8x8, Inc.

How to Pick a Unified Communications System That Kicks Your Competition's UCaaS

COMMfusion

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Introduction

As Bob Dylan so masterfully wrote, "the times they are a changin'." While Dylan was referring to the social and political upheaval of the 1960s, the same could be said of today's business communications environment. Never since the introduction of IP telephony in the 1990s has there been so much change, with a host of new options and choices for business customers.

The driving forces behind this change are the steady adoption of unified communications (UC) and the migration to the cloud, also called UC as a Service, or UCaaS. Rather than simply replacing aging phone systems with newer ones providing similar functionality, businesses are looking for enhanced capabilities, and are turning to unified communications and collaboration solutions to improve the customer and employee experiences.

Cloud-based solutions are taking off, as companies look to the cloud for their UC, collaboration, mobility, and contact center communications needs. This growing market is extremely competitive, with a large number of vendors and service providers for organizations to choose from.

How can businesses make the right decisions about which provider to select, what capabilities are needed, and how to plan for a successful telephony and/or call center deployment?

Part of the answer is to come with the right questions to ask solution providers. This eBook will help guide mid-market businesses as they evaluate their UCaaS and contact center options and develop their strategies.

Chapter One

Success is About Communications—Within the Company and With Your Customers

Just as Dylan and other 60's legends represented a new generation in music and clothing, UC solutions represent a new generation of communication tools, building upon previously siloed components and tasks.
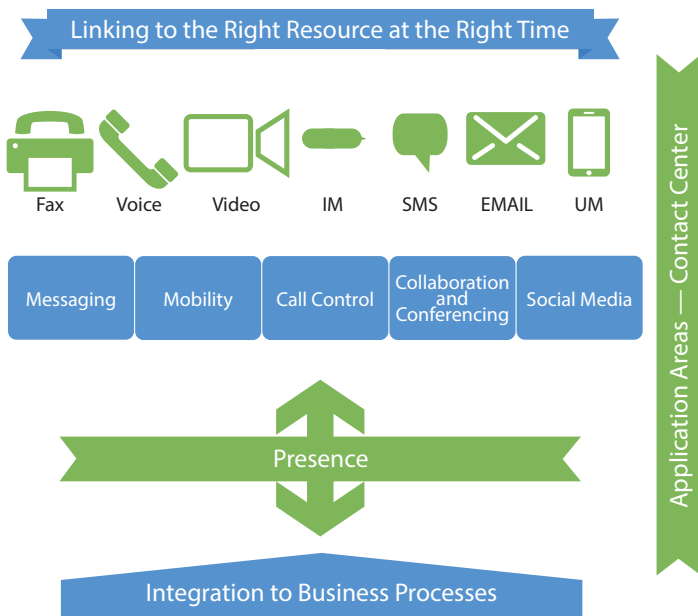
UCStrategies defines unified communications as "communications integrated to optimize business processes." In other words, Unified Communications integrates real-time and non-real-time communications with business processes and requirements, presenting a consistent unified user interface and experience across multiple devices, applications, and geographies, with personalized rules and policies for the individual user.

Companies that have implemented UC solutions have experienced improved employee productivity, improved customer service with higher customer loyalty and retention, faster problem resolution, better communication with partners, suppliers, and customers, shorter product development cycles, and faster time to market.

UC Elements and Components

UC is not a single feature or product. Rather it's a solution made up of different elements or components, including:

- Call control via VoIP: includes typical PBX functionality
- Presence: knowing the availability status of colleagues, both online and on the phone
- Messaging: includes voicemail, email, IM, and chat
- Conferencing and collaboration: includes audio/web/video conferencing, as well as document or file sharing, whiteboarding, and other collaborative tools
- Mobility: includes capabilities such as advanced call forwarding or single number reach, desktop extensions, and mobile clients for smartphones and tablet devices
- Client access: providing a unified interface for accessing communications – whether it's through a web portal, mobile device, softphone, or other endpoints
- Business process or application integration: tying the UC capabilities directly into customer relationship management (CRM) systems and other business applications and workflows

Linking to the Right Resource at the Right Time

| Fax | Voice | Video | IM | SMS | EMAIL | UM |

| Messaging | Mobility | Call Control | Collaboration and Conferencing | Social Media |

Presence

Integration to Business Processes

Application Areas — Contact Center

UC Elements and Components Source: COMMfusion LLC

Contact Centers—Communications With Customers

For most businesses, the primary goals are increasing sales, reducing costs, and maintaining customer satisfaction and loyalty. The front door to customers for sales, service, and support is often through the contact center. Contact centers are used strategically to better manage incoming calls while providing operational market intelligence data. Every company, regardless of size, needs to think strategically about customer contact. While in the past customer contact was primarily conducted via the telephone, in today's world it takes many forms, including email, web chat, and even social media. Each and every interaction with a customer is rich with information on how to best know your customers and meet their needs.

The contact center infrastructure must support multiple channels of customer contact, offer a single queuing and routing engine for all channels, a single integrated view of the customer and a single reporting system.

Contact Center Elements and Components

Contact centers consist of several elements, including:

- Automatic Call Distributor (ACD) to route phone calls and interactions
- Universal queue for all media types, including voice, web chat, email, and new channels such as social media
- Enhanced routing, such as skills-based routing, to route and distribute calls and interactions
- Interactive Voice Response (IVR) for self service
- Computer Telephony Integration (CTI) providing screen pop and integration with customer data in CRM and other data sources
- Historical and real-time reporting and statistics
- Call recording and logging
- Real-time monitoring
- Supervisor dashboards and tools
- Forecasting and scheduling tools

Optional components include quality and performance management, workforce management and optimization, analytics, and outbound dialer.

All of these components help to ensure that:

- Customers get to the right agent on the first interaction
- Customer interactions are supported across multiple channels
- Agents have access to relevant customer information providing customer insight

Enhancing Communications Through UC and Contact Centers

Unified communications makes it easier to interact with colleagues, customers, partners, and suppliers than ever before, regardless of location or device used, by enabling individuals to reach others efficiently without costly delays. Imagine how employee productivity is enhanced by viewing your "buddy list" on your UC-enabled mobile device to determine if a co-worker is available for communication, and initiating an Instant Message chat discussion or phone call.

Similarly, by simply using click-to-call and drag-and-drop capabilities in the UC client, additional parties can join the phone conversation, which can also be escalated to a web conference or collaborative session, with document sharing and other collaborative tools.

Contact Centers: Increasingly Central to Customer Communications

Most of these capabilities can also be leveraged by contact center agents to enhance customer interactions. Agents can view the status of supervisors, other agents, and even individuals in the organization outside of the contact center, and can initiate instant message interactions to get information needed to best serve customers. They can bring supervisors or subject matter experts into calls with customers when additional expertise is needed, using simple drag and drop tools. If desired, agents can collaborate with each other and with supervisors to share information in order to provide better customer service.

Companies find significant benefits from utilizing the same vendor for their contact center as their phone and UC solution, and the purchase decision for one weighs heavily on the other. Having a single vendor reduces management requirements and provides end-to-end support, with no finger pointing between vendors. In addition, the single vendor has more control over the product, including new feature releases and the ability to keep features current on both systems.

The results? Simplified collaboration, enhanced productivity, improved customer service, increased sales, reduced communication costs, and more.

Chapter Two

A New Choice for Business: Understanding UCaaS

Now that most organizations are aware of UC and the benefits it provides, they're moving on to the evaluation stage to determine the best way to implement UC in their organizations.

Until recently, organizations had one choice for their business communications—purchasing PBX equipment that sat on their premises. Today there are various choices, including cloud or hosted service offerings, also called UC as a Service (UCaaS). Increasingly, companies are turning to cloud services as an easier, more effective way to deploy communication capabilities.

Premises-Based Solutions

Most businesses today use a premises-based switched telephony system, generally a PBX or IP-PBX. In addition to the upfront capital expense, these premises-based solutions require an IT staff to manage and maintain the systems, including moves, adds, changes, software upgrades, and more. Unified communications solutions that typically run on top of the IP-PBX require multiple servers for the various UC applications already described, including messaging, mobility, conferencing, etc. These solutions also generally require SIP trunking, Session Border Controllers (SBCs) and gateways to provide security and interoperability with the public switched telephone network (PSTN). This can add up to a lot of servers, complexity, and management headaches.

Cloud Services and UCaaS

Shifting away from these complex solutions, more and more companies of all sizes are turning to cloud-based VoIP and UCaaS solutions. With UCaaS, the UC applications are hosted by a vendor or service provider and made available to customers over the Internet. The cloud service or hosting provider runs and manages the hardware and software in their data center, and is responsible for monitoring and managing the service on behalf of the end-user company. UCaaS offerings generally provide the same types of functions as their premises-based counterparts, but are available in a different delivery or consumption model. Customers can get the telephony and UC services they need—whether real time voice, messaging, conferencing, mobility, and so on, from the cloud provider. Organizations get the benefits of UC without the large capital investment or the need to manage and maintain the solution.

These solutions let you adopt a pay-as-you-go model for UC, which can be particularly cost-effective for small and midsized companies. They are particularly attractive to businesses with expensive and/or obsolete communications equipment on their premises. Companies only pay for the services needed for the end users on the system, and can easily scale up or down.

The Many Benefits of UCaaS

While cost is usually the main reason companies start investigating hosted solutions, there are many other benefits of hosted UC services.

Simplicity	UcaaS is much simpler for organizations than premises-based solutions, which can be somewhat complex. A typical premises-based VoIP implementation generally requires many servers, and when you start adding UC applications such as web conferencing, it increases the complexity even more.
Speed of Deployment	Services can be available quickly and easily, without having to install and implement servers. Users can have a hosted UC solution up and working in weeks, rather than months. Moves, adds, and changes can be accomplished in a matter of minutes, versus days.
Business Continuity	Provides redundancy and disaster recovery, as the service provider generally provides backup power, site redundancy and high-capacity bandwidth connectivity. Having off-site backup and redundancy reduces downtime in emergency situations. If a business location is inaccessible due to natural causes such as earthquakes, flooding or snowstorms, phones can be quickly and easily relocated. As long as employees can access a mobile phone or the Internet, they can be in business.
Staffing Efficiency	Typical IT tasks, including maintenance and management (including moves, adds, and changes) are handled by the cloud provider, removing the burden from the company's IT department.
Ability to Stay Current	Companies avoid the cost of technology refreshes, as they automatically get the latest versions, saving time and money.
Reduced Risk	Reduces the risk of technology obsolescence and other issues, as well as a lowering initial risk.
Reduced Cost	By offloading the equipment to the cloud provider, companies can reduce real estate, energy and staffing costs.
Location Independence	Using a browser-based portal to access their communication options, users have full access to their business phone systems, can set their routing rules, voicemail greetings, etc. Employees can work from anywhere they have an Internet connection.
Focus	By outsourcing responsibility for managing and maintaining the business communication system, organizations can focus on their core business, while freeing up the IT staff to focus on more complex IT needs. This is especially true for businesses with multiple locations that no longer need dedicated IT professionals at each site.

Potential Challenges

You might be saying to yourself, "UCaaS sounds great, but there's got to be a downside." The biggest complaint about hosted solutions is the loss of control, as the hosted provider generally makes the changes and is responsible for managing the solution. However, companies increasingly prefer to pass on the management responsibility of their communication solutions to an experienced third party, so they can focus on their core business.

The other issue that often arises is whether the cloud provider can ensure the security and privacy of the company's communications and data. This is particularly true for companies in regulated industries such as healthcare and financial services.

While security may have been a concern when cloud services were first introduced, these fears can now be assuaged. Leading cloud service providers are taking security and compliance very seriously, and some now support various compliance standards for data security and privacy. But it's essential to work with a cloud provider that has the necessary certifications and security controls in place, as described later in this paper.

Customization may be more difficult in a hosted environment, as most hosted services provide a fixed set of capabilities that are not customized for each individual customer. Some of the hosted vendors have ways to customize their solutions, but not all can do this. It's important to work with a service provider that has a professional services team that can provide the specific integrations and customization needed for each customer's specific environment.

Some cloud providers offer services that come pre-integrated with popular software such as Salesfore and Outlook.

For large enterprises with full-featured IP PBXs, cloud services might not offer all of the features and functions found in some premises-based offerings. This could be a challenge for companies requiring specific bells and whistles that the hosted provider does not offer. But for most companies, especially small and mid-market customers, the functionality provided meets their general needs. In fact, small and mid-market customers find that they can get advanced features and functions such as conferencing and collaboration more cost-effectively through cloud-based solutions.

Call quality and quality of service (QoS) may be challenging for smaller businesses that don't have the network infrastructure required to accomodate the communications traffic, especially for remote workers who rely on cable or DSL for Internet access. Most providers have tools to test the bandwidth, but because customers generally use the public Internet (or their own MPLS in some cases), the hosted providers generally do not guarantee quality of the last mile. Make sure that your service provider has testing and monitoring tools to determine whether your network can support the UC service and will work with you to ensure call quality.

Premises-Based vs Cloud-Based Solutions—Which is Right for Your Business?

	Cloud	Premises
Product Updates	✔	
Flexibility	✔	
Less risk	✔	
Business Continuity	✔	
Obsolescence Avoidance	✔	
Security	✔*	✔
Customization and Business Process Integration		✔
Control		✔

* There is considerable diversity in the security and compliance of hosted solutions. Some cloud vendors offer HIPAA, FISMA and FIPS compliance, but this is a rarity, so you need to ask about security and compliance before choosing.

Does "One Size" Fit All?

Initially, cloud services were seen as the savior of small businesses, providing organizations with less than 50 workers a cost-effective solution that wouldn't tax their IT staff. Today, cloud services are reaching businesses of all sizes, especially those with multiple sites and branches.

For small and very small companies, UCaaS should be a "no-brainer." It's easier to deploy, can be up and running very quickly, and, most importantly, doesn't require IT resources and expertise to implement, manage and maintain.

UCaaS is also a good decision for very large enterprises that need to manage and maintain multiple UC systems, often from different vendors.

Regardless of the size of company, hosted services make a lot of sense for geographically-dispersed organizations with multiple locations. It's generally much easier to connect various locations through cloud-based services than to have equipment sit in every site.

How UCaaS Helps Mid-Market Organizations Manage Growth

While a bit later to adopt UCaaS than SMBs, more and more mid-market companies are turning to cloud services. Many businesses need to update and replace their aging phone systems. And rather than simply replacing an old PBX, they can cost-effectively add productivity-enhancing tools such as UC, collaboration, and contact center through the cloud.

Mid-market organizations have unique challenges, as they compete against larger enterprises with more resources. These businesses need more capabilities and more flexibility than small businesses that tend toward the lowest-priced solutions, but do not have the financial and staffing resources of large enterprises. IT resources in midsized companies are more limited, and while they need the same capabilities, midsized companies need them to be easy to deploy and manage.

With fewer staff, employees "wear more hats" and have more responsibilities, requiring tools to make them more efficient. Mid-market companies might not have offices and branches throughout the country or the world like large enterprises, increasing the need for workers to travel and use mobile cababilities. Sales and service reps also have to cover larger territories, while the general manager may have to travel more to visit with clients, go on sales calls, and meet with suppliers and partners in various regions. These situations can be handled wth mobile collaboration services such as web and video conferencing.

How UCaaS Supports Business Expansion

UCaaS provides mid-market firms with the same collaborative tools that large enterprises have been using, leveling the playing field and making these firms more competitive. Workers may be spread out in different branches and regions, rather than working in a centralized headquarters, necessitating collaboration and constant communications. In addition, UCaaS lets companies hire talent no matter where people are located and allows them to work from home using UC tools, increasing the talent pool.

As the need for multi-channel customer care increases, mid-market companies without extensive call center operations are finding that they need to have more advanced contact center capabilities. Rather than making a significant investment in the infrastructure necessary, these companies can use cloud-based solutions to get up to speed quickly.

Chapter Three

Contact Centers: The Front Lines of Customer Relationship Management

While not necessarily part of a UC solution, contact centers are often tightly aligned with an organization's business communications solution and vendor. As the front door to the customer, contact centers are critical for customer service and sales, as well as for driving company revenues. By deploying a multi-channel contact center platform, providing a single queuing and routing engine for all channels, a single integrated view of the customer, and a single reporting system, businesses can reduce costs while enhancing customer service and support.

Cloud-based solutions make it easier to integrate multiple contact centers into a single "virtual contact center," with centralized management and operations for headquarters, remote and branch offices, and at-home workers. Calls and interactions can be intelligently routed to the agent, group, skill group, or location that is best suited for the customers' needs, and companies can tap into larger workforces, independently of where they're located, to serve customers.

The cloud provides flexibility and scalability, enabling organizations to increase the number of agents needed based on call volume, seasonal fluctuations, or even specific events such as new marketing campaigns or natural disasters. All the agent needs is good-quality Internet access, a computer, and a headset. In addition, cloud contact centers make it easier to add new interaction channels, such as email, web chat, and even social media. Leading solutions help organizations manage customer interactions across all of these channels in an integrated way.

Many contact centers already use cloud-based customer relationship management (CRM) solutions from vendors such as Salesforce.com, Zendesk, and others, so it's a logical next step to migrate to or deploy a cloud-based contact center.

All of the benefits of cloud-based UC solutions appiy to cloud-based contact centers, including simplicity, speed of deployment, reduced costs, staffing, automatic updates, etc. Cloud-based contact centers have additional benefits, such as the following:

Flexibility	Cloud-based contact centers can support agents anywhere, making it easier to manage seasonal and variable traffic. With no software to download to the agent desktop, remote agents can be enabled quickly.
Licensing	Companies only pay for the user licenses they need, and can add and remove seats as necessary. This is especially useful for contact centers and companies with a great deal of seasonal workers, such as tax preparation firms, retailers, and others.
Support for a follow-the-sun strategy	To provide service to customers around the globe, many contact centers "follow the sun," utilizing agents in various parts of the world to provide 24/7 service.

Remote Agents, Business Continuity, and Increased Talent Pools

Cloud-based contact center solutions make it easier to deploy virtual contact centers with remote or at-home agents, enabling companies to hire the best agents possible, regardless of geographical location.

Companies have found tremendous benefits from using remote agents, including:

- **Increased agent talent pool:** Organizations can hire workers with the necessary skills and knowledge needed, regardless of where they're located. In addition, the talent pool is expanded to agents who might not be able to work full-time in a formal contact center due to family obligations or other issues.

- **Reduced agent churn:** Remote agents are generally more satisfied with their jobs, and appreciate the flexibility of being able to work from home and achieve better work-life balance.

- **Reduced real estate costs:** Companies can avoid building new contact center facilities as they don't need to provide physical space for all of the agents.

- **Flexibility and ability to meet changing volume:** Remote or home-based workers can be brought online quickly, enabling companies to respond to changing demand and call volumes. Companies have been able to quickly ramp up contact centers in a matter of hours to provide assistance to customers or individuals and respond to emergencies and natural disasters.

- **Business continuity:** Employing remote agents allows companies to keep contact center operations running even when there's a natural disaster or other emergency situation. For example, during the snowstorms of 2014, some companies routed calls to agents who were unable to leave their homes, while others routed interactions to agents in different geographies and locations.

Escalations and Expert Agents

In addition to the use of remote agents, many organizations are using the cloud to leverage "expert agents." Expert agents, or subject matter experts and knowledge workers within an organization, can help front-line contact center agents provide faster and better responses to customer inquiries. Using UC tools like presence and IM, agents can get additional information to help answer a customer's question. For example, they can use presence to see which subject matter experts are available, and send an IM to ask an available expert for information while on the call with the customer, resulting

in faster call resolution and more satisfied customers. By aligning your UC and Contact Center solutions, both contact center agents and knowledge workers can utilize the same tools and platform to more easily communicate with each other to better serve customers.

Chapter Four

Planning Your Move to the Cloud

Is UCaaS Right for You?

UCaaS isn't right for everyone, so it's important to determine whether it meets the needs of your organization. If you answer "yes" to two or more of the questions below, a cloud solution may be right for you.

Do You...	Yes	No
Want employees to better collaborate across locations and devices?		
Have a limited or small IT staff?		
Have a distributed workforce — remote and mobile workers, branches, teleworkers?		
Have flexible staffing requirements — seasonal, volume, etc.?		
Have an outdated or multiple/disjointed legacy business phone system?		
Want to reduce your number of vendors?		
Want to move to an OpEx model?		

Source: COMMfusion LLC

How to Select the Vendor That Best Meets Your Needs

You've decided that it's time to move your business communications to the cloud—now what? Selecting the right vendor that best meets your needs takes time and research. Be prepared by knowing what to look for and by asking the right questions.

There are many UCaaS providers, and the number keeps growing, with well over 100 companies at this time, ranging from telecom carriers to traditional equipment vendors to small mom-and-pop hosted providers. The challenge is to find the UCaaS provider that offers the functions and capabilities needed, while ensuring security, scalability, and peace of mind.

A Set of Core Features to Verify

Most UCaaS providers offer similar basic calling features, including:

- Local and long distance calling
- Automated attendant
- Audio conferencing
- Visual voicemail
- Unified messaging
- Call forward/Call transfer/Call waiting
- Fax services
- Enhanced E911
- Dial by name capability
- Caller ID
- A do-not-disturb feature
- Ring groups
- Find me/Follow me capabilities
- Call rules and scheduling
- Call log reporting
- Call recording
- Music on hold
- Four-digit dialing between locations
- Screen pop

They also offer web-based administration portals for managing user accounts, as well as basic mobile capabilities such as being able to receive calls on a mobile device while maintaining and accessing PBX features and functions, the ability to initiate calls via WiFi and 3G, and simultaneous ringing on multiple devices.

Key Differences Between Providers

Where the vendors differ is in more advanced features such as contact center capabilities, advanced mobility, conferencing, desktop controls, and advanced unified communications capabilities. Vendors also vary in the tools they provide to end users, managers, and administrators, as well as the ease of use of these tools. Intuitive and easy-to-use administration tools empower management to control their system without needing vendor or IT support.

Many of the offerings appear very similar at first glance, so it's even more important to do your homework and carefully evaluate the various options. Key areas of difference can be found in:

- **Features/Capabilities:** While vendors continually add and enhance features and capabilities, it's important to make sure that your vendor offers the key functions you need. For example, some vendors offer only audio conferencing, rather than web conferencing. Contact center capabilities vary dramatically between vendors, with some offering full contact center functionality, and others offering only "ACD lite" capabilities. The same is true for mobility—some vendors offer support for mobile devices including Apple iOS and Google Android, while others don't. Dig deep to understand what is and isn't provided. If the provider doesn't offer the capabilities you need, a complete solution might require a third-party service, which may not be as well integrated. Also check to see which features could cost extra, so that you can compare pricing.

- **Platform:** As mentioned, there's a large range of service providers. Some deliver the UCaaS offering by leveraging platforms from companies such as Microsoft, Broadsoft, and Cisco. But "built for the cloud" providers, such as 8x8, Fonality, and RingCentral, developed their own cloud platforms from the ground up. By developing and managing their own software and network infrastructure, "built for the cloud" companies don't need to rely on third-party providers to add features and functions, and have more control over the system in terms of quality and uptime.

- **Deployment:** The way that UCaaS is deployed varies greatly between vendors. In some cases, basic cloud services for small businesses can be ordered online from the service provider's website, and deployed within 24 hours from the time you receive the phones and the phone numbers are ported to the new provider. For mid-market organizations, especially those with multiple sites, deployment will take more time and require more resources from the provider. The level of support and "hand holding" will vary from vendor to vendor, particularly when some level of customization is required. The deployment process can take weeks in order to ensure that the service is working well and everything functions properly. The process should also include training for the IT staff who are often responsible for setting up the call flows, routing rules, and automated attendant, and provisioning the users. Rather than using a "cookie cutter" approach, the cloud provider should spend time understanding the customer's business requirements and what they're trying to

accomplish in order to properly design the service and provide maximum value for the end users.

- **Service and Support:** Whether you choose a cloud-based or premises-based solution, service and support before, during, and after deployment is essential. If you have global operations, it's important to work with a vendor that offers support in the appropriate time zones and languages. It's also preferable to work with a vendor that provides their own service and support and does not offshore support to a third party.

- **Pricing and Packaging:** Most service providers offer various packages and bundles, each with different levels of features and functionality. Try to compare apples to apples. For example, one vendor may offer web conferencing in the basic package, while another offers it in a more advanced (i.e., expensive) package. Some vendors do not offer certain features such as a contact center solution.

- **User Interface:** Ease of use is critical, and to get the end-user adoption desired and reduce any potential resistance to change, the desktop and mobile user interface needs to be intuitive, providing easy access to the solution's features and capabilities. Most vendors offer a browser-based interface, as well as a mobile interface. Look for a user-friendly interface that will help make both novice and "power users" more efficient.

A Critical Quality Difference: Security and Compliance

One of the biggest differentiators amongst vendors is the way they handle security and compliance. As mentioned, this can be one of the biggest challenges for companies that need to safeguard the privacy and security of sensitive information. Implementing UC creates new threats toward business voice systems, such as data loss and fraud, as well as attacks against the underlying data network resources and Denial of Service (DoS) attacks that disrupt not only voice, but also other application services.

The cloud provider should have appropriate security controls to protect sensitive data, prevent eavesdropping, ensure endpoint device security, and more. At a minimum, it's important to take basic precautions such as requiring alphanumeric passwords and data encryption.

In addition, there are many regulations that the cloud provider needs to support, such as HIPAA, US Federal Information Security Management Act (FISMA), Federal Information Processing Standard (FIPS 140-2) and HITECH Final Omnibus Rule. New HIPAA regulations governing the protection of patient health information went into effect in September 2013 that place additional requirements on the service provider for healthcare organizations. Businesses must comply with these regulations and make sure that their service providers are HIPAA-compliant business associates, or risk being assessed very heavy fines.

Questions to Ask Vendors and Service Providers

The following section provides an overview of some of the key questions you should ask to help differentiate potential UCaaS providers. Depending on your specific requirements, some will be more relevant than others, but this provides a good starting point.

- **Security and Compliance:** How do you ensure compliance for regulated industries such as healthcare and financial services? What certifications can you provide? Do your solutions meet our compliance guidelines and provide compliance auditors the information they're looking for to ensure compliance? Have you passed third-party verification for your HIPAA compliance? Are you PCI-compliant? Do you have a dedicated security officer? Are the phones you ship preconfigured with security and do you securely authenticate your phones so that they can't be hacked and the endpoints can be secured?

- **Reliability:** How often do you shut down your system for maintenance? How many outages have you had? How long does the average outage last? Do you provide your uptime statistics and make them available? How can customers verify and validate this? Are network uptime SLA's available? Do you supply both the UC functionality and the network services? If not, who is responsible for the different elements of the service? How many data centers do you have, and where are they located? Do you have a failover capability in case one center has an outage?

- **Service and Support:** Do you provide 24/7 technical support? In what regions? Is there an extra cost for support? Where is your support team based? Who handles Tier 1 support?

- **Training:** What kind of training do you provide? Is there a fee? Is the training web- or phone-based? Do you provide post-deployment training? Do you provide end user training, or just training for the IT staff?

- **Deployment and Implementation:** How long does the deployment process take? Is there a formal deployment program? Do you have a project team that does the onboarding and helps with the configuration and project management? Is deployment done remotely? How much in-house technical expertise is needed? Do you provide post-deployment support to help

customers as they learn to use the system? Is there a dedicated deployment support rep for each customer?

- **Professional Services and Customization:** What APIs do you provide for integration with peripheral systems and applications? Do you provide professional services engagements?

- **Platform:** Do you utilize your own platform or a third party's? If using a third party, how often are new versions released?

- **Global Footprint:** What regions and languages do you support, and can you provide international numbers and calling plans? As Gartner points out, "Global UCaaS support is not trivial." UCaaS providers must secure local regulatory approvals, manage in-country telephone numbers, add new data centers, support additional languages and currencies, and provide in-country professional services.

- **Financials:** Are you a publicly traded company? Can you share your financial data to confirm longevity and financial viability?

Businesses with contact centers should also ask:

- Do you provide full multi-channel queuing and routing capabilities?

- What CRM applications come pre-integrated with your solution?

- What APIs, plugins, and integrations are available for CRM, ERP, and other business applications?

- Do you provide CTI, screen pop, workforce management, quality management, supervisor capabilities, and full reporting capabilities?

Steps to Take When Starting Down the Path to UCaaS/ Contact Center Solutions

When you start thinking of deploying a UC solution, you should begin by identifying and focusing on your business needs. What is it you're trying to address? UCaaS success is not about the technology—it's about what your goals are and how you can achieve them.

Are you trying to increase customer intimacy and loyalty, reduce the sales cycle, get products out the door faster? How can UCaaS help you achieve these goals? Look at the various needs of your different user groups, and what kinds of functions they need. The capabilities you want will differ based on these needs.

Here are some ways to avoid potential issues, both technical and cultural:

- Involve the right people in the process and engage key stakeholders.

- Have a designated project lead who can ask the right questions and be the focal point.

- Work with your service provider to do a network assessment to make sure your network has the bandwidth to support the new services, especially video.

- Do the legwork prior to deployment, including developing your rollout strategy, understanding integration needs, such as CRM, etc.

- Do end user training to make sure users understand all the features and how to best use the service.

- Adapt your culture for change—including a new mobile and collaborative workplace, a new user interface, and more. Prepare workers for technical and cultural changes and let them know what to expect. In some cases, policy and "etiquette" guides can be useful.

Why You Need Unified Communications Now

The need for UC has never been greater. The growth of the mobile workforce has led to the need for workers to communicate regardless of their location or device, and the virtual workforce requires enhanced collaboration. Mid-market organizations are turning to UCaaS as a more cost-effective, simplified, and flexible way to deploy the latest communication tools and technologies to help them be more productive. Working with the right provider will help to achieve business goals and get the most out of UCaaS solutions.

About the Author

Blair Pleasant is President and Principal Analyst of COMMfusion LLC and a co-founder of UCStrategies. As a communications industry analyst, she provides strategic consulting services and market analysis on business communication applications, technologies, and markets, aimed at helping end-user and vendor clients both strategically and tactically. Her primary areas of focus are Unified Communications and Collaboration, contact center, communication-enabled business processes, social media, and unified messaging. Blair provides clients with a variety of custom consulting services, including market analysis, surveys and research, white papers, product assessment, competitive analysis, strategic development, vendor analysis, marketing and product positioning, partner development, and more.

 She is a frequent speaker and participant in industry conferences, webinars, podcasts, and other events to help educate customers, solution providers, channel partners, investors, and others about the evolving Unified Communications and Collaboration and contact center markets.

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