

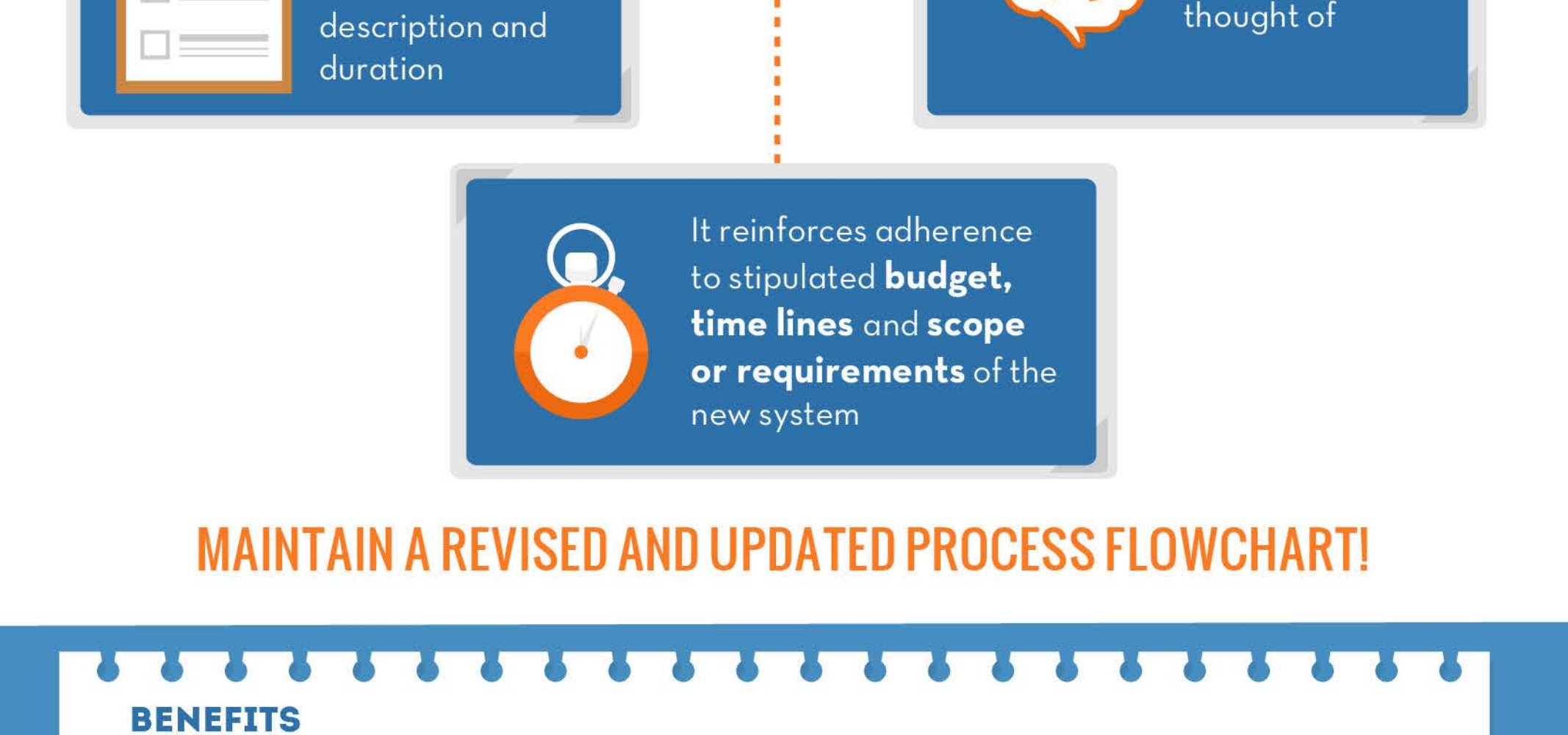
STEP-BY-STEP PHONE SYSTEM IMPLEMENTATION

According to Cisco, **90%** of businesses attribute their global success to a **robust communication structure**.

LEARN HOW TO SELECT, IMPLEMENT AND TEST A BRAND NEW PHONE SYSTEM FROM SCRATCH!

PLANNING

1 PROCESS FLOWCHART



MAINTAIN A REVISED AND UPDATED PROCESS FLOWCHART!

- #### BENEFITS
- ✓ Gather takeaways and learning from other implementation processes
 - ✓ Build a knowledge library
 - ✓ Overtime, develop a foolproof process for subsequent projects

2 DEFINING BUSINESS REQUIREMENTS

[DON'T OVERLOOK THIS STEP!]

Gathering information is a crucial step to scope out the business requirements.

- #### #1 USER REQUIREMENTS

End users are the best source of reliable and useful intelligence regarding features and functionalities of the new phone system!
- #### #2 SYSTEM ENVIRONMENT

 - Evaluate hardware and software needed to implement the new system
 - Check compatibility with existing systems
 - This will impact the budget!
- #### #3 TRAINING & COMMUNICATIONS

 - Check availability and pricing of training
 - In-depth training will be required for advanced features like CRM and ERP integration
- #### #4 SECURITY ISSUES

Devices and network security must be validated

3 COLLABORATING WITH TECHNICAL SUPPORT

- IT will be highly involved in the implementation phase
- Get IT's input for requirements such as configuration, compatibility, integration....
- Also, IT is the first to be called in case of a malfunction or user based problems: they need to know the solution

4 SELECTING A SYSTEM AND VENDOR

Most important step of the planning phase!

First, select a solution

- Based on user inputs and requirements, budget, scope, reliability and security needs,...
- Draw a RFP and send it around
- Evaluate vendors' products and quotes
- Shortlist solutions
- Familiarize yourself with feature and benefits of most likely systems
- Watch demos, read testimonials, call references

Then, select a vendor that has:

- Similar customers (same industry, size, business,...)
- Strong reputation
- Quick response time for any questions (service, scaling, upgrading,...)
- Good training options

5 IDENTIFYING PERFORMANCE METRIC

- Define a solid list of performance metrics to track improvement
- For new implementation: use baseline performance values of similar competitors or other sites of the company
 - Baseline values refer to statistics for each performance metric without deploying any management or technical advancement features
- For a phone system implementation, some of the performance metrics are:
- TANGIBLE METRICS**
ROI, sales, conversion rates, efficiency, call time, decreased wait time
 - INTANGIBLE METRICS**
Client satisfaction, employee satisfaction, reputation

6 ESTABLISHING A TIMELINE

Prepare the actual timeline for the implementation of the system. The timeline is created in collaboration with the IT department and the vendor. It includes:

- Clear deadline to help project move forward
- Mapping of responsibilities and contacts details
- Leeway for "escalation processes" (if higher authority required to approve additional financial sanctions or talent import)

IMPLEMENTATION

7 UNDERTAKING NETWORK ASSESSMENT

- 

HARDWARE-SOFTWARE MANAGEMENT

For a new system: prepare extensive list of hardware (handsets, switches, routers, end point voice devices)

For an upgrade: inventory existing stock to buy improved and advanced equipment if needed
- 

BANDWIDTH AND LOAD TESTING

Define requirement for projected number of calls, on average and during peak hours
- 

QUALITY OF SERVICE

Evaluate the needs under stressed or peaked conditions. Accordingly, the bandwidth and line estimations need to be revised.
- 

LOAD AND OPERATION MANAGEMENT STRATEGIES

In case of unusually high volumes: check emergency lines, cooling system, backup power supply,...
- 

NETWORK DIAGRAM

Create the new network diagram complete with specifications of hardware and software to give a comprehensive view of the new solution

8 SETTING UP THE NETWORK

Keep track of:

- Correct execution of features which prioritize and facilitate communication, like group hunt and call forwarding
- Proper integration of network security measures
- Proper incorporation of add-on features like integration with CRM and other database
- Inclusion of performance tracking methods (identified metrics)
- Relevant call routing setup
- Customized interface according to the brand, needs and feel of the company
- Proper implementation of the failsafe measures
- Provision of a wide berth for future scaling

9 PILOT TEST

Plan with care: the pilot should not disturb the company's main operations

- Set up a test network with limited number of end devices and bandwidth
- Put test network through "stressed" conditions to corroborate the statistics provided by the vendor
- Test the failsafe mechanisms
- Transition non-critical departments to the test network for a full-fledged pilot run
- Document results to tally with expected performance
- Tweak and introduce needed changes with help of vendor

10 ROLL OUT YOUR NEW PHONE SYSTEM!

