CoreTech Brokers

ASSISTANCE WITH TEAMS CLOUD VOICE

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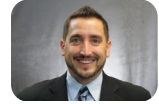
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Visit us at teamsvoicepoc.com

POC PLANNING AND LICENSING

Determine PoC Scope:

- Define the number of users involved.

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

Review Contract Options of PoC Provider

- Review current contracts (expiration, Early Term Penalties, notice requirements).

- Review new Service Provider contract

Review & Plan Microsoft Licensing:

- Assess current Microsoft licensing.

- Determine required Microsoft base licenses.

- Identify and purchase any add-on licensing if needed.

SERVICE PROVIDER ASSESSMENT

Direct Routing/Operator Connect Provider Evaluation:

- Confirm calling and location requirements:
  - U.S.
  - North America
  - Multinational (specify countries).

- Issue Test DIDs for evaluation.

- Establish a support process for handling questions:
  - Assign provider and client technical contacts.
  - Set up a ticketing and escalation process.

- Schedule weekly PoC review calls.

- Review the service provider's production support:
  - Service Level Agreement (SLA).
  - Escalation contacts and processes.

Phone Number Management:

- Test local number porting and toll-free number RESPORG processes.

- Assess overall number management capabilities.

SYSTEM SETUP AND ADMINISTRATION

Phone System Setup:

- Create users and assign licensing.

- Test other Teams administrative tasks:
    - Add, move, or change users.

Network Considerations:

- Verify bandwidth requirements.

- Test network redundancy and special configurations, if any.

KEY FEATURES AND ROUTING

Call Features:

- Busy on Busy, Call Escalation, Call Park.

- Call Quality Monitoring:
    - Dashboard (provider-level).
    - End-user reporting.

- Caller ID customization (masking options).

- Call handling:
    - Transfer, waiting, overflow, routing (time/day/week/month).

- Auto Attendant with Text-to-Speech capability.

- Advanced features:
    - Call queues (simultaneous/sequential).
    - Hunt groups and voicemail configurations.
    - Do Not Disturb, custom ring tones, speed dial.

- Voicemail Setup:
    - Record voicemail prompts.
    - Test text-to-speech options.

Team Collaboration Features:

- Sharing capabilities (e.g., screen sharing).

- Presence tracking and background effects.

EMERGENCY AND COMPLIANCE

Emergency Calling (E911):

- Verify compliance for:
    - Work-from-Home (WFH) users.

    - Work-from-Anywhere (WFA) mobile users.

    - Multinational scenarios:
        - U.S. users working from or traveling to another country.

OPTIONAL FEATURES & THIRD PARTY SOLUTIONS

Optional Features:

- Audio conferencing.

- Certified desk phones (hardware sourcing, provisioning).

- Power BI integration for reporting.

- Paging and emergency notification systems.

Third-Party Solutions:

- Evaluate integration with:
    - Receptionist consoles, analog lines, fax.
    - Contact centers and crisis notification systems.
    - Application connectivity.

REVIEW FINDINGS AND MIGRATION

Post-PoC Review:

- Assess findings and identify challenges or issues.

- Confirm service provider plans to address issues before production rollout.

Migration Planning:

- Plan migration (forklift or phased approach).

- Ensure coterminous terms for contract additions.

ADDITIONAL RECOMMENDATIONS

End-User Training & Support:
- Include training sessions for end-users and administrators to maximize feature adoption.

- Provide documentation for troubleshooting and escalation processes.

User Experience Feedback:
- Gather feedback from PoC users to evaluate overall satisfaction and identify pain points.

Security & Compliance:
- Verify provider's adherence to security and compliance standards (e.g., GDPR, HIPAA, etc.).

Cost Analysis:
- Provide a detailed cost breakdown (initial setup, recurring charges, savings over time).

ROI Evaluation:
- Utilize a Teams ROI calculator located at teamsvoiceroi.com to measure potential benefits for the organization.

ADDITIONAL NOTES