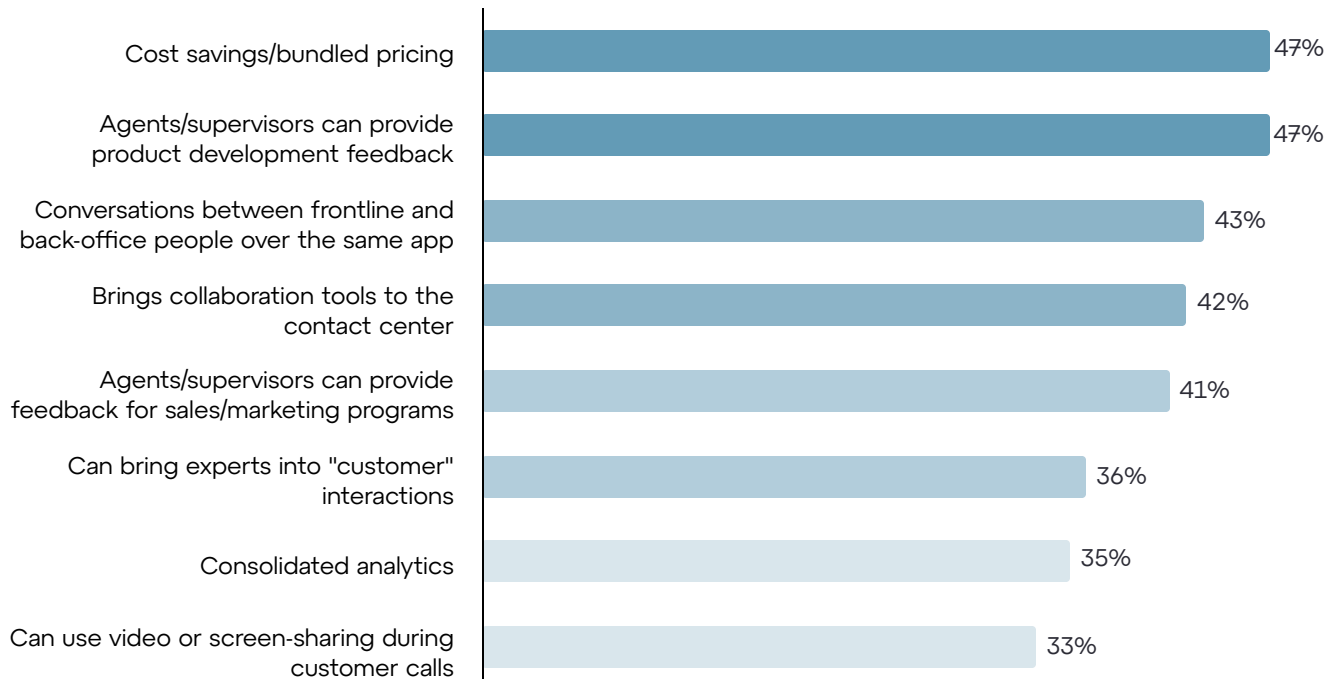
Connecting UCaaS to CCaaS for Improved Experiences

In its workplace collaboration and customer experience (CX) research, Metrigy consistently finds an increasing appetite for integrating UCaaS and contact center-as-a-service (CCaaS) platforms. Within the education sector, this is especially the case among higher-ed institutions, which are more likely than smaller K-12 organizations to have the need for full-blown contact center platforms. For higher ed, pulling the systems together enables seamless conversational flows between internal personnel, such as administration, staff, and faculty, who rely on UCaaS, and external constituents, such as parents, students, and alumni who interact with customer service via CCaaS.

UCaaS and CCaaS Integration: Today and Tomorrow



Value Provided by Integrating UCaaS and CCaaS



Results Achieved with UCaaS/CCaaS Integration



Higher
revenue



Better
productivity



Reduced
costs



Improved
CSAT

3 Ways Higher Ed Can Benefit from Platform Integration

Bringing UCaaS and CCaaS together provides a variety of opportunities for colleges and universities. Here are three examples:

Improved Student Enrollment Experience



A prospective student uses the Admissions website chatbot (CCaaS) to ask a complex question about transferring credits from a foreign university. When the chatbot can't resolve the inquiry, the CCaaS platform seamlessly routes the chat—including the full transcript—to an available Transfer Registrar employee. The employee immediately uses video chat (UCaaS) to bring in a departmental expert for a three-way conversation and quick resolution.

Coordinated Crisis Communications

During a campus-wide weather closure, the central administrative office uses a CCaaS feature to broadcast a mass notification via text, email, and social media. Simultaneously, facility and security teams utilize the UCaaS platform's presence and group chat functionality to coordinate in real-time, instantly reporting local conditions and requesting assistance, ensuring a unified and rapid response without staff having to switch communication applications.



Personalized Fundraising



The Advancement Office uses a CCaaS-driven outbound campaign to contact a high-value alumnus. When the alumnus answers, the CCaaS agent sees a screen-pop with the alum's giving history and stated interests (from the integrated CRM), and when the conversation shifts to a specific research project, the agent instantly checks the UCaaS presence of the relevant dean and transfers the call, delivering a high-touch, personalized experience that deepens engagement and giving potential.



Keeping Ahead on Security and Data Compliance

Unauthorized access to a UCaaS platform can wreak havoc for any organization, educational institutions included. Among the threats are voice phishing, social engineering attacks, eavesdropping, and others. Breaches can be devastating.

3 Potential Problems and Fallout Resulting from Security or Data Breaches

Operational disruption

Without access to UCaaS, staff can't make or receive calls, or communicate with remote employees, parents, or students

Reputational damage

Exposure of personally identifiable and other sensitive information stored in UCaaS systems (user credentials, chat logs, voice mail transcripts, meeting recordings)

Distrust in technology, slowed rate of adoption

If the UCaaS platform is shut down, the ability to host remote lectures, facilitate online group work, and connect distance learners disappears, forcing a halt to the curriculum and delaying academic progress. Negative experience leads to lack of support

Security strategies are lacking:

- **20.5%** of all organizations studied report having a collaboration security incident in 2024
- But just **35.0%** have a formal workplace collaboration security strategy
- **30.0%** block access to collaboration apps over security and compliance concerns
- Just **34.7%** use a third-party security and/or compliance management platform

3 Recommended Best Practices for Securing UCaaS

- 1** Institute multifactor authentication for students, faculty, and administrative staff, and implement role-based access controls
- 2** Establish strong endpoint security and usage policies, especially for video conferencing
- 3** Work with your UCaaS provider to ensure regulatory compliance (FERPA, HIPAA, etc.)

Don't Be Left Behind on AI

Metrigy's AI research shows a serious commitment to AI across verticals, including education. In an educational scenario, when integrated with UCaaS systems, AI can transform the flow of information across a campus or throughout a school district, automating routine administrative tasks—such as generating meeting summaries and routing student inquiries—and creating a more personalized and efficient environment.

Among education, participants in Metrigy's research^[4] say their organizations are using AI extensively (53%) vs. within a few departments/business units (47%). In addition:

53% see high value in AI

47% see some value in AI

The top 2 values are reduced costs and increased productivity

.....
By leveraging AI within their UCaaS platforms, educational organizations can transform how they communicate with students, parents, staff, and other constituents. They can use AI functionality to:



Automate administrative tasks around routine communications

- Chatbots, virtual assistants
- Automated call routing

Support enhanced safety and security

- Automate emergency alerts
- Provide intelligent location services

Facilitate improved student and parent engagement

- Personalized communications
- Automated follow-ups, notices

Bolster fan engagement at K-12 and college sporting events

- Analyze real-time communication and social data to generate personalized content
- Push personalized stats to fan's mobile app during college games

[4] Metrigy's AI for Business Success: 2025-26 research study



Conclusions and Recommendations

The transition to a cloud-based communication and collaboration strategy is no longer optional; it's the cornerstone of a modern, resilient educational institution. By migrating to a platform that consolidates phone, messaging, and video into a seamless system, IT leaders can move beyond unpredictable, capital-intensive legacy systems to a predictable operating expenditure model. Crucially, embracing this integrated approach—backed by AI-powered efficiency and robust, built-in safety features—is the most effective way to ensure regulatory compliance, reduce operational risk, and meet the high expectations of today's hybrid students, faculty, and administrators.

IT leaders at educational institutions must:

- Consider UCaaS where not already in use.
- Assess platforms for factors such as reliability, security, ease of use, and value (bang for the buck).
- Run a cost analysis of maintaining on-premises systems vs. a cloud-based subscription service.
- Understand needs of all constituents, and how UCaaS can help address these.
- Familiarize yourself, administrators, and the legal team with federal and state regulations around 9-1-1.
- Tap into UCaaS capabilities to assure safety preparedness.
- Consider integrating UCaaS and CCaaS for improved efficiency and engagement.
- Implement or revise collaboration security strategy to stay ahead of security threats.
- Tap into AI for continuous transformation of communications, collaboration, and related workflows.

About Metrigy

<http://www.metrigy.com/>

Metrigy is an innovative research and advisory firm focusing on the rapidly changing areas of workplace collaboration, digital workplace, digital transformation, customer experience, and employee experience—along with several related technologies. Metrigy delivers strategic guidance and informative content, backed by primary research metrics and analysis, for technology providers and enterprise organizations.

About GoTo

<http://www.goto.com/>

GoTo, the leader in cloud communications and IT, is dedicated to powering a world of work without limits. Featuring flagship products GoTo Connect, LogMeIn Resolve, and LogMeIn Rescue, the GoTo portfolio offers secure, reliable, AI-enabled solutions that are simple to adopt for small and midsize businesses, and scalable to enterprises worldwide. GoTo continuously improves human experiences for AI-enabled workforces across hundreds of thousands of customers. The company is headquartered in Boston, Massachusetts, with approximately \$1 billion in annual revenue and 2,800 employees throughout North America, South America, Europe, Asia, and Australia.