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## A Guide To Deploying Communications Devices In The Contact Center:
## A Structured Approach Nets the Best Results

Commissioned by:

**Jabra®**

A Frost & Sullivan
Business Briefing

www.frost.com

January 2012

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## EXECUTIVE SUMMARY

Businesses invest in contact center infrastructure in order to improve customer satisfaction and achieve sustainable growth. Contact center managers and IT staff must carefully evaluate various communications solutions and end-user devices to ensure successful technology implementation.

End-user devices can have a significant impact on technology adoption among contact center agents and thus determine technology return on investment (ROI). However, as business communications devices and soft clients proliferate, contact centers find it increasingly challenging to make the right choices. Whether enhancing or replacing traditional communications devices, or deploying advanced solutions, decision-makers need to apply a structured approach to device selection and deployment.

Based on best practices, Frost & Sullivan recommends a four-phase approach to communications device implementation in a contact center environment, as follows:

- Assessment and Discovery
- Vendor and Product Selection
- Implementation and Change Management
- Measuring ROI and Follow-Up

**Assessment and Discovery** helps contact center managers and IT staff identify potential gaps between technology deployments and key stakeholder needs and objectives. The Assessment and Discovery process must focus on the three key tenets of successful technology implementation: people (agent needs and technology preferences), strategy (alignment of technology investments with strategic business goals) and operations (IT challenges and objectives). This phase should set the stage for the next phases with an implementation plan, budget, timelines and management structure.

The next three phases require a customized approach as they strongly depend on each individual business case. However, Frost & Sullivan recommends several steps and considerations in each phase that can help contact centers ensure successful implementations.

**Product Selection** must focus on aspects such as audio quality, reliability, functionality, interoperability, security, price, comfort, convenience and flexibility.

**Vendor Selection** considerations include depth and breadth of product portfolio, technology standards and openness, portfolio vision and roadmap, customer service, technical support and attention to customer needs, and financial stability.

The **Implementation and Change Management** phase must incorporate the following key considerations: downtime management, stepped implementation, training, ongoing user support, feedback and process adjustment, usage policies, and change management.
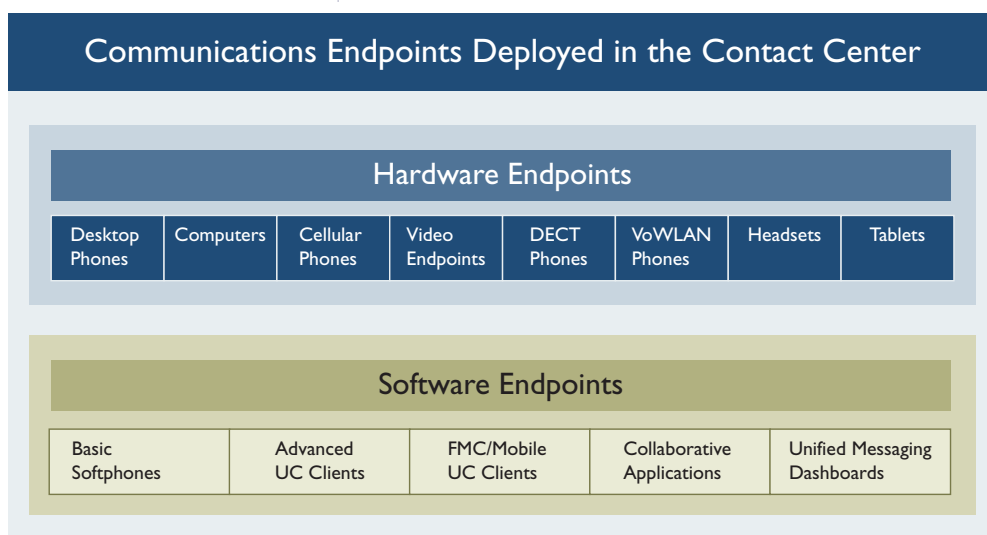
Once the contact center has deployed an appropriate mix of communications devices, it enters the final phase— **Measuring ROI and Follow-Up**, which includes two main elements: user satisfaction and technology utilization monitoring, and KPI tracking.

The four phases equip contact center managers, IT and telecom staff, C-level executives, and other decision-makers with a proven methodology for end-user device selection and implementation.

## INTRODUCTION

Businesses invest in contact center infrastructure in order to grow revenue, reduce operational costs, and improve customer satisfaction. Effective use of communications and collaboration technologies in the contact center is critical for business success. However, contact centers sometimes overlook the importance of certain elements, such as end-user devices that connect employees to applications and infrastructure. With continued technology advancements, end-user devices are becoming increasingly feature-rich and powerful, and can greatly improve agents' technology utilization and performance. Whether replacing or enhancing existing traditional devices, or deploying new, advanced technologies, contact centers must carefully evaluate their options and apply a structured approach to the device selection and implementation process.

Contact center managers and IT staff can choose from a broad range of communications devices and soft clients to deploy in a contact center environment.

| Communications Endpoints Deployed in the Contact Center | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Hardware Endpoints** | | | | | | | |
| Desktop Phones | Computers | Cellular Phones | Video Endpoints | DECT Phones | VoWLAN Phones | Headsets | Tablets |
| **Software Endpoints** | | | | | | | |
| Basic Softphones | | Advanced UC Clients | | FMC/Mobile UC Clients | | Collaborative Applications | Unified Messaging Dashboards |

This guide discusses best practices for deploying end-user communications devices in a contact center environment. It equips contact center managers, IT and telecom staff, C-level executives, and other decision-makers with a proven methodology for end-user device selection and implementation. Ultimately, this guide intends to enable contact centers to generate a greater return on technology investments.
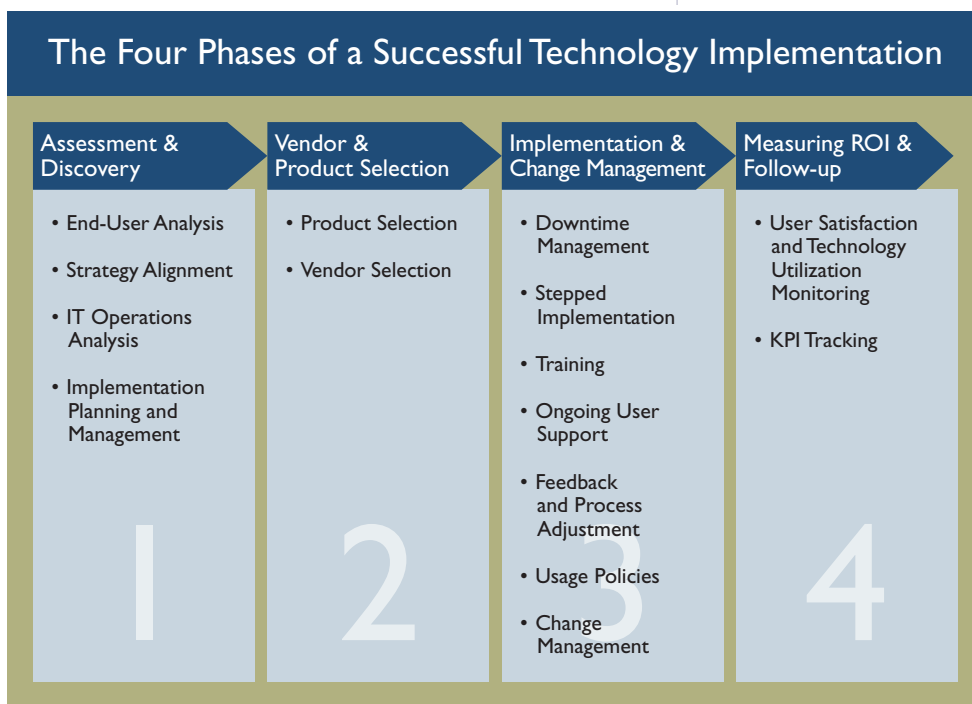
Contact center decision-makers need to take three tenets into consideration when evaluating and deploying communications devices:

- People
- Strategy
- Operations

Agent adoption and proper utilization of communications tools determines the contact center's ability to leverage technology for a competitive advantage. To deliver maximum benefits, technology implementations need to be closely aligned with the broader organization's business strategy and objectives. Further, communications investments must address specific operational challenges to ensure adequate IT support throughout the life cycle of the solution.
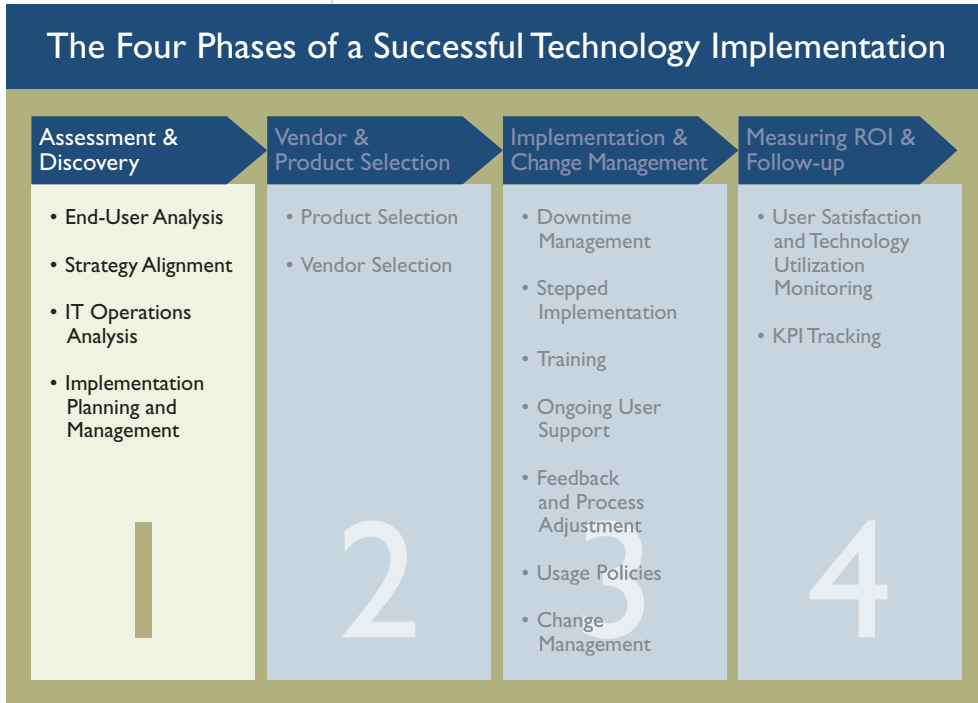
## A STRUCTURED APPROACH TO COMMUNICATIONS DEVICE IMPLEMENTATION

Frost & Sullivan best practices advise that successful implementation of communications devices in the contact center is comprised of four phases, as described in the chart below.

### The Four Phases of a Successful Technology Implementation

| Assessment & Discovery | Vendor & Product Selection | Implementation & Change Management | Measuring ROI & Follow-up |
|---|---|---|---|
| • End-User Analysis<br><br>• Strategy Alignment<br><br>• IT Operations Analysis<br><br>• Implementation Planning and Management | • Product Selection<br><br>• Vendor Selection | • Downtime Management<br><br>• Stepped Implementation<br><br>• Training<br><br>• Ongoing User Support<br><br>• Feedback and Process Adjustment<br><br>• Usage Policies<br><br>• Change Management | • User Satisfaction and Technology Utilization Monitoring<br><br>• KPI Tracking |
| 1 | 2 | 3 | 4 |

A proper Assessment and Discovery process can greatly enhance a contact center's ability to deploy the communications devices that most effectively address specific business objectives and end-user needs. The importance of the subsequent three phases— Vendor and Product Selection, Implementation and Change Management, and Measuring ROI and Follow-Up— should not be overlooked. However, these

phases require a much more customized approach for each individual business case. Therefore, comprehensive strategies for these phases can only be developed with specific business scenarios in mind.

## The Four Phases of a Successful Technology Implementation

| Assessment & Discovery | Vendor & Product Selection | Implementation & Change Management | Measuring ROI & Follow-up |
|---|---|---|---|
| • End-User Analysis<br><br>• Strategy Alignment<br><br>• IT Operations Analysis<br><br>• Implementation Planning and Management | • Product Selection<br><br>• Vendor Selection | • Downtime Management<br><br>• Stepped Implementation<br><br>• Training<br><br>• Ongoing User Support<br><br>• Feedback and Process Adjustment<br><br>• Usage Policies<br><br>• Change Management | • User Satisfaction and Technology Utilization Monitoring<br><br>• KPI Tracking |
| 1 | 2 | 3 | 4 |

## PHASE ONE: ASSESSMENT AND DISCOVERY

Contact center managers and IT staff need to conduct a thorough assessment and discovery process that focuses on end-user needs, business objectives and IT/contact center operational challenges. This process intends to identify gaps and opportunities in each of these areas in order to guide future technology investment decisions.

*End-User Analysis*

Communications devices greatly impact agent performance. Therefore, the assessment and discovery process should start with an in-depth analysis of end-user (agent) demographics and technology preferences. Agent device preferences and needs will vary by agent role/function within the contact center, technology acumen, age, and cultural background.

Contact center decision-makers need to take the following steps to determine end-user communications device requirements:

- Identify any notable differences in communications device requirements and preferences by user role and function (e.g., sales, billing, technical support, supervisors, etc.). Factors such as degree of mobility and the need to access distinct applications can determine demand for specific devices within various user groups.

- Identify the average age of the agent base, determine the trend (i.e., how the mix of different age groups is expected to evolve over time), and analyze device preferences by age group.

- Analyze agent geographic distribution and identify any key differences in terms of communications device adoption and usage based on cultural background.

- Determine whether agents are utilizing consumer devices for business purposes. Identify the types of consumer devices most extensively employed and determine if these devices provide any unique business value. Assess the challenges and benefits of supporting these consumer devices on the company network.

- Supplement the demographic profiling with direct user feedback. Solicit feedback by polling users about their needs and preferences with regard to communications devices. The polling exercise will help to determine user satisfaction with the communications devices currently deployed and uncover demands for new/different capabilities needed to better perform their business tasks.

Based on the obtained end-user analysis, managers and IT staff can determine the appropriate mix of devices for their contact center end-user base.

***Align Technology Investments with Company Objectives***

Technology investments must be tightly aligned with specific company objectives and business processes. Armed with the information obtained through the end-user analysis, contact center managers and IT staff need to work closely with C-level executives to determine how end-user devices can help further company goals and streamline business processes. C-level executives are commonly the final budget approvers, thus their involvement in the early stages of the decision-making process can help ensure that they are committed to the planned technology investment.

Contact center managers need to address the following specific issues:

- Determine the budget allocated to contact center technologies, including end-user devices. There needs to be a clear vision for budget allocation over the near and long terms in order to develop an appropriate end-user device implementation plan.

- Identify company priorities with regard to contact center technology implementation. Prioritizing goals for cost containment, revenue growth, and/or need for differentiation/unique competitive advantage can determine which communications device investments are the best fit.

- Determine whether higher management anticipates growth, down-sizing or stable employment for the foreseeable future. This factor can impact both the number and type of communications devices deployed.

- Share results from the end-user analysis with higher management to ensure a coordinated approach going forward.

### Identify IT Operational Challenges and Objectives

End-user and corporate goals are often poorly aligned with IT operational realities. Once IT staff and contact center management have properly identified agent needs and preferences and broader company objectives, they must consider specific IT challenges and objectives.

Therefore, contact center managers and IT staff need to explore the following issues:
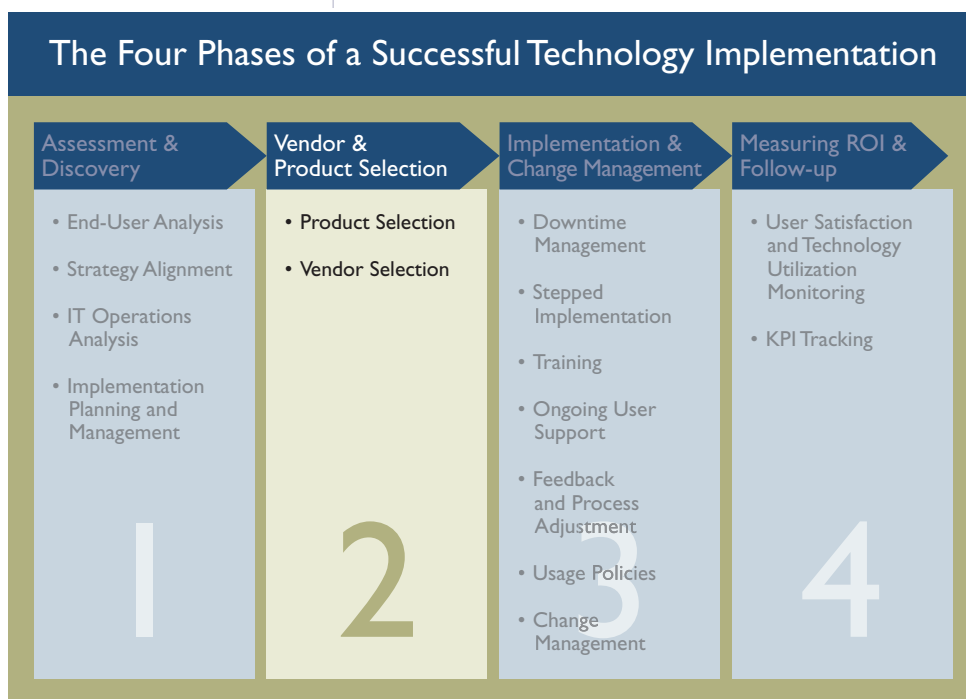
- Thoroughly examine and inventory existing communications solutions and devices. Assess their book value as well as their actual value to the organization. Actual value depends on the ability of existing devices to support end-user communications needs and broader corporate goals.

- Determine whether the IT department and the contact center are properly equipped to support an expanding array of communications devices, as well as any specific types of devices. This concerns both number of staff (for instance, an expanding array of communications devices may require additional service support) and relevant expertise (such as the ability to support soft clients or mobile devices).

- Assess the network's ability to support existing and planned communications devices. The growing number of communications devices and endpoints utilized by contact center agents can strain network resources. Therefore, IT needs to properly design the network in order to avoid downtime and poor audio quality.

- Identify potential security, reliability or governance issues arising from the addition of new types of devices or communications endpoints. For example, the growing use of consumer-owned mobile phones or PC soft clients may raise concerns.

- Ensure communications device investments are optimally aligned with the communications infrastructure roadmap for the foreseeable future. Plans for increasingly software-based communications may envision eventual migration from desktop phones to soft clients. However, a gradual transition may be more feasible than a rip-and-replace approach in order to protect unamortized investments in legacy infrastructure and devices.

*Plan and Manage the Implementation Process*

At the end of the Assessment and Discovery phase, IT staff and contact center managers must take the following steps to ensure a successful communications device implementation project:

- Prepare a preliminary investment plan, clearly identifying how the new communications device mix addresses the three key tenets: end-user needs, company strategy and objectives, and IT operational priorities.

- Align the stakeholders and ensure agreement on the priority elements of the investment plan.

- Determine how the implementation will be managed. Identify and appoint project leaders and/or a project committee and assign their specific roles.

- Map and set deadlines for each phase of the implementation.

- Determine key performance indicators (KPIs) to be accomplished through the technology implementation (e.g., enhanced agent productivity, reduced operational costs, improved customer satisfaction, etc.).

## The Four Phases of a Successful Technology Implementation

| Assessment & Discovery | Vendor & Product Selection | Implementation & Change Management | Measuring ROI & Follow-up |
|---|---|---|---|
| • End-User Analysis | • Product Selection | • Downtime Management | • User Satisfaction and Technology Utilization Monitoring |
| • Strategy Alignment | • Vendor Selection | • Stepped Implementation | • KPI Tracking |
| • IT Operations Analysis | | • Training | |
| • Implementation Planning and Management | | • Ongoing User Support | |
| | | • Feedback and Process Adjustment | |
| | | • Usage Policies | |
| 1 | 2 | • Change Management  3 | 4 |

## PHASE TWO: VENDOR AND PRODUCT SELECTION

Vendor and product selection can be based on multiple factors, including the assessment and discovery results, existing vendor and channel partner relationships, and actual vendor offerings at the time of communications device implementation.

### Product Selection Criteria

Although each scenario differs, the following represent key product selection criteria that must be observed in most communications device implementations:

**Audio quality:** Audio quality is of paramount importance in contact center operations. However, audio quality varies significantly among different communications endpoint types such as desktop phones, mobile devices, soft clients, and headsets. A combination of devices may be required to achieve superior audio quality (for instance, headsets can greatly improve the audio quality of soft clients, as well as desktop phones).

**Reliability:** Certain communications devices, such as desktop phones, have been designed specifically for voice communications and therefore offer the highest reliability. Other communications devices (e.g., mobile phones) may have limited in-building coverage; yet, others (e.g., soft clients) rely on PCs and laptops that were originally designed for data-centric productivity applications and, therefore, may not be optimal for voice communications.

**Functionality:** End-user requirements may vary with regard to communications device functionality. A simple desktop phone coupled with a professional headset may be sufficient for most agents. Some users may, however, require integration with software applications such as customer relationship management (CRM) or multi-media conferencing, which may indicate the need for soft clients and/or more sophisticated desktop phones. Similarly, mobile users may demand endpoints such as voice over wireless local access network (VoWLAN) phones, digital enhanced cordless telecommunications (DECT) handsets, cellular phones, or cordless headsets.

**Interoperability:** As most contact centers deploy multi-vendor communication environments, it is important to ensure that the various solution elements are interoperable. Communications devices need to integrate with call control platforms as well as with other communications applications. For example, third-party soft clients need to interoperate with desktop phones, whereas headsets (typically from a different vendor) need to integrate with desktop phones, soft clients and/or mobile devices. Trials and pre-qualification tests can help contact centers ensure all software and hardware elements of the communications solution work together seamlessly. Vendor participation is recommended at this stage to address potential interoperability challenges and avoid downtime, unanticipated costs, and user frustration once the implementation is complete.

**Security:** Security is often handled on the network level; therefore, communications devices properly integrated with the corporate network are typically as secure as the network itself. However, the use of consumer endpoints (typically mobile phones, but occasionally also consumer soft clients such as Skype) for business purposes may raise security concerns. Contact center managers and other decision-makers need to consider security issues and develop policies concerning consumer devices and applications in the contact center.

**Price:** Price is always a key factor in communications device procurement, particularly as contact centers seek to lower costs and improve margins. However, price alone should not be a determining factor; rather, the price-value ratio of the various devices can help contact center managers design the most appropriate device mix. As price is highly correlated with device functionality and quality,

investment decisions should be based primarily on end-user needs, with price determining the final choice among devices with similar features and capabilities.

**Flexibility, Convenience and Comfort:** Agents are increasingly concerned about the flexibility, convenience and comfort provided by their devices. In a contact center environment, headsets enable multi-tasking, mobility, improved ergonomics, noise cancellation, and even multi-device integration. Therefore, regardless of the specific communications devices deployed in a contact center, headsets can be added to the mix in order to improve agent flexibility, convenience and comfort, and also agent performance.

The above considerations can help contact center managers select the types of devices that meet their specific requirements. Testing, trials and pilots, product specifications, and customer testimonials can help them select the actual brands and the respective vendors that provide the best combination of functionality, price and other capabilities.

*Vendor Selection Criteria*

Product selection may be supplemented by vendor analysis when the contact center is looking for a long-term partnership. Key criteria for selecting a communications device vendor include the following:

**Depth and Breadth of Product Portfolio:** It is both convenient and economical to deploy a complete set of communications solutions and devices from the same vendor. A vendor with a broad portfolio, including a variety of end-user devices, can help the contact center deploy a tightly integrated communications environment with native interoperability and a common evolution roadmap for all solution elements. Furthermore, when purchasing a more comprehensive package of communications solutions from a single vendor, contact centers can expect a more significant discount on list prices. Finally, one-stop shopping for communications solutions helps contact centers reduce overhead related to vendor management and ongoing technology procurement and support.

**Technology Standards and Openness:** In certain instances, it may be more beneficial (in terms of best-of-breed functionality or better price points) to deploy communications solutions and devices from multiple vendors. In such instances, it is critical to ensure that the vendors adhere to open standards and support interoperability with related products and technologies. Furthermore, the communications device vendors need to be certified to support other elements of the communications solution (for example, a headset vendor should be able to support the various desktop phones and soft clients deployed within the customer organization). This can help contact centers guarantee tighter integration of the various elements within the multi-vendor environment, resulting in improved functionality and lower infrastructure implementation and management costs.
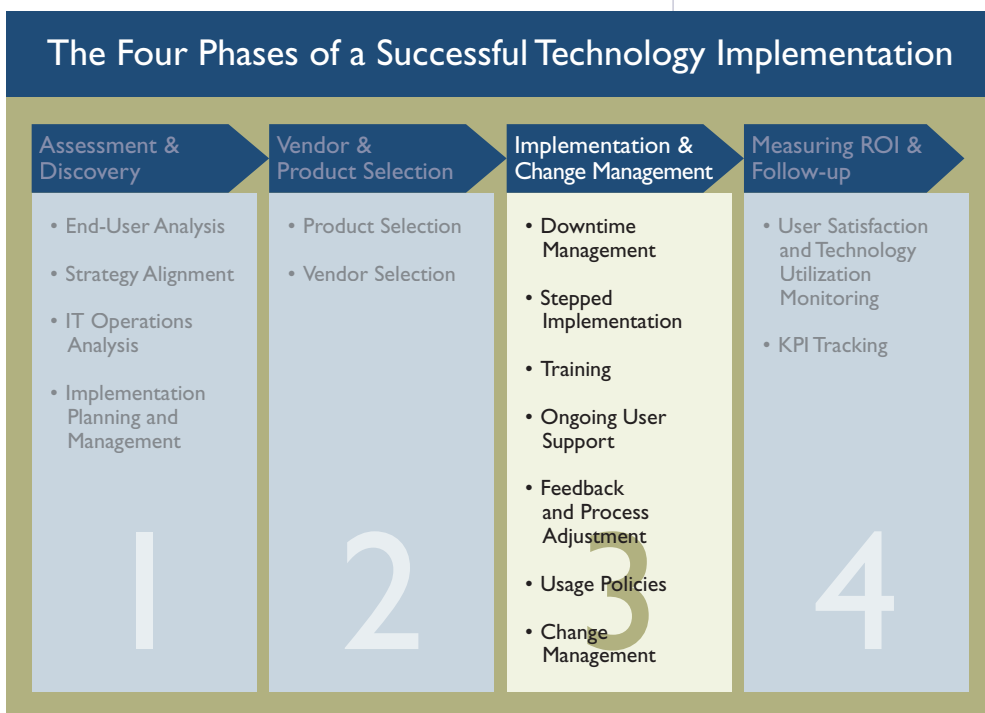
**Portfolio Vision and Roadmap:** It is critical to ensure that a vendor's portfolio vision and roadmap are aligned with the contact center's strategic objectives and technology investment plans. Communications technologies are evolving rapidly.

Decision-makers need vendor support in developing a migration path that protects their ongoing investments and allows economical, non-disruptive infrastructure evolution.

**Customer Service, Technical Support and Attention to Customer Needs:** As communications solutions and devices become increasingly complex, contact centers must select vendors that provide extensive implementation assistance and ongoing technology management. Shorter technology life cycles, more frequent upgrades, as well as the need for customization and continued integrations with other technologies compel contact centers to require a greater commitment from their vendor partners. Customer references and personal experiences throughout the proposal and trial stages will help contact center decision-makers select partners that would best cater to their present as well as future needs.

**Financial Stability:** Tough economy and growing competition can negatively impact the financial viability of communications technology vendors. Contact centers looking for a long-term partnership should assess vendors' financial status and corporate stability before making a commitment.

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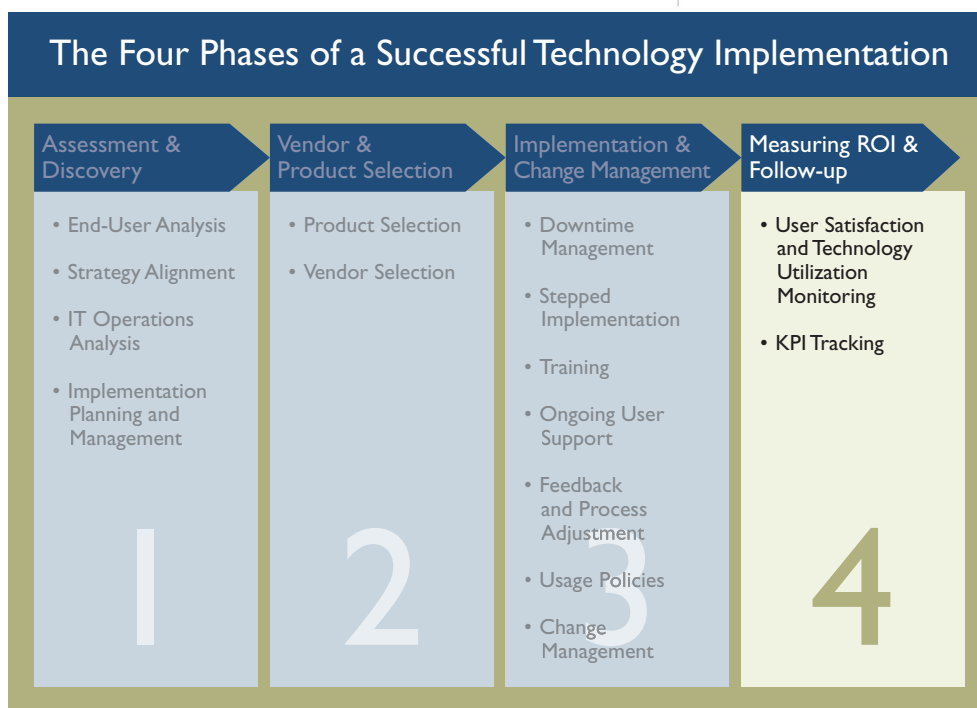### PHASE THREE: IMPLEMENTATION AND CHANGE MANAGEMENT

Communications device implementation is a complex process that requires a structured and highly customized approach. The following key issues will need to be addressed in order to ensure success:

- **Minimize Downtime:** New technology implementation should not be

disruptive to key business processes. Communications are mission-critical in a contact center environment— downtime should be minimized when replacing communications devices or adding new ones to the existing tool set.

- **Implement Gradually by User Groups/Functions:** When new communications devices are introduced in the contact center, a gradual implementation can help tackle potential challenges before they impact a large user base. Contact centers should first deploy new devices to the users that most need or are likely to be most receptive to them. For example, wireless headsets can first be tested by supervisors or a select group of tech-support staff.

- **Provide Adequate Training:** Communications devices are becoming increasingly complex and require more training to ensure proper utilization. Gradually introducing new devices to different user groups and incorporating feedback from these early adopters can help fine-tune the training process.

- **Provide User Manuals and Other Self-Help Materials:** As communications devices become more diverse and sophisticated, contact centers should require vendors to provide end-user manuals and other self-help collateral. Such resources can help end users deal with simple technical challenges without the delay, cost, and hassle of asking IT to troubleshoot many basic matters related to communications devices. Furthermore, such manuals can let agents easily explore additional functionality when they need it.

- **Encourage Feedback and Adjust Implementation Accordingly:** Throughout the implementation process, contact center managers and IT staff must solicit user feedback about the functionality and usability of the new communications devices. Early adopters can help decision-makers adjust the implementation and training processes as well as influence changes to the originally planned types and ratio of devices deployed.

- **Implement Usage Policies while Allowing Flexibility:** It is critical to put certain usage policies in place, particularly if contact center staff is utilizing a growing variety of devices. Such policies are more critical with consumer devices supported on the company network (such as mobile phones) or more sophisticated devices (such as videoconferencing endpoints) that may raise security and/or cost concerns. However, contact centers must allow users a certain degree of flexibility when comfort or convenience, and therefore performance, may be at stake.

- **Change Management:** Contact centers must ensure that business processes and key performance indicators (KPIs) are synchronized with new communications tools and devices. As communications devices proliferate, contact centers need to adjust the way calls are logged, monitored and analyzed to account for all the possible devices that an agent may be utilizing to conduct business. Similarly, some contact center applications may need to be upgraded, replaced or customized in order to help leverage the new devices for greater

benefits. For example, mobile access to some applications may need to be enabled to ensure that users are as productive on the move as they are at their desks.

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| 1 | 2 | 3 | 4 |

### PHASE FOUR: MEASURING ROI AND FOLLOW-UP

Technology value assessment should not be limited to the implementation stage. Contact centers investing in new communications devices need to continually measure user satisfaction as well as other KPIs to determine whether they should continue on the same path or adjust their strategy in order to improve their ROI. Due to constant technology evolution and shifting user demands, contact centers may find that a certain technology investment will have a shorter life cycle than originally anticipated. Communications devices are evolving even more rapidly than other technologies, thereby requiring a more frequent re-assessment.

Contact centers should take the following steps to ensure continued success:

- **Monitor and Measure User Satisfaction and Technology Utilization:** Contact centers need to solicit frequent feedback from end users on their usage of and satisfaction with specific communications devices. Formal surveys and various analytical tools can provide helpful statistics. However, those should be supplemented by informal interviews with representatives of key user groups to obtain additional details and more sensitive information.

- **Track and Compare KPIs:** If technology investments are properly aligned

with user needs and company objectives, they will deliver tangible results. In a contact center environment, those may include (but are not limited to): a larger number of customer interactions per day, shorter hold times, more deals closed per call, improved customer satisfaction, higher customer retention rates, increased agent job satisfaction, reduced agent turnover, fewer agent sick days, and so on. Although it may be difficult to correlate these metrics with communications device investments, a notable improvement would indicate that the communications infrastructure (including end-user devices) is adequately supporting the business.

## PITFALLS TO AVOID

**Status Quo Just Works:** Consider evolving customer and agent needs when making investment decisions. Solutions and devices that worked well in the past may not be as effective in the future.

**New Technologies Deliver the Greatest Benefits:** Do not rush to deploy advanced technologies just because others are doing so. Evaluate properly their benefits to your users and organization.

**One Size Fits All:** Do not assume that the same tools are suitable for all agents. Analyze your user base and deploy the right mix for your contact center.

**Time is Money:** Do not rush. Spend the time to properly complete each stage in the process.

**A Quick ROI is Best:** Consider long-term benefits when deploying communications devices. The long-term total cost of ownership (TCO) of your communications infrastructure and devices is just as important as short-term ROI.

## CONCLUSION

The proliferation and increasing complexity of communications devices require a structured approach to evaluating, implementing and managing communications device investments in the contact center. Contact center managers and IT staff can achieve best results by focusing on the three key tenets of people, strategy and operations, and by methodically following the recommended steps in the four phases of the implementation process. Frost & Sullivan recommends that decision-makers use a flowchart to track their progress with the implementation process.

**Phase I:**
Assessment and Discovery

**Phase II:**
Vendor and Product Selection

**Phase III:**
Implementation and Change Management

**Phase IV:**
Measure & Follow-Up

| | | Phases and Steps | Status (✓ when complete) |
|---|---|---|---|
| Phase I | End-User Analysis | Identify differences by user role and function. | |
| | | Identify differences by age. | |
| | | Analyze agent geographic distribution and cultural background. | |
| | | Identify consumer devices most widely used and determine their value to the business. | |
| | | Solicit user feedback on device preferences. | |
| | Strategy Alignment | Determine budget allocated to contact center technologies. | |
| | | Identify company priorities with regard to contact center technology. | |
| | | Determine higher management vision for business expansion or contraction. | |
| | | Share results from the end-user analysis. | |
| | IT Operations Analysis | Examine and inventory existing devices. Assess their book value and actual value. | |
| | | Determine whether IT and the contact center are properly equipped to support all types of devices. | |
| | | Assess the network's ability to support existing and planned devices. | |
| | | Identify potential security, reliability or governance issues. | |
| | | Ensure communications device investments are aligned with the infrastructure roadmap for the future. | |
| | Implementation Planning and Management | Prepare a preliminary investment plan. | |
| | | Align the stakeholders and ensure agreement on priorities. | |
| | | Appoint project leaders and/or project committee. | |
| | | Map and set deadlines for each phase. | |
| | | Determine key performance indicators to monitor. | |
| Phase II | Product Selection Criteria | Audio quality | |
| | | Reliability | |
| | | Functionality | |
| | | Interoperability | |
| | | Security | |
| | | Price | |
| | | Flexibility, convenience and comfort | |
| | Vendor Selection Criteria | Depth and breadth of product portfolio | |
| | | Technology standards and openness | |
| | | Portfolio vision and roadmap | |
| | | Customer service, technical support and attention to customer needs. | |
| | | Financial stability | |
| Phase III | Implementation | Manage downtime | |
| | | Implement gradually by user groups/functions. | |
| | | Provide adequate training. | |
| | | Provide user manuals and other self-help materials. | |
| | | Encourage feedback and adjust implementation accordingly. | |
| | | Implement usage policies while allowing flexibiliy. | |
| | Change Management | Synchronize business processes and KPIs with new communications devices and tools. | |
| IV | Ongoing Evaluation | Monitor and measure user satisfaction and technology utilization. | |
| | | Track and compare KPIs. | |

## ABOUT FROST & SULLIVAN

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