ASSISTANCE WITH TEAMS CLOUD VOICE

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MICROSOFT LICENSING FOR TEAMS VOICE POC

Microsoft licensing is continually evolving. The service provider should be very familiar with the latest Microsoft licensing requirements as well as recent or upcoming changes or consolidations as part of the Proof-of-Concept (PoC).

- Determine the number of users that will be used in your PoC

- Determine the length of the PoC (typically 30 days)

- Review current Microsoft licensing

- Determine any needed Microsoft licensing for the PoC

- Purchase any needed Microsoft base license

- Purchase needed Microsoft add-on licensing (if any)

DIRECT ROUTING / OPERATOR CONNECT PARTNER

- Discuss locations / calling
    - U.S.
    - North America
    - Multinational
        - Which countries

- Service Provider should issue test DIDs

- Establish Weekly PoC Review Calls

- Establish support process for questions in-between PoC calls
    - Provider technical contacts
    - Client technical contacts

- Review the Provider's production support:
    - Service Level Agreement (SLA)
    - Ticketing / Support System and Process
    - Escalation Contacts and Process
    - Billing Sample
    - Contract impacting Moves, Adds, and Changes (MAC)

PHONE NUMBER MANAGEMENT

- Phone number test

    Although the service provider may offer phone numbers for testing, If possible, test the service provider's processes for porting and RESPORG changes.

- Local Numbers

    - Porting process

- Toll Free Numbers

    - RESPORG process

PHONE SYSTEM SETUP

- Create users

- Assign licensing

- Other Teams Administration

    - Move

    - Add

    - Change

    - Parking numbers

CALL FEATURES / ROUTING

Microsoft is often adding features. This is not meant to be a comprehensive list, but a potential **starting point**. Cross off the features you do not wish to test during the PoC. Add other features not listed to this test checklist.

- Busy on Busy

- Call escalation

- Call Park

- Call and Video Quality

    - End user training to see real time data

- Caller ID

    - Masking

- Call Transfer and Handling

- Call Waiting

- Call Overflow

- Call routing scheduling

    - Day, week, month, holiday

- Click to Call

- Auto Attendant

    - Text to speech

- Intercompany calls - Dial by Name - Extension replacement

    While Teams can do extensions, it is generally messy and gets in the way. Companies use dial by name

- Call Queue (can be used as a hunt group)

    - Simultaneous

    - Sequential

- Call Group - (can also be used as a hunt group)

    - Set individual user or set up separate voicemail

- Custom Contact Groups

- Custom Ring Tones

- Do Not Disturb

- Delegation

- Out of Office

- Sharing - Teams screen sharing features

- Background effects

- Simultaneous Ring

- Speed Dial

- Three-way calling

- User Presence

- TTY Support

- Softphone dialing

- Set up voicemail

    - Voicemail text to speech

    - Record voicemail prompt

- Shared Users

- Low Use Phones (breakroom, lobby, etc.)

- Copilot

- Reporting

    - Accounting

    - Call detail report

    - _____

    - _____

    - _____

Other features to test:

_____

_____

_____

_____

_____

_____

NETWORK

- Review bandwidth requirements

- Review and document redundancy or recovery plans

- Special considerations (if any)

EMERGENCY CALLING

- E911

    - Work-from-Home (WFH)

    - Work-from-Anywhere (WFA) mobile users

    - Multinational

        - U.S. users assigned to U.S. location but working from another country

        - U.S. users traveling out of country

OPTIONAL

- Audio Conferencing

- Teams Rooms (Conference Rooms)

- Desk Phones (if any)
    - Certified equipment
    - Sourcing hardware
    - Provisioning

- Custom Reporting

- Paging System - does this need to be tested or discussed?
    - Overhead speaker paging

- Emergency notification system

MICROSOFT LICENSING FOR THE ORGANIZATION

Assess and review the PoC findings with the service provider. It is important to clarify any issues that arose, what was the root case, and how the service provider will assist in making sure these challenges are not repeated in a production rollout.

- Review current Microsoft licensing against licenses required

- Determine any needed Microsoft licensing

- Purchase needed Microsoft licenses

- Purchase any wanted or needed Microsoft add-on licensing

PLANNED PRODUCTION ROLLOUT

- Forklift or planned migration?

- Term
    - Are future adds coterminous to the original contract start date?

- Other licensing considerations

THIRD PARTY SOLUTIONS

- Receptionist Console

- Analog lines

- Fax

- SMS

- Contact Center

- Crisis Notification

- Application Connectivity

- Toll Free Service

- Voice Conferencing

- Web Conferencing

- Webcast

- Collaboration

MIGRATION AND TERMINATION

Current Contracts - (contract expiration / Early Term Penalties (ETP) - Termination Notice Requirements)

- PSTN (lines, trunks, PRI, SIP)

- Long Distance

ADDITIONAL NOTES