

# Cloud Communications: a Methodology for Successful Deployment

White paper



# Overview

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Cloud-based communications solutions offer obvious benefits over traditional on-premises PBX systems, including peace of mind, unsurpassed scalability, and overall cost effectiveness. But while cloud technologies can drastically reduce management and implementation complexity, the transition from legacy PBX solutions to cloud-based solutions can still involve unforeseen complications and challenges. The secret to a successful deployment is a well-planned implementation aligned with the organization's business requirements, objectives, and outcomes.

## Keeping up with new requirements

The way organizations work has evolved dramatically over the past decade and will continue to do so as new business requirements and user expectations enter the picture. Employees are now more mobile, distributed, and connected than ever before. Outdated PBX equipment and disparate meetings and team messaging solutions restrict the ability of teams to work at their full potential. The simple act of switching between disparate applications is hindering team productivity significantly. With a cloud communications solution, companies not only meet today's demands, but prepare themselves for the future.

## The case for making the transition to cloud communications

There are six top benefits for making the transition from on-premises PBX to cloud communications:

### 1. Increase reliability

Reliability is a serious consideration when transitioning to cloud. If a local area network or data center went down, so did the cloud service. An on-premises system functioned much the same way. If an aging PBX or connection to a PSTN failed, so did the business's ability to connect. Localized service also resulted in susceptibility to natural disasters.

Today, cloud applications are supported by multiple geographically redundant data centers, with flexible, highly reliable connectivity options that are available from anywhere, anytime. With as high as a 99.999% reliability rating, the cloud has supplanted on premises as today's most reliable option.

### 2. Innovate and scale quickly and efficiently

Innovation and agility are critical to today's business success. The ability for a business to open or close offices, move locations, or innovate in how communications are used across the organization can have a direct impact on revenue and overall business success. Businesses today are looking to the cloud to provide the competitive edge in improving productivity, enhancing collaboration, and adapting to the changes in business.

### 3. Consolidate vendors

The cloud enables businesses to consolidate and deploy a single phone, SMS, fax, web meetings, video, and audio conference solution across the entire organization. This not only centralizes management, but eliminates shadow IT tools and applications to help mitigate cybersecurity risks at both headquarters and remote locations.

## 4. Lower costs

IT leaders are often asked to deliver technology that both improves productivity and reduces total cost of ownership (TCO). Cloud communications allows companies to simplify equipment, management, service, and ability to scale while also improving end-user productivity. All together, enterprise organizations have lowered total cost by 30–40% in their first year alone.

## 5. Integrate with other business applications

A recent study shows that knowledge workers lose up to 32 days per year in productivity by simply switching between applications. With the average enterprise using over 1,000 cloud applications, integrating even just some of these solutions can not only save time and money, but create greater business insights over what's possible with on-premises solutions.

## Stage one: multi-site qualification

A methodology and strategy must take into account existing sites, plan and design future state, project management of each stage of implementation, and ultimately the onboarding of end users unfamiliar with the new solution.

Before implementation, organizations must first gain a thorough understanding of where the cloud service will be used, the network conditions at each location, and user profiles for those using the service. This 360-degree approach is useful in gaining a complete picture, including any yet-unidentified limitations that will impact usage or quality of service.

### Site expansion strategy

For businesses with multiple global offices, IT teams may choose to identify select locations for a phased rollout strategy. Often headquarters and one additional location will be selected for

## Stage two: planning and design

Frequently, one of the triggers in adopting cloud communications is the digital transformation of customer experience initiatives and workflows. Therefore, a successful transition plan must reconnect the project to the principles of the new user experience it aims to support.

### Call routing and IVRs future state

At the center of the voice channel is the Interactive Voice Response (IVR) system. For organizations looking to quickly connect consumers with the right associate, the IVR gives organizations the flexibility to create structured, multiple-layer call menus that efficiently connect consumers to associates, call queues, or contact center locations seamlessly and quickly.

## 6. Gather business insights

Telephony analytics empower IT teams by providing access to reports on real-time inbound and outbound calls. This feature helps optimize the advantages of a cloud communications system by presenting usage analysis and trending metrics in an easy-to-read graphical way. Teams tasked with migrating systems often cite a number of concerns:

- How do we migrate from legacy to cloud seamlessly, including number porting?
- How do we successfully deploy this new technology?
- How do we implement in a timely manner across hundreds or thousands of locations?
- How do we drive adoption?

immediate implementation, with a second and third phase of development to follow in the coming quarters. However the approach, it is important for those managing the team to clearly identify the strategy and communicate with all stakeholders.

### Network-readiness assessment

A network-readiness assessment allows IT teams to understand constraints on network capacity, quality of service, firewall configurations, plus supported devices and configurations. Often cloud providers recommend that an enterprise network and soft-client computers support a minimal set of features to ensure high-quality VoIP, video, and communications services. For this purpose, requirements and recommendations are provided for some type of routers, DNS, NAT, etc.

To further enhance the customer experience, organizations can take advantage of multi-level IVRs that enable them to design, deploy, and modify custom intelligent inbound call flows that simplify call routing management for multiple locations. This type of IVR typically offers connections to the dial-by-name directory, system extensions, voicemail, or external phone numbers.

Designing the new IVR is a critical task that can undermine the expected financial upside of your cloud transition project if not executed flawlessly. During this phase, a successful large cloud deployment relies on experts that can map out the desired call flow routes, central and local IVR menus, and connections to external numbers that will optimize the IVR. Teaming up with product experts who can identify your organization's customer experience

principles and match them to the right numbers, product features, and settings will ensure a flawless deployment and project execution.

## Integration opportunities

When organizations migrate to cloud communications, they have an opportunity to align business communications with the larger digital transformation goals through integrations. As part of mapping out the new system, organizations should team up with project experts to identify what workflows can be further improved with the addition of integrated communications features. Common candidates for enhancement are the sales and service workflows.

Organizations that have migrated sales and service workflows to the cloud now have a chance to further automate processes and make agents more productive—and customers more satisfied. These could include automatic call logging, screen pops showing customer histories, automatic text notifications about orders,

and two-factor authentication via SMS. Whether your workflow is powered by a public or custom-built application, the possibilities are virtually limitless. And engaging the right project experts can result in incremental productivity gains to your cloud migration project that will further improve the return.

## Business requirements documents

Once the design of your new cloud communications system is complete, be sure to record all the requirements in a formal project document that lists specific dates and owners. Known as a Business Requirements Document (BRD), it should include covered locations, network connectivity, user profiles, number porting, IVR designs, custom app integrations, and phone hardware requirements. The BRD becomes the blueprint for your implementation and provides a clear overview of project timelines, required resources across the organization, roles, and responsibilities.

## Stage three: managing deployment

For a successful project execution, your organization should work with your vendor to ensure you have unique point of contact for the duration of the implementation phase. Successful deployments rely on a designated project manager who takes over from your account manager as your primary point of contact for the project and coordinates the work across your organization and your cloud vendor. Based on your BRD, your project manager should identify

the different stakeholders, manage both internal and external resources, and establish project milestones with timelines. Ensuring a clear and constant flow of information across both organizations is a critical pillar of successful deployments as it avoids last-minutes surprises, provides complete project transparency, and ultimately demonstrates full accountability for the commitments established in your BRD.

## Stage four: implementation and adoption

Once your organization is ready to start implementing your cloud communications migration project, three main workstreams lie ahead. First, your cloud communications vendor will build your account. This includes creating individual users, assigning the correct user entitlements, and implementing your billing rules. Next, your legacy numbers must be ported (or transferred) to your cloud communications provider. Finally, a project manager will oversee the entire number-porting process and ensure that on the day your account is ready to go live all numbers are properly ported to your new cloud vendor.

It is critical during implementation to create new IVRs. The new IVRs are frequently at the center of your cloud communications transition and successful deployments rely on your vendor to execute it as part of implementation. As with number porting, this can become a complex and lengthy process that might delay your live date and erode the return expected from your project.

Partnering with your cloud communications vendor will accelerate your live date and remove the complexities associated with it. Your organization can at any point after live date easily modify and edit each IVR as needed.

One of the key reasons organizations migrate to cloud communications is to consolidate all communications applications into a single platform and eliminate unnecessary spend in redundant tools. Therefore, successful deployments must incorporate training and adoption initiatives that focus on both end users and administrators. These can be done either in person or remotely, and eventually on-demand with pre-recorded videos. Ensuring your organization has been trained on the new system is very effective in preventing users from bringing in new applications or communications vendors that will erode the financial benefits of your cloud communications transition project.

## Implementation partnership

RingCentral Professional Services™ engagement is ideal for customers looking for support to implement RingCentral service in complex or multi-location business environments. Featuring a committed team of experts, RingCentral Professional Services will deliver a premium onboarding experience and extensive support to drive your business success.

- Pre-deployment consultations to understand your unique environment and requirements
- Personalized implementation and deployment plans designed specifically for your business needs
- Worry-free experience—industry experts design best-practice processes to eliminate business downtime
- Hands-on training for administrators and users to ensure smooth onboarding

## Summary

A cloud-based communications solutions offers a number of benefits from increased reliability to ability to scale quickly and consolidate vendors. The benefits continue even in transitioning from on-premises to cloud in that both management and implementation complexity are greatly reduced.

The secret to a successful deployment is to first start with a strategy that takes into account the entirety of the current and future states, plans and designs to the specific needs of the user,

guides optimal deployment, and ensures end users are able to access and use the product as needed.

IT organizations with multiple locations, complex network infrastructures, limited in-house IT resources, or those requiring minimal business disruption may want to partner with a professional services team to drive all stages of migration to ensure the planning, designing, project management, implementation, and ongoing support will deliver the best results possible.

Contact RingCentral Partner Support:

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