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Lawrence C. Miller, CISSP

***Small Business
Unified
Communications***
FOR
DUMMIES®
AVAYA CUSTOM EDITION

by Lawrence C. Miller, CISSP



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Acquisitions, Editorial, and Media Development

Senior Project Editor: Zoë Wykes

Editorial Manager: Rev Mengle

Business Development Representative:
Susan Blessing

Custom Publishing Project Specialist:
Michael Sullivan

Production

Senior Project Coordinator: Kristie Rees

Layout and Graphics: Melissa K. Jester

Proofreaders: Laura Albert,
Jessica Kramer

Special Help from Avaya:
Cynthia Caramico, Steve Hardy,
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Ravi Ramanathan, Joe Scotto,
Brian Wenk

Publishing and Editorial for Technology Dummies

Richard Swadley, Vice President and Executive Group Publisher

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Mary Bednarek, Executive Director, Acquisitions

Mary C. Corder, Editorial Director

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Diane Graves Steele, Vice President and Publisher

Kristin A. Ferguson-Wagstaffe, Product Development Director

Composition Services

Debbie Stailey, Director of Composition Services

Introduction

The panacea of telecommuting, made increasingly viable in recent years with technological innovations such as high-speed Internet access, WiFi, and virtual private networks (VPNs), has become a commonplace reality for businesses everywhere. The phenomenon of “working from home” has now evolved into a broader concept known as “teleworking.”

Teleworking, unlike telecommuting, is accomplished independent of location: from home, a hotel, a client’s office, the train, an airport, a car, or anywhere away from your primary place of employment.

Today, the technology driving workplace change is known as Unified Communications (UC). UC brings together communications software, systems, and devices to make the user experience one that adapts seamlessly to a dynamic work environment. UC enables teleworking for an increasingly mobile workforce by reducing costs, improving productivity, and introducing new real-time communications capabilities.

About This Book

Small Business Unified Communications For Dummies, Avaya Custom Edition, provides an in-depth overview of UC: what it is, what capabilities it can provide to small and medium businesses, what a small business needs to do to implement it, and how it will impact your business. The book is written for nontechnical readers such as small business owners and key managers (office, telephony, financial, and sales/marketing) in small and medium companies (defined here as a business or organization with 250 or fewer employees).

How This Book Is Organized

I've organized this book into five chapters, each written to stand on its own, so that you don't necessarily have to read it from start to finish. Feel free to jump in wherever it makes the most sense for you!

Chapter 1: What Is Unified Communications and Why Do I Need It?

In Chapter 1, I explain Unified Communications — what it is and what it can do for you — and how it differs for small and medium businesses compared to larger ones.

Chapter 2: How Will Unified Communications Help My Small Business?

In Chapter 2, you take a look at some of the many challenges that affect your business on a daily basis and how a UC solution can benefit your business and your employees by reducing costs, enhancing productivity, improving customer service, and improving employee morale and retention.

Chapter 3: Creating a Unified Communications Strategy

Chapter 3 helps you create a UC strategy for your business and discusses various technology and personnel considerations that need to be addressed in your UC strategy.

Chapter 4: How Do I Implement a Unified Communications Solution?

Chapter 4 explores various technologies and installation considerations, as well as various tips for implementing a UC solution — I promise not to get too technical here! I also describe some of the policies, and procedures you should implement along with your UC solution to help you prepare your organization for UC and its many benefits.

Chapter 5: Ten Reasons to Implement Unified Communications

The final chapter, in that famed *For Dummies* style, presents ten very good reasons you should incorporate teleworking and UC into your small business — all in an easy-to-follow format.

Icons Used in This Book

You'll occasionally see special icons that call attention to important information. Don't bother double-clicking the page — just perk up and take note! Here's what you can expect.



This icon points out information or a concept that may well be worth committing to your nonvolatile memory, your gray matter, or your noggin' — along with anniversaries and birthdays!



If you're an insufferable insomniac or vying to be the life of the party, pay attention. This icon explains the jargon beneath the jargon and is the stuff legends — well, at least nerds — are made of!



Thank you for reading, hope you enjoy the book, please take care of your writers! Seriously, this icon points out helpful suggestions and useful nuggets of information that may just save you some time and headaches.

Where to Go from Here

Well, if you had pointy ears instead of a pointy chin (like the Dummies Man logo), you might say “logic clearly dictates that you turn the page and start at the beginning.” Instead, I suggest that the needs of *you* outweigh the needs of the *many*, and this book has been written to meet *your* needs!

Although you don’t have to, I recommend starting with Chapter 1 to gain an understanding of the basics of Unified Communications (UC). I explain some key concepts and define some common terms that will make it easier to follow no matter where you go in the rest of the book. From there, I help you build the business case for UC, create a UC strategy, implement a UC solution, and prepare your organization for the UC revolution!

Chapter 1

What Is Unified Communications and Why Do I Need It?

.....

In This Chapter

- ▶ Exploring the basics of Unified Communications (UC)
 - ▶ Identifying your everyday business challenges
 - ▶ Addressing why you haven't already implemented UC
-

As the owner or manager of a small business, you are constantly challenged to do more with less, to compete more favorably against larger competitors, and to keep costs in check. That's really the crux of the issue: How do you make the most of what you have? Enabling your people to be more productive, keeping your costs down, and making sure that you're providing the best possible service to your customers is paramount. It may surprise you to know that Unified Communications (UC, for short) is a solution that can help address all of these areas.

Communication has become much more complex for a number of reasons. First, we all have many more ways to communicate with each other — using our desk phones, cell phones, BlackBerries, iPhones, smartphones, pagers, e-mail, and instant messaging (IM) systems. And all of this “stuff” operates largely independently and unaware of each other, with little or no integration between systems, devices, and applications.

We've also become such a mobile workforce that knowing how to simply “reach out and touch someone” has become more difficult. People work not only from their office cubicles, but also from a home office, or a coffee shop, or a hotel room, or an airport terminal — just about anywhere. Remember, work isn't where you are, it's what you do!

Thus, a customer or colleague urgently trying to contact you may leave a voicemail on your office phone, send an e-mail to your personal mailboxes, and send an SMS (Short Message Service) text or IM, before finally reaching you on your cell phone — assuming, of course, that this person had your office phone number, your various e-mail addresses, your IM handle, and your cell phone number all readily available — and the time and patience to try them all!

There is, of course, a solution. You can enable your employees to use the right device, at the right time and in the right place, making it easy for them to reach others and for them to be reached. Everything works together (no matter where you are) to make reaching your customers, partners, and suppliers — and letting them know how to reach you — as simple as entering a single phone number or address, and letting the *technology* rather than your *fingers* do the “walking.” This solution, not surprisingly, is known as *Unified Communications*.

Enabling employees to be as productive and responsive as possible — in any of those circumstances — is what makes UC so compelling for small businesses. Think of the advantages you'll have over your competitors — even many larger competitors — by enabling your employees to easily communicate with your customers and with each other virtually any time and anywhere.

In this chapter, I present a broad overview of UC: what it is and what it can do for you and your small business.

Understanding UC and How It Helps You Stay Connected

UC allows you to easily stay in touch with the people who are most important to your business: your customers, your

colleagues, and your suppliers . . . anytime, anywhere, using just about any device that's appropriate at the time. It simplifies communications so that your customers find it easier to get in touch with you — when you want them to (an important element of UC is that you have full control over who contacts you and when).

UC frees you up to do business where and when you need to, under just about any circumstances. Three feet of snow outside your front door? No worries. With just your laptop, Internet connection, and home phone, UC lets you receive calls that come in to your office and to make calls that look like they're coming from your office, and no one ever knows that you're working while curled up next to your fireplace!

UC breaks through the technical barriers of modern communications to help increase the productivity of your employees, lower your business costs, and delight your customers. Can one technology really do all that? The answer is *yesss!*

Next, you take a look at some common issues that modern communications technology presents, and how UC can help.

Using one phone number for everything

Today, your business card may look more like a phone directory with numbers for your desk phone, cell phone, virtual office (home) phone, fax line, pager, and so on. With UC, contacting you becomes simple once again, as all of these numbers become one with:

- ✔ **Single Number Access:** Whether you want to talk, leave a voicemail, request a notification, transmit a fax, or send a text message, you only need to have a single phone number. This makes it easier for customers and colleagues to find you — one number to call, so interactions are faster and decisions can be made more efficiently.
- ✔ **Single Outbound Identity:** A single “calling” number that identifies you to the person you are contacting, regardless of the device or mode of communication you are using.

Simplifying call handling

When someone calls you, do you want the call to be routed to your assistant, your voicemail, your mobile phone, your home phone, or some other destination? Does it depend on who is calling or the time of day?

Call coverage refers to how incoming calls are handled. With UC, you can set up simple rules to route calls directly to voicemail, to an assistant or receptionist, to a call center, or to almost anyplace else. You can define rules that handle calls differently based on who is calling, the time of day, whether the call is internal or external, or whether your phone is busy. Unlike call forwarding, which simply re-directs a call to another phone number or extension, call coverage gives you the power and flexibility to simply and intelligently handle calls based on a wide range of criteria.



An incoming call can also be routed to an Interactive Voice Response (IVR) system that can ask the caller questions and, based on the caller's response, make decisions about how to handle the call.

Managing your messages

How many voicemail boxes do you “manage” every day? Perhaps three or more, including your desk phone, cell phone, and home office phone mailboxes? Each mailbox has to be set up and each greeting needs to be regularly updated. Each mailbox has to be frequently checked for new voicemail messages, and each one has to be accessed differently. And, forget transferring, forwarding, or replying to a voicemail between systems — just try to remember that delete is “6” on your cellular voicemail system and “7” on your office voicemail system . . . or is that the other way around? Oops!

Today, messaging is a fragmented hodgepodge of independent systems and service providers, largely lacking interoperability between them. UC bridges these isolated “islands” of

messaging communications, providing capabilities such as:

- ✔ **Single voicemail:** Instead of having to maintain numerous voicemail systems, you have a single voicemail system that you can access anywhere. Voicemail notifications can be sent to your office *and* cell phone, as well as desktop applications such as e-mail.
- ✔ **Cross-media reply:** A single communications infrastructure supports all messaging and can reply in various media formats, including voicemail responses to e-mail, and e-mail or text responses to voicemail.
- ✔ **Unified messaging:** Think of the time you'll save getting e-mail, voicemail, and faxes in a single mailbox. And with *text-to-speech* capabilities, you can have your e-mail messages read to you while accessing your voice messages.
- ✔ **Visual voicemail:** Sort, scan, and review your messages in order of importance, rather than in the order they were received.

Letting others know if you're available

With UC, you can specify your communications preferences and availability, letting customers and coworkers know when you're available — before they even try calling you.

This feature — known as *presence and availability* (or simply *presence*) — makes it easier for a caller to reach someone who's available and willing to be called. Presence enables people to inform others of their status (for example, “on the phone,” “busy,” or “do not disturb”), their availability, and how they can be contacted before a communication session even begins, thereby increasing productivity by making it easier to reach people more efficiently.



Presence is not limited to a single person; presence can also apply to a group of people (for example, Finance) or a device (for example, Phone Status = Off-hook or On-hook).

Conferencing: It's more than just three-way calling

UC brings new capabilities to audio, Web, and video conferencing, including

- ✔ **Device independence:** Participants can join a conference using a cell phone, smartphone, wireless device, or PC Web portal.
- ✔ **Conference call-out:** The conferencing system calls out to the meeting host and participants instead of having everyone dial in allowing meetings to get started on time. No more searching for dial-in numbers and access codes — just answer the phone when it rings.
- ✔ **Integrated scheduling:** When someone organizes a conference, the conference information can be included in the e-mail invitation, and the participants' calendars are automatically updated.
- ✔ **Click-to-call, click-to-conference:** You can dial a number or join a conference directly from your Web browser or e-mail application.
- ✔ **Connecting your desk with your device:** Conference organizers can — in real time — control video and audio aspects of the conference. Participants with rich media capabilities can see the video, the audio, the application sharing, and so on, while participants on less capable devices, such as a cell phone, will receive only the capabilities that are enabled on their device.

Mobilizing your desk phone

UC lets you take many of the rich and powerful features of your desk phone with you by extending these capabilities to your cell phone.

Calls to your office desk phone can ring simultaneously on your mobile phone (or any other phone for that matter). Calls can be managed on your cell phone, just as though you were in the office: you can forward calls, put them on hold, toggle between two calls, conference in other people, transfer the call to another phone, and more.

And if you're using a smart mobile device, your cell phone can function even more like your desk phone by routing calls through your office phone system, thereby saving on toll charges (especially for international calling). It also means you can maintain better customer records such as who called, when, and for how long.

UC client software enables you to visually manage all of your e-mail and voicemail messages, access your business directory, use PBX-like features (such as transfer, conferencing, and 4- or 5-digit extension dialing), and update and access presence and availability information.

In the next section, I take a brief look at some of the challenges you are facing as a small business.

Recognizing Your Business Challenges

It's important to highlight some of the basic challenges you are facing as a small business, because unless a technology impacts one or more of those challenges — and helps bring you closer to achieving the strategic goals for your business — there's really no reason to implement that technology, is there? Why invest in something that isn't going to deliver a return — be it happier customers, lower costs, greater revenue, or more dedicated and loyal employees?

Keeping productivity high

You may not be able to quantify it, but lost productivity is costing you something. When employees are traveling, or come in a few hours late so they can let the cable guy in, productivity suffers. What does it cost for your business?

That depends, of course, on the kind of business you're in and the way you conduct it. Using, say, \$2,000 per year per employee as a benchmark, if you have 25 employees, that means lost productivity could be costing you about \$50,000 per year. Saving a third, or even half, of that lost productivity

with a UC solution that enables your employees to work from virtually anywhere would be a pretty worthwhile investment!

Managing your costs

With the economy as uncertain as it is today, just about every small business is watching its expenses very closely. Where you can cut, you usually do. And if an expense is not absolutely essential, you'll probably reduce or completely eliminate it. Unified Communications can play a real part in reducing expenses in some truly surprising ways. For example, real estate costs for a business can really add up: your lease, utilities, furniture and office equipment, to name a few. The industry average for facilities costs for a small business is about \$5,000 per employee, per year. But what if some of your employees could work from home just as effectively as in the office?

You may not be able to immediately realize some of these savings, but when it comes time to renew your lease, you might want to consider having some of your employees work from home and take less space. Or, if you're expanding, you could stay in that same space rather than moving to larger offices. You could save thousands of dollars a month in rental costs alone, not to mention furniture, equipment, and utilities. In Chapter 2, I tell you about a company that did just that.

Retaining and recruiting new staff

What does it cost you to recruit new talent for your business and how do you retain that talent? It's difficult to quantify, but I think you'll agree that being able to attract and retain the best people for your business will not only save you money, but will also make your business more profitable and successful.

What if your communications system delivered the flexibility for employees to work at home one or more days a week? Such a benefit not only positively impacts their work-life balance, but it also saves them commuting costs, dry cleaning bills, and restaurant meals. That's a nice perk to offer your employees that puts money right back into their pockets — and gives them more time to enjoy it!

Ensuring fast responsiveness

Balancing the right number of employees in your business and your ability to respond quickly and effectively to your customers is always difficult. With an unlimited number of employees, you could always respond quickly to customer requests! Of course, that's not reality, so you rely on employees who work hard and care about customer service, effective processes, and great communication. UC can help you take leaps and bounds in your ability to respond not only to customers, but also to everyone connected with your business.

Environmental considerations

Enabling employees to work from home even just one day a week can deliver tremendous benefits to the environment. A typical commute contributes about 5,000 pounds of harmful carbon emissions per year and uses about 400 gallons of fuel. What is your "green" policy (more and more of your customers want to know) and could offering your employees the opportunity to occasionally work from home provide real savings and benefits to your business and the environment?

Why Aren't You Using Unified Communications Already?

Now that you have an understanding of what UC is and how it can help your small business lower costs, serve your customers better, make your employees happier and more productive, and even help the environment, you may be kicking yourself and asking, "why haven't I done this already?"

Or, you may still have some reservations. Change can be difficult and can often require a leap of faith — particularly when it comes to allowing your employees to work remotely or at home. Here are some of the typical concerns small business owners have identified for not implementing UC and teleworking — and some other ways to think about these concerns.

How do I know my people will be working?

Many organizations traditionally manage by sight and subjective measurement. This paradigm has definitely shifted with the modern-knowledge worker whose performance and productivity is better evaluated by objective measures such as actual output, rather than time spent. “Work smarter, not harder” is more than just a slogan — with UC and teleworking, it can become a reality.



According to The Telework Coalition (www.telcoa.org), increased productivity of teleworkers compared to their office counterparts range from “about the same” to as much as a 45 percent increase with 20 to 22 percent being the average.

How will I manage them if I can't see them?

Are you managing by counting hours or by measuring actual productivity and individual performance results? One of the keys to a successful telework program is training both teleworkers and their managers. How do they currently manage when they're out of the office on travel or client visits? During a benchmarking study performed by The Telework Coalition (www.telcoa.org) in 2006, a respondent from AT&T's telework program astutely observed, “If a manager is incapable of managing a distributed workforce in the twenty-first century, that person will not last as a manager.”



Instant Messaging (IM) is an excellent way to know whether someone is online, on the phone, or in a meeting. With a quick “ping” on IM, a manager can check on his or her employees.

What about my security?

With technologies such as thin client PCs, virtual private networks (VPNs), encryption, and endpoint security, remote access today has proven itself to be very secure. These technologies, in combination with proper policies can help assure a secure working environment whether in the office or at home.

Will my people be available when I need them?

How do you know your employees are available now? Between meetings, travel, absences, vacations, transit disruptions, and adverse weather, how much time do your employees actually spend in the office? A properly planned telework program will outline common hours when employees are to be available, meeting times, and other work parameters. In fact, many employees happily give more time to their employer than ‘office bound’ workers, in recognition of the time and money they save by being able to work from home.

How can I be sure they’ll be reachable when out of the office?

For years, “remote access” was considered “data access.” The technologies focused on accessing data and information, and the “voice” part of the equation was largely neglected. With UC, employees can work from virtually anywhere — with both voice and data — so that you and your customers can reach them when they need to.

Will my people understand the parameters of working this way?

Many organizations, especially smaller ones, often don't comprehend that these "new ways of working" are available, let alone have a leader within the organization with a clear understanding of how the positive and progressive changes can create a real advantage for their business. Small businesses typically have less internal red tape and bureaucracy than larger organizations, thus decisions can be made more quickly and easily. With proper leadership, appropriate training, and the right policies, your small business can gain a real advantage over larger competitors.

Chapter 2

How Will Unified Communications Help My Small Business?

In This Chapter

- ▶ Recognizing the unique challenges of small businesses
 - ▶ Understanding how UC can impact a small business's bottom line
 - ▶ Empowering your employees with UC
 - ▶ Realizing the benefits of UC at Limousine Eighteen: A case study
-

Making your employees more productive by controlling costs, improving customer responsiveness and satisfaction, attracting and retaining top talent — as a business owner these are the kinds of things you think about every day. But did you realize that communications — your phone system — can play a key part in improving all of these areas? Perhaps not. But you're not alone! Many small businesses don't realize how much of a role communications play in improving their business overall — in real, bottom-line ways. In this chapter, I show you just how far-reaching a Unified Communications solution can be, and how it can help your business succeed, even in a tough economy.

Ensure Continued Productivity Outside the Office

Like many businesses, your employees probably spend a lot of their time away from their desks. They might be at a client's office, at an airport en route to close a deal, or negotiating a buying agreement with a supplier. Or, they could be stuck at home in severe weather or sitting in their cars in traffic. Basically, they could be anywhere! The question is what happens to their productivity when they aren't in the office in front of their computer, next to their phone?

Have you thought about how much productivity is lost in those "out of office" situations? Have you ever tried to measure it? If not, you're in good company: an Avaya study shows that only 13 percent of small business owners try to measure lost productivity. But those businesses that did try to measure it estimate that lost productivity costs them about \$20,000 per year.

The good news is that UC can help you recover some of that lost productivity by enabling your people to be accessible, responsive, and productive in just about any circumstance. And, UC can deliver benefits to your employees that can be the equivalent of a substantial raise.

Working from home — when your employees need to

Allowing people to work from home on a daily basis is a decision most small business owners don't take lightly (I talk about how best to make that decision in Chapter 4). But what about enabling them to be more productive and responsive at home when the need arises — like when the streets are covered with ice or a child is at home with the flu? These are just two examples of many possible productivity killers that UC can help your business avoid, or at least lessen the impact.

There are also times when it's actually better for employees to stay home. Who hasn't had a dedicated employee come into the office sneezing, wheezing, and coughing, potentially infecting others (or at least creating some paranoia) who then still ends up out sick for a couple of days? In an office of only 25 people, having five of them out sick represents 20 percent of your workforce. This scenario is known as *presenteeism*, which is when employees feel compelled to be in the office, even when they're sick or stressed and would be better off not coming in at all.



According to an Avaya study, 72 percent of small business owners say employee sick days and stress are the top two contributors to lost productivity, more than 20 percent are severely impacted by inclement weather and power outages (six or more days per year), and 13 percent agree that unscheduled absences cost their businesses as much as \$20,000 annually in lost productivity.

UC enables employees to work from home and to have complete access to the communications tools they have in the office. They can make and receive calls using just their laptop and their home phone (an application on their laptop interfaces with their home phone). They have access to their speed-dial numbers, can conference in colleagues or customers, and can transfer calls as though in the office.

Staying connected when mobile

Even when they aren't stuck in the house, your employees are often caught between locations or working from some other place, with or without their laptop.

UC allows you to provide "one number" access for your mobile employees. That means that when your best customers call, your sales person's desk phone and mobile phone (or any other phone for that matter) ring simultaneously, so they don't miss the call. You can even set it up so only certain calls are routed to another phone, while other (presumably less important) calls — like your Aunt Sophie's dog groomer — go directly to voicemail.

Another often overlooked source of lost productivity is the time employees spend commuting to and from work. If the average daily one-way commute for your workers is 40 minutes, the time spent in their cars could be costing you up to 40 working days per employee, per year. Even if your average employee only worked from home two days a week, you could still save over two weeks — that's a significant uptick in productivity and responsiveness.

Reduce Expenses

It goes without saying that in a challenging global economy, businesses of all types and sizes are taking a close look at their expenses. But did you know your phone system can also help you reduce your real estate costs? Implementing a UC solution can save your business a significant amount in telecommunications costs. These may include voice lines and Internet access, conferencing, leasing and maintenance fees on phone systems, local and long distance toll charges, and employee phone expense reports.

By enabling employees to work full-time from home with UC, you can save significant facilities costs including office space, furniture, and electricity. For example, a case study by The Telework Coalition (www.telcoa.org) found that a 40-employee Washington, D.C.-based insurance company that implemented a telework program was able to reduce office space from 12,000 square feet to 4,200 square feet, realized savings of \$400,000 with 20 full-time teleworkers, and eliminated 15,000 vehicle trips in the first two years of the program.

At some point, your business may outgrow your current facilities, requiring a move to a larger office space. With some or even a substantial number of your employees working from home, it may be possible to defer or downsize real estate investments. The cost of leasing additional office space is not insignificant, and the cost of the move itself can be substantial — not to mention the disruption to office operations and service to your customers.

Case study: Spraylat Corporation

Consider the case of Spraylat Corporation, a global 35-person specialty coatings manufacturing firm. Challenged with high communications costs, as well as difficulty connecting with remote workers that negatively impacted productivity and customer service, Spraylat turned to Avaya.

After implementing a UC solution from Avaya, Spraylat was able to

immediately realize \$30,000 in annual long-distance savings alone. According to Stacey Gardella, Administrative Services Manager for Spraylat, "Annual cost savings have been really impressive. Communications from and to our customers is simple and seamless, and we have great connectivity with each other through 4-digit dialing in-house and to remote sites...."



Avaya provides a convenient ROI calculator tool on its Web site that can help you quickly see how a new phone system with Unified Communications capabilities from Avaya can provide a quick and substantial return on investment to your business. Go to www.avaya.com/ipofficeroi.

Improve Responsiveness

The ability to react rapidly to changing conditions and customer requests is one of the most important differentiators for small versus large companies. Without that, small companies lose an important advantage over their larger competitors.

Prospective customers have many choices when deciding with whom to conduct their business. If they contact a business and get no response, they will go somewhere else. Like any business, you depend on new customers in order to grow.

A delayed response to clients, suppliers, or other employees can cause missed deadlines, missed orders, and ultimately, lost business.

Cutting real estate costs with UC at Mindwave Research

Mindwave Research (www.mindwaveresearch.com) is a leading full-service market research firm focused on the IT market. Mindwave needed to offer reliable, high-quality communications for an international roster of clients.

Mindwave chose to implement Unified Communications and teleworking by installing Avaya IP

Office. As a result, they have successfully moved 60 percent of their staff to home offices, enabling them to move to smaller office facilities and reducing their real estate costs by 89 percent (\$2000 per month versus \$11,000). Additional savings are realized through in-house management of the system and reduced conferencing costs.

UC can help small companies maintain their competitive advantage and improve responsiveness by ensuring that your customers can always reach the right people, any time and anywhere.

Reducing unnecessary delays in business communications is a key benefit of UC. These delays can occur when the right people in your business can't be contacted.

Recruit and Retain Talented Staff

It's difficult to think of a resource in your business that means more to your success than your employees. In many small businesses, they are the key asset. And although just about everyone wants to see their earning potential rise, another often overlooked benefit that a small business can offer to potential employees is a more flexible work environment. In fact, according to a study by Dice Holdings, Inc., almost 40 percent of technology workers said they would take up to a 10 percent pay cut if they could telecommute.

Another benefit of a teleworking program that definitely adds up for your employees is the savings to them of *not* being in the office. These savings can include the cost of commuting (gas, tolls, train fares, parking, vehicle wear and tear), meals, and dry cleaning, which can total as much as \$2,500 to \$11,000 per year. Reducing these expenses for your employees with UC and teleworking is a great recruiting and retention incentive and can translate into an equivalent salary increase of up to \$16,000 per year.

Beyond the potential savings to employees, people also want to know that their company cares about the environment. Reducing commuting requirements can pay huge dividends for the environment (see the next section), which can help you attract and retain great employees.

Smaller businesses also tend to have fewer resources available to recruit talent outside the local area and to relocate new employees or obtain working visas for foreign employees. This potentially limits the diversity of the company and ultimately hurts creativity. But when location doesn't matter (because you have UC and full-time teleworkers), your talent pool isn't limited to your zip code — you can recruit and retain talent from anywhere in the world.

Enabling your business with UC means you can hire people from virtually anywhere — down the street, across the country, or around the world. UC allows you to hire those people so they are on that time zone and working locally. Expanding your talent pool can pay huge dividends for your small business.

Help the Environment While Helping Your Business

Responsibility for the environment is an increasingly important issue for businesses, your customers and potential customers, your employees and potential employees, and the planet in general.

Permitting your employees to work remotely with UC and a teleworking program, even one day a week, can save as much as 78 gallons of gas per year for your employees and reduce

carbon emissions by more than 1,000 pounds. A full-time teleworker can reduce gas consumption by as much as 400 gallons and carbon emissions by more than 5,000 pounds annually. To put that in context, you would need to plant 12 trees a year to offset 5,000 pounds of carbon emissions in the environment!

In the next section, I describe who in your business can benefit from a UC and teleworking program and how it affects their daily work life.

Who Benefits from UC?

The short answer is just about everyone in your business can benefit from UC. But why not get a little more specific? As mentioned before, what UC really does is free up your people to be able to reach out — and be reached — under just about any circumstances. But different kinds of workers will find themselves working in different situations more often than others. Here, I take a look at some of those work groups that probably make up your small business.

Power users

These people most likely have a laptop computer and are as comfortable working in the office as they are out of it — from home, or a car, or at the airport, or in a coffee shop — just about anywhere. And they need to be accessible no matter where they are. Think of yourself, your executives, and your key managers.

Highly mobile sales people

These folks may not have a laptop, but they are frequently out of the office — either meeting with clients or roaming around your facility. We often see these kinds of workers in a real estate office or an auto dealership, to name a few.

Full time teleworkers

These employees don't have an office in the traditional sense; they work from home exclusively. But that doesn't mean they don't need to work as though they are in the office.

Receptionists

Often the first point of contact for your customers, your receptionist needs to route calls with great efficiency — even when people are out of the office, working from home, or busy at their desks.

Customer service representatives

Often called a call center or contact center, customer service reps spend their days talking on the phone to customers — selling or helping them resolve issues. Your business may not have a traditional call center, but if you have employees who talk with customers on a daily basis, you've got customer service reps and they need effective communications tools.

Customer service supervisors

These people manage your customer service representatives, ensuring that customer interactions are as effective as possible, monitoring call volumes, identifying and resolving gaps, and helping to make sure representatives are maximizing opportunities to sell to or assist your customers.

Can you recognize employees in your business that fit one or more of the profiles here? If you're like many small businesses, you probably have at least one of these work groups in your business, and in many cases all of them. Each group has its own unique needs, but they can all benefit from the improvements delivered by UC.

Case study: Limousine Eighteen

Limousine Eighteen Ltd. (www.limo18.com) is a luxury ground transportation company that offers airport transportation, chauffeured cars, and special services for corporate sports and entertainment events. Located in Burlington, Massachusetts (near Boston), the firm provides regional service throughout New England, plus worldwide scheduling through a network of global affiliates.

In the highly competitive ground transportation industry, Marc and Linda Shpilner of Limousine Eighteen strive to ensure that their firm will always stand out above the rest for luxury services and outstanding customer relations. To maintain this competitive edge, they needed state-of-the-art communications capabilities to make it easy for customers to contact them and for Limousine Eighteen's customer service reps to respond to customers. They also wanted to explore mobility options to serve customers efficiently on a 24-hour basis, both on-site and remotely.

Delivering exceptional service also requires the ability to attract and keep outstanding employees. In addition to an excellent environment and top-notch training, the Shpilners wanted to provide an advanced telecommunications solution that could empower employees to do their jobs efficiently and also enable them to work at home during unsafe weather conditions and other unusual circumstances. "In an area that had at least

20 days of really disabling weather last year, it's essential that we have good options for ensuring absolutely uninterrupted communications with our customers," comments Marc.

The Shpilners deployed an Avaya IP Office system with Unified Communications for Small Business. This powerful software solution helps small businesses use communications to increase productivity, improve customer service, and realize significant savings. It can enable employees and management to have the communications capabilities they need to be productive and responsive no matter where they are working. And, it's efficient to implement, manage, and use.

As a result, the company has been able to recruit and retain employees who, for reasons of location or family situation, need to work at home. "The home office situation we have is working out great," Marc said. "One of those employees lives out of state, and I couldn't have hired her unless I could offer the home office option. The other employee lives locally, but we would have lost her to maternity leave if she wasn't able to work at home."

Marc added, "I wish we had known about how good the home office solution can be when we leased our current offices. We might have taken less space than we have now, and we may even consider that option in the future."

Chapter 3

Creating a Unified Communications Strategy

In This Chapter

- ▶ Assessing the needs of your business to decide “where you need to go”
 - ▶ Knowing “where you are” to determine “how you’re going to get there”
 - ▶ Getting what your business needs out of your UC solution
-

Introducing Unified Communications (UC) into your business need not be a daunting task. As long as you have a well-conceived strategy, you’ll find it’s relatively easy to do. Like other changes to your business, having a well-defined plan makes the transition more likely to succeed. Defining a UC strategy consists of the following four tasks:

- ✔ Understand what your business needs are and what you want to achieve.
- ✔ Take an inventory of your current communications equipment.
- ✔ Identify the communications capabilities you need for your business.
- ✔ Develop a timeline for rolling out your solution, including getting your employees trained.

Having a strategy will give your business a clear direction on the UC solution you need and help you stay focused on your business objectives.

In this chapter, I help you create your UC strategy to get the most out of this “cool” technology so that you can offer real advantages to your business — whether it’s making you more competitive, helping you provide better customer service, or perhaps enabling your employees to be more productive — all delivering a strong return on your UC investment.

Understanding Your Business Needs

You want to begin developing your business strategy by conducting a *business assessment*. What exactly are you trying to achieve with UC, and how does that map to your overall business strategy? This assessment is your foundation for implementing your UC solution, so it’s important to clearly articulate your goals for the technology, including

- ✔ Evaluating how your employees communicate, who they communicate with, and where they perform their work activities
- ✔ Determining the specific UC capabilities you want for your business including mobility, collaboration, and customer interaction requirements
- ✔ Specifying and prioritizing the timelines for delivering those capabilities

Your UC strategy should recognize the various workgroups you have in your business — laptop users, highly mobile employees, receptionists, customer service representatives, supervisors and other managers. Each will have unique needs and require different capabilities. I explain some of these unique needs in the following sections.

You need to consider three basic environments when developing your UC strategy: main office, remote or home office, and mobile office. Within each of these, there are unique options that will provide the UC solution most appropriate for your workers.

Main office

Your main office (or facility) has employees who primarily work in offices or cubicles or at workstations at a company site. All or some of your business operations, administration, and support functions may be performed at this location, and communications and technology equipment is typically fixed (such as desktop PCs and desk phones) and assigned to specific individuals. Capabilities within the network may include conference calling, voicemail, e-mail, instant messaging (IM), presence and availability.

Remote or home office

The remote office is a satellite location — perhaps a branch or virtual home office — with mostly standalone operations but also a need to regularly communicate with the main office.

Remote offices present some unique challenges, particularly virtual home offices. Communications systems need to provide the same level of accessibility to your teleworking employees as in the main office. Coworkers need to be able to seamlessly communicate with each other, and your customers expect the same level of service and support, regardless of where folks are actually located.

In fact, if UC is implemented correctly, your customers should never have any idea that your employees may be assisting them from home or from a remote branch office. In order to deliver that level of service and support, your employees need to be able to easily access various resources, whether working from home or in the cubicle next door.

Mobile office

People who work from a mobile office are always on the go and use a variety of devices, each with the means to provide a variety of capabilities. These employees can work from many places, including the main office, a virtual home office, a branch office, a hotel conference room, an airport terminal, a coffee shop, or the back seat of a taxi cab.

Taking Stock of What You Already Have

You need to determine what you already have in your existing communications and technology environment. This includes support, security and accessibility, and infrastructure.

Support

If you don't at least have an "IT guy" or your technical resources are otherwise limited, you will need to address this as you deploy your UC solution, perhaps with a support contract from your UC solution vendor or reseller. Manuals and trained support personnel (whether internal, contracted, or outsourced) must be readily accessible to your users when they need them.

Although your UC strategy should be flexible enough to accommodate individual communication requirements, it should also strike a delicate balance with your support requirements.

Security and accessibility

Access to your UC solution's capabilities must be carefully planned and appropriate security policies implemented to ensure proper safeguards, regulatory compliance (if applicable), and appropriate use by your employees. Consider security and access questions such as:

- ✔ Which functions should remain behind the firewall?
- ✔ What information can be sent via e-mail or IM?
- ✔ What data should be encrypted and when?
- ✔ Where can information be stored and accessed?
- ✔ How will workflows be impacted?

If you don't have the expertise in-house to address these questions, you can work with your UC solution provider or value-added reseller (VAR) to develop an appropriate security and access strategy for your business.

Specifying the Communications Capabilities You Need

With the many features and capabilities available in a UC solution, it's important that you select only those that ultimately support your business objectives. Your UC solution provider can help you sort through your many options. These may include increasing productivity, improving customer service and support, enhancing collaboration, reducing or eliminating costs, and attracting and retaining key employees.

With a clear understanding of your business objectives, you should next specify the communications capabilities that your business needs in order to achieve your objectives, such as:

- ✔ **Conferencing**, including conference calls, in-conference management capabilities, conference scheduling, click-to-communicate, and recording and playback
- ✔ **Communications**, including voicemail, e-mail, presence, profiling (call routing management), and single identity (project your business identity or phone number when making outbound calls from any device)
- ✔ **Mobility**, including find-me/follow-me services (route call to mobile device) and single number access (route any incoming communication to any device)
- ✔ **System administration**, including business and communication continuity, seamless mobility, customizable settings, applications integration, enhanced administration capabilities, and deployment options

Your UC strategy must provide access to the communication tools that your workers need from wherever they are.

Knowing the situations that are applicable and the options your employees require will help you establish a UC strategy that increases productivity and improves customer service.

Developing a Timeline and Getting Your People Ready

As you develop your UC strategy, cost will always be an important consideration. Remember that when implementing your UC solution, you define the pace. You can ease into it, adding capabilities as your budget and business strategy permit, or you can go for the whole enchilada!

Because UC is so tightly integrated with many other communications technologies, you'll quite possibly be able to replace certain technologies and reduce or eliminate some costs. Today, your communications costs likely include

- ✔ Server and software costs
- ✔ Internet access costs (routers, firewalls, and circuits)
- ✔ Telephone equipment such as handsets, headsets, fax, voicemail, cellular devices, and a PBX or Centrex switch
- ✔ Local and long distance toll charges, cellular plan conferencing, party lines, and other call features

It is also likely that UC will bring new communications capabilities to your business, so you'll need to develop policies and procedures for all of this new technology, and train your people on how to get the most out of it!

Finally, it's important to consider support options in your UC strategy. Although a UC solution isn't necessarily complex, you may need additional support staff or a service contract that provides highly responsive support when you need it.

Chapter 4

How Do I Implement a Unified Communications Solution?

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In This Chapter

- ▶ Starting your UC project right — with solid planning
 - ▶ Getting ready to deploy your UC solution
 - ▶ Working with a qualified partner so that you never have to “go it alone!”
-

Ensuring the successful introduction of a Unified Communications (UC) solution requires a clear understanding of your business needs and desired outcomes (refer to Chapter 3 for help on creating your UC strategy), and careful planning to ensure a smooth deployment.

Preparing your people for UC involves a little more than announcing “Hey, we’re all getting new phones!” In fact, introducing UC into your business can bring about a complete change in the way your people work and communicate.

The key to making UC work for your business is the combination of technologies and policies that enable your people to choose what is best for their individual situation and to have options available to them that will drive increased productivity.

These options might include working from home when an employee is sick or snowbound, or receiving a call on a mobile phone from a valued customer when a traffic situation causes considerable delays and otherwise wasted time. The list of benefits is virtually endless.

In this chapter, I walk you through the steps necessary to properly prepare your employees and successfully implement UC for your business. Working closely with a trusted solution provider or Value Added Reseller (VAR) that understands your business and your needs is critical to the success of your UC project and implementation.

Planning Your UC Deployment

When planning your UC project, you'll want to have a project manager, map your business objectives and strategy to your UC requirements, gather technical information, design your solution, and develop a detailed implementation plan.

Establish and empower a project manager

Plain and simple, if your UC initiative is to be successful, it needs a responsible individual to oversee all aspects of the effort, including

- ✔ Creating and maintaining the project plan and milestone schedule
- ✔ Managing and coordinating all activities and personnel associated with the project
- ✔ Documenting and proactively communicating the status of those activities
- ✔ Ensuring tight change control

Your project manager needs to be more than just a figurehead that is good at checking off a “to do” list and holding meetings. He or she needs to be an effective manager and an experienced leader.

Your project manager may have management responsibilities for your UC initiative that transcend his or her normal position in your business. The ability to communicate effectively with other managers and work with a diverse group of people with differing positions, skill sets, and priorities is key to successful project management.

Document your existing processes and equipment

Once your needs and expectations are clearly understood, you need to document:

- ✔ Current practices for in-office, remote, and mobile workers
- ✔ Key communications-dependent business activities
- ✔ Existing network architectures including local area network (LAN), wide area network (WAN), and remote access connectivity to determine capacity and performance requirements for the UC solution



If you do not have an understanding of the communications needs and expectations of your business, then you do not have an effective UC strategy. Go to Chapter 3 — go directly to Chapter 3, do not pass “Go,” do not collect \$200.

Develop a blueprint

A comparison of your documented business requirements and strategy against your technical documentation provides a blueprint that is used to design your actual UC solution. This includes

- ✔ Identifying key people and functions and involving them in developing the requirements and timetable
- ✔ Segmenting your user groups to ensure that the individual requirements and preferences are incorporated in the solution
- ✔ Identifying existing infrastructure elements, devices, and applications that can be re-utilized and determining how to integrate those components into the proposed solution
- ✔ Specifying the new components that will be required
- ✔ Addressing reliability, security, scalability, business continuity, and regulatory compliance requirements
- ✔ Identifying lifecycle management and maintenance requirements for the UC solution
- ✔ Reviewing the proposed timeline and estimated budget to ensure the plan is flexible, feasible, and realistic

Design the UC solution and deployment plan

Your UC solution design should be optimized for maximum performance and business impact.

Once any needed changes have been incorporated into the design of your UC solution, the final step is to develop a detailed deployment plan. The plan should conform to your required budgets and milestones, maximize appropriate re-use of existing investments, and address the needed level of security and business continuity.

Your plan should specify the deployment sequence, including how and when existing communication capabilities and configurations will be moved over to the new UC solution. It should also address any “coexistence” issues that may occur during the transition period from your old system to your new UC solution.

Finally, you should plan for the unexpected. Contingency plans should be developed and flexibility should be built into the schedule.

Understanding the Need for Policies — and What Policies You Need

Policies provide overall guidance for businesses and their employees and provide a basic framework for more specific procedures.

A common mistake for businesses and organizations is to implement new technology without first developing appropriate policies. This can lead to ambiguity and confusion, which ultimately may result in missed opportunities, lost productivity, less than optimal use of available technologies, and perhaps, more ominously, abuse and legal troubles.

Another common mistake is to think that you'll always have time later to create policies. Ideally, businesses experience rapid and sustained growth. But if your policies are not already in order when your business takes off, it is very likely that they will never get developed and eventually the absence of policies may create problems for your business and employees. This is particularly germane when implementing UC, which may actually drive business growth and transform the way your business and employees operate and work.

Examples of important policies to consider with your UC implementation include Acceptable Use Policies (AUPs), teleworking, and the use of personally-owned equipment.

Acceptable use

Acceptable Use Policies (AUPs) are among the most important policies for any organization. AUPs are usually very brief but comprehensive. AUPs tell employees what they can and cannot do while using your company's:

- ✔ **Computers and networks.** These include restrictions on personal use, playing games, installing software, disabling security applications, and sharing passwords.
- ✔ **Internet access.** Topics covered include hacking and piracy (software and music); accessing pornographic, illegal, or harassing content; excessive bandwidth use (such as streaming audio); and restrictions on operating a personal business (such as eBay).
- ✔ **E-mail and Instant Messaging (IM).** Typical topics may include personal use of e-mail, forwarding spam or inappropriate jokes, encryption requirements, content restrictions, and confidentiality and privacy expectations.

Less common, but equally important, are AUPs for company-owned cell phones. Topics may include personal use, roaming and international calls, excessive use of pooled minutes, and restrictions on using a cell phone while driving (to potentially limit your company's liability in the event of an accident).

Teleworking and remote access

A successful teleworking program requires you to re-think the way you manage your staff, using objective standards that ensure that you achieve your business goals and measurable performance criteria. Productivity measured by time spent, rather than output, must be addressed — not only for teleworkers, but also for office workers.

Remote access policies include security requirements such as physical security for laptops, disk encryption, use of virtual private networks (VPN), and public WiFi network access.

Teleworking policies also need to outline common hours when employees are expected to be available, meeting times, and other work parameters.

An interesting paradox is that you may find it necessary to create policies that define when employees are expected *not* to be available, for example, while on vacation or in a parent-teacher conference. This helps prevent burnout because many teleworkers happily give more time to their employer in recognition of the time and money they save by working from home.

Personally-owned equipment

Policies should be created to address the use of personally-owned equipment such as a cell phone or desktop/laptop PC.

Although the issue of personally-owned cell phones has been somewhat lessened by decreasing device costs and the portability of cell phone numbers, your policy should address issues such as ownership of business contact information. You don't want an employee walking out your door and into your competitor's with all of your business contact information.

Similarly, your employees may prefer using their own computers or laptops, particularly if they are working from home. Possible issues to be addressed include using company-licensed software, anti-virus and firewall requirements, reimbursement for Internet access costs, and the ownership, confidentiality, and destruction or recovery (in the event of a termination) of company data that may be stored on a personal hard drive.

Moving On: “To Deployment and Beyond!”

Having developed a UC solution that will meet the needs, budget, and time requirements of your business, the implementation phase turns that blueprint into action.

Using a phased approach

Part of the beauty of a UC implementation is that it can be undertaken in incremental steps rather than in a single all-or-nothing cutover. Most UC deployments can be divided into phases that correspond to the cutover of individual locations or specific workgroups. A phased deployment is typically the best approach for businesses that want to implement new technology at a pace that is within the “comfort zone” of their individual users. It also allows businesses to plan their budget expenditures and make adjustments as needed.

Giving the “thumbs up”

Before proceeding with any key phase, the project manager must assess “go/no go” readiness, including the following:

- ✓ Ordering, receipt, configuration and testing of all new equipment
- ✓ Training of appropriate personnel, such as system administrators and end users

Ultimately, it is the “human factor” that remains one of the largest variables that determine whether or not a new technology solution is successfully adopted.

Maintaining your UC solution

After you’ve implemented your UC solution, you need to be sure that you have the right technical resources and processes to support your end users and maintain your UC solution.

Make sure you are ready for the questions that accompany the introduction of any new technology by having support resources available, either internally or externally. You should also ensure that your power users and key employees have received training.

You also need to establish the capabilities, either internally or externally, to perform other lifecycle functions, including upgrades, hardware and software maintenance, performance optimization, and configuration management.

Lastly, since UC capabilities will continue to evolve, ensure that the use of UC applications is periodically revisited and included as a recurring element in your business-planning process.



You need to work with a trusted solution provider or VAR throughout your UC project and implementation to help ensure your success.

Chapter 5

Ten Reasons to Implement Unified Communications

In This Chapter

- ▶ Increasing productivity, gaining competitive advantage, and accommodating growth
 - ▶ Reducing facilities, energy, and telecommunications costs
 - ▶ Mitigating risks, putting a smile on people's faces, and making the world a little greener
-

You already know the benefits UC could bring to your business, and you're likely ready to move forward with a UC and teleworking program. But, just in case you'd like to put it all in a nutshell, here are ten great reasons to incorporate teleworking and UC for your small business.

Increase Productivity

Small businesses usually have to do more with less — less people, smaller budgets, and fewer resources. UC provides the tools to empower your employees to work from just about anywhere and under any circumstances, allowing them to be more productive. When employees can communicate any time with each other, and with customers and vendors, their productivity can rise. And productivity enables other benefits for your business — more revenue, happier customers, more loyal employees, and lower costs. UC helps your business be more productive by enabling your people to communicate — wherever and whenever they're working.

Gain Competitive Advantage

Quick response and efficient execution are the bread and butter of small businesses. If you are seeking a greater advantage over your larger competitors or are trying to retain established accounts in an increasingly competitive environment, being able to effectively and efficiently communicate is critical. UC and teleworking can help you gain this advantage by enabling your employees to communicate more efficiently from virtually anywhere.

When customers can quickly and easily reach their sales or service reps, they're happier and more likely to stay with you (or switch *to* you). When your employees can talk with each other at a moment's notice, you'll be able to make more timely decisions, which can help you win new business. Being nimble is a key advantage for small businesses, and with UC you can build that advantage even more.

Accommodate Growth

Most small businesses envision themselves growing larger, serving more customers, and expanding their market share. UC offers capabilities that can make growth — and the associated growing pains — less painful. And with the productivity tools discussed earlier, it can help you grow your business by making your employees more efficient while minimizing costs.

Downsize Facilities, Not People

If a significant portion of your workforce is working from home with a UC solution, you may be able to delay or defer the costs of additional real estate. During challenging economic times, do you really want to sign a lease for larger facilities if you have any concerns about the sustainability of your growth?

If your real estate lease(s) are up for renewal within the next nine to eighteen months and you're looking at options, you should seriously consider UC and teleworking.

Reduce Operating Expenses

Businesses are under pressure to reduce costs; facility and overhead (energy and telecommunications) expenses are chief among these expenses. For a small business, these relative costs are greatly magnified.

UC and teleworking can significantly reduce electricity and travel costs for your business. If business can be conducted just as effectively (or even more effectively) remotely, you can reduce energy consumption in the office and travel time and expenses with teleconferencing. The Avaya IP Office solution, for example, includes a 64-party conference calling bridge, eliminating the need to purchase the capability from a third party. That can add up to significant monthly savings.

Reduce Risk

Providing the ability for employees to work from virtually any location (their home, for example) can help reduce your risk of exposure in case of emergencies, natural disasters, or other events (such as severe weather, health-related issues, and other adverse occurrences).

When such events occur, employees who are already accustomed to UC and teleworking can often continue working without missing a beat. Not being able to get into the office — due to severe weather or other emergencies — can quickly take a toll on a small business. There's something to be said for not putting all of your eggs in one basket.

Protect the Environment

Customers want to do business with “green” companies. Regardless of your beliefs about climate change or your politics, businesses cannot afford to be perceived as insensitive to environmental concerns. Implementing UC and teleworking can help reduce your business's energy consumption costs and your employees' commuting costs, both of which can significantly reduce carbon emissions in the environment.

Diversify Your Workforce

There are times when it becomes difficult to find qualified people to hire in the local area, or it simply makes more sense to hire someone who lives in a different area (and time zone). With UC you can expand the talent pool to help ensure you hire the right people for the job, no matter where they live.

Boost Employee Morale

A flexible working arrangement can be a key factor in employee morale. Enabling people to work from home on occasion, or even full-time, can enhance their quality of life in a number of ways. Some studies show that a flexible work schedule is more important to employees than higher salaries.

Helping employees balance their work and life commitments should be a concern for any business. Workplace stress and illness, coupled with the growing problem of presenteeism, reduces employee effectiveness and overall productivity.

Bring It All Together to Increase Profitability

All of the preceding points are great reasons to implement UC and teleworking in your small business. But the bottom line is that you want to improve your bottom line! Taken as a whole, the advantages of UC and teleworking described here can help you dramatically improve your top line (increasing revenues by attracting new business through greater customer responsiveness and service) and your bottom line (reducing costs and improving productivity to increase profitability).



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