

CHANNEL SALES HANDBOOK: UNIFIED COMMUNICATIONS

By Michael Finneran



JULY 2016 | US\$25

Channel Partners™

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AS AN ANALYST, FOR YEARS I'VE WATCHED THE DEFINITION OF "UNIFIED COMMUNICATIONS" EXPAND AT A BRISK CLIP. WE'RE NOW AT A POINT

where there are a wide variety of very different solutions that share that moniker. Some of these offerings clearly trace their lineages back to traditional PBX platforms, others focus on full-featured business communication and collaboration, while some are about managing group projects and trying to replace email (good luck). Some run on-premises, some in the cloud, some are hybrids.

What's more, many channel partners' UC portfolios include a number of different offerings, making the sales team's job that much more challenging. How do you decide which is the best fit for a given customer?

The answer is to evaluate a prospect's organization using a checklist that sizes up technical requirements, business objectives, roles to be supported, aggressiveness in technology adoption and how open employees are to new ways to work. Partner sales teams then have an organized process for categorizing prospects to determine which of the UC solutions they offer are likely to be the best fit.

I advise clients to think of UC platforms on a continuum that stretches from a simple PBX or IP-PBX on one end to cutting-edge social collaboration platforms like Cisco Spark that appeal to tech cognoscenti. The largest segment, and middle ground, is the unified UC suite that can support everyone from executives to call center agents.

The other idea to keep in mind is that the differences we are talking about are essentially matters of degree — hence the “continuum” concept. Sales teams that successfully determine where along that continuum the customer will find the best fit will ultimately provide the greatest benefit, and win loyalty and repeat business.

Let’s talk about how to build a customer profile, starting from the basics.

UNIVERSAL FACTORS TO CONSIDER

When developing a customer profile, begin by noting:

- **Type of organization:** On the whole, I find that certain industries are either aggressive or conservative when it comes to technology. Yes, this is starting to change with the overall importance of technology in reshaping business. However, most manufacturing firms, for example, with the exception of those in the technology sector, tend to be conservative when it comes to adopting new technologies. That characterization would push them toward basic voice solutions or IP-based systems with a strong emphasis on traditional telephony. Given the flexibility they need to adapt to changing requirements, in contrast, service firms are typically more amenable to new technology solutions. This would certainly move them in the direction of fundamental UC capabilities and likely collaboration capabilities as well. The lesson: Know your verticals.
- **Ratio of task workers to knowledge workers:** Knowledge workers and task workers use phones and other communications technologies differently, and that must be taken into account. Most of the enhanced communication and collaboration technologies that have been incorporated into UC&C solutions are geared toward knowledge workers. By definition, these are people whose jobs revolve around collecting, processing and distributing information.
- **Telephony-, email- or text-centric?** Voice telephony had been the dominant form of business communications for many years, and it remains so in many organizations today, though in some cases email is taking over that role. As more millennials enter the workplace both of those traditional vehicles are being supplanted by text, whether through an IM app or a social platform. That position would argue for UC&C or social collaboration tools over traditional telephone systems.
- **Average age of workforce:** It is no secret that the above-mentioned influx of millennials is changing organizations’ mixes of communications tools. Transitioning established workers from managing projects through email to something like a social collaboration platform could be a major challenge that requires executive backing. On the other hand, millennials have grown up with Snapchat, Facebook, Twitter and Instagram and find these types of platforms intuitive — that’s why they’re called “digital natives.” That is not to say that older workers are not amenable to new ways of communicating; however, it is one factor you have to weigh.

Once you have this information in place, consider a few profiles. These are just a starting point. Sales teams should work with marketing and technical experts within their companies to learn about special cases, such as verticals.

PROFILE: VOICE 101

In my practice, I still see a number of environments with millions of lines in service that require only the most basic PBX capabilities. Good examples would be hospitality and health care. While the front-office or professional staffs in these facilities benefit from true UC-type capabilities, the majority of lines are supported by basic, single or multiline analog phones in guest rooms or next to hospital beds.

Sales Guidance: The prospect for this type of solution would typically be an organization that does not embrace new technologies enthusiastically. Think older-line manufacturing firms in relatively staid industries and those with IT teams that, for whatever reason, are reluctant to “rock the boat.”

While basic voice might be the type of solution this customer category requests, you should seek to expand their horizons. Given the many other, more functional options — often for the same or less money in an as-a-service model — sales teams that allow any prospect to only consider options in this category are remiss and not giving that customer the best guidance.

UC vs. UCaaS: 5 Decision Points

Helping customers decide between on-premises, hosted or a mix boils down to:

Location: One large plant or multiple, geographically dispersed offices and contact centers? The former may do better with an on-premises offering.

Mobility Support: A wash, with user uptake on UC mobility functions low across the board. Apple is trying to change that, however. It has roughly 70 percent market share in the enterprise and has just opened up its dialer APIs so users can make UC calls using the native iOS interface — that has been the big hurdle.

Ease of Adds & Changes: Companies that burst their employee counts, for example, retailers adding call center agents for the holidays, can easily scale up and down with UCaaS. Make sure it's in the contract!

Custom Coding: Customers that want to use APIs and custom hooks into enterprise applications may do better with an on-premises model.

Existing Investments: A company with a fairly new and functional PBX is unlikely to abandon that investment. Maybe look to integrate that PBX with Skype for Business as the IM and presence solution and go from there.

Even if a customer doesn't immediately recognize it, UC&C and UCaaS solutions have the potential to dramatically increase efficiency and productivity. Your sales process should at least introduce them to the idea, demonstrate the capabilities and describe how these options can positively impact productivity. Run a TCO analysis. They might be surprised.

PROFILE: FUNDAMENTAL UC

As the UC industry coalesced, a core set of capabilities came to define unified communications. The fundamental feature set centered on a multifunction user dashboard and presence-enabled directory. With presence, an end user can see the availability of colleagues in real time (“Out of Office,” “Offline” or “In Meeting”) to determine if they are reachable, and if so, via what means. Then, with a single click, the end user can initiate a text chat, send an email or set up an audio or video call. That audio call could use an associated desk set or a headset and softphone client on the user’s PC.

Sales Guidance: Organizations with a significant percentage of knowledge workers and professionals are the sweet spot. This group would certainly include businesses in the tech fields, but also service businesses with middling to intensive communications requirements. Those with more intense communications needs might also be candidates for softphones and headsets, particularly if users spend a good deal of time on the phone every day.

These organizations typically have requirements for basic phones in lobbies, elevators and common areas; those requirements can be met with analog gateways. In evaluating analog phone requirements, don’t forget these devices’ range limitations. Many organizations have been caught short when they inked plans to install all of the gateways in the data center but then found the analog range was not sufficient to support phones in other building on the campus, or even on higher floors in tall buildings. Gateways then had to be distributed throughout the facility at additional cost. In cases where locations are far-flung, consider UC-as-a-service.

PROFILE: COMMUNICATIONS-ENABLED APPLICATIONS

While the original idea of enterprise voice communications centered on dedicated PBX systems and multibutton desk sets, the advent of UC has opened up new possibilities. Increasingly, enterprise applications have voice, video, chat and email capabilities built in. With a communications-enabled order entry app, for example, if a task worker encounters a problem with processing an order, he could simply click a button in the app and initiate a voice or video call or send a text or an email to the customer. A number of analysts are predicting a significant reduction in the number of PBX lines needed as a result of having these fundamental communications capabilities integrated into other business applications.

Sales Guidance: Communications-enabled applications can have the biggest impact in organizations that have a high percentage of task workers performing relatively complex functions, with the need to contact internal or external resources to handle problems. Having communications embedded in the applications they use can greatly increase the productivity of those workers, who are also excellent candidates for headsets.

The challenge here will be to help the customer identify or source the software to interface with those applications, which can make use of internal resources or professional services. For organizations with this profile, available SDKs, APIs and development resources should be one of the major focuses in the selection process.

PROFILE: COLLABORATION IS KING

One of the first major additions to the traditional UC lineup was collaboration — thus the UC&C moniker. By incorporating all of the various ways coworkers interact, including audio and video conferencing, web conferencing and screen sharing, productivity is significantly enhanced. While vendors love to demo their video capabilities, the vast majority of conferences are still audio — though increasingly that is being augmented with web conferencing or simply screen sharing.

Sales Guidance: The pitch for these customers would be very similar to those requiring fundamental UC. For organizations that also depend heavily on audio and video conferencing and need web conferencing and screen sharing, the benefits can be significant. One obvious savings will be on the use of external conferencing services, but the improved sound quality from wideband VoIP will remove a lot of the tedium from long conference calls.

Further, the ability to distribute log-in credentials with a meeting invite and to join with a single click can cut several minutes of wasted time from the beginning of each conference call.

One of the biggest improvements, and selling points, is audio conferencing with support for wideband audio. Where a traditional audio conference over the PSTN delivers around 3 KHz of audio bandwidth (and often horrendous sound quality if someone calls in from a cellphone), wideband VoIP conferencing connections deliver over twice that bandwidth for vastly improved clarity and sound quality. The response from end users is universally positive, though the customer might still need a solution that offers traditional PSTN dial-in numbers for those who don't have access to a PC or other VoIP-capable device.

PROFILE: CONTACT CENTER

Customers with contact centers take UC&C in a different direction with a keen focus on customer engagement. Indeed, many of the capabilities that have been incorporated into UC&C, like presence, got their start in the contact center environment. Most IP-PBX/UC&C platforms include a basic contact center capability with interactive voice response (IVR), call queuing and fundamental management information capabilities. However, large-scale, complex contact centers have typically been managed separately from the office telephone system.

Today, the contact center business itself is going through a transformation as companies need to be able to engage with customers not only with voice calls, but via email, text chat and increasingly social media, like Twitter and Facebook. While many of those new media are being integrated into UC&C, the specialized nature of the contact center business seems to indicate that large-scale multichannel contact centers may still be purchased and managed separately from the office communication system.

Sales Guidance: As we noted, virtually all full-featured UC platforms feature at least some contact center capability. The level of functionality provided is suitable for the vast majority of internal applications, like the IT help desk or HR functions, and they could support fairly simple customer-facing applications.

4 Keys to UC Success

Partners' sales teams can help make sure end users are happy with the UC system. To get there:

1. Define success. Help the customer ensure internal IT is on the same page with business executives as to what they expect from the deployment. Only by defining business goals can you align technical requirements. Is the CEO willing to spend on "soft" returns, like more efficient mobility, or is the CFO insisting on quantifiable cost reductions? Does the company need to federate with customers, suppliers and partners? What consumer-class tools are in use? It also helps to have analysis tools that allow you to measure adoption and use of particular features, like video conferencing, which can be tied to expected savings.

2. Be a realist. Everyone likes a big-bang sale. But if a customer simply wants to retire a legacy PBX and add on-demand video conferencing, that's much different from building communications-enabled business processes or increasing knowledge worker productivity.

3. Insist that customers test the network. And not just the LAN. Watch for integration problems with multivendor deployments, and check WAN capacity for UCaaS. Will they need new management software, or to run cabling? Do on-site IT pros understand QoS? It's still manual and prone to breakage. Test everything before going live.

4. Get influencers on your contact's side. Every company has power users and social influencers. Recommend that your IT contacts cultivate them, get their input and involve them in testing, feature specifications and even product selection. They'll be invaluable in driving engagement. In addition, ensure IT has a plan for formal training on new UC systems.

For very large customer-facing contact centers, a specialist supplier may be required. Usually, the customer's IT team will be able to shed light. However, highlight the capabilities in today's enterprise UC&C suites, such as skills-based routing, call recording, agent coaching and detailed metrics and reports. As the contact center is evolving from telephones to multichannel customer engagement platforms that merge traditional voice with email, chat, social and possibly video, it will be important to pitch the ability to use all these vehicles and explain why the agent should have access to all of the interactions the company has had with that customer, regardless of medium.

PROFILE: MICROSOFT SHOPS

The entry of Microsoft into the UC&C space with Skype for Business adds yet another wrinkle. Many organizations have implemented Skype for Business as a lightweight solution for IM and presence, but are now looking to add the real-time voice and video calling (with PSTN access) capabilities, as well as audio, video and web conferencing and screen sharing. It's designed to integrate tightly with the entire Microsoft productivity suite, including Exchange, SharePoint and Yammer. However, it is also a lot of work to integrate the various parts — end points, gateways, diagnostic tools — and even then, I've seen something as simple as one user with a non-certified headset (or just using the PC's microphone and speakers) turn a multiparty conference call into a nightmare.

Further, a lot of the capabilities business users take for granted, like the ability to have lines appear on multiple sets or access to overhead paging systems, don't exist in the Microsoft solution. Overall reliability remains a challenge, and niceties like native contact center capability or support for Mac OS are still years behind.

Sales Guidance: The good news: Microsoft's entry into the UC&C space has brought a different type of buyer into the picture. IT departments are heavily invested in Microsoft productivity tools, and the addition of real-time voice, video and collaboration tools to that lineup is a major advance. If a customer has the resources available to coordinate a complex deployment, and its reliability requirements don't approach five nines, at least for some roles, Skype for Business could be sufficient.

On the other hand, any customer that needs even basic telephony functionality can't look to Microsoft alone, and that's an opportunity.

Skype for Business is a unique offering in that Microsoft provides only the server software to make it work. To fill out the rest of the bill of materials, including handsets, video terminals, gateways, session border controllers and diagnostic test and monitoring systems, Microsoft depends on an extensive network of partners. And like other VoIP systems, Skype for Business works over the customer's existing WAN and LAN infrastructure.

Microsoft represents a strategic partner for many large organizations, so it is not surprising that its UC&C offering is getting a lot of attention from IT teams. Some customers who are using Skype for Business for IM and presence are now looking to add the Microsoft real-time communications and collaboration capabilities, while other shops are looking to maintain Skype for Business for IM and presence but utilize a separate UC&C platform for voice, video and most collaboration capabilities. To that end, [most UC&C vendors have solutions](#) that link their platforms together with Skype for Business so they can work together as one, often the best solution.

PROFILE: SOCIAL COLLABORATORS

Probably the most interesting development we have seen in the UC&C space in the past few years has been the introduction of what we call social collaboration platforms. While many of the capabilities overlap with what we find in UC&C, these are primarily tools for organizing and managing collaborative projects.

These platforms got their start in the software world with offerings, like Slack and Atlassian's HipChat, that were based on group chat with the ability to store documents and support materials in a shared repository, typically called a "room." However, some vendors, like Cisco with Spark, had bigger visions for their solutions and included most of the communications and collaboration options we find in their UC&C platforms.

The idea is that when a project is initiated, a new room is set up, and all team members are provided access. There are clients for PCs and Macs as well as iOS and Android smartphones and tablets. Now, rather than trying to organize a project using email (possibly the worst collaboration tool ever conceived), all of the correspondence, background information and work product is, in theory, stored in the project room. By scanning the chat stream, new team members can come up

TCO Analysis: Beyond Capex and Opex

UCaaS has a higher total cost of ownership than on-premises UC. That's the conventional wisdom, anyway. To help customers do the math, ensure they take into consideration:

- PBX hardware, installation and maintenance versus subscription costs over three or so years. The crossover point when UCaaS exceeds on-prem is usually about two to three years out.
- Data center costs including servers, storage, power and redundancy
- Licensing: Is flexible billing for on-prem overcapacity an option?

And don't overlook internal IT costs and data and voice circuits.

to speed on the progress of a project. With some offerings, users can launch an audio or video call or conference with web collaboration and screen sharing right from the project room.

Interestingly, Microsoft does not have a "product" that fits into this category, but with the combination of Skype for Business, Outlook, Exchange, SharePoint and Yammer, it does have all of the necessary parts.

Sales Guidance: Social collaboration platforms are still a new entry in the UC&C space, so identifying a typical profile is challenging. Initial adopters were mostly tech firms, startups or both. However, for organizations that depend on collaborative projects, often involving people in multiple locations, tools like these have a lot to offer over alternatives like email. Further, while Slack and HipChat were initially based on group chat, with other media being added as time went on, offerings like Cisco's Slack incorporate most of the required communications and collaboration capabilities.

The big challenge here is changing user behavior. As frustrating as it may be, users know how to coordinate projects through email, and now we'd be asking them to do something completely different — people don't like change. And without participation by 100 percent of team members, all of the potential efficiencies can be lost.

In my view, these products are still best suited to tech-oriented companies involved in collaborative projects with younger employees who are very comfortable with social networks and computer devices (including smartphones and tablets), and are willing to try new ways of working.

THERE'S ALWAYS A SURPRISE

The purpose of this guidebook is to make sales pros aware of the different types of UC&C options available and how strongly they might resonate with different customer profiles. The last point to remember, though, is that every customer is (or wants to be seen as) a special snowflake. As a general rule, we can say that old-line manufacturing firms are less likely to embrace new technology solutions, but that is never going to be 100 percent accurate. There will be exceptions to every rule, and if you look long and hard enough, I'm sure you will find exceptions to that one.

So while this guide can hopefully help you match customer preferences to the most appropriate (and most likely to be selected) options, it's still important to listen to customers. Sure, the sign over the door may read "Old-School Manufacturing." But you might find that the people who work there have a mind-set that is more like a Silicon Valley startup. That's the fun of channel sales.