

GUIDE

Selecting UCaaS & CCaaS Solutions: WHAT YOU NEED TO KNOW

INTRODUCTION: THE COMMUNICATIONS REVOLUTION

Businesses continually work to improve how they communicate, both internally with their employees and externally with their vendors and customers.

Today many companies embrace a hybrid work model and consider it part of their longer-term strategies. A December 2020 Gartner survey of HR leaders found that 90% of businesses planned to allow their workforces to continue working from home at least part of the time, even after the COVID-19 pandemic subsided.

This guide to UCaaS and CCaaS will help you navigate The Communications Revolution by sharing tips to selecting the best solution for your desired outcome.

[Unified Communications \(UC\)](#) solutions improve productivity by streamlining the various channels through which employees connect and collaborate internally and with other businesses. A good [UC platform](#) delivers a comprehensive suite of tools that includes voice and video communications, web conferencing, document collaboration and instant messaging among others.

Contact Center (CC) solutions assist businesses in achieving a tight engagement with customers through a variety of channels and tools. These solutions include customer-facing tools like automated interactive voice menus, chat bots, and outreach campaigns as well as a wide range of analytical tools. Modern solutions often utilize artificial intelligence (AI) to track customer interactions and calculate ways to improve efficiency for future transactions. The goal of a contact center system is to create and enable agile business strategy execution for a frictionless customer experience.

The recent pandemic accelerated hybrid work scenarios for employees and agents, as companies searched for ways to maintain costs, scale systems efficiently and remain productive.

But whether businesses bring their employees back into offices or let them continue working remotely, one thing is clear: Unified communications and contact center solutions will remain a big part of organizations' budget and strategic priorities.

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SERVICE MODELS: DO IT YOURSELF OR "AS A SERVICE"

Companies seeking to migrate to new UC or CC platforms or expand their current systems must decide if it is more cost-effective to maintain an in-house platform, host it and have someone else manage it, or leverage their UC or CC as a cloud-based service from an outside company. Managing a UC or CC platform involves a significant investment in infrastructure and equipment. It also requires an IT team with the expertise and bandwidth to manage, maintain and upgrade the equipment and software. A lot of businesses believe that building this type of platform is simply outside their core competency.

As a result, many companies decide to engage an outside service provider to offload these burdens. Vendors such as Amazon Web Services (AWS), Microsoft, Cisco and 8x8 have built agile, scalable and resilient cloud infrastructures that meet the most stringent security requirements to keep customer data safe. These companies sell access to their cloud servers directly or through third-party vendors like InterVision. User-friendly interface tools, "as a Service" (aaS), make communications and data management in the cloud easier and more cost effective while the third-party oversees all daily operations of the services.

DEFINED: UCAAS & CCAAS

[Unified Communications as a Service \(UCaaS\)](#) provides UC solutions as a cloud-based suite for employees to communicate more effectively from multiple devices at any location. A similar, expanded tool set used by in-house customer service and technical support agents are part of a [Contact Center as a Service \(CCaaS\)](#) platform. The main difference between UCaaS and CCaaS is that UCaaS improves and streamlines internal communication and collaboration, while CCaaS focuses on refining the customer experience and boosting customer satisfaction.

FEATURES: UCAAS

UCaaS platforms provide a suite of solutions to accommodate your communication needs. These include:

- Enterprise Phone Systems (PBX)
- Local & Long-Distance Calling Plans
- Audio & Video Conferencing
- Virtual Meeting Rooms
- Screen/Desktop Sharing
- Voicemail
- Messaging/Chat Apps
- Customer Relationship Management (CRM)
- Document Collaboration/Editing

FEATURES: CCAAS

CCaaS systems are designed to improve call center efficiency, leverage artificial intelligence to gain customer insights, and create a superior customer experience through a range of components:

- Interactive Voice Response (IVR)
- Advanced Call Distribution (ACD)
- Omni-Channel Communications (voice, chat, email, SMS, social media)
- Virtual Agents & Chat Bots
- Customer Self-Service Tools
- Analytics/Reporting Tools
- Artificial Intelligence (AI)
- Customer Relationship Management
- Customer Insight Tools
- Customer Journey

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STEP START WITH STRATEGY

When looking to purchase a [UCaaS](#) or [CCaaS](#) solution through a service provider, start by assessing your organization's current and future needs. Your communications strategy should align with your long-term business goals and desired strategic outcomes. This means considering both your immediate needs and where the business plans to be in three to five years. No one can predict the future of technology, but when it comes to developing a UCaaS or CCaaS strategy, aim not just for where you are now but where you're going as well.

InterVision has helped many businesses perform these assessments and recommends that your communications strategy should include these four elements:

FUNCTIONALITY

It is important to understand your short and long term business and IT goals. Decide which functions and resources you will want to integrate into a UCaaS or CCaaS platform or if you will need some type of hybrid solution. Get input from your employees as well as all relevant stakeholders and business units including IT and Customer Experience (CX).

SECURITY

What specific security concerns does your company face? Do you utilize sensitive customer data or proprietary information? Do your employees need to transmit this information internally or externally? How will this affect your needs and vendor requirements? There can be a lot of regulatory and compliance issues to address, so it's always a good idea to get your IT security team involved early on. Their input can be invaluable.

BUDGET

Perform a detailed cost/benefit analysis. How much will integrating a UCaaS or CCaaS save from your capital budget? What is your final budget and what flexibility do you have? Remember, there may be a lot of moving pieces when calculating the financial impact this type of technology migration can have on your business. Ensure you're accounting for all the savings, both in equipment and personnel when building your budget.

MANAGEMENT

Determine who in your organization will be responsible for managing and maintaining the UCaaS or CCaaS tools. This includes things like testing, maintenance, and handling administrative tasks such as "moves, adds, changes and deletes" (MACD).

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STEP

EVALUATE POTENTIAL SOLUTIONS & SERVICE PROVIDERS

Once you have developed a communications strategy that aligns with your overall business goals, it's time to begin evaluating specific product and service providers to find your best match. There are a wide range of service providers representing multiple solutions and products, so it can feel a little overwhelming to start. To help with this process, InterVision recommends considering eight factors when choosing a service provider.

BREADTH OF THE PORTFOLIO

Be sure to look at the entire portfolio of products and tools the provider offers, such as Disaster Recovery as a Service (DRaaS) and Cloud Managed Services. The broader the range of products a vendor offers will likely be an indicator of their expertise and will make them a better long-term partner. Even if you don't need the full offering now, it's always important to be "future looking" when making these types of business decisions.

FLEXIBILITY AND INNOVATION

One of the first things to determine about a third-party provider is how willing and able they are to customize solutions for their clients. Do they offer a choice of public, private or hybrid cloud models? Are their tools scalable to accommodate rapid growth or unexpected events? What types of new and unique solutions have they developed? How quickly can they bring these new products to market? Innovation and flexibility should be an integral part of their culture.

RELIABILITY

One of the most important things to consider when choosing a UCaaS or CCaaS vendor is the reliability of the network and technology they represent. Be sure to ask for documentation of the "uptime" record. You should be looking for at least 99% or higher. Also, be sure to review the disruption recovery time. You may pay more for greater stability, but it will be well worth it to your organization. They should also be willing to sign a service level agreement (SLA), and clearly state what will happen if they miss that target.

Focus not only on where your business is;
but also on where you want it to be.

RECORD OF SUCCESS

What is their history of migration and management? As with any potential business partner, you will want to know what their record of success looks like. How many clients have they have worked with in the past? Do they have experience with big corporations and small businesses across a wide range of industries? Have they worked with companies in the same industry as yours?

Secondarily, be sure to research the level of customer satisfaction through reviews or independent rating systems. Look for consistent trouble spots or areas of potential concern that might relate to your specific needs. Have they demonstrated the ability to learn from past failures? Do they adapt and grow?

EXPERTISE

An excellent UCaaS or CCaaS service provider should be able to demonstrate a solid expertise and deep understanding of the technology, as well as up and coming trends. You should determine how consultative they are. Are they willing to provide training for your teams and walk you through the ins and outs of the solution?

Will they talk you through the best options available and point you toward a better solution even if it means less revenue for them? This is an indicator of whether or not a company will be a good long-term partner. A UCaaS and CCaaS service provider should do more than just sell you a software platform. They should have the experience and expertise to be a trusted advisor and consultant during the entire service management lifecycle.

SECURITY & COMPLIANCE

Does the service provider support the compliance or regulatory framework you must meet? In an age of data breaches and cyber crimes, one of the biggest concerns people and businesses have is losing sensitive customer data to cybercriminals. Your UCaaS and CCaaS service providers should have the proper certifications for proof of what protocols they meet, and which partners they have in place to safeguard your data. Many organizations must now meet regulatory frameworks, sometimes more than one. These could include HIPAA, GDPR, PCI, or NIST, as well as other data sovereignty requirements. Check that the provider can support you in these needs.

COST VS. VALUE

Ultimately, every business has to work within a budget. Can you quantify the value you're getting for your money? What cost savings do you expect to see? Will you be able to reduce headcount, or realign your team to focus on more important tasks? Is adjusting business demand to usage costs critical? Does demand vary seasonally? Just because one provider is cheaper than another does not always mean it offers better solutions. There may be hidden costs that could impact your efficiency or productivity.



CONNECTING YOUR STRATEGY TO REALIZATION

Your business is unique, and so are your specific communication needs. There is no “one-size-fits-all” [UCaaS](#) or [CCaaS](#) solution. If you are searching for a service provider, InterVision experts and our key partners ([Amazon](#), [Cisco](#), and [8x8](#)) will answer your questions.

Visit our website at intervision.com to learn more, or call us at 844.622.5710 to speak with one of our knowledgeable advisors.