Evaluation Guide: How to Select a Hosted Communications Solution and Partner

Introduction

If you are considering alternatives to an on-premises communications system, you need to thoroughly understand the issues and options. Since anyone with a server and an Internet connection can become a cloud vendor, how do you know what to ask, or who to believe? As the old telephony solutions have evolved into multi-modal collaboration platforms, it is critical that new questions are asked of both the products and the partners. The following is a three-step process, or evaluation guide, you can use to cut through the hype and make an informed decision:

1. Define your requirements
2. Evaluate the cloud solution
3. Select a cloud partner

For the purposes of this discussion, the following definitions apply:

- Hosted – Hardware and software to run the enterprise communications application(s) located at a vendor's data center.
- Cloud communications – Internet-based voice and data communications where telecommunications applications are hosted by a third party outside of the organization using them and accessed over the public Internet.
- Managed service – A vendor who provides services such as monitoring, troubleshooting, and operational tasks for the hardware and software it is hosting.
- Partner – A vendor that has a relationship with a manufacturer to sell and support its products; it owns the relationship with the customer.
- Manufacturer – Vendor that designs, builds, sells, and supports software and hardware solutions; usually does not sell directly but instead uses an authorized partner.

How to Select a Hosted Communications Solution and Partner

Define Your Requirements

Before you start evaluating the possibilities, it is important to consider the true needs of the organization. It is not helpful to simply list every feature ever developed and using a pass/fail approach to pick a system. A better approach is to conduct a self-evaluation and identify how you want to use both the old communications tools and the new capabilities, such as mobile device integration, desktop video, instant messaging, and other software-based tools. For unusual requirements or special needs, a use case approach to what you want to accomplish will provide a better evaluation base. It also gives those partners with the best-fitting solutions a chance to show how they are different from the average offering through a customized match to your unique requirements.

As you review the rest of this evaluation guide, continue to ask yourself, “What is most important for my organization?”, or “How does this apply to us?” These questions will help you focus your vendor questions and the subsequent comparisons on what matters to you. Remember, if you are not specific, you may find that many vendors will use every means possible to avoid admitting that they don’t measure up or that a feature performs in a different manner than what is expected.

One other highly important element to consider is to collectively create a detailed scope of work that covers exactly what you expect and need and ensure that associated costs are known in advance. Be prepared. Professional services can be expensive, but avoid the temptation to cut necessary costs because it can easily undermine the success of the intended solution. Many of the current hosted or cloud partners run lean organizations and cannot provide a full implementation team, including engineering, training, project management, carrier coordination, and post-installation support. As part of the implementation work plan, make sure that staff assignments and workload commitments are clearly identified. Be sure to also document what is expected of your team.

Evaluate the Hosted or Cloud Solution

Solution Design Issues

A preliminary step is to understand what the solution possibilities are and how they differ. A pure cloud solution is generally described as 100 percent public Internet-based with limited options on how it can be deployed. But many hosted solutions are not limited to using the best-effort-only public Internet and include private line networking to ensure call quality. Additionally, many of the pure cloud solutions use a shared platform, similar to a multi-tenant services setup, with all customers running off a common set of servers. This may work well for some services, but it may limit individualized configuration-based choices for the core telephony applications. By contrast, a hosted arrangement provides the end-user organization a dedicated instance of the solution. This hosted or dedicated instance provides the benefits of a premises-based system without the disadvantages. It allows more flexibility, improved security, reduced risk, and better customization possibilities while typically offering a more complete set of features.

The first building block is the home of the solution core—the data center. One of the main advantages of using a hosted solution instead of a premises solution should be an upgrade in the system environment and outsourcing the supply and management of this critical core infrastructure. A quality data center will have a hardened environment with redundant power sources backed up with local generators, redundant carrier access, overbuilt

HVAC, etc. This can be a source of significant savings over the cost of self-provisioning and maintaining an equally well-designed internal data center. However, it is important to verify the quality of the proposed data center, especially since even a large data center has experienced (highly public) service outages. It is important to seek providers that can guarantee availability and reliability; such resiliency usually requires business continuity designs. Large or sophisticated enterprises may need to seek a partner with multiple geographically separate data centers for the most appropriate solutions to support business continuity. These partners can also help to optimize network traffic between the core services and the external services, which can be critical with bandwidth-intensive solutions such as video.

Architecture Review

The review process then extends into an exploration of the overall architecture of the solution. It starts with a robust and scalable infrastructure platform based on reliable components, but it extends into an exploration of the possible points of failure and the impact on your operations.

1. Integrated Solution
   Is the core solution an integrated offering backed by a major manufacturer's product line with good support services? This is important because telecommunications is in a state of constant change and the product that the solution is based upon must be continuously updated, improved, and enhanced. Also, no matter how good the selling partner is, it needs advanced support from the manufacturer's experts and developers.
2. Modified Open-source Software
   Avoid solutions based on systems that have little history in the market, are based on modified open-source software, or use a customized package of multiple suppliers to create a full suite. These vendors may be creating better margins for themselves but the problems that are created will become yours.
3. Business Continuity
   Are critical components redundant in an active mode that provides true business continuity (no interruption), or do certain failures require a restart, re-registration, database load, etc.? This same set of questions extends to any geographically separate backup sites. Are they simply duplicate elements, hot-standby (which needs to be defined for each vendor), or will a failover maintain the entire operation without users and callers being able to notice? What happens to calls in progress, calls in queue, etc.? What are the survivable options if the link(s) to the carrier fails?
4. Service Uptime
   What are the documented service uptime stats? Ask for details on the root cause of any service interruptions over the past two years. This applies to either a dedicated or owned data center maintained by the offering partner, or for a third-party data center where the service provider is a tenant.
5. Integration with Other Applications
   If the communications solution needs to integrate with other applications such as CRM, then external communications architecture needs to be reviewed. In some cases, this will involve a cloud-to-cloud link if the other application is also hosted, or it may be a cloud-to-premises link that must be designed. In either case, this will involve a review of both the network link and the integration package.

How to Select a Hosted Communications Solution and Partner

The best solutions can also offer premises components where it makes sense, or even the ability to replicate a solution as either on-premises or hosted (because they are based on the same platform and software). This can include the interface routers at your site to ensure high-quality delivery of the communications and collaboration services to the firm's data network, and on-site gateways to implement localized carrier lines when preferred (see the next section). However, the interconnecting equipment, such as routers and gateways for local carrier circuits, should be on backup power and designed for business continuity.

If a customer has implemented a single customer-care application in the cloud (CRM, for example), then a cloud-to-premises link and integration is necessary. If all customer care applications are moved to the cloud, including the core contact center communications functions, then integration between the multiple clouds is required and, in most cases, cloud-to-premises links will still be necessary to integrate with legacy systems or data until they are fully retired.

Network Services and Dial-Tone

The portion of the solution that used to be called carrier services is a critical element of a hosted solution, and it requires additional attention that does not apply to a premises-based solution. Fortunately, access to the public switched telephone network (PSTN dial-tone) can be bundled into the proposed price or provided through gateways at the local premises. Either way, these choices will help a distributed organization save significant amounts on telephone charges. There are many parts to the network services investigation process:

1. Is the interconnection from the partner data center to the client site(s) provided over a deterministic network with assured call quality (such as point-to-point circuits or MPLS)? Or is the only option a standard Internet link (which is not preferred)?
2. Which carriers are available for the network link, and does it require a separate contract with the carrier? Will the hosted partner allow you to use your existing WAN service provider network?
3. For mobile staff and small sites, are Internet-based VPN options available to deliver telephony and collaboration services?
4. Do the carriers available at the data center have physically separate redundant paths for the local loop?
5. How is call quality ensured (including QoS options and VLANs)? Explore how each partner and carrier configures and supports QoS to ensure real-time communications are prioritized. Not every carrier supports a full range of application markings. Often, the local gateway option (see below) is an excellent way to provide quality-controlled voice services.
6. What is the geographic coverage available from the carrier? This can affect both how services are provided and at what costs. Furthermore, some carriers will charge long distance rates based on the location of the data center, and some will use the customer's originating point (using the calling party telephone number) to determine the free-call area. Be aware that some countries have strict rules about where and how voice and data traffic is routed in and out of the country.

How to Select a Hosted Communications Solution and Partner

One option to consider carefully is the advantages and costs of keeping PSTN access directly connected to onsite gateways. With the correct core solution, this can provide a different layer of survivability in the event of a data center or WAN outage. For normal operations, the signaling packets are transmitted to the hosted core, but it keeps real-time media (usually voice packets) localized to your organization's network. This provides the benefits of secure call flow, on-site call recording options, and reduced WAN requirements. However, this may cost more, and some of the enhanced call routing features may not be available.

Because the network services design is critical to meeting your business continuity needs, it must be properly matched to the capabilities of the data center, the core applications, and the disaster recovery plans of your organization.

Security

With any hosted solution, it is natural that questions arise about security issues. The hosted industry has clear awareness of these concerns and capable partners have addressed them. Even though some hosted data centers are more secure than most premises installations, it is still important to ask many questions about end-to-end security. With cloud solutions, various components are shared among customers, therefore, security needs to extend inside of the cloud, and not just at the perimeter. Questions need to be asked about the partition of customer data, and application level access. In addition, security impacts many layers of the solution, and you want to find a partner that has addressed the full set of issues.

1. How is physical access to the site controlled?
2. What are the written policies, procedures, and methods for ensuring security?
3. Are they compliant with applicable rules and regulations (such as PCI, HIPPA, etc.)?
4. Do they offer a written Service Level Agreement (SLA) that covers security concerns, risks, and liability coverage?
5. Do they offer encryption of all stored data?
6. Can all media packets (voice, video, IM, etc.) in transport be encrypted?
7. Who has access to the de-encryption keys?
8. What types of operating systems are running on the servers and how does the vendor secure them from exploits?
9. What is in place to prevent device-level exploits? This should include any locally installed gateways, data storage devices, and even the telephones.
10. What type of security exists within the applications to prevent abuse and malicious activities?
11. What security measures are in place to grant access to authorized client staff that need to access the system's management tools?
12. How does the partner protect the services from standard IP vulnerabilities, including denial-of-service attacks?

A solid solution from a quality partner will not brush over your security concerns lightly but instead will share what they do, how they do it, and how you can audit them if necessary.

How to Select a Hosted Communications Solution and Partner

End-User Features

Like any technology today, it is important to see the solution through the eyes of your firm's employees. Concepts like ease of use and flexibility are not found on a feature checklist, but can be determined through use cases and demonstrations. Many of the solutions have limited telephone set choices or push third-party SIP phones, and many of them offer a feature set that does not match up with the best premises-based systems. Keeping in mind that not every feature is needed, you still need the ability to meet all the unique requirements of your users.

As part of a use-case approach to the organization's needs, it is helpful to define the various categories of workers. By defining the capabilities and services required for each unique user group profile, the solution can be tailored to fit. For example, a highly mobile group such as sales is provided different functionality than a static phone sitting on a manufacturing bench; the needs of the executives and assistants are different than the customer-facing staff. With a hosted or cloud solution, the organization will pay only for the features when and where needed.

As an example, use case descriptions are often developed around the specific needs of the organization within the following categories:

1. Voice Call Options
    a. For those that need phones, the devices typically need to be capable of a wide variety of deployment configurations, including multi-line coverage, boss and admin features, intercoms, and other things not easily provided by basic SIP phones. What telephone set options exist?
    b. Are headsets connected to PCs (and with no phone) a viable choice for some users? It is rare that telephones can be eliminated for a majority of users, but now is the time to look into how people use the phone. These softphone options are an increasingly acceptable option for many employees, especially those knowledge workers that spend most of their day in front of a computer.
    c. If it may apply, also check to see if video-enabled phones are available. They can be extremely useful and many hosted vendors don't support video or don't support it well.
2. Mobility and Bring Your Own Device (BYOD)
    a. Some users would be just as happy if they used only a cell phone for the voice calls. This introduces an entirely different dynamic, such as who owns the device, pays for its usage, etc., but it also introduces options. The best systems have good tools to allow a mobile employee with a smartphone to be a fully functioning internal user on the system, instead of forcing them to be 10-digit outsiders with smartphone-based voice mail.
    b. Another key feature exists for staff that use mobile phones frequently but also have a desk phone. Called twinning or single number reach, these features ring both devices at the same time and allow the user to answer on either.*
    c. BYOD is more than just a passing phase; users will need the ability to use a variety of devices as part of their communications tools. This can impact both standard voice calling requirements and the call-control software listed in the next section.

3. PC and software-based call-control apps
    a. Regardless of the answers to the initial questions, the most important feature in today's systems is the telephony user application that resides on the PC (or in some cases, as a tablet or smartphone app). It brings forth the processing power, stored data, and related software of the computer to the telephone, along with a big display and point-and-click ease of use.
    b. Determine the ability of the solution set to match your specific environment, including the versions of desktop operating systems, office suites, smartphones, and tablets used or planned.
    c. As a parallel task, explore which products work inside standard browsers or virtual desktop environments that extend functionality beyond the LAN.
4. Additional Applications
    Determine how well the call control application (described above) incorporates advanced collaboration capabilities, and compare to your potential use of:
    a. Instant messaging and presence integration
    b. Multi-party conferencing, including web-enabled features
    c. Desktop sharing
    d. Integrated video conferencing (both desktop-to-desktop and desktop-to-video conference bridge)
    e. Click to communicate with multi-channel options and directory enabled communications

Some of these features may not yet be heavily used in your organization, but many firms have found that once installed, the usage of these new capabilities expands rapidly. Because the above features are the visible element, most users will judge the success of the new system based on how well it fits their personal needs and how easy it is to use. Be aware that some of the low-cost hosted and cloud solutions typically fall short of the capabilities of the market leading unified communications systems.

How to Select a Hosted Communications Solution and Partner

System Features

Some of the differences between offerings are often subtle, until you find out how important a standard feature is when it is not provisioned the same as you expected. Thus, certain areas require scrutiny into the details; the following is a sample of common problem areas:

1. Integration with current telephony and communications platforms. It is rare that all new services are implemented everywhere as a single cutover, thus, phasing and legacy integrations are required. Flexible dial plans, including the ability to accommodate current numbering plans and to port the existing numbers into the cloud solution, should be available.
2. Inbound and outbound call routing choices, including the ability to provide automatic alternate routing in the event of outages or overflow. This may include localized facilities, depending upon your configuration.
3. Enhanced identification of the specific caller on emergency calls, which can be a critical requirement depending upon local laws (improved E-911 in the US).
4. Integration with the current systems, including authentication processes, backend databases, directories, etc.
5. Voice mail and unified messaging. Premises-based solutions have become very feature rich, but some hosted offerings lack essential functions. It is important to check the critical features, like synchronization, and lower priority items, like out-calling or some other feature users may have come to rely upon.
6. If some of the additional applications you plan to integrate are also cloud-based, you need to thoroughly explore both the connectivity and the functionality of any cloud-to-cloud information flow.

Video Conferencing as a Service

Some of the biggest impediments to widespread usage of video conferencing are resolved with a cloud-based service. Great improvements have been made in ease of use, quality of the experience, availability, compatibility, and costs. This is where a non-dedicated centralized service can take video from the inconvenient exception to the routine enhancement of your daily communications. You should explore what is offered as a package to the hosted and cloud options you are considering, but check the following:

1. Availability of multi-point conferencing bridge as a service that can be used when needed (scheduled or unscheduled) for various sized video conferences (Elasticity). A hosted vendor can provide the ability to allocate resources at the time of sessions, although you need to determine if it is best-effort or guaranteed quality.
2. The ease of use by access to a one-click (or one-button) meeting activation for a scheduled meeting with guaranteed access for all participants.
3. Virtualized meeting room services with access to a personalized bridge for anytime conferencing; this eliminates the bridge contention problem when using shared pins.
4. The types of interoperability available for remote video endpoints, ensuring connection to a range of users and endpoint types (e.g. immersive, room-based, personal or BYOD video collaboration applications).

5. Support for standards-based conferencing to enable seamless connections to H.323 and SIP endpoints
6. Ability to connect to other businesses without the need to separately arrange for media conversion, networking, and other compatibility issues (B-to-B interoperability) and extend integrated video, data-sharing and audio seamlessly to all meeting participants.
7. The level of security and media encryption offered for video sessions on and off net.
8. Ability to customize the meeting environment including screen layouts, host pins, and active conferencing controls (including meeting roster, mute/unmute functionality).
9. The guaranteed or expected quality of voice and video, and a consistent user experience with other collaboration applications

If it applies to your situation, additional use cases can be defined for hybrid environments that include hosted services as overflow capacity for premises-based systems or expanding your reach outside of your networks.

Because video conferencing equipment is both expensive and subject to rapid technology improvement, a compelling case can be made for many customers to use a pay-as-you-need service rather than investing in premises equipment. Vendors offering support for standards-based endpoints and interoperability for business to business options are preferred because investments can be protected.

How to Select a Hosted Communications Solution and Partner

Contact Center

If you have contact center requirements then there are many more elements to consider. Contact centers are often an excellent fit for hosted services, especially when compared to the capital costs for premises-based software and services required to effectively operate a contact center. This is also an area where significant differences exist, both with the service providers and with the various platforms available. The vast majority of cloud and hosted telephony providers do a poor or an incomplete job of meeting contact center requirements. In fact, many vendors have to team with a third party for contact center services, since their core platform is so limited. Of course, this introduces additional concerns over call flow, integration, management, support services, billing, upgrade compatibility, and more. If you need a blended solution that includes both standard telephony users and a modern contact center with features like those listed below, be wary of any proposals that spread the solution over multiple hosted platforms and vendors.

There are many contact center components that need to be carefully reviewed, and each can be critical factors if your contact center needs are sophisticated. A complete analysis of all possible answers is beyond the reach of this document, but following are some topics to cover:

1. Call routing
   You will want to explore the power and flexibility of the call routing options, including advanced features such as skills-based routing and provisioning tools.
2. Interactive Voice Response (IVR)
   It is important that the IVR is well integrated and is a complete solution for your contact center, and not just a well-disguised auto-attendant. Key features like post-call surveys, reminder calling, screen-pops, and queued callback are not available from many of the low-end IVRs. Also explore how the IVR integrates with your back-end database(s).
3. Multi-channel
   Not every contact center can support multiple communications channels such as emails, web chats, SMS (text) messages, or video sessions. An integrated multi-media solution will use parallel logic and combined reports.
4. Agent and supervisor interface
   These are the desktop tools your contact center staff will use on a daily basis to perform their jobs, so a careful review and demonstration are in order. Look specifically for what real-time views are provided to the supervisors and which productivity tools agents can access.
5. Reports
   Standard reports should be varied and usable, but your supervisors should be able to create custom reports as well. Find out how long the raw data and historical reports are available. Determine if calls that touch the IVR or use more than one media are tracked throughout the system to create a unified report.

6. Call recordings
   Determine what percentages of your calls need to be recorded, and if you want screen images captured as well. For security purposes, you need to know where the recordings are stored and if they are stored encrypted. If speech analytics are important to you, ask for details.
7. Social media
   Check to see if the solution can proactively capture various social media activities, and allow your team to respond to customers in real time using the same social network customers are using.

   As mentioned above, not every solution will be part of a fully integrated offering, so it is important to understand how the architecture of the system will affect the contact center. As the most visible customer-facing element of many organizations, it is critical to understand what happens during various scenarios. For example, if there is a system or network failure with many solutions, calls in progress may be dropped, calls in queue or moving through an IVR are lost, management reports are incomplete, etc. The ideal solution will prevent those events from threatening your business operations.

Pricing and Cost Comparisons

Like with many technology procurements, it is easy to overemphasize a few dollars difference and regret not getting the right solution. Thus, don't let costs be the primary deciding factor, but do invest enough time and attention to get complete quotes. Many times the low-cost provider during the initial look has to add multiple third-party and optional items to meet your true requirements (if it can). Make sure you have the proper costs for all items. The following is a sample of the many different categories that may be a part of the bill:

- Non-Recurring Charges
  - Core Service Offering
  - Data Center Provisioning
  - Carrier Circuit Installation
  - On-site Equipment
  - Sets (if purchased)
  - Miscellaneous Hardware
  - Software (such as SDK)
  - Professional Services
  - Integration components
  - Third-party installation fees
  - Sales Tax (where applicable)
- Monthly Recurring Charges
  - Core Service Offering
  - Annual maintenance on Purchased Equipment
  - Per user fees - basic user
  - Per user fees - advanced user
  - Per call center agent fee
  - Per call center supervisor fee
  - Mobility or remote user fees
  - Carrier circuits (MPLS, T1, etc.)
  - Trunk ports or SIP sessions
  - Toll-free numbers
  - DID numbers
  - Gateways and other hardware
  - Sets (if leased)
  - Software applications
  - Storage Fees
  - Third-party integration fees
  - Long Distance Costs
  - Excise tax, FCC fees, etc.
  - Sales Tax (where applicable)

How to Select a Hosted Communications Solution and Partner

Also take the time to determine if additional discounts are available due to purchases of other technology (such as data networking gear, Telepresence systems, phones, etc.) or if current assets can be traded-in to offset the new system costs.

After getting the full picture of all cost elements, then it is time to determine how the solution will save you money. This is more than just replacing a capital purchase with an op-ex spend; the hosted/cloud solutions produce savings in many categories, including cost avoidance elements. It is hard to determine these costs on your own, so ideally, you will choose a trusted partner that will work with you to develop accurate numbers.

Select a Cloud Partner

While choosing a platform has many specific comparison points as noted above, it is just as important to diligently examine the capabilities of the proposing partner. These should not be surprising evaluation categories, but given the "managed services" nature of a hosted or cloud solution, it is critical to be sure you are picking the right partner. Unlike a services partner in a premises-based situation, it is difficult to switch if you make a mistake.

1. Experience
   Obtain as much information as possible on the experience level of the partner staff. Does the partner have a strong technical team, including industry recognized certifications?
2. Financial Strength
   Ask what is the partner's financial strength and determine their ability to stay in business (there are far too many partners and the weak will not survive).
3. References
   Don't just ask for references – call each of them and ask what lessons they learned and what they would do differently.
4. Manufacturer Relationship
   Examine the relationship with the manufacturer and what support they have. Has the manufacturer vetted the solution provider or partner? Is the partner in good standing? Does the partner meet manufacturer certification and specialization requirements (or will they let just anyone resell its system)?
5. Support
   Can the partner provide leading, scalable customer support, including required escalation points?
6. Project Management
   Can the partner demonstrate strong project management capabilities and hold industry standard project management certifications?
7. Contracts
   Ask for all contractual agreements up front – and don't ever sign the documents without a full review. Most Service Level Agreements (SLAs) are relatively weak with minimal penalties for non-performance, so leave ample time to negotiate a fair set of documents.

How to Select a Hosted Communications Solution and Partner

Deployment, Management, and Support

One of most important differences between offerings will be talents, tools, and procedures the partner can provide. Thus, there is a series of questions specific to the "how" and "how well" a partner provides the following:

1. What tools does the partner use for deployment management? In addition to a scope of work document mentioned earlier, explore how the partner executes on the Statement of Work (SOW).
2. How long does it take to deploy (both the initial services and subsequent additions or changes)?
3. How are service requests handled? What types of online tools exist for reporting and tracking troubles, change requests, etc.? Who handles the service requests – the partner or the manufacturer? Can you go to one organization or do you need to work with multiple other companies to resolve the service request?
4. Does the solution include access for your (trained) IT staff to make standard changes to the systems (typical move/add/change activities)? This should include a multi-level authorization that allows control over specific elements, including for call center managers (specific to their system management and reporting needs).
5. What is the partner's flexibility in adding additional features and capabilities? What is the policy towards implementing the manufacturer's upgrades? Is it your choice or theirs to upgrade or enhance the solution when the possibility exists? What about third-party enhancements?
6. For all of the network services, how is support and troubleshooting handled? Will the partner coordinate all service work? Do they have the means and knowledge to provide end-to-end testing?
7. What types of performance monitoring tools are included? Do you have direct access to those tools and reports? Can you get proactive notification of service events, alarms, and other exception events?
8. Are there any other management tools provided, such as online access to billing, usage reports, etc.? Many of these capabilities are provided through software applications or dashboards – take the time to see if they fit your needs or can be customized to your requirements.

How to Select a Hosted Communications Solution and Partner

Closing

Fundamentally, there are two decisions to make. Although you often evaluate both at the same time, the first choice is to select a solution that is high quality with the complete set of features and functions you need now and in the future. The second decision, equally important, is to select the right partner to deliver the solution, bring the proper level of skills and support your organization needs. To verify what is proposed it is vital that you talk to references – don't just take the vendor's promises as the final word. Quality partners will have quality references.

Select the right partner with the right mix of services appropriate for your specific needs and a hosted solution can be a great way to meet your communications infrastructure requirements. Use this evaluation guide to choose wisely.

About the Author

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What is a Use Case?

A use case is a methodology used in system analysis to identify, clarify, and organize system requirements. The use case is made up of a set of possible sequences of interactions between systems and users in a particular environment and related to a particular goal.

A use case (or set of use cases) has these characteristics:

- Organizes functional requirements
- Models the goals of system/actor (user) interactions
- Records paths (called scenarios) from trigger events to goals
- Describes one main flow of events (basic course of action) and possibly other ones (alternate courses of action)
- Is multi-level, so that one use case can use the functionality of another one

A good use case is goal-based and results oriented.

How to Select a Hosted Communications Solution and Partner

Appendix - Partner Scorecard Checklist

Evaluation Criteria	Partner 1	Partner 2	Partner 3	Partner 4
Responsiveness to Customer				
- Existing corporate relationship				
- Speed/timing				
- Accuracy				
Completeness of Offer				
- Voice features and voicemail				
- Integrated messaging				
- Soft client capabilities				
- Audio conferencing				
- Web conferencing				
- Video				
- Immersive video conferencing				
- Instant messaging				
- Presence				
- Integrated mobility strategy				
- Contact center				
- Email integration				
- Third party application integration				
- SIP Trunking / network				
Pricing Strategy / Costs				
- Per-user per-month				
- Implementation				
- Day 2 incremental costs				
- CPE costs and approach				
Quality Assurance				
- Security				
- Business continuity / disaster recovery				
- QoS design				
- Service Level Agreement structure				
- MTT respond & MTT repair				
Rollout Plan				
- Coverage area (global, if needed)				
- Timing capabilities				
Project Management Skills				
Staff Technical Skills				
Manufacturer Relationship				
Training, Certifications and Expertise Level				
Financial Record				
References				
Customer Service Record or Awards				

Note: Scoring matrices often vary, and a common approach includes 1 for non-compliance and 5 for full compliance.