

CLOUD AGENT PROGRAM

The Workflow Process and FAQs



The Lead Workflow

Lead Qualification

Agents must ensure a lead is qualified and meets these requirements before submitting to ESI:

- > The prospect is interested in a cloud phone system.
- > The prospect plans to make a purchase decision within the next three months.
- > The prospect needs at least five seats.
- > The prospect must be on a month-to-month billing cycle, or their contract needs to expire within 120 days.

Discrepancies in lead qualification will be determined solely by ESI.

Information Discovery

Current Phone Usage

As part of the effort to help increase chances for a successful deal closure ESI highly recommends obtaining a copy of the prospect's last two months' phone bills (it must include their current fees for services, call history is not required).

Why is it important to collect this information?

- > ESI will use this information for a price analysis during deal closure.
- > It allows ESI to verify services.
- > It allows ESI to get the ball rolling on porting, ordering DID's, etc.

Network Assessment & Network Information

The Agent is required to gather some simple information that is crucial to the success of turning this prospect into a customer:

- > For each site, ESI will need to know the make and model of the router, modem, and switch.
- > You do not have to be technical to gather this information.

If necessary, you may need to visit the site and collect the information yourself.

Take pictures of the equipment if possible.

ESI requires this information as certain modems, routers and switches will not support Cloud services.

We may also identify specific modifications necessary to ensure the success.

- > Send this information to your Senior Cloud Specialist as quickly as possible.

You do not need to be on-site to start the network assessment:

- > A link is sent via email to the primary contact at the customer site to initiate the test. It includes:

Speed Test (a snapshot – in the moment).

A 48-hour test provides a good sample of network usage and demands and should be run during the week, not on a weekend.

- > Pass/Fail Status:

The assessment will be considered pass when all criteria are met. Your ESI network engineer can give you details on the criteria.

A conditional pass – this means all criteria are met except easy-to-fix QoS or SIP ALG Settings. ESI will advise you of the criteria to be fixed and how to address it.

If the assessment fails, ESI will make a recommendation to improve the network anomaly.

Waiver – you have the option to have your client sign a waiver and not conduct the assessment; however, your client will not be covered by the ESI 30-day guarantee.

Qualified Lead Submission

Once the lead is qualified, the Agent can submit it to ESI by visiting the Cloud Agent Portal and completing the form.

- > The lead will be assigned to a Senior Cloud Specialist who will contact you to discuss the opportunity.

ESI would like to extract as much information as possible about the opportunity before speaking with the prospect.

- > After this discussion takes place, ESI will schedule a sales demo with the prospect.

ESI strongly encourages the Agent to participate throughout the entire sales process, although ESI will take the lead.

Your participation will allow you to stay informed every step of the way. It is a powerful 1-2 punch to have you, our partner, as the local presence and ESI as the provider.

Setting Up a Live Demonstration

Now we are ready for a demo!

- > With all the proper information gathered, we are well-positioned to succeed in converting the prospect into a customer.
- > ESI will be able to customize a perfect solution that is right for the prospect.

- > We will demo the dashboard, all the key features, and the most appropriate phones for them.

- > After the demo, we will prepare a preliminary quote so they can understand the cost of the ESI solution.

With the phone bills that you previously provided we will have a cost of ownership analysis ready for review.

- > At this point, we will ask for their business!

Together We Can Win

It takes a little bit of upfront work, but when the process is followed, we have a great chance to turn the lead into a customer. This is highlighted by our 82% success rate closing qualified leads!

Lead and Sales Process

Q. Are there any requirements to stay active in the program?

A. You must register at least 3 new leads and have 1 new closed deal per year. You must also pay the \$150 annual program fee.

Q. After I submit a qualified lead do I have to do the product demo?

A. No, ESI will demonstrate the product to the prospect. If you would prefer to conduct product demos you can get certified and be given a demo environment to do them, still enjoying support from ESI to ensure the demo is successful.

Q. Can I email leads or provide info over the phone?

A. To maximize efficiency and accommodate the scope of information collected to effectively work with, and ultimately convert, a prospect, leads are entered through the Cloud Agent Portal.

Q. Do I have to develop my own marketing materials?

A. ESI will provide a wide variety of materials to be used throughout the sales process.

System Implementation

Q. How does the implementation process work?

A. A hand-off call is set up between sales and the implementation team to move from the sales process to the implementation process.

During this call, you will meet your project coordinator, and you both can get answers to any questions regarding the process.

Q. What happens on a configuration call?

A. Discuss how the system is to function: what features and applications will be deployed

This call is most productive when you, the Agent, are involved because you know the customer best.

This call will also define the implementation flow.

Q. What are the steps involved for activation?

A. We do require that you, the Agent, be on-site and will ask you to:

- > Plugin the phones.
- > Verify the configuration is correct.
- > Assist in determining any changes necessary to ensure the system is operating properly.

Q. What is the process for porting of numbers?

A. Existing carriers may resist and try to drag their feet. Losing carriers can be challenging to work with when they are when losing business.

Per the FCC, it can take up to 30 days. A Letter of Authorization (LOA) is required. An LOA is a legal document in which the executing party makes certain assertions to a service provider about their authorization to switch (port) services and telephone numbers from one provider to another. Traditionally, this would be a paper document requiring an actual signature.

- > New DID's do not require porting.
- > ESI can port most numbers.
- > Porting is completed the day after activation.



Q. Why is a 2-week project follow-up call scheduled with an ESI account coordinator?

A. After a few weeks, the customer typically requests some changes based on real-time usage, preventing minor issues from becoming big ones.

We want to get it right by being there to help you and the customer and confirm the system is working as expected.

Q. What happens after the 2-week follow-up call?

A. Once the site is certified, going forward the customer may call ESI technical support to request changes or report technical issues.

Post Implementation

Q. How is billing handled?

A. The first invoice is sent to the customer approximately one month after porting is completed.

Q. What happens with any charges from an initial partial month?

A. Prorated charges for the previous month are included on the first bill.

Please help set proper expectations for the customer and make sure they are aware of this information.

Q. Are there any potential Non-Recurring Charges?

A. Non-Recurring Charges (NRC) are billed when equipment ships. Examples of NRC charges are:

- > Porting charges
- > Routers
- > Equipment



About ESI

Since 1987 ESI has successfully provided telephone systems for businesses, including law firms and other professional service organizations.

ESI's systems are simple, intuitive, and uniquely integrated to provide customers with the highest support and service level. ESI provides a holistic engineered system that is built to be optimized around other ESI products.

ESI is unique because:

ESI delivers an end-to-end communication experience from the desk phone to the desktop or any mobile device, delivering a single user experience across all devices and leveraging the advanced features of ESI hardware.

How Do Law Firms and Companies Benefit from Cloud/VoIP?

With the changes in how technology is used, and the ongoing increase in remote work, phone systems must adapt like other technology and equipment to provide maximum flexibility and functionality. With so many new capabilities the phone system should be seen as part of a firm's tech stack, and no longer just as 'furniture'.

ESI's cloud solution functions as the end users' service provider:

- > Managing and maintaining all aspects of voice service.
- > Monitoring and managing hardware and software in the secure ESI data center.
- > Enabling businesses to offload their day-to-day voice management and maintenance.

Cloud-Based Unified Communications:

- > Allows companies to efficiently employ a remote workforce.
- > Delivers small businesses better options for their communications dollar, reducing IT infrastructure and operational expense.
- > Eases the technology burden involved with IT systems support and maintenance.





For questions regarding commissions, please call 855-585-2455

