
As you begin any implementation process it is essential to have a solid implementation plan with your hosted provider. Adding IP voice to your UCaaS solution has a different technology focus.

Organizations can face any number of complications during the implementation process. Embarking in a UC implementation without a process in place is too risky. We have identified 9 vital criteria to ensure you have a successful UCaaS implementation.

9 CRITERIA THAT ARE VITAL TO A PROFESSIONAL UCaaS IMPLEMENTATION

1

EXPERIENCED IMPLEMENTATION EXPERTS

There are a lot of moving pieces when it comes to implementing a robust unified communications solution. Your business requirements are unique and your hosted provider needs to have the experience to properly guide your charge into a successful UC implementation.

2

PROJECT MANAGEMENT

Your chosen hosted solution provider should have a designated Implementation team led by a project manager who is responsible for your entire implementation project as well as on-boarding. The project manager will establish clear expectations, ensure success through execution and be in charge of the customer relationship and experience. The project manager will also coordinate all activity and efforts of the Implementation Team and any additional resources.

The project manager should be held accountable and ensure continued momentum with any additional resources needed to complete your successful UCaaS implementation.

3

BRIEFING

Implementation preparation starts with discovery. The hosted provider should work with your team to obtain a thorough study of your current environment. During the briefing, a business use will be established for your new solution, and features and functionality will be investigated in your current environment. Customer requirements and expectations will be outlined and the overall project will have a general idea of when your implementation should be complete.

4

PROJECT PLAN

A working implementation plan should contain the complete strategy framework for the project phases, which should include, preparation, planning, refining design, implement, operate and optimize. The framework will establish clarity and expectations for the implementation project and process. The product definition, should be crafted by the hosted provider to be used as a reference point throughout the life of the project. It will provide detailed clarity for the overall purpose of the project by defining objectives, success criteria, major milestones, deliverables and project conditions (Assumptions, Issues, Risks, Constraints).

The Project definition will vary by product, solution, and your unique business environment and including specific needs.

5

KICK-OFF CALL AND SCOPING

The kick-off call establishes the handoff between the sales team to the implementation team. The hosted provider sales team and solution engineers make introductions to the implementation team.

The implementation team will identify and define roles on their team. Your team will identify team members that will work with the implementation team will be established as primary contacts for keeping the project plan on target. The key team members from your team will be principal technical and provision associates, as well as a financial contact.

The implementation team will review the current environment, share the implementation vision and clarity objectives. An in-depth review of the scope of project document will be appraised. The team will also review the project plan, timeline and milestones, dependencies and resources needed. During this call, customer requirements will be established, as well as a schedule and meeting guideline. Training needs and various options will be discussed and determined. The implementations manager will provide you with escalation options if you do not feel that your project is on target.

6

REFINE AND DESIGN

As the project initiates, the weekly meetings will review updates, verify any changes, and make requests identified during the kick off call. During these meetings, the project plan will be updated to reflect any and all progress and additional requirements.

7

IMPLEMENT

During the next phase of the implementation, your project will continue to be monitored and tracked and the project plan will be updated. The weekly calls will ensue that all parties are confident with the direction of the implementation. The solution will be deployed according to the company plan, configured to meet the needs of your company and the procurement of any hardware required will be setup. A test group at your business will be granted access of the enabled solution and training will begin. The test group will evaluate the solution.

8

GO-LIVE

Once the solutions have been tested and evaluated for functionality, final training and rollout will be initiated. Performance of the solution and any enhancements will be closely monitored and fine tuning will be made.

9

MIGRATION TO SUPPORT

The transition from the Implementation team to the Support team is done in a similar manner as the transition from Sales to Implementation. The onset of the meeting will begin with a comprehensive question and answer session. The implementation Manager will review the project, the customer will provide feedback to ensure that all parties feel that expectations were met and that implementation is a success.

LET'S CONNECT