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# UCaaS: One Size Doesn't Always Fit All

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## Executive Summary

Businesses have come to rely on a host of communication tools, including video meetings and chat, for connecting with employees, partners, and customers. While these tools have proven extremely important, businesses still require traditional calling capabilities. Metrigy's *Employee Engagement Optimization: 2025* global study of 400 businesses found that for 68% of participants, the phone system remains critical for communications. The importance of the traditional phone call has not gone away.

From the retailer to the doctor's office, high school office, municipal water department, and beyond, the phone system remains critical for interfacing with customers and partners. The ability to receive and send calls is critical for the foreseeable future, but where the calling system resides and how it is managed continues to undergo a transformation as businesses migrate their phone systems to the cloud and managed service providers.

## One Size Does Not Fit All

Calling, as an important communications tool, is not going away any time soon, but implementation is not one-size-fits-all. In North America, businesses have been migrating to multi-tenant cloud voice services in the form of unified communications as a service (UCaaS) for over 20 years. It's been a steady movement away from on-premises PBXs. Another option is customizable, private-cloud voice service, which offers enterprises the benefits of a third-party managed service in a cloud environment but with a dedicated single-tenant platform.

According to Metrigy's *Workplace Collaboration MetriCast: 2025* global study of 775 organizations, 63% of those based in North America have migrated all of their calling to UCaaS. Migrating to UCaaS is not always an easy rip-and-replace scenario in which a cloud service fits all the requirements of what it is replacing. There are tremendous benefits of utilizing a hosted phone solution within UCaaS, but there can be important considerations that require a level of customization for individual companies.

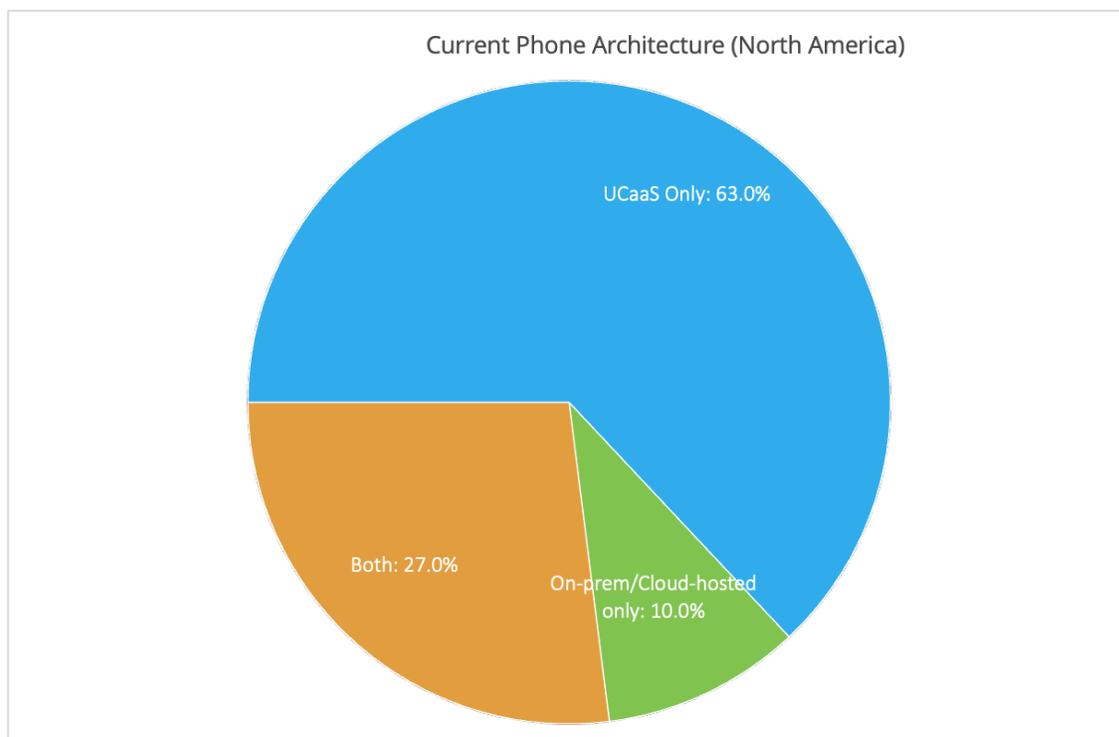


Figure 1: Current Phone Architecture (North America); source: Metrigy Workplace Collaboration MetriCast: 2025

## Customizing UCaaS for Large Enterprises

UCaaS offers the benefit of a system run in the cloud, allowing centralization of features and functionality, benefiting highly distributed businesses, especially large enterprises. Additionally, businesses benefit from third-party management of the system, including keeping the system operational, ongoing maintenance, and the deployment of new and enhanced features.

Per Metrigy’s *Workplace Collaboration MetriCast: 2025* study, important decision criteria for utilizing UCaaS service are security, reliability, and voice quality. At the end of the day, businesses need voice services that work as expected—voice calling should never be compromised.

The challenge with UCaaS services is that most offerings are cookie-cutter offerings—what you buy is what you get. That does not always work for organizations that have unique feature requirements. Some providers specialize in working with enterprises to fine-tune solutions that meet specific requirements, including regulatory, security, and integrating with third-party applications and services unique to their operations.

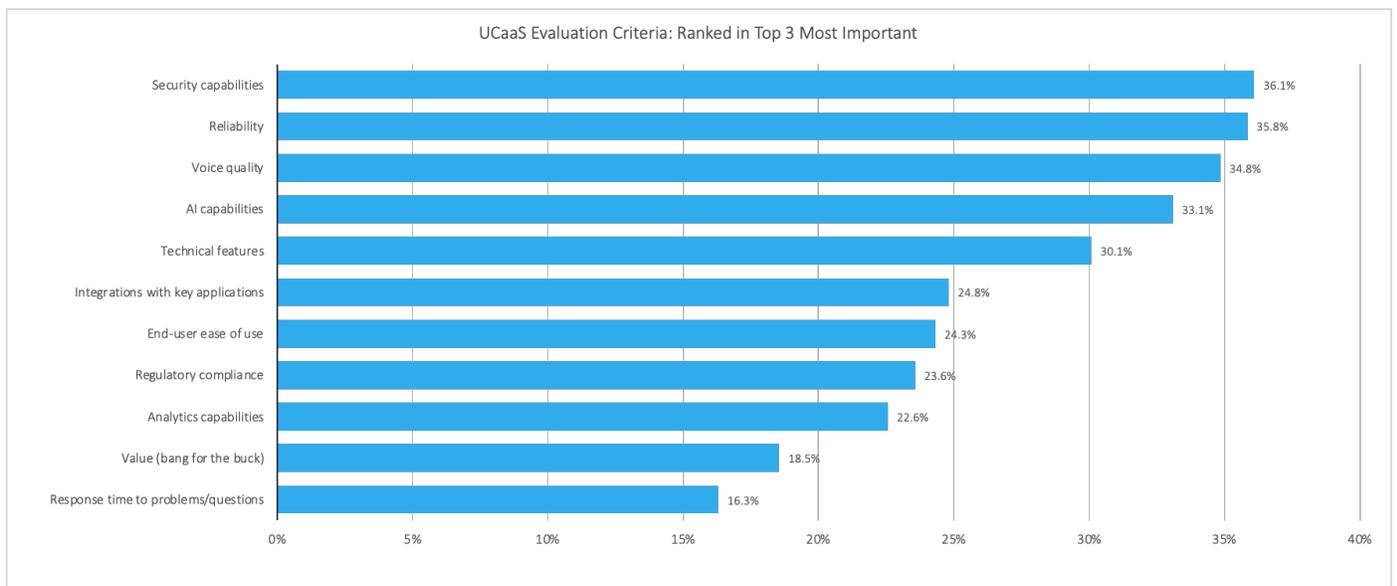


Figure 2: UCaaS Service Important Evaluation Criteria; source: Metrigy Workplace Collaboration MetriCast: 2025

### Unique Requirements for Large Enterprises

Larger organizations migrating to UCaaS often require a range of unique requirements, including custom application integrations, call flows, and call treatments. Many companies that have unique requirements have maintained existing, and often long-standing, on-premises PBX solutions because migrating to UCaaS does not provide them with the same level of customization required for their unique situations. However, there are UCaaS providers with the ability to work through necessary customizations while taking advantage of the benefits of a managed cloud service.

Other important considerations include e911 call routing and location management to ensure compliance with national and local regulations, support for specialty phone lines for use cases such as elevators and alarms, and POTS replacement services. In some verticals, such as education, phone systems must integrate with incident and emergency response platforms, including in support of Alyssa’s Law, which states are adopting to mandate that in-room faculty

and staff be able to silently call for help in an emergency. There are also specialized platform areas, such as integration with emergency notification, intercom, paging, recording systems, and push-to-talk devices. Many of these are not common capabilities with off-the-shelf UCaaS offerings.

### *Financial Institution Case Study*

The following case study from Clearspan Communications illustrates how a large U.S. financial institution with over 6,000 retail locations and more than 30,000 customers is utilizing UCaaS with unique, customized calling capabilities.

It was important for this financial institution to have a cloud platform that offered flexibility to add or reduce locations and users based on seasonal requirements. The company utilizes Microsoft Teams for internal communications, and Clearspan for inbound and outbound calling. The company's key baseline requirements for the UCaaS system included:

- Call control and routing, PBX features and uptime
- An admin/management system to manage all the users, analytics, and custom reports. The Clearspan system stood out for this in meeting the financial institution's needs.

The financial institution utilizes integration between Microsoft Teams, its contact center-as-a-service (CCaaS) platform, and Clearspan's UCaaS system. There is Microsoft Teams Direct Routing integration with Clearspan in this implementation. This was important to bridge its internal and external communications platforms. Important API-level integration with the Clearspan service illustrates unique levels of customization for a large enterprise. The integrations include the following:

- Integration with Microsoft Teams presence. If an employee is on Teams, and they are "red," an inbound call will be routed to another available branch employee.
- Integration with the company's CCaaS platform—if an employee is logged into the call-center application, presence in Teams goes to red.
- API integration with the HR platform. This is important for temporary workers, so when someone comes in or leaves, it is conveyed automatically to the Clearspan UCaaS system.
- Customer relationship management (CRM) integration that provides screen pops using caller ID coming from the telephony system with client records for Microsoft Teams and the CCaaS platform.

## Conclusions & Recommendations

For those organizations with standard business calling requirements and features, migrating to a UCaaS solution that is integrated with meetings and chat right “out of the box” is an easy choice—a single, integrated solution and bill from one provider managed from the cloud. But for many businesses, especially larger enterprises that have unique requirements, the move to the cloud can be fraught with challenges. As a result, many organizations continue to utilize their on-premises PBXs for calling while taking advantage of a separate messaging and meeting service.

Metrigy recommends that businesses that cannot simply port numbers and platforms to UCaaS for their calling requirements evaluate providers that specialize in working with businesses in specific vertical markets and ones that offer high levels of security and customized integrations. UCaaS offers important benefits but, depending on specific requirements, finding a partner that offers flexibility of customization along with regulatory and security components is recommended. Beyond integration with leading meetings and messaging platforms, such as Microsoft Teams, Cisco Webex, and Zoom Workplace, considerations for CRM and contact center platform integration should be at the top of the evaluation criteria.

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