



The Number One Mistake

When Choosing a Unified Communications Solution

By Travis Dillard

Which UC Vendor do I Choose?



Evaluate the Heart for Services



Evaluate Your Own Needs



Evaluate Services Specialization



Evaluate Mission Critical Support



Evaluate Size Specialization



Evaluate Industry Specialization



Evaluate Contact Center Specialization



Evaluate Pricing versus Partnership

Introduction

A common mistake IT professionals make when evaluating Unified Communications is placing far too much focus on the actual technology itself with little attention to the integrator. We've seen substandard technology be deployed with amazing success. We've seen "best of breed" technology fall flat on its face. We've seen brilliant integrators create very unhappy customers and we've seen marginal integrators hit it out of the park! The X factor truly is the alignment between the vendor and customer.

One might be reading this introduction and be thinking, "don't I just need to pick a vendor that seems smart and has good customer service?" No, I disagree. Even though I know my company is staffed with industry-leading personnel and has phenomenal services, I also know that we're not the perfect fit for all organizations.

And if we pretend otherwise, and try to work with a company that isn't the right fit, we would set ourselves up for failure.

In this white paper, we'll lead you through first profiling your own organizational attributes, how these traits should align with prospective vendors, and then ways to identify and evaluate those traits in the vendors. Most importantly, we'll throw up red flags that are common mistakes when making your vendor evaluations.

Evaluating the Heart for Services

Regardless of your needs, philosophies, or the deployment methodology (on site, cloud, or hybrid), your vendor must at least have the following attributes:

Regardless of your size, complexity, and communication support requirements, you need a UC vendor that is organized, generally good at what they do, and actually *care* about your success. Without this, the rest is a moot point.

Attribute 1: Heart Evaluation Checklist

Use this checklist to evaluate if your prospective vendor has a heart for the services he is offering you and your business.

- ☐ Are they passionate about good customer service in their other lines of business?
- ☐ How long have their customers been with them?
- ☐ Ask for references that can speak to a time when the vendor fell down and “made it right.” Don’t always ask for references where everything was bunnies and rainbows!
- ☐ Do they share their support metrics? More importantly, do they track this internally? You can’t fix what isn’t measured! How quickly do they respond and resolve issues? Do they track customer satisfaction? How is this done? If they do these things, their answers will be unencumbered and free flowing.
- ☐ Beyond the support department, look at other departments of the prospective Unified Communication vendor’s business. This will be a good indicator of their “service culture.” How friendly and easy is it to do business with their accounting department? How quickly do their sales people respond with answers? How quickly does the phone get answered in general? How fast and do they respond to general company inquiries via email?
- ☐ Do they put their money where their mouth is? Is there a penalty if they fall short?
- ☐ Do they promise perfection? If they do, run. We’re all humans working on imperfect technology. Perfection is far from realistic. This is a good test of their integrity.

Attribute 2: Proficiency in Networking and Information Technology

I'm assuming that if you're looking to replace your phone system, you're only considering Voice over IP options (VoIP). If you're considering older digital or hybrid digital / IP technology, think again. VoIP is, after all, an application on your network. You wouldn't let a vendor that didn't understand networking install and maintain a mail server on your network, right? Your phone system is no different.



Red Flag: Many phone system integrators have tried to evolve from installing and supporting traditional, digital technology to installing and support VoIP. They've tried to train their "legacy" phone technicians on IP networking and IT. I've rarely seen this work. The only way to make this transition is to hire technicians and engineers who were networking professionals first and phone technicians second. I apologize if I'm offending anybody here. My job is to bring you my 20+ years of experience for your benefit,

this is a big decision and you need the right information, not the politically correct information.

Attribute 3: Strong Implementation Capabilities AND be Good Providing Ongoing Customer Support

You must vet their strengths on both sides of the project. Many vendors' entire operational strategy and focus is on the initial installation. This is where the most money is made in the shortest amount of time. And then, unfortunately, the support is an after-thought. Further in this document, we'll present ways to identify and evaluate your prospective Unified Communication vendor's implementation and support strengths that go beyond a simple reference check.



Red Flag: A simple reference check is almost worthless. The vendor is only going to give you their happiest customers. Read on. We'll present ways to pull back the curtain and get the real scoop on the vendors you're looking at.

Evaluating Your Own Needs

I would challenge you to answer the following questions about your organization. Note, I didn't say "*questions about you.*" The alignment must come between the "personalities" of your two companies, not you and the provider's sales person. These are the questions about your company you must first know the answers to:

On A Scale of 1 to 10: How Complex is Your Company's Communication Needs?

- ✓ Can your company get by with generalist good support, or do you need specialists with good support? Note the common denominator is "good support."
- ✓ Does your communication environment involve a Contact Center?
- ✓ Are there unique application integration needs?
- ✓ Are you integrating multiple disparate systems together like legacy phone systems, SIP gateways, fax servers and PCI-compliant call recording over a complex network(s)?
- ✓ Are your call flows vast, disparate and complex or are you a single site with a basic auto attendant and simple user needs like making sure the phone rings and users can access voicemail?

5 or Less

If your communication needs are 5 or less on a complexity scale, you might be able to contract an organization that, among providing other technology support services, is a "part-time phone vendor" at a lower initial and ongoing price tag.

5 or Greater

If you answered 5 or greater, you need to focus on finding a specialist. You need to find a company that has at least 75% of their business deploying and supporting complex communications systems.

In addition to the "IT generalist" other examples of companies that are NOT specialists would be "high volume, low value" technology retailers (CDW, Black Box) that want to sell you network switches, storage arrays, printer ink, steak knives and phone systems. Another example would be carriers that want to sell you DSL, phone lines, cloud storage, security AND a phone system.

Evaluating Services Specialization

If you stand for everything, you don't stand for anything. Look for the specialists into what your true needs are.

Attribute 4: Far Too Many Products or Brands

Look at their website, how many different types of products and services do they sell?

If they sell phone systems, how many different brands do they sell?

Attribute 5: Sales Rep Asking Out of Scope Questions

Is your sales rep trying to “go deep and wide” into your account? Are they trying to sell you phones, network, wireless, security, cabling, storage and servers?

Attribute 6: Testing Their “Real World” Experience

Ask your potential vendors real world examples of the types of projects they’ve worked on. Don’t confuse large for complex! Smaller projects with smaller seat sizes can also be complex. Asking the questions below in the order they are presented will help you evaluate this attribute:

1. What real world examples can they give of difficult projects they completed that are similar to your own? What did they accomplish?

2. Did they integrate multiple systems?

3. Did they consult on, and deploy, a robust Disaster Recovery Solution?

4. Did they integrate with SIP providers?

5. Did they align the communications system with the business requirements by implementing things like dynamic database integration, complex routing and screen pops? Who did the work?

6. Was it them or was it outsourced?

Attribute 7: Assess if They Are Specialized at Any Particular Industry

What types of customers do they work with? Their industry plays a big role in driving communication needs, requirements and subsequently complexities.

Ask other people in the organization these questions, not just the sales person! The sales person is trained to answer these. If you ask the “lead” engineer or project manager without warning, you’ll learn the world! If this is something they truly do every day, they’ll quickly (and enthusiastically) provide multiple, detailed examples. If they haven’t, you’ll learn that quickly too.

Attribute 8: Evaluate the Lasting Impression

Are they passionate about their craft?

Ask yourself this question. Working through the answer will really help you in your evaluation.

Attribute 9: Price Versus Value

Is their messaging centered on pricing or their value? Are they 30 percent cheaper than everybody else you're evaluating? It's very important to mention that a true niche and quality Unified Communication expert organization simply cannot exist being the cheapest.

Hiring and keeping the best talent and deploying sound systems and methodologies are costly. Don't be fooled. Like everything else in this world, you can't have cheap and quality. You know your leadership team. Is price their only consideration? If so, do yourself a favor, lower the expectations you set for your internal stakeholders, and go with a less expensive provider and system. Save yourself AND the quality / niche vendor you're looking at time and sanity.



Red Flag: Too many IT providers make the mistake of adding VoIP services to their line card because it's simply "another application on the network." Along with installing network switches and fixing your PCs, they're going to install and support your communication systems with as much success, right? **WRONG!** Your communication applications are often times (1) the most visible to your customers, employees, and C-level stakeholders and (2) are mission-critical to the success of your organization.

With real-time data transmission requirements like voice and video comes a very unique set of complexities. If you were a hospital, would you let your "IT generalist" IT company implement and support a complex Electronic Medical Record system? No, you would work with the specialists that do it every day. Why is your communication system any different?

Evaluating Mission Critical Support

How mission-critical are your communication needs? Note, you can have very basic or very complex communication needs that are vital to the day-to-day success of your company. Examples include call centers, hospitals and schools.

✓ Are you 24x7x365?

✓ Do you require immediate, around the clock, support?

If your phones are down, are you losing thousands of dollars a minute or are lives at stake? Or if your phones are down, could you survive on email and mobile phones for a day? A great litmus test is to ask your managers and staff. How would a phone outage affect them and their departments?

Attribute 10: Type of Customers

What types of customers has your prospective Unified Communications vendor supported over time (meaning successfully for at least two years or longer)? Are they hospitals or call centers? What concentration of their customer base fits this profile?

Attribute 11: Check References

Ask for (and verify with reference checks) for examples when your prospective vendor helped a customer with a major issue in the middle of the night, on a holiday or on the weekend. How quickly did they respond? If this is an inherent capability of their service offering, they'll be able to come up with plenty of examples.

Attribute 12: What's In the Agreement?

Do they have service level agreements that guarantee quick response times and around the clock support?

Attribute 13: How Deep Is Their Bench?

Do they have a large staff of Unified Communications specialists? Note, non UC experts don't count! Many prospective UC vendors will list ALL their engineers when asked, not just their UC specialists. How is "John, the storage expert" going to help when your phones are down at 3:00 in the morning or he's busy on a storage project?

Attribute 14: Are They Truly 24x7x365?

What are their after-hours processes and systems for handling around the clock support? Ask for details.

Attribute 15: What's Their Support Pricing

Again, price is always a good indicator. Providing prompt, reliable support 24x7x365 isn't cheap. It should be reflected in the pricing.

Evaluating Size Specialization

- ✓ What's your size?
- ✓ How many users/sites do you have?
- ✓ Are you geographically dispersed?



Red Flag: Something to note, many times a UC vendor that is used to supporting larger organizations is NOT a good fit for smaller customers! Don't assume that, because they work with large, complex customers successfully, that they're going to provide you the same level of success. In fact, this is most often not the case. Smaller organizations often require a UC vendor that "specializes" in small business. Their expectations and requirements are vastly different.

Almost always, the expectations smaller customers have are actually much wider than what the larger vendor is willing to provide. Smaller companies generally have little or no IT personnel on staff. Because of this, they're going to demand a much broader suite of services like day-to-day programming changes, non-phone system support for computer issues ("my phone seems to have broken my printing, please fix it"), and working with the carriers for ticket resolution.

Larger companies with IT personnel on staff have the ability and expectations to

handle these types of issues and only then rely on the Unified Communications vendor to handle the more complex and impacting issues that arise.

Attribute 16: User and Location Profile Match

Does the prospective UC vendor have a large concentration of customers that fit your user and location profile? Do they specialize in smaller / single site or larger / multisite customers?

Attribute 17: How do they handle remote offices?

Is this outsourced or do they have "boots on the ground" in your markets? If not, have them give examples of how they've met their current customers' remote office support requirements. Again, if this is truly the "norm," they'll be able to give many examples.




Red Flag: Unlike days of old, having an army of technicians and trucks all over the country is NOT required to support modern day Unified Communication technology. In fact, if they have offices with people all over the country, that might actually be a bad sign. That might mean they're

a large, slow, complacent provider that sells everything under the sun and has prohibitive support processes that ends up defeating the whole purpose of prompt, personal, accurate, expert service (carriers for example). That said, they need to have an answer on how they handle geographically diverse sites if you have them.

Attribute 18: What's the Core Customer Profile?

Does your prospective UC vendor have a core customer profile that they target?

Ask them to tell you what this is. If they have a specific type of customer do they have the discipline to walk away from a customer profile that wasn't a good fit? Do they have examples of when they did this?

 **Red Flag:** If they don't and they "support any and every type of company" that's a red flag if you're looking for a specialist.

Evaluating Industry Specialization

Do you require a Unified Communication vendor that specializes in your industry?

Are there requirements like application integration unique to your industry? Examples might include specific accounting applications, specialized Customer Relationship Management (CRM), Electronic Medical Records (EMR) or Property Management Systems (PMS). Other examples might be an excessive amount of analog extensions with very long cable runs (ski resorts) or a lot of analog in general (hospitality).

Ask the Critical Questions:

- 1. How many customers do they have in your industry?**
- 2. How long have they been with your prospective UC vendor? More than two years?**
- 3. What examples of projects do they have that would match your deployment?**

Evaluating Contact Center Specialization

Do you have a Contact Center or Contact Center component to your organization? Too often people bundle Contact Centers and phone systems into the same category. If a vendor has a lot of experience with complex phone system deployments, they should have mastered Contact Centers, right? Absolutely not! They couldn't be any more different.

Phone systems are technical systems with "features" and "deployment options" and "administration consoles" and "phone options." Contact Centers are most likely your business's life blood. All too often I've seen IT staff evaluate a phone system / contact center combination, pick and deploy a system and the project was a complete failure. They didn't bother to involve the Contact Center stakeholders like the Customer Service or Marketing Managers. Unfortunately, these are often the most influential (powerful) people in the company.

Your stakeholders who are responsible for the Contact Center (and in essence being primarily responsible for things like revenue and customer satisfaction) don't care about the nice phone options and blinking lights. Don't make that mistake. Get them involved EARLY in the process.

Unfortunately, most Unified Communications vendors I've come

across don't understand Contact Centers. It intimidates them. It's an afterthought. They don't understand the terminology and the many intricacies involved. They're not sure how to engage in discussions and ask questions of leaders from marketing, sales, operations, customer service, etc. They underestimate the importance of things like application integration, reporting, and agent engagement. They don't understand how it makes a business function.

If you fall into this category, you need to partner with a vendor that deploys and support advanced Contact Centers every day.

Attribute 19: Contact Center References

Talk to organizations they've supported that fit your Contact Center size and complexity profile for at least two years or longer.

Ask for specific examples of projects, problems overcome, complex integrations, etc., that your vendor has accomplished.

Attribute 20: Talk the Talk

Get your Contact Center stakeholders in the initial discovery, design and demonstration meetings early. Coach your stakeholders to “talk the talk” and ask questions that are common to Contact Centers. Examples might include “What’s your WFM Strategy” or “How does your product calculate FCR on agent transfers.” You’ll quickly determine if this is something they do every day. Do they respond with casual, quick answers? Or do you see “deer in the headlights” in their eyes?

Attribute 21: knowledge

All too often the integration vendor will bring in the manufacture that does this

every day. Of course they can answer your questions! Who’s doing the talking? Who’s answering the questions? Once you sign the contract or install the system, the manufacture goes away and you’re often left with the integration vendor to work with. You become a very small fish to the manufacture or hosting provider. I’ve seen this go very bad.

Your vendor should be knowledgeable, have an intimate knowledge of your Contact Center and business now and into the future. Plus, without a knowledgeable vendor, you won’t be able to get the most out of your system. A good vendor that understands Contact Center will be able to continually identify areas where the technology can be bridged to your business to improve processes, workflows, analytics, etc.

Evaluating Pricing versus Partnership

Price versus Partnership: And last but certainly not least– Price. We touched on this briefly before but it’s worth a little more attention. Price is important. Nobody wants to pay 2x the industry average or get gouged. The key is price for value.

Is your organization an organization that endorses and fosters long-term vendor partnerships or getting the best “deal”? If it’s the latter, don’t be ashamed! Just

be honest with yourself (and prospective vendors). It will save you time in the long run.

I've mentioned earlier that a true, white glove, boutique, niche Unified Communications company cannot also be the cheapest. They could probably do it for about a year and then something has to give. Either they lose their internal "A" talent and become cheap or they raise prices. I know, as the owner of a boutique, expert UC shop, I've been on that journey (we opted for keeping the best talent and focusing on customers that valued partnership, service and value).

Attribute 22: Quote Comparison

How does their quote look compared to their competition?

Attribute 23: The Sales Process

In the sales process, did they focus on understanding and articulating how they were going to solve your business needs? Or did they slam out a quote and ask for the PO?

Was the whole message focused on pricing and being cheap?

Attribute 24: Push Them on Price!

How do they respond? Do they buckle and get cheap? Do they stand their ground and try to rearticulate their true value proposition? Perhaps they meet you in the middle? Price negotiation is a way of life. Just try to understand what's

happening behind the curtain. A true "A" player in the Unified Communications industry will challenge you because they know what their value is. And someone that knows their value will usually disqualify you as a potential customer and go and find another customer that better aligns with their offering, service and culture.

Attribute 25: Your Cost Structure Matters

Did they take the time to understand your current cost structures and show how the solution can save you money, increase potential revenue, improve efficiencies and make you look better to your customers?

Attribute 26: Continuous Improvement

Do they have business processes that provide you continuous education in the Unified Communications space and refresh their knowledge of your business drivers?

Attribute 27: What's their account management philosophy?

Attribute 28: References

Do they have long-term customers that can testify to these things? Ask their references specific questions surrounding these topics!

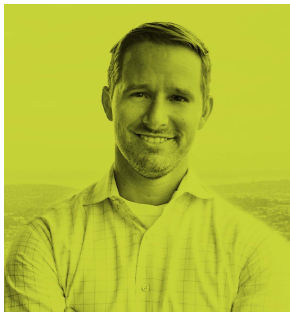
Conclusion

There are many UC vendors out there and making a decision can be difficult. If you only take one concept away from this document, vendor and customer alignment would be the most important one.

Alignment is the key to your success. Understanding the “personality” of your company as it pertains to procuring technology is going to be an important step. Make sure your company’s personality is in alignment with the vendor you choose.

I’ve seen organizations’ “personality” be value and service driven as it pertains to their own customers but very transactional and price-driven as it pertains to their own vendors. Be honest with yourself and your prospective vendors. Obviously not all Unified Communications vendors are a good fit for you. More importantly, you are not a good fit for all Unified Communication vendors. Dig deep and ask yourself these questions. It might be a bit painful, but will alleviate a lot of pain in the long run.

About the Author



Travis Dillard is the President of Inflow Communications, Inc. He joined the company in 2006 and began shaping Inflow into what it is today: a firm that strives to be the most focused and competent Unified Communications provider in the nation.

Travis has been in the technical communications field for over 20 years.

His career started in the United States Air Force, traveling the world as a Combat Communications Technician focusing on tactical voice, Satellite Communications, and global Wide Area Networks.

Upon leaving the military, he founded Packet Network Architects (PNA), a Northwest Wide Area Network (WAN) integrator that specialized in Voice over IP and Frame Relay technologies. He sold PNA in 2001 and filled the Director of Sales and Marketing role for Accolade Technologies, a Northwest Integrator of voice, video, and data that specializes in Avaya communications systems.

In 2009, Travis became President and owner of Inflow and hasn’t looked back.

About Inflow Communications

Inflow Communications is a national leader in ShoreTel Unified Communications and ECC Enterprise Contact Centers. Founded in 1997, Inflow has offices in Portland, Seattle, Dallas, LA and the Bay Area and is one of the nation's top Unified Communications providers in today's market with over 70,000 endpoints under Inflow's innovative support plans around the world.

Inflow's dedication to knowledge and innovation, and unrivaled ShoreTel customer support, has landed them in ShoreTel's top 2% in global customer satisfaction and is ShoreTel's fastest growing partner in the world.