

UCAAS CUSTOMER CONVERSATION STARTER

01. Are there any vendors/solutions you are already considering or have spoken to?
02. What is the business driver causing the customer to consider a change?
03. What is your current Unified Communication environment (Record details and notes on next page)
 - a. Do you currently operate a call center today? (If no, are you looking to in the near future?) (See CC questionnaire)
 - b. What 3 things about your current phone system are you happy and not happy with?
 - c. What PBX do you have today? Is it IP, PRI or analog?
 - d. Do you centralize phone management across multiple locations?
 - e. How are you currently supporting remote employees today? Do they have the same technology as HQ?
 - f. Do you need to monitor the service quality or employee calls?
 - g. What technologies do you currently use to communicate with your customers?
 - h. Do you have a support or inside sales team?
 - i. What conferencing services are you currently using?
 - j. Is your current voice platform integrated with your CRM? What CRM are you using? Would you like it integrated to your system?
 - k. How are you measuring individual or group performance today? How important are reporting and analytics to you?
 - l. What internet connection is being used at each location? Do you need connectivity or are you already providing it?
 - m. Do you currently have multiple Ethernet ports running to where every phone is located? Is there Power over Ethernet Switches being used? If not, and you are using desktops, that's fine, you can daisy chain the phone with the computer.

04. Let's talk numbers

- a. Are you looking to expand? Do you have multiple offices / remote teams? How many locations do you have and where are they? Domestic? Int'l?
- b. How many seats do you need?
 - i. Active users?
 - ii. Conference rooms?
 - iii. Native (hallway, break room, etc)?
- c. Will phones need to be provided with the solution? Will the phones be purchased, or leased? What is the phone preference?

- | | |
|----------------------------------------|----------------------------------|
| <input type="checkbox"/> Avaya | <input type="checkbox"/> Cisco |
| <input type="checkbox"/> Mitel | <input type="checkbox"/> Polycom |
| <input type="checkbox"/> Yealink | <input type="checkbox"/> Yiptel |
| <input type="checkbox"/> Other (_____) | |

What features do you require?

- | | |
|---------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> Chat | <input type="checkbox"/> Mobile app |
| <input type="checkbox"/> Presence | <input type="checkbox"/> Audio/Video Conferencing |
| <input type="checkbox"/> Video chat | <input type="checkbox"/> Social Media (Facebook, etc) |
| <input type="checkbox"/> Screen share | <input type="checkbox"/> Web chat |

- d. How many DIDs do you have? Please list them
- e. Do you require any analog phone lines? I.E. alarm systems, elevators, door buzzer, overhead paging, etc.
- f. Does the solution require any analog endpoints?
- g. Do you require any toll-free numbers? What are the requirements?
- h. Are there any faxing requirements?

- | | | |
|----------------------------------|-----------------------------------|-------------------------------|
| <input type="checkbox"/> inbound | <input type="checkbox"/> outbound | <input type="checkbox"/> both |
|----------------------------------|-----------------------------------|-------------------------------|

- i. Is there any integration needed between the phone system and any other systems? I.e. Teams or a CRM? Will this need to integrate with existing overhead paging systems?

