



Making the Move to Unified Communications in Ten Simple Steps

Unified Communications and other collaboration tools can be powerful means to increasing productivity and engaging remote users. Finding this value, however, can be a challenge and there are many factors to be weighed when deciding whether or not to move existing IT infrastructure to support Unified Communications and collaboration. Read this E-Guide for a look at how enterprises are finding the value of Unified Communications and how to take advantage of collaboration in today's 21st century workplace.

Sponsored By:





SearchUnifiedCommunications.com E-Guide

Making the Move to Unified Communications in Ten Simple Steps

Table of Contents:

[What's the value of unified communications?](#)

[UC applications make SMBs competitive with heavy hitters](#)

[Organizing for unified communications](#)

[Resources from Dialcom](#)

What's the value of unified communications?

Gary Audin

Unified communications—everyone seems to see great value in its implementation, but how does the enterprise evaluate the move to unified communications (UC)? Since UC is sold on human productivity improvements, who within which parts of an organization will benefit? UC is of greatest value when both ends of the communication functions have access to the same features. One end will limit the productivity enhancements if it does not have access to UC.

In this tip, you will find a list of important questions that should be asked of you and your organization when you are considering a unified communications implementation. The entire process of creating a product or service—from a rough idea to delivery—involves many people, organizations and internal/external information, all of which will benefit from better communications. Collaboration, mobility and presence mechanisms will be important tools. The following seven phases are explored for the analysis of the value of UC in each.

Internal enterprise support

The internal operations of an enterprise have to be effective before that enterprise should offer any product or service. UC can make company executives more efficient and benefit internal organizations such as finance, human resources, facilities and IT. Collaboration, mobility and presence as used in UC will improve the enterprise efficiency, reduce the staff's stress levels and improve productivity.

- Can UC mobility provide seamless information for decision support?
- Will client access be improved with UC?
- There will always be business issues to resolve. Will UC reduce the time to issue/problem resolution?
- Executives need to collaborate on policy development and business direction. Will UC improve these processes?

Product or service development

The developers of a product or service will always be working with a time constraint. Competition will drive the schedule for the development.

- Will UC reduce the time to market? Developer collaboration that is fast and efficient will be the goal (whether working with internal staff, consultants or potential vendors) and will thereby accelerate the time to market.
- Development groups do not always have the expertise necessary to complete the development of a product or service. Does the UC function provide an effective method for locating and accessing the expertise required?
- Will UC enhance the ability of geographically scattered people and resources to work as a real-time team?

Marketing the product or service

Marketing needs to prepare a number of tools (advertising, brochures, press releases, meetings, etc.) to bring the product or service to the attention of the customers.

- Does UC benefit the exchange of information, schedules and tools with external resources such as the press, PR firms and potential first customers? Contact management and the associated linkages are important during the product or service introduction as is the continuing marketing effort after the release of the product or service.
- A marketing campaign will need continuous fast and effective communications. Can UC be used to keep the campaign on schedule and be useful in responding to market changes?
- Will UC help ensure that the time-to-market schedule is met? Collaboration and mobility will be the key values of UC during the marketing effort.

Producing the product or service

This phase will include external part delivery, service providers, packaging and shipping companies and other organizations that need to be coordinated—especially if just-in-time scheduling is the goal. Accurate communications, delivered in a timely manner in whatever form is most productive, are the key value of UC.

- Will the collaboration features of UC benefit the production process design?
- Will UC reduce the time for problem/issue resolution?
- Will UC be useful for identifying the resources needed to resolve a problem/issue?
- Once the production process has begun, how will UC help in the management of the process?
- Will UC enhance the ability of geographically scattered people and resources to work as a real-time team?

Selling the product or service

Increasing sales productivity and market penetration are the primary goals of the sales organization. Sales may be made directly through agents, retail stores or VARs. The different methods all have common needs—consistent and reliable product/service information and delivery.

- Can UC reduce the sales cycle time? Analysis has demonstrated that up to a 30% reduction in the sales cycle duration can be accomplished through the use of UC.
- Can UC reduce the telephone tag by providing and controlling the presence information and providing immediate alternate means of communications such as IM and email?
- Will a smaller sales staff be able to sell more product/service by employing UC?

Delivering the product or service

The delivery of a product/service is a logistics issue. Delivery issues will be similar to the issues encountered in the production environment.

- Will the collaboration features of UC benefit the delivery process design?
- Will UC reduce the time for delivery problem/issue resolution?
- Will UC be useful for identifying the resources needed to resolve a problem/issue?
- Once the delivery process has been implemented, how will UC help in the management of the process?
- Will UC enhance the ability of geographically scattered resources such as production facilities, warehouses and delivery service providers to work as a real-time team?

Customer service

Keeping the customer satisfied—even happy—should be the goal of any organization. This is not always the case, however, and bad customer service will always come back to haunt the negligent enterprise, causing the reduction of market share and profitability.

- Will UC provide rapid access to the correct enterprise resource to make the sale?
- Will UC provide rapid access to the correct enterprise resource to resolve an issue or problem?
- Can UC reduce the customer service time and thereby reduce the customer service staff size?
- Will UC provide alternative communications methods for a wide variety of customers to access?
- Will UC tools be able to give the service managers better visibility into their service operation?

Implementing unified communications may not address all of the questions and considerations. Demonstrating the value of UC will, at first, be less of a financial issue and more of a productivity improvement issue—and increased productivity eventually translates into financial benefits.

About the author: *Gary Audin has more than 40 years of computer, communications and security experience. He has planned, designed, specified, implemented and operated data, LAN and telephone networks. These have included local area, national and international networks, as well as VoIP and IP convergent networks, in the U.S., Canada, Europe, Australia and Asia.*

UC applications make SMBs competitive with heavy hitters

By Jessica L. Dempsey | SearchUnifiedCommunications.com

Celina Insurance, a small mutual property and casualty insurance company based in Celina, Ohio, is ranked highly among insurance heavyweights—an honor Celina's CIO Rob Shoenfelt attributes to the company's embrace of unified communications (UC).

Founded in 1914, Celina Insurance did business entirely on paper until Shoenfelt joined the company in 1998. He brought with him the conviction that technological innovation would make Celina competitive with larger and better-known insurance providers in the Midwest.

Shoenfelt started by deploying an email system in 1998. Rolling out email enabled Celina to dispose of 75 former dump terminals that had been used to house their garbage, mainly paper. Two years later, instant messaging (IM) was added.

Increasing employee productivity with IM

Although confident in his decision to deploy IM, Shoenfelt was concerned that the company's employees would resist the new technology, which would require them to learn an unfamiliar process. "Initially the employees' fear was that IM would interrupt their daily routine," Shoenfelt explained. Those fears were assuaged when the majority of the employees recognized how the application improved their productivity.

For example, when an underwriter receives a message from one of Celina's outside independent agents, he can click on a link that takes him directly to the same page as the outside agent, allowing instantaneous response and collaboration. Insurance is a time-critical business, and IM allows both underwriters and agents to get their work done quickly and accurately.

UC applications drive competitive advantage

Following the success of email and IM, Shoenfelt knew that Celina could use technology to its advantage. "We were competing against these huge entities and knew we needed to provide enhanced collaborative features to our underwriters and agents," he said.

The ability to embed instant chat into business processes leveraged presence awareness technology to improve customer service, as agents and underwriters were now able to get timely answers to their questions. The ease of doing business with Celina has led to what Shoenfelt describes as "electronic loyalty" with independent agents who appreciate the UC system's simple, time-saving attributes.

These UC applications, Shoenfelt added, make Celina look (and act) bigger than it really is. The company can now host webinars for employees, saving conference space and in-room equipment. The ability to e-train remote employees using videoconferencing and Web conferencing has been instrumental in developing increased learning

initiatives. The lengthy, wasteful paper manuals of yesteryear have been replaced with online webinars that lower costs and increase employee productivity.

Everyone within the insurance industry (and beyond) is moving to a paperless system of doing business, and in an industry where sharing of resources is commonplace, it is tough to get and maintain a solid technological advantage. "If you want to succeed," Shoenfelt said, "you must make it easy for agents to do business with you."

Celina has earned a reputation for its innovative approach to doing business, as evidenced by a call from another insurance company—some 20 times larger than Celina—that wanted to know how Celina deployed its instant messaging system.

Although small in size, Celina's willingness to embrace new technologies puts it ahead of much larger companies whose innovation process lags behind the smaller competitor.

Turnaround time accelerates, costs plummet

In five years, its headcount has decreased by 40%, allowing the company to enjoy its highest profits to date. Shoenfelt attributes this success to UC. Celina can write the same amount of business with about half as many people.

Another of Celina's expenses has decreased—phone calls. Phone usage eats up not only employee time but company money. Because phone calls are now largely unnecessary, thanks to IM and other communication applications, phone usage has decreased by 50%. Turnaround time on policy inquiries and other transactions has been reduced from weeks to days, allowing both underwriters and agents to do more, faster.

New corporate culture allows growth, stability

Celina Insurance is not a company that measures success solely on data and numbers, however. For employees to be effective, they need to feel that they are an integral part of the team. Celina wants everyone to be on a level playing field. With their old system in place, many employees felt disconnected from higher-ranking executives whose offices were far from the call center.

"This technology has broken down the previous barriers of a top-down mentality within the company," Shoenfelt said. "You do not see anyone's titles, you just communicate with people." From the CEO and CFO to the call center representative, from seasoned underwriters to recent college graduates, collaborative and presence technologies are all-inclusive.

This change in corporate culture has also allowed the company to attract new talent nationwide—a previously daunting task because Celina is located in a small town, with major cities at least an hour away. With the increasingly difficult task of not only attracting but retaining top talent, Shoenfelt says that Celina's expanding technological presence and open corporate culture is more likely to entice tech-savvy employees.

When asked about any potential downsides to Celina's UC implementation, Shoenfelt said that he sees none. Celina has a more relaxed corporate culture and increased profits, and the company can provide employees the option to telecommute. Why move to UC applications? "Why wouldn't you?" Shoenfelt replied.

Organizing for unified communications

Gary Audin

Unified communications—what is it and how will it benefit the enterprise? What are the IT and telecom organizations doing to successfully implement UC? Technology is a tool. UC is a new tool (or even a collection of tools, depending on how you implement it). Will the enterprise organization(s) be ready for this new set of tools and multiple system and product integration? UC requires even more organizational convergence than VoIP did. New vendors, like those with collaboration tools, will be involved.

Unified communications implementation is a cultural change, not just a new way of building a better communications environment. The rapid integration of what were separate technologies into a unified environment affects IT management and staff. Can you future-proof the IT organization? Modified IT organizations, cross training and knowledge transfer in multiple technologies have become mandatory.

The organization structure and staffing necessary for successful implementation is usually limited. Although existing organizational structures may have a common management point in the CIO, the staff is segregated by technology—they operate in silos. Data network personnel are generally unfamiliar with UC and collaboration technologies. They also have little knowledge of the servers and applications running on their data networks. Applications personnel have limited knowledge of data networks and need knowledge of the collaboration products they will be operating for UC. New applications will emerge that will be developed and installed. Mobile users add to the complexity and skills requirements. Those responsible for security must understand all of these technologies. These are the issues of organization readiness for UC deployment.

Managing these segregated groups presents a challenge. Management is not required to bridge the ignorance gap among these groups. Management must make the business decisions justifying and promoting the UC technologies. It is common that management is removed from the nuts and bolts of technology. They will have a difficult time adjusting to the major decisions and challenges that will occur with a UC environment, independent of whose UC definition is used.

Elizabeth Herrell, vice president at Forrester Research, has published documents dealing with the staffing issues related to UC and evaluating the business value of UC. She provided the following insights about migrating to UC:

- Some of UC functionality can be delivered when implementing IP telephony (IPT), but it is a good idea to implement IPT first.
- Conferencing over a data network will have to be well managed for the traffic. It will be difficult to predict the conferencing impact on the data network. The data network staff will have to monitor and control the traffic and possible abuses. For example, leaving a conference up when not in use so that the connection does not need to be established another time during the workday.
- A staffing issue will be the lack of UC knowledge with UC's conferencing, collaboration and presence capabilities. The IT staff should develop pilot installations to see how UC will be used in their enterprise.

- The IT staff will most likely have to deal with two or three vendors, not one, to implement UC. One may be a voice vendor, the second a collaboration vendor, and possibly an application vendor.
- The choice of these vendors will be as much a policy decision as a technical decision because the vendor relationship will have to last for many years.

I have produced a set of suggestions to help the IT organization implement UC successfully.

- Focus on business needs.
- Remember that UC is designed to increase user productivity.
- All staff members must appreciate and understand each technology.
- All staff members must talk the same language.
- Set expectations right at the beginning of the UC project.
- There must be one overall master of the UC project. Don't let one technology group lead. Select an independent project manager.
- Form a blended interdependent team early.
- Admit that the data network may not support the UC traffic or produce the necessary reliability.
- Use a formal systems acquisition process for the needs analysis, RFP preparation and vendor scoring methodology.
- Include testing and assessment in the project.
- Train, train, train the user.

Good technology itself is not enough for success. The IT organization can be ready or it can try to solve the implementation problems as they happen. Staff and organization readiness can avoid the nightmares. Remember how easy to implement IP telephony was going to be, according to the vendors a few years ago.

Resources from Dialcom



[Spontania's UC Solution](#)

[Spontania Data Sheet](#)

[DialCom Homepage](#)

About Dialcom

An innovator in unified collaboration, Dialcom delivers premise based, real-time video communication, collaboration and multimedia sharing capabilities over IP between any device, any network, and any user—seamlessly and securely. The most complete, flexible, and integrated system available, the Spontania collaboration software suite empowers users to spontaneously switch among collaboration methods, to suit the immediate circumstance within the session including IM, VoIP and/or teleconference, multi-party IP videoconference, interactive file sharing, and white-boarding. Dialcom's collaboration application automatically controls bandwidth and seamlessly integrates into the existing IT infrastructure—with a light footprint. More than 100 customers spanning a number of industries around the globe use the Spontania unified collaboration suite. Headquartered in Herndon, Virginia, Dialcom maintains offices in Madrid, Frankfurt, and Singapore and supported by a global network of partners in other regions. More information can be found at www.dialcom.com.