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GUIDE TO FINDING A NEW PHONE SYSTEM

A STEP-BY-STEP APPROACH TO FINDING THE BEST SOLUTION
FOR YOUR BUSINESS



STEP 1: DETERMINE YOUR BASIC NEEDS

Before you begin comparing prices, researching features and pressing buttons, you first must figure out what you truly need—OK, and want—in a business phone system. Putting necessary time and thought into your requirements will ensure you end up with a system that meets or even exceeds your expectations.

TAKE STOCK OF WHAT YOU'VE GOT.

Give your current system an earnest, thorough once-over. Consider why you want to purchase a new phone system. Some of the most common reasons are: poor voice quality, outages or dropped calls, the need for better call routing, a reduction in contract or maintenance costs and wanting additional features.

Solicit feedback from the people who interact with your phone system most frequently. Get input from staff—both technical and nontechnical, light and heavy phone users. Ask them what's working about the current system and what's not working. What frustrates them? Watch some of them interacting with the phone. Is it easy to use, easy to program and comfortable ergonomically?

Don't forget about the users on the other side of the handset either. Ask your customers, partners and vendors about their experience contacting your business. Are they able to reach your staff easily? Are dropped calls an issue? Assess what your competitors are doing well or not so well in the area of communications, too, so you have a benchmark to compare to.

Along with evaluating the pluses and minuses of your existing system, craft a wish list of features and options your users would like in a new system. Look for patterns that help you pinpoint how you can improve the user experience from all sides. The better you can understand your current system, the better you can choose and tailor your future system to meet your requirements.

In addition to usability, review your current system for relevancy. How old it is? Has it been discontinued, making replacing parts and service challenging? Are maintenance costs becoming too much? When it comes to ROI, take a look at where you stand and where you want to go.

SIZE AND FLEXIBILITY.

The size of your business is a big factor in the selection of a phone system. Consider not only how many employees you currently have but also how many you expect to have in the coming year. What are your staffing projections for the next three and five years?

Business needs are constantly evolving. Gaining an accurate picture of your company's user scope is important so the system you choose has the proper usage capacity. You don't want to invest in a system that you'll outgrow in three years. On the other hand, you also don't want to pay for a bunch of users that you won't have for another year or two. The key is finding balance with a system that can grow in lock step with you. You'll want to understand how each potential supplier accommodates upsizing requirements. Every manufacturer has a different definition of small and mid-sized business, so be prepared to clarify your terms.

LEASE OR BUY?

Like a vehicle, your phone system can be leased or purchased. As with any other capital expense, there are upsides and downsides; both are legitimate options. Once you have established your budget and considered total cost of ownership, you can better evaluate which is the more cost-effective choice for your organization.

REPUTATION AND RELIABILITY COUNT.

Because your phone system is so essential to the day-to-day operations of your business, you want to get the best product from a reputable manufacturer. Compare product reviews. Don't rely solely on testimonials; seek out user references from businesses like yours. And ask about warranties, service agreements and costs.

CONSIDER VOIP.

If your call volume is high or you regularly make long-distance calls, you may want to entertain the idea of going with VoIP technology, which lets you make calls over the Internet versus traditional phone lines. This can mean potentially big cost savings.

CUSTOMIZE YOUR NEEDS.

There is an array of available features on today's advanced phone systems. Do you want audio, video and Web

conferencing? Would you like the ability to program your speed dials through a computer interface? Do you need multiple voicemail boxes? Do your employees share desks? How about a message service to greet callers and route calls to the appropriate staff member? Think about what kinds of functionality will give you a competitive edge. There's likely to be a hardware and/or software solution.

While you certainly don't need to pay for options you won't use, it's better to grow into a system's features than regret their absence. Retrofitting is not feasible with most phone systems.

TAKE MOBILITY INTO ACCOUNT.

With the rise of mobile communication, the anytime/anyplace nature of business and the realities of multi-tasking have raised the stakes for all of us. And if you have multiple offices, a number of employees who travel regularly or staffers who work remotely, your phone system requires particular flexibility. That's why it's more important than ever to have a central hub that can seamlessly manage your telecommunications traffic without compromising quality or productivity. The right system offers freedom and flexibility for all users.



STEP 2: CHOOSE AN INFRASTRUCTURE: LANDLINES OR VOIP?

Traditional phone systems use landlines and trunks, and transmit voice using analog or digital devices. Each employee has his or her own phone extension and voice mailbox as well as such features as conferencing and caller ID. Traditional systems are highly reliable and can continue working even during power outages and other network interruptions. And if you already have the infrastructure in place, it may be cost-effective and advantageous for you to utilize it.

Traditional phone systems are best for businesses that make mostly local calls and can be costly for those that do a lot of long distance and international calling. If you don't already have a legacy system in place, the investment in a new one can be significant and is largely up front. You'll also need to plan well for future growth as adding lines to a traditional system is difficult. And you'll need to have proper IT staff in place to maintain two networks—one for voice and another for data. User changes, however, can be cumbersome as a technician has to reconfigure and physically move a phone from one workspace to another.

VoIP, on the other hand, uses a dedicated or shared Internet connection to one or more locations using special IP phones. These systems reduce telecommunications costs by delivering calls over the Internet, requiring that you only pay for extensions actually being used, reducing staff, and eliminating costly voice lines and local and long distance contracts. You can buy a basic VoIP system and add extensions and features as your business grows. Operating

costs are further lowered by eliminating multiple vendors and communications providers, and refocusing IT staff from hardware-based systems to other areas of the business.

VoIP systems don't require the large capital expense that traditional phone systems do because they use existing computer networks. The applications and management of VoIP systems reside with the service provider. Instead of spending money on a costly capital expenditure, VoIP gives you a predictable monthly operating expense.

Updates to VoIP systems are managed through an online admin portal. Instead of sending a technician to physically move a phone line, the user simply moves his or her phone to a new jack or the phone is reprogrammed through the portal with a new extension. Voice is treated as an application running on the network, meaning that only one data network has to be maintained.

VoIP also allows for more flexibility than traditional systems. Businesses with multiple offices can be connected with remote employees anywhere. Phones can be easily relocated without complex hardware installations should a business location be inaccessible due to natural disaster, extended power outages and Internet failures. With VoIP, you can still make calls from your network as long as you have access to an Internet connection. Calls can also be routed to mobile devices or remote computers, and you can still receive and respond to voicemail messages.

If you're thinking that VoIP is the obvious choice (and it very well may be), not so fast. There are some things to consider

first. Because VoIP uses an Internet connection, it requires optimal network performance to ensure acceptable voice quality and reliability for users. While wireless phone users have accepted substandard call quality, most desktop phone users will not. And doing business can be seriously affected if you have poor call quality, no dial tone or connection problems. Most network infrastructures are optimized for data, not for converged data and voice traffic. VoIP should always take priority over data, so look for a system that monitors and prioritizes voice over data traffic. But you'll also need to evaluate your network performance as a whole to handle both, particularly if your business depends on applications and quality user experiences.

The question that Gartner analyst Jeff Snyder urges purchasers to ask themselves is whether or not your network can support VoIP fully or partially. He estimates that about 85 percent of networks are not ready for VoIP.¹ Gartner further reports that 75 percent of businesses that do not perform an analysis of their IP network infrastructure will not achieve a successful VoIP implementation.¹

Assessing the current state of your network, evaluating its ability to support VoIP and identifying what is hindering performance is key to making the right choice. Underperforming networks can significantly affect the performance of other critical applications. Conduct a complete analysis of the data network and record measurements such as bandwidth and quality of service.

You must also consider the growth of your business. A subscription service could become too expensive over time if not planned for versus an on-premises system that had room for growth.

Wishing you could take the best of both worlds? You can! Hybrid systems combine the benefits of traditional and VoIP systems. They allow you to use traditional phone lines for local calls and VoIP for long distance and international calls, plus other features. A solutions engineer can help you design and implement a hybrid system to work for your business' needs.



STEP 3: SELECT A DEPLOYMENT MODEL

Next, you'll need to decide if you want to host your communications network yourself on-premises or if you want to deploy it in a cloud model.

PREMISES-BASED SOLUTION

With a premises-based solution, your entire phone system is housed on your organization's premises and your staff maintains the network. Some organizations insist on this model because they want to maintain control over all their data. But finances should be considered. Premises-based deployments require substantial up-front investment in infrastructure. And you also have to consider the cost of staffing personnel to manage and maintain the network.

CLOUD SOLUTION

As storage and bandwidth charges fall, cloud solutions are becoming more affordable for businesses wishing to reduce licensing costs and IT staff, and focus on growing their business. They require a low up-front investment and no software or hardware and licensing. You pay only for what you use.

Some companies shy away from cloud deployments because they don't like to relinquish control over their network, or they believe it isn't as secure as a premises-based solution. This, however, is a myth. Cloud solutions can be highly secure and reliable. In fact, they may be more so when you consider the disasters that can strike a workplace, such as power outages and weather-related events.

HYBRID SOLUTION

A hybrid deployment utilizes premises-based and cloud solutions to build a network that's right for your organization. It lets you maintain control where you want it and use your existing infrastructure, resulting in a significant cost savings, flexibility and scalability. A hybrid solution can save your business thousands of dollars from having to upgrade its entire LAN infrastructure to accommodate IP-only phones. You do not have to invest in a purely cloud solution.



STEP 4: CONSIDER NECESSARY AND BENEFICIAL FEATURES

Think a business phone system is just a bunch of devices that sit atop employees' desks that ring and (sometimes) get answered? Think again. A business phone system is much more than that. It's an essential tool that allows staff to connect with one another, develop relationships with clients and get things done. And the right system offers features that can make all that happen better, faster and more efficiently. So think beyond the standard features of call transfer, speed dialing and voicemail, and discover which functions can help you work smarter.

HOT DESKING

In some offices, it is convenient for the organization to have a pool of phones that are shared by multiple employees. For example, real estate agents, who are often out of the office showing houses, may not need dedicated phones. Perhaps the office has 10 or 15 desk phones for 20 employees to use. Hot desking allows users to enter an access code into any phone on the system and automatically have access to personalized phone settings, speed dials, voicemail and more. Then, when they're finished, they just log out and a different user can log in. Hot desking makes phone sharing possible and can help businesses save on equipment and office space.

MANAGEMENT AND ACCOUNTING

This feature records all phone system activity and logs the information based on data you want to capture. Many phone systems offer standard reports, but customizable reports are available as well. For example, you may want to monitor call patterns within certain departments or track employee availability and call length.

AUTOMATED ATTENDANT

You're already well-acquainted with this feature, often simply called auto attendant, even if you don't know it. It is the voice that greets you when calling a business that provides you with menu options so that your call is routed to the correct extension. For instance, you might be instructed to, "Press 3 to speak with someone in billing,"

or fan-favorite, "Press 0 to speak with a representative." The auto attendant can also prompt callers to change the language of the spoken menu, dial an extension or listen to a prerecorded message, such as the business' address, fax number or hours of operation. Auto Attendant has become a widely available business phone feature and comes standard with many systems.

AUTOMATED DIRECTORY SERVICE

Similar to auto attendant, this feature allows callers to be connected to a department or an individual within an organization without knowing which extension to dial. Some systems allow callers to search the directory by entering the first three letters of the individual's last name while others allow callers to speak the person's name or department.

AUTOMATIC CALL DISTRIBUTION

Sometimes, customers call a company but don't need to speak with anyone in particular or they don't know with whom they need to speak. The automatic call distribution feature allows system administrators to determine how calls will be distributed within an organization or call center. Say you're a cable company and you need to connect customers with technical support staff. You could set the automatic call distribution feature to route calls to technicians who have been idle longest. Or, you can have them routed to staff in order of seniority, technical expertise or location.

AUDIO AND VIDEO CONFERENCING

Most phone systems include a conference call, or audio conferencing, feature, which allows you to join more than two phone lines on a call. Depending on the system, though, that number of participants can range from three to many.

More advanced systems also include the capability for video conferencing. But don't stop at availability when inquiring about this feature. There are many service providers that offer video conferencing, but it's important to work with a provider that is reliable and can handle the bandwidth needed to support a video conference. Too little bandwidth

or unstable service will lead to choppy video feeds and frequent disconnections.

UNIFIED MESSAGING

Do you ever get tired of having to check several different devices or applications to retrieve your messages?

Unified messaging is designed to take care of that. It is the collection of all your voice mail, email, fax and text messages in one interface. For example, the access point for messages might be a computer application that is included with a phone system.

PRESENCE

If you've ever dialed more than one number to track down a colleague, you know the value of this feature. Presence is the status indicator of each person on the system. It allows every user to see each other's status at a glance so they can decide the method for communication that's needed. For instance, if a user sees that the person she needs to speak with is on the phone, she may choose to instant message him instead. Another user would benefit from seeing his co-worker's status set to "gone for the day" so she doesn't waste time trying his desk extension again and again.

DO NOT DISTURB

The days of a boss calling out to a secretary to "Hold all my calls" are pretty well over. But that doesn't mean you can't get some uninterrupted time to work on your own. When

this feature is activated, your desk phone won't even ring. While the do not disturb (DND) feature is widely available, different systems handle the process differently. With some systems, callers get a busy signal or hear a recorded message that the person being called does not wish to be disturbed. Other systems' DND feature sends calls to voice mail or allows you to route them to another person—such as that administrative assistant you wish you had.

FOLLOW ME

This feature is pretty much the polar opposite of DND. It's a type of call routing that allows you to program a list of numbers you wish to be tried, in order, for locating you when you're not at your desk. For example, you could set the feature to route calls to your desk phone but if you don't answer in a certain number of rings to try your cell phone. And if you don't answer that, you could have it call your home phone. The phone system will attempt each phone number you've programmed in succession until the call is answered or the list is exhausted, in which case, the call is sent to voice mail.



STEP 5: CHOOSE A VENDOR AND DEVICE

You've made some major decisions thus far about what you need and want out of your new phone system. Now it's time to look at and compare actual vendors and devices.

SET UP AND SUPPORT

When choosing a phone system vendor, consider who will install the system and provide support for technical issues. Ask vendors how much experience they have in installing this particular system in businesses of your size and likeness. Do they offer training and support? Ask for customer references and call them. Find out if they charge for installation, and get an itemized list of maintenance and service fees. Lastly, inquire if the phone manufacturer itself offers support for the hardware—some do and some don't.

TOTAL COST OF OWNERSHIP

Phone systems are priced all over the place. Some that boast low monthly fees have hefty up-front costs and vice versa. Others are reasonably priced at the outset and on a monthly basis but then require regular and costly upgrades or service fees. The best way to compare apples and oranges is to look at the total cost of ownership. Your vendor can help you determine this number.

While it will no doubt be an important factor in your decision-making process, be careful not to overemphasize cost in choosing your phone system. Finding a system that will serve your business well for the length of time you plan to have it is what's most important. Selecting a system that will ultimately negatively affect your customers and productivity won't be worth the few hundred dollars you will save over its lifespan.

AESTHETICS AND ERGONOMICS

Now comes the part in the phone shopping process that you may have been tempted to start with—the design of the device itself. Depending on your business and whether or not your customers will ever see or directly interact with your phones, phone design may be an important factor in choosing a system. After all, you wouldn't want to junk up your sleek doctors office or modern boutique hotel with clunky telephones, would you?

The design of the user interface is key, too. Is the phone easy to use? Will employees (and customers, if they'll be using them, too) be able to figure out how? The last thing you want is to invest in a communications system for your business only to find that employees are opting for email or their own personal mobile phones because they can't or don't want to use the new phone system.

And in that same vein, you also want to be sure to choose a device that is comfortable to use for extended periods of time. Does the handset feel natural to hold? Is it comfortable on the ear? Are accessories such as headsets or cordless handsets available?



STEP 6: IMPLEMENT!

Now that you've considered all your options, it's time to make a selection and get your new system in place. It may seem as though your work is almost done—and, don't worry, it is—but it's crucial not to rush this last step in the process. Failing to plan the implementation process with care could lead to mistakes that are costly not only in time and resources but also in perception. You could choose the perfect phone system for your business, but if it's not implemented well, then employees may resent the change and executive management will take notice.

Here's a quick rundown of what you'll need to do when implementing your shiny new system:

- 1. Notify staff.** Give employees a heads-up that a new phone system is on its way so they can get used to the idea of change. Assure them that there's no need to worry—they'll get all the training and support they can handle.
- 2. Take inventory.** Go through all of the equipment, including cables and peripherals, to make sure you received everything you ordered and that you have everything you need to get started.
- 3. Set up a test network.** Select a small group of early adopter end users and test the system with them before deploying it company-wide to work out any kinks and also make them advocates for the new system. They can help other users get comfortable with the system and answer questions when IT isn't around.
- 4. Train users.** Once your vendor installs the system, provide staff with training from a professional. Group training is great for giving an overview of the system and basic features, but also conduct individual training so users can ask questions and get tours of features and functionality most important to them. Give everyone a cheat sheet with instructions for common actions and settings.
- 5. Party!** It's been a long process but you hung in there. Pat yourself on the back and start planning your next major project.