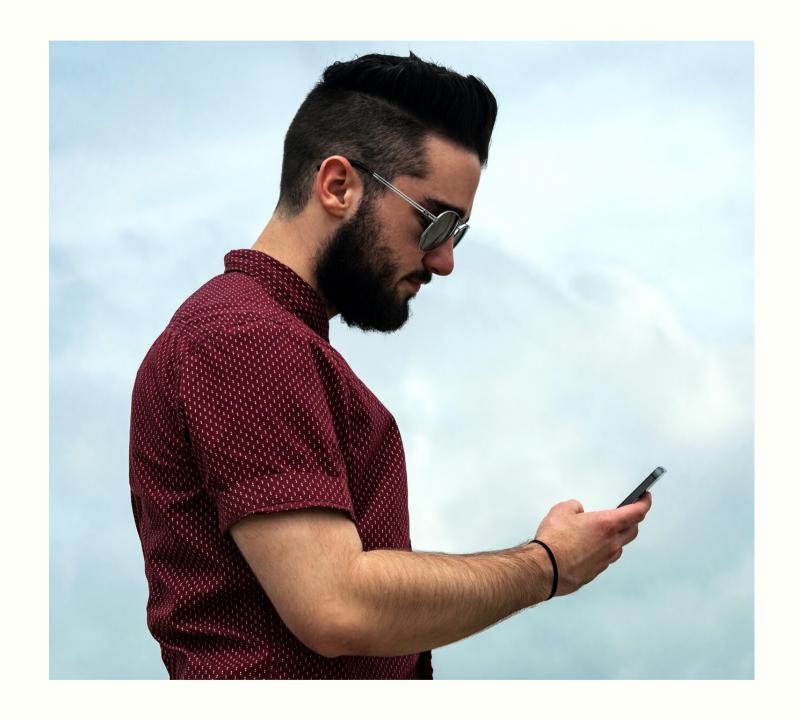# CLOUD PHONE SYSTEM CHECKLIST

# WHAT DO YOU NEED TO CONSIDER

**Before you consider a change in your current phone system or move to the cloud, consider this:**

- What do you need your phone system to do for you?
- How flexible does your phone system need to be?
- Which analytics and insights matter to you?
- Which cloud enhancements and applications do you need?
- How can collaboration tools improve team performance?

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# WHAT DO YOU NEED YOUR PHONE SYSTEM TO DO?

Understanding what you want your phone system to do is the first step. Ask yourself the following questions:

- How many offices do you have?
- Do you plan to open in an international location?
- Do you have employees who work remote?
- Would you prefer voice mail to text transcriptions?
- Do you need an auto-attendant?
- Do you need smart numbers for voice and fax?
- What is the expected installation timeline?
- Will your team require training?
- Will you require someone to project manage the installation?

# HOW FLEXIBLE DO YOU NEED YOUR PHONE SYSTEM TO BE?

Today's business communication systems offer maximum flexibility giving you the choice of how you want to own, manage and maintain your system. Public cloud, private cloud, hybrid, mobility and on-premise options open an entire scope of possibilities. Ask yourself the following questions to determine how flexible you need your phone system to be.

- Do you want to own or manage your phone system?
- Do you want to invest into an entirely cloud-based phone system?
- Do you need a hybrid version that enables you to keep some controls of your phone system within your internal team while accessing key cloud-only features?
- Do you need to managed and integrate your Contact Center into your phone system?
- Do you want to outsource your phone system including the hosting, management and support of your entire system?



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# WHAT TYPE OF BUSINESS ANALYTICS DO YOU NEED FROM YOUR PHONE SYSTEM?

Business phone analytics provide a robust suite of web-based tools that provide enterprise-level analytics that can be used to make highly informed business decisions. Analyze and manage your extension summary and call detail, call routing, agent performance and hold times from a customized dashboard view. Spend less time managing customer reps, with easy-to-understand reports and dashboards that show you how you're doing.
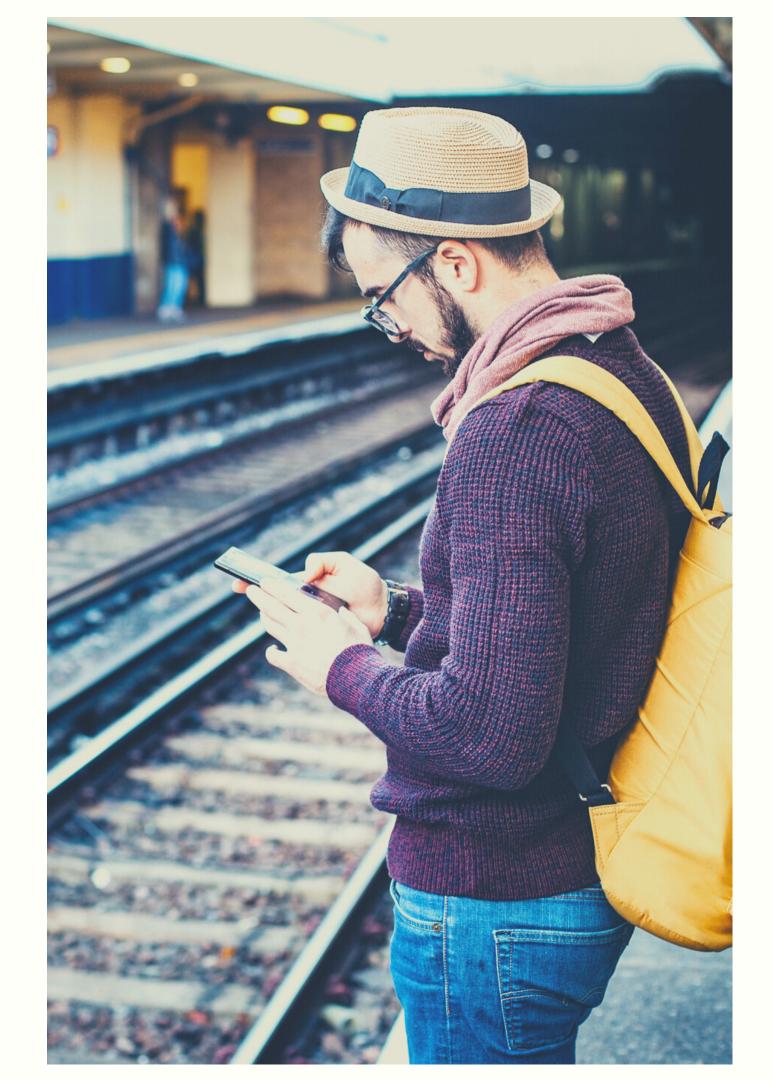
**Call Volume & Routing?**

**Contact Center Analytics?**

**Customer Satisfaction Metrics?**

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# HOW CAN COLLABORATION TOOLS IMPROVE TEAM PERFORMANCE?

Many small business employees work from home or remote locations. That makes collaboration more challenging - and more important. With cloud-based phone systems, you can collaborate the way that works best for you, including voice and video calling, instant messaging and web presentation from any device and any location.

## Ask yourself if any of the following tools could boost your productivity:

**Instant Messaging:** IM provides quick and instant communication between your team. This collaborative technology instantly connects employees in any location, in real time, securely, allowing them to communicate using almost any device.

**Video Conferencing:** People do business with people, and nothing bridges the distance gap like video. Digital imaging can help collaboration on important projects and allow your team to meet new clients face-to-face or deliver company-wide presentations.

**Desktop Sharing:** Share files, images and project notes in real time through desktop sharing - all connected to your communication system.

**SMS:** Quickly becoming the preferred method of communication for the younger workforce, SMS or texting provides instant, secure access to colleagues and customers. Take your customer service to the next level with SMS.

**File Sharing:** While more and more employees work from remote locations and time zones, file sharing allows teams to collaboratively continue to work regardless of timezone and geography. Secure file sharing through your communication system is now and integrated part of smart office logistics.

**Mobility:** Save a file, spin up an instant video conference or receive updates from any device. Security and communication functionality is integrated and provides seamless access.

# Is it time to explore your communication options?

You need to **invest** in technology and infrastructure that will grow with your organization. You must keep your data secure while providing the flexibility that new technologies & cloud communication features offer. While the need for human connection hasn't changed, the modes in which people communicate have changed dramatically over the last decade.

**Blue Fox Group** specializes in evaluating the business needs of mid-market and enterprise organizations. We act as consultants not technology re-sellers. We will help you work through the design and implementation issues that will help you bolster productivity. When you need answers to how to design the best technology solution to fit your communication and collaboration style, then consider a starting a conversation. No pressure; just real answers to better ways of doing business.

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START A CONVERSATION

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