Unlocking the future of work

Whitepaper

Contents

Foreword

In just a year, the working life many of us knew so well has vanished. The pandemic accelerated the trend to more flexible working and gave millions the opportunity to experience the benefits of working from home. Now, the challenge for business is to move on from the emergency arrangements of the past year and enable ways of working that can support a diversity of workstyles.

There are no standard solutions. Every organisation will have a different formula, from those that wish to continue with a predominantly office-based model, to those that choose 'work anywhere' for all, and every variation in-between. It's a puzzle that all business leaders will have to figure out – it's likely your answer will look very different from everyone else's.

Putting people first must always be the starting point. The crisis has underlined our shared humanity. And it's by drawing on richly human qualities, such as creativity, empathy and co-operation that we can figure out the future of work together.

Knowing what to do is always easier than understanding how to do it. The purpose of this paper it to share our approach for 'how' based on our insight and experience. It addresses the three core pieces of hybrid working – employee collaboration, connectivity and security. It's our strategy for solving the puzzle.

The right combination will be unique to each organisation. Getting it right will need time and thought, plus incremental steps and a willingness to adapt and change along the way. It's okay to think short term and take a pragmatic approach whilst you develop your future plans.

New ways of working will be reflected in new ways of technology procurement. Gone are long-term, monolithic single-vendor contracts, to be replaced with an ecosystem of flexible commercial models that allow enterprises to choose the right mix of in-house and managed services. We believe this new collaborative model is the way forward.

The experience of the last year has shown what can be achieved when we all work together. Now, we look forward to helping you shape your future of work, drawing on everything we've learnt so far.

Bas Burger
CEO, BT's Global unit

# Introduction – We're not in Kansas anymore: where do we go from here?

The coronavirus whirlwind has brought about one of the most transformational shifts in the history of work. Almost overnight, millions of people around the world found themselves working from home. No more commuting, no more in-person meetings, no more business travel, no more watercooler chat.

Previously, it would've been almost unthinkable for jobs as diverse as financial traders, contact centre agents and teachers to move en masse to remote working. But in a triumph of human ingenuity and adaptability (and Microsoft Teams, Zoom and Cisco Webex), it worked out.

A year on, and it's clear that a new pattern of hybrid working is here to stay. Employees like it so much that nine in ten don't want to return to the office full-time. They prefer to choose locations, including the office and their home, customer premises and local co-working spaces.[2]

While it's early days, employers can see the potential for reducing costs, boosting employee wellbeing and reducing environmental impact. It's a real opportunity to re-imagine the future of work. To no longer think in terms of where, but how people work.

The challenge now is how to enable this new way of working for the long term. When the lockdown first kicked in last year, it was fine to go with work-around solutions, to accept compromises. But if hybrid working is to be the norm, then it needs to meet all the standards of accessibility, service quality and inclusivity of the old office-centric model. And of course, it must be secure.
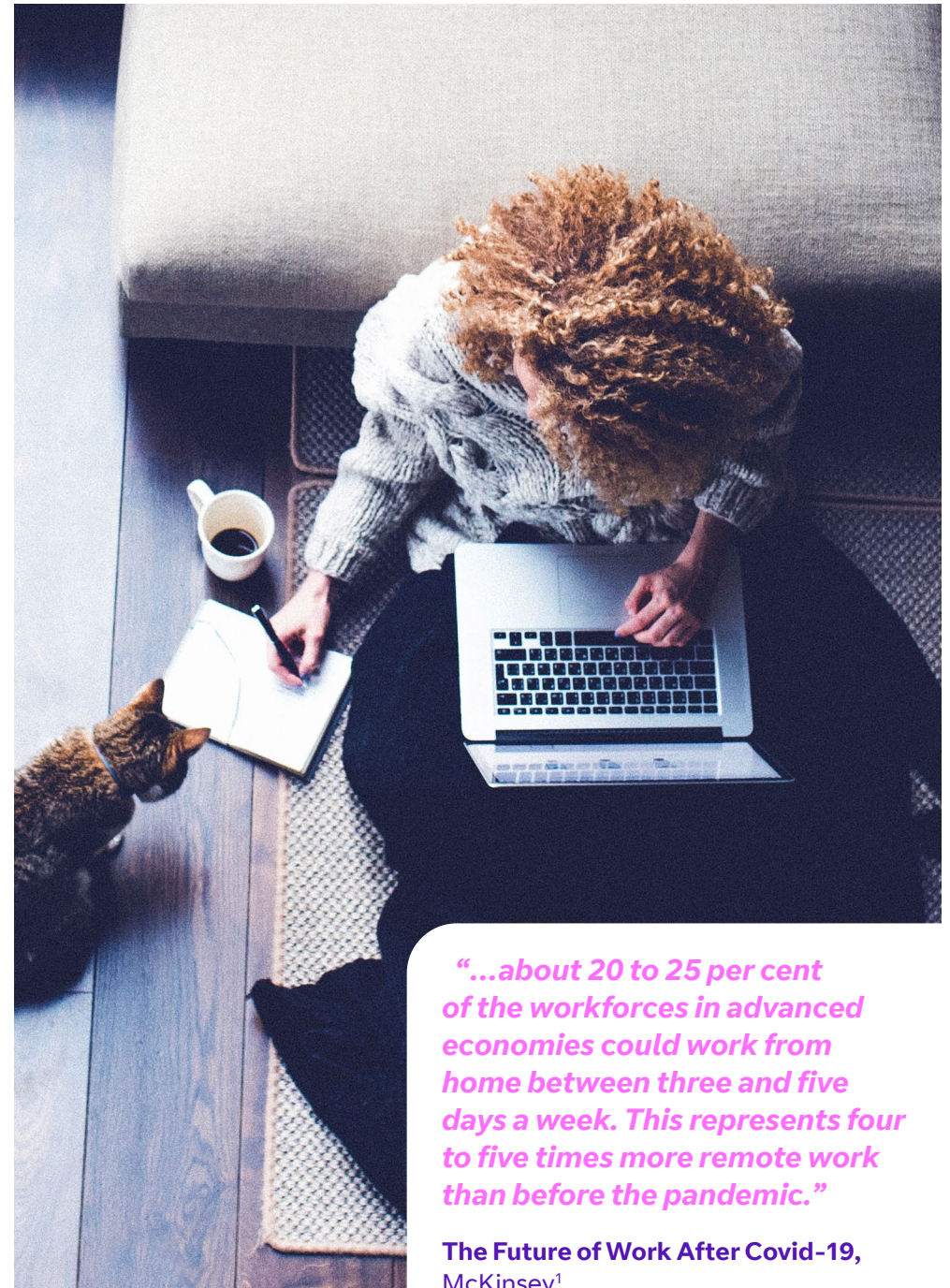
"…about 20 to 25 per cent of the workforces in advanced economies could work from home between three and five days a week. This represents four to five times more remote work than before the pandemic."

The Future of Work After Covid-19, McKinsey[1]
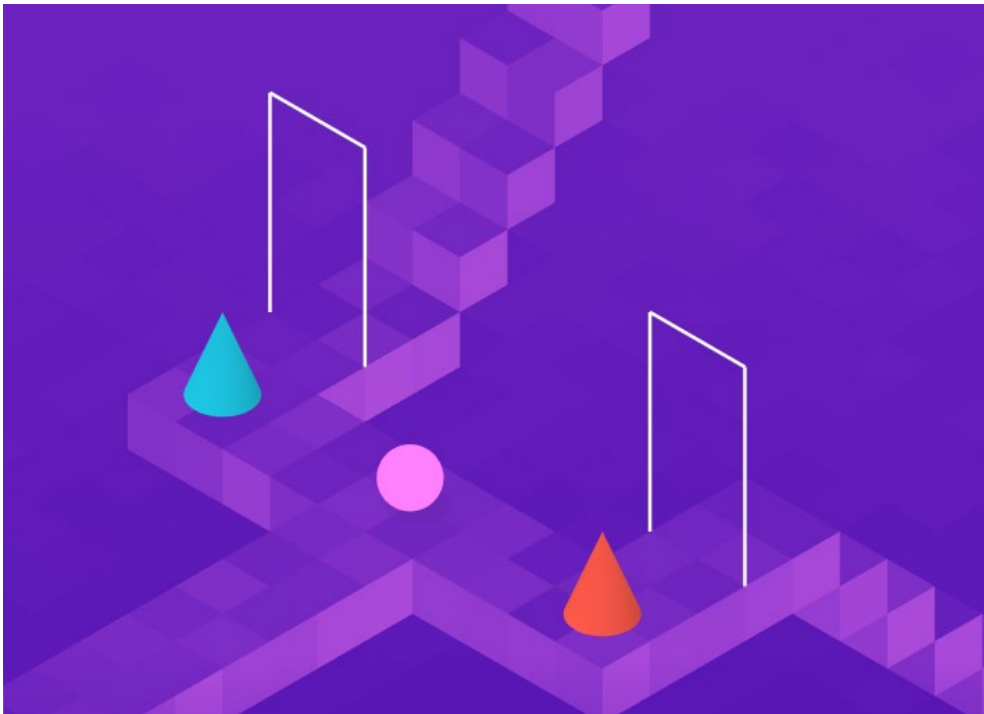
The hybrid working spectrum

- Goldman Sachs wants workers in the US and UK to return to physical offices by mid-June.

- JPMorgan Chase US employees are expected back to the office on a 50% rotating basis by July.[4]

- Amazon plans to return to an "office-centric culture". [5]

- Unilever office workers will never return to their desks five days a week. [6]

- HSBC moves more than 1,200 UK staff to permanent homeworking. [7]

- Nationwide will allow all 13,000 of its office staff to permanently work remotely when coronavirus restrictions are eased. [8]

- Twitter says employees can work from home forever. [9]

We already have most of the tools and services we need. The trick is working out how to choose, combine and deliver those services in a way that allows people to be productive, collaborative, motivated AND protected.

We're not starting from ground zero. Enterprises have already embarked on digital transformation programmes, started to develop hybrid networks and prioritise security. All this experience will help uncover the right solutions.

Our approach for finding answers to the question 'how do we make a successful transition to hybrid working?' has three interdependent areas:

1. enabling ways of working for everyone

2. developing a supportive, adaptable and resilient infrastructure

3. protecting people, data and services with security built in at every step, not bolted on.

There are no right or wrong answers. It's your organisation, your rules. This puzzle is not a Rubik's cube with only one (hard to find) solution but a kaleidoscope of ever-shifting possibilities.

We can also embrace a new mindset. Think agile. Trial it, test it, tweak it. If something better comes along, take it. With the commercial flexibility that comes from cloud-based services, you're not choosing a vendor for life, just a service you can switch on and off. It's hybrid sourcing for hybrid working.

We're not saying it's simple, but businesses and their technology partners have learned and achieved so much in the past year. Let's build on that.

"This year's global pandemic has accelerated the change. Overnight, vast numbers of the workforce found themselves working from home. Many are still remote from their offices and it is unclear how or when this will change. What organizations have learned this year is that they need to enable digital workplace on a large scale and now."

Global Study Findings: Digital Workplace Technology Adoption, Drivers, Challenges and Maturity in the Age of Covid-19, CCS Insight, October 2020

1. How do we enable new ways of working for everyone?

Hybrid working has been a great corporate leveller. All ranks have shared the good, the bad and the ugly of online meetings and collaboration tools.

The overall group experience is only ever as good as the worst individual experience. So, whether working from home, company office or the 'coffice' on the high street, the big question is 'how do we give everyone a great experience?'

It seems obvious that choosing the 'right' collaboration technology will have the most impact on employee productivity and business outcomes. Historically organisations like to have a single platform, with the control over user experience, security and costs that brings (even though over half of IT decision-makers are confused by the complexity or the number of collaboration tools available[10]). But you know what? It doesn't matter what you choose – Microsoft Teams, Zoom, Cisco Webex – they're all great. The average person now uses 3.5 collaboration tools and a third of us use six . [11]

What employees are saying is that they need different tools for different jobs. That they're the best judge of what to use to accomplish the task and employers should enable that choice. The real challenge is how to stitch together this variety of tools and services behind the scenes so that people have a consistently brilliant experience whatever they choose, wherever they are. That's why we enable a choice of platforms – Zoom, Cisco and Microsoft – that work together through session layer and the right network, and why we put such an emphasis on experience, whatever the platform. That's putting people first.

85%
of business executives want a better way of integrating different collaboration tools.
Beyond the office, BT, 2020

70%
of IT decision-makers say investing in collaboration technology is currently a top three priority for their organisation.
Beyond the office, BT, 2020

"The right tools are the ones that work for people in their current work environment. This could be as simple as a set of noise-cancelling headphones, or a user-friendly conferencing tool that works well on home wi-fi. Without the right tools, people often start looking for their own solutions in an effort to be more efficient."

Andrew Small
Director, digital solutions, BT[12]

Extending beyond the purely digital to the physical is also putting people first. Making sure that wherever they are, individuals have the right equipment, whether that's noise-cancelling headphones, some way to print and destroy confidential materials, or ergonomic furniture. Plus, of course, connectivity and security – more of which follows.

Putting people first also means taking another look at the bricks and mortar office. As coronavirus moves from pandemic to endemic, physical office spaces must be a safe and secure environment. They'll not be able to accommodate the same number of people as before for some time. 'Matrix'-style, high concept immersive conference rooms will need to be remodelled into smaller, software-enabled spaces.

Our experience of transformation programmes in BT and with our customers has proved the value of working with workstyle 'personas'. It's a people first, design-led approach based on understanding different employee roles, their workstyles and corresponding risk profile. Identifying personas is key to getting roles, processes and tools to fit neatly together. The starting point is people. What have they got now? What do they need more or less of? What needs to be upgraded or integrated? What needs to be secured?

Successful hybrid working also needs a shift in leadership style. According to Microsoft, the digital intensity of workers' days has increased substantially, with the average number of meetings and chats steadily increasing since last year.[14] There are big questions to answer around how we manage wellbeing. And also inclusivity – no-one wants a cultural divide between those working at home and those in the office. We'll need to re-visit the processes we previously took for granted and give senior managers new leadership skills for hybrid working. We'll probably need new metrics to track the impact of these changes. This is about looking again at what you have, understanding how it's used and then finding ways to make it work more effectively for more people in more locations. When things aren't working it's about quickly pivoting and making changes.

"The reports of the demise of the office are also much exaggerated. They had already been undergoing a bit of a transformation Before Coronavirus, as people realised that they were key collaboration platforms, rather than places we necessarily do work… 88% of business executives now feel that future offices will primarily fulfil that collaboration and community function. Younger execs believe that offices are likely to become places where younger employees will work, as older employees are mostly based at home."

Dr Nicola Millard
Principal innovation partner, BT[13]

A global oil and gas company needed to find a better way to integrate collaboration tools across multiple platforms and regions. They wanted to work with a single supplier, to simplify their estate and enable a modern, hybrid environment for the best, cost effective user experience. We helped by working with them to transform their collaboration estate.

An initial move to Global SIP and Microsoft Teams simplified their operations and significantly reduced their costs. We then expanded their voice and video estate and provided adoption services to help migrate at pace and ensure a consistently strong user experience globally.


"The problem isn't video… it's meetings! We've lifted a Before Coronavirus (BC) way of working into an After Coronavirus (AC) world without questioning whether meetings are the best ways to get things done. Remote organisations in the BC world had already adopted a more asynchronous way of working, such as using chat and shared documents, and having shorter mutually agreed windows for meetings rather than everlasting 'death by meeting' days."

Dr Nicola Millard
Principal innovation partner, BT

Creating ways of working that deliver for everyone – some starting points

- Review all your collaboration tools and applications to better understand the choices people make.

- Bring together details of all spending on calling, collaboration licenses and devices so you can see where the money goes and work out what you could save with new solutions.

- Think about how employee needs and behaviours have changed, and group them into personas according to their roles. What can you do to create a consistent digital experience and encourage the take up of new ways?

- Maximise your investment in Zoom, Office 365 and Webex licenses by adding voice and video services. Make sure at least one platform offers users the choice of dial access as a fail-safe connection.

- Set up the physical office environment for video. Think about acoustics, branding, backgrounds, visual angles and lighting, plus noise-cancelling speaker phones or headsets, and better video cameras. Is anything missing?

- Check what security measures are built into your collaboration platforms and what might need reinforcement.

2. How do we develop a supportive, adaptable and resilient infrastructure?
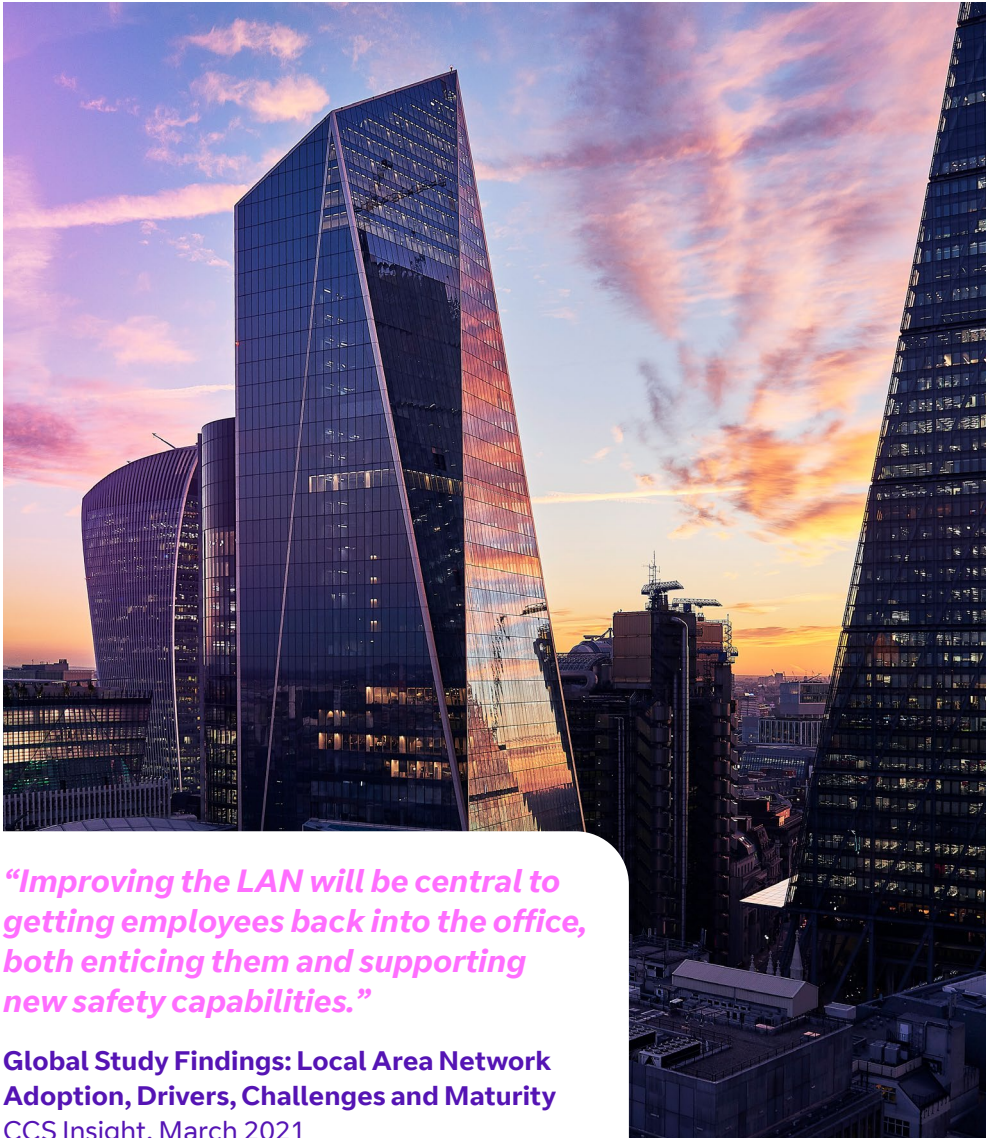
User experience drives productivity and is often how the infrastructure is judged. The pandemic has asked tough questions of the corporate LAN, especially around scalability and performance.

Even pre-coronavirus, many LANs were struggling to keep up with pressure from digital transformation projects, increased video streaming and a growing volume of connected devices. Improving LAN performance is critical to enabling new ways of working and enforcing security measures. And the physical nature of a LAN means it can be difficult to flex and scale.

Demand on the LAN has jumped into a new league. Video meetings are already up more than 300 per cent. If health and safety measures restrict face-to-face meetings in offices, then it's likely that office-based workers will continue to use video, even when colleagues are in the same building. Many office LANs weren't designed for this level and type of use so it's critical that businesses prepare before people return. Plus, more devices than ever are connecting at the Edge as offices install cameras to track people density and thermometers for temperature checks as employers build safer physical workplaces. And all this comes on top of changes many organisations are already making to their LAN to benefit from more automation and integrate new technologies such as 5G.

Fortunately, the improving speed, availability and cost of internet services let organisations move lower-priority traffic to the public network infrastructure during lockdown. However, they and their users have also learned that internet services vary hugely in performance, security and cost.

Now's the time to move on from the stopgap measures of 2020. Hybrid working is here to stay, and that means consistent and secure connectivity, regardless of location.

"Improving the LAN will be central to getting employees back into the office, both enticing them and supporting new safety capabilities."

Global Study Findings: Local Area Network Adoption, Drivers, Challenges and Maturity
CCS Insight, March 2021

Monitoring tools can give new insight into which applications your people use, how they use them and how those applications perform as they travel from the user to the cloud and around your network and user connections. Without this insight, it's difficult to understand what traffic to prioritise, where the bottlenecks are and how you can fine tune the network for the best user experience.

There can't be many of us who haven't, at some point over the past year, found our remote work performance compromised by lack of access to the corporate network, inadequate bandwidth on our domestic broadband (competing with a youngster watching Netflix perhaps) or a weak mobile signal. We all know what it's like trying to communicate with a colleague with a poor connection. Everyone's work suffers.

Software defined networking is central to developing a supportive and resilient infrastructure for hybrid working. SD-WAN is especially useful for providing the optimum home working experience at a relatively low cost. It's quick and simple to install, using devices that remote employees can connect themselves (no visit from an engineer needed) and which automatically apply user policy based on personas. The most demanding personas can be allocated premium broadband, SD-WAN, premium security features and 4G or 5G as backup.

SD-WAN can be easily integrated with other virtual network functions, such as firewalls, optimisers, and accelerators. Automated set up with additional instant functions ordered through a digital portal and delivered through backend network orchestration provides LAN agility like never before.

The remote employee gets pretty much the same high quality user experience and invisible security as in the office; the IT team gets flexibility plus data streams that tell them how it's all going and prompts intervention if things go off track.[17]

"The starting point… must be a clear benchmark position of how applications and networks are performing. Only from that point can you pick up the variations that can signal issues. And for this to work, you need end-to-end visibility with a granularity of detail that can identify problems."

Adrian Comley
Senior manager, managed network services, BT[16]

Factors driving the upgrade of corporate LANs:

support for hybrid working
59%

increased use of video calling
49%

ability to track user densities
42%

cameras for security services / wider monitoring
41%

cameras to monitor safety
32%

Global Study Findings: Local Area Network Adoption, Drivers, Challenges and Maturity
CCS Insight, March 2021

"SD-WAN technology adds a virtualization layer on top of the physical network infrastructure. This allows IT teams to create and change the network without the cost, time and complexity involved in changing hardware. By becoming software-defined, the virtual network can extend across both private and public infrastructure. For example, the company data centre could be connected with a public cloud while retaining the security and policy controls that previously existed within the company's private network."

Global Study Findings: SD-WAN Adoption Drivers, Challenges and Maturity in the Age of Covid-19, CCS Insight, September 2020

As we've often said, successful networking isn't only about which technology to deploy. It's really about how you combine technology with security, service, network management and commercial contracts into an infrastructure that fits your business. This requires an exceptional mix of skills and experience – and outsourcing LAN management is increasingly popular. Half of enterprises[18] say the pandemic has made them think about outsourcing some or all of their LAN functions.

In the longer term, taking a holistic approach to LAN and WAN operations could create the potential for performance improvements and financial savings. Finding the right LAN partnership is a stepping stone in that direction.

An Asian life insurance company needed to rapidly increase its remote access capability to 22,000 employees. We helped by increasing the infrastructure and network capacity to support this, doubling capacity in the space of a week. We also accelerated the implementation of a video conferencing solution to enable collaboration with employees working in offices and at home.[19]

A multinational professional services company – needed to make complex changes in their network. We provided seamless VPN access for more than 21,000 users and disconnected their data centre from our network.[20]

Developing a supportive, adaptable and resilient infrastructure – some starting points

- Make sure you have the tools to fully understand what is happening on your network. More bandwidth isn't always the answer when you can easily triage applications.

- Review your network estate because traffic patterns have changed. Scrutinise each connection in terms of performance, cost, service and security.

- Speed up plans to introduce software-defined services for extra performance and control. Deploy those services beyond the network into the cloud and homes.

- Focus on where and how you connect to the cloud. Cloud connectivity is rapidly changing to offer simpler, faster and more cost-effective solutions.
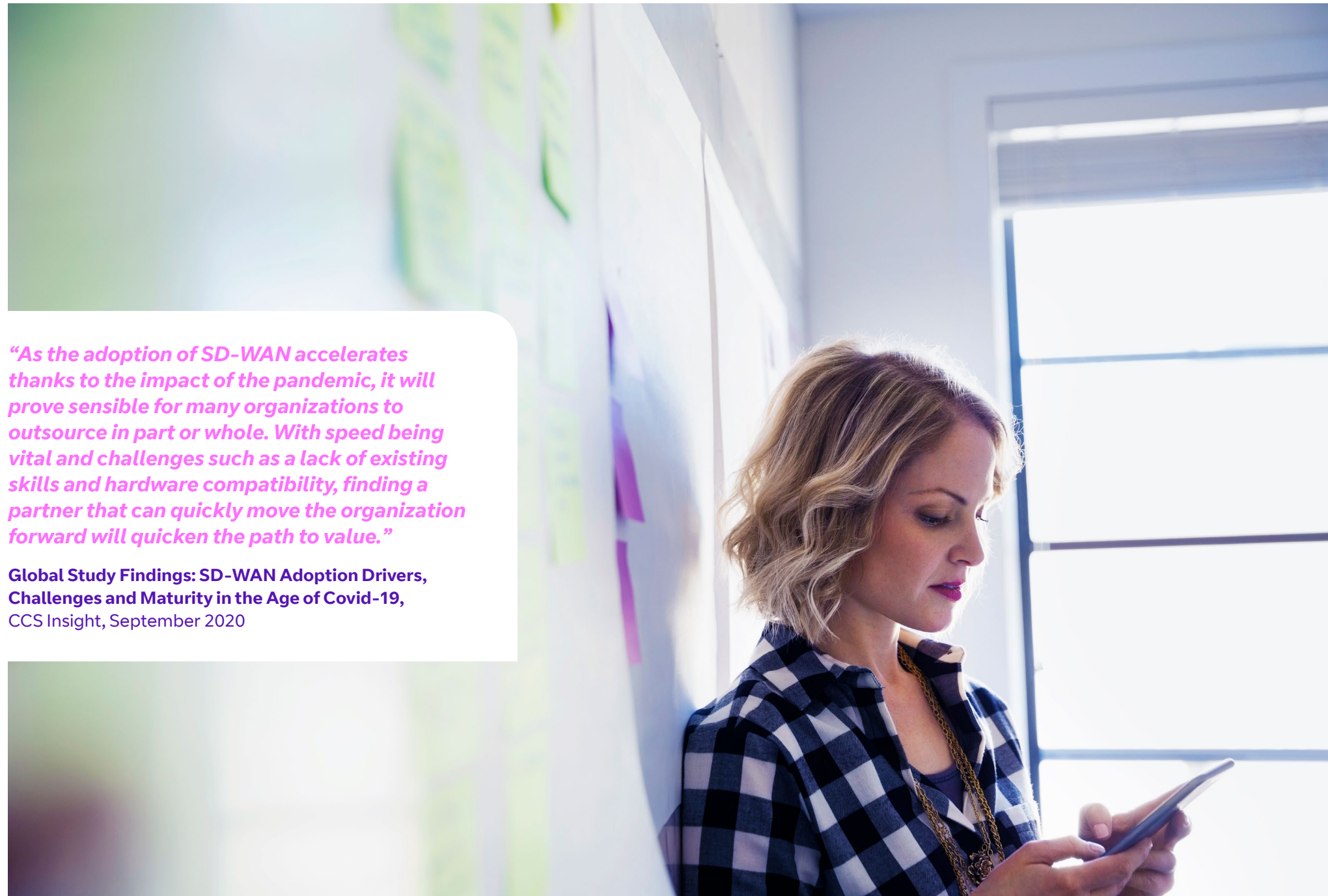
"As the adoption of SD-WAN accelerates thanks to the impact of the pandemic, it will prove sensible for many organizations to outsource in part or whole. With speed being vital and challenges such as a lack of existing skills and hardware compatibility, finding a partner that can quickly move the organization forward will quicken the path to value."

Global Study Findings: SD-WAN Adoption Drivers, Challenges and Maturity in the Age of Covid-19, CCS Insight, September 2020

# 3. How do we protect people, data and services with confidence?

Security and governance concerns around collaboration tools were an issue even before the pandemic hit. Then the rapid transition to remote working exacerbated the situation, opening up corporate networks, data and users to a torrent of new evolving risks. Risk-based decisions were made to keep the business going, but now it's time to secure hybrid working for the future.

Cybersecurity has (finally) appeared at the top of the boardroom agenda (second only to the coronavirus) as a mainstream business issue.

Yet, although there's a high level of confidence in corporate cybersecurity measures, breaches and losses continue to occur at an unsustainable level; eight in ten executives admitting that their employer suffered a security incident in the last two years.[21]

"Three quarters of business leaders rate their organisation as excellent or good for protecting against cybersecurity threats. Yet 84% of executives say their organisation has suffered from a data theft or loss or a network security incident in the last two years."
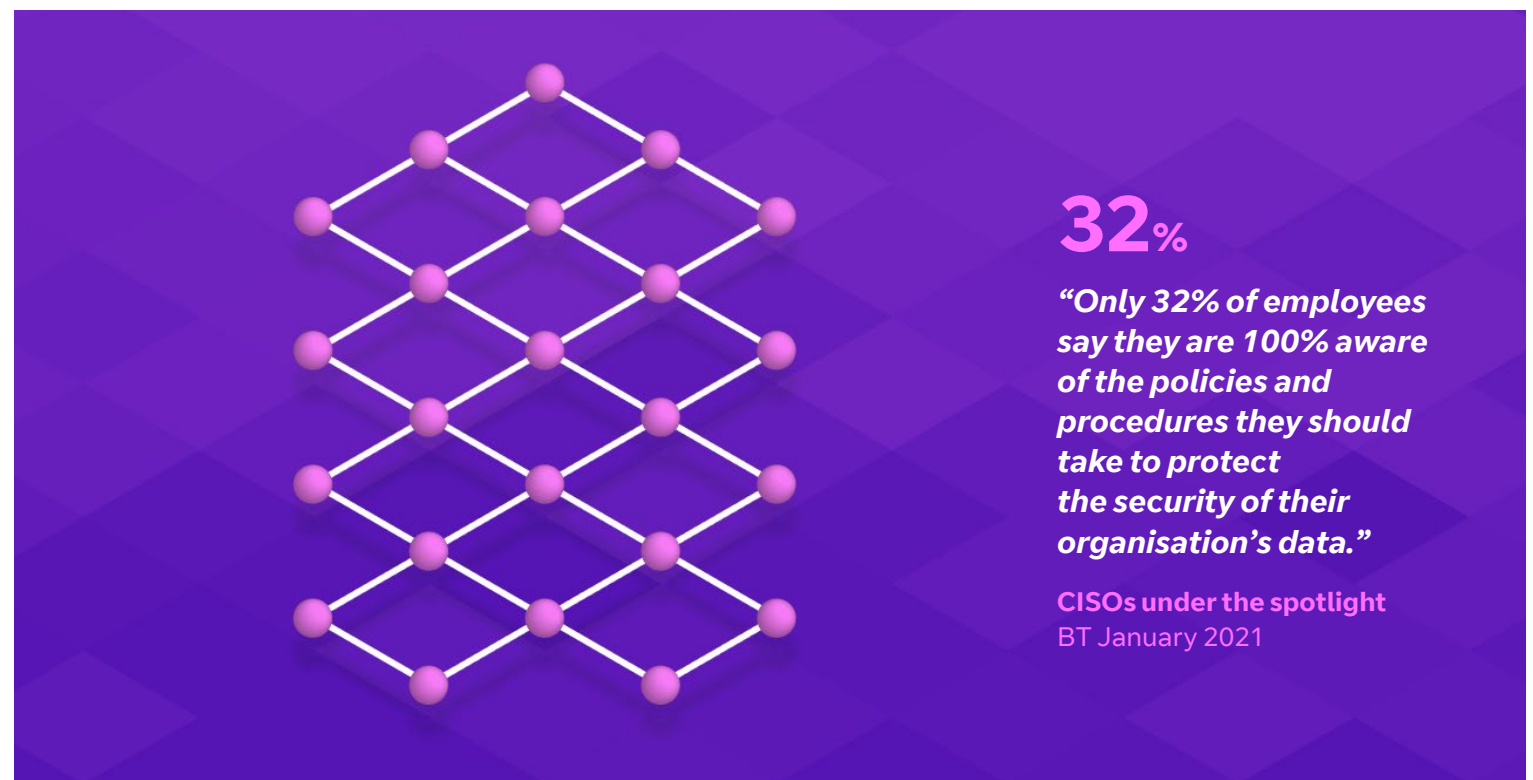
CISOs under the spotlight
BT, January 2021
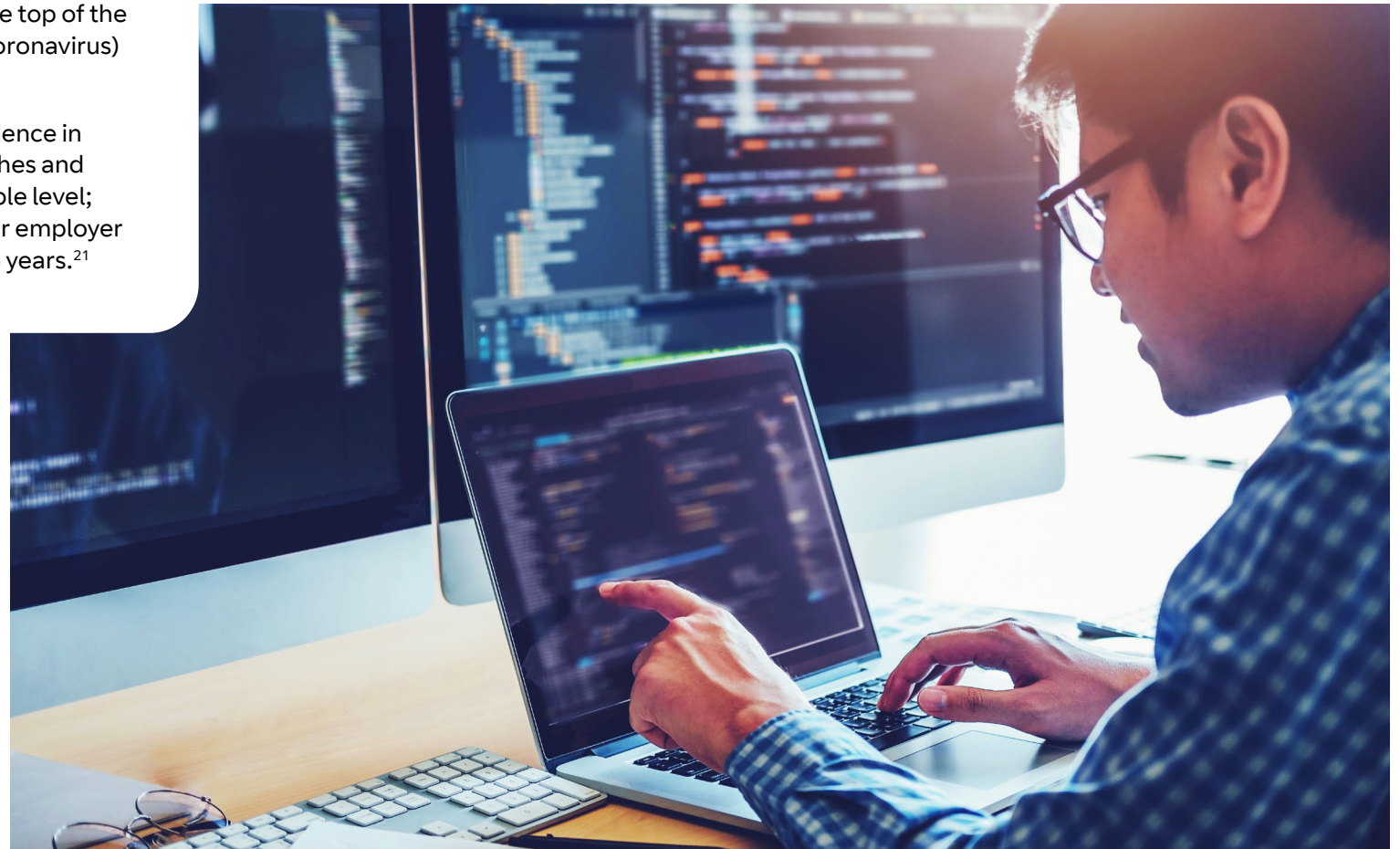
Some of this has to do with what people do (or fail to do) in the workplace. Small things, like individuals sharing their log-in details and password with colleagues. Others not so small: nearly half of people have had a security blunder at work (such as losing a laptop) and not reported it.[22]

"While the worst of the coronavirus crisis may be behind us, we must live with change and uncertainty for some time. The pandemic has manifestly accelerated the adoption of more digital ways of working, plus introduced new risks and opportunities. A business who can depend on its employees to be a human firewall will find it easier to withstand cyberattacks and make the most of emerging possibilities."

Kevin Brown
Managing director, BT Security[24]

Getting cybersecurity right is a balancing act. For three in four IT decision-makers, security trumps the user experience[23], but the downside of this thinking is that if it isn't easy, then employees may turn to shadow IT, using personal devices and consumer services to get the job done, and exposing the business to even more risk.

32%

"Only 32% of employees say they are 100% aware of the policies and procedures they should take to protect the security of their organisation's data."

CISOs under the spotlight
BT January 2021

With hybrid working, more than ever organisations need to build their human firewall. The easiest way to infiltrate any business is still through the people who work there. That means investing in governance and training and making it easy for people to do the right thing.

Again, the persona approach can help: what sort of roles and responsibilities correspond to what sort of risks? www.globalservices.bt.com/en/insights/blogs/which-employees-represent-the-most-risk-when-remote-working

But it doesn't end there. Fewer than one third of business leaders rate key components of their company's IT security as 'excellent'[25]. They have little confidence in their

organisation's ability to deliver cybersecurity basics, such as routine patching, controlling user access to services and following up policies with training and oversight.

"Often the most effective solutions lie in following established best practices. That's not to say implementation will be straightforward but using simple controls and starting with the most abused capabilities will often yield the best results for protecting your business".

Kevin Brown
Managing director, BT Security[26]

Yet cybersecurity departments are working harder than ever, dealing with a blizzard of cyberattacks, ranging from phishing expeditions to ransomware.[27]

The puzzle is how to lower your overall risk whilst managing the need for investment. And, working out where and when you place that investment for most impact. Automation is key and it'll help you deal with threats more efficiently.

Such is the scale of global cyber threats that enterprises will increasingly seek to augment in-house resources with specialist help from partners with global security operations. We believe the future security operations model is a truly collaborative one, developed with a partner who acts like an extension of your organisation, understands the business outcomes you're trying to achieve and whose people can complement and support your own team.

Working with such a partner as part of your team allows you to develop a security strategy that builds on your own skills and leverages experts to complete the picture.

"90% of execs believe monitoring security threats would improve network and data security."

CISOs under the spotlight
BT, January 2021

Call it co-management, collaboration, co-operation – it's a partnership with a cybersecurity specialist whose intelligence, experience and operations will help you to respond in real time to the morphing threat climate and the unpredictability of the future of work.

We helped a global life assurance provider by quickly delivering increased bandwidth to support working from home. We also completed an urgent call recording upgrade to ensure regulatory compliance of users working from home. We did this over a weekend when it would normally take over two weeks to complete.[28]
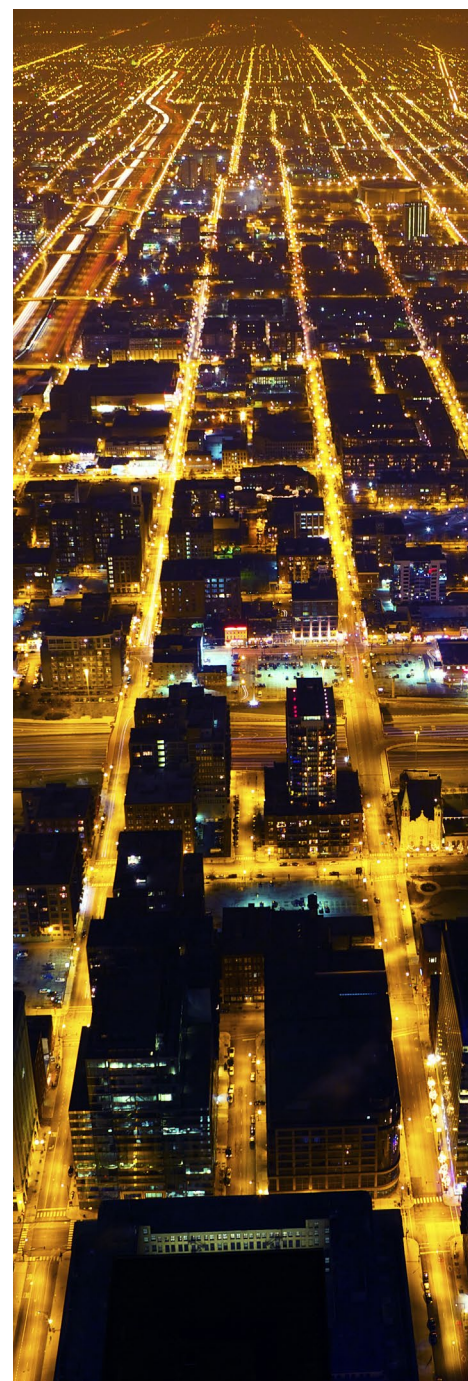
Protecting people, services and data – some starting points

- **Remember the basics** - embed the right security behaviours in your people and across your business.

- **Be bold.** Consider how a collaborative security partnership could help you optimise your investments.

- **Think security;** identify how new ways of working impact existing risks or create new threats to the business and check to see if there are implications for compliance requirements.

- **Know who's on your network and where they are.** Work out which personas (employee groups) are highest risk.

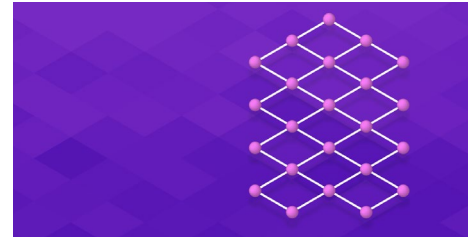- **But don't forget the user experience.**

Last word

We're only at the very beginning of something new. There are many pieces to the puzzle, and as many solutions as there are businesses.
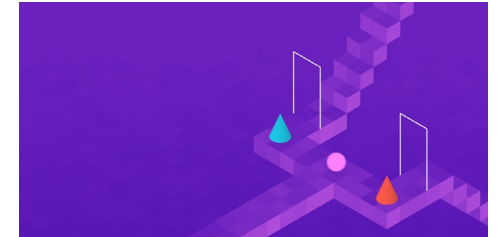
To make it easier, start to think about these three big pieces:

hybrid working that delivers for everyone

a supportive, adaptable and resilient infrastructure

protection for people, services and data from cyber threats.

And remember that short-term thinking is okay. Try it, trial it, test it and refine it. And change it when something better comes along.

Commercial flexibility is important. No business wants to make long-term contractual commitments when the future is so uncertain. We understand that.

Above all, tap into the thinking, the experience and skills of your technology partners. We may not have all the answers, but we can help you move close to your goal. Together, we can figure out the future of work.

Further reading

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Sign up for our business leaders insights series and keep on top of this fast developing topic: **www.globalservices/en/ home/forms/unlocking-the- work-puzzle.html**

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