

THE ULTIMATE GUIDE TO CLOUD COMMUNICATIONS

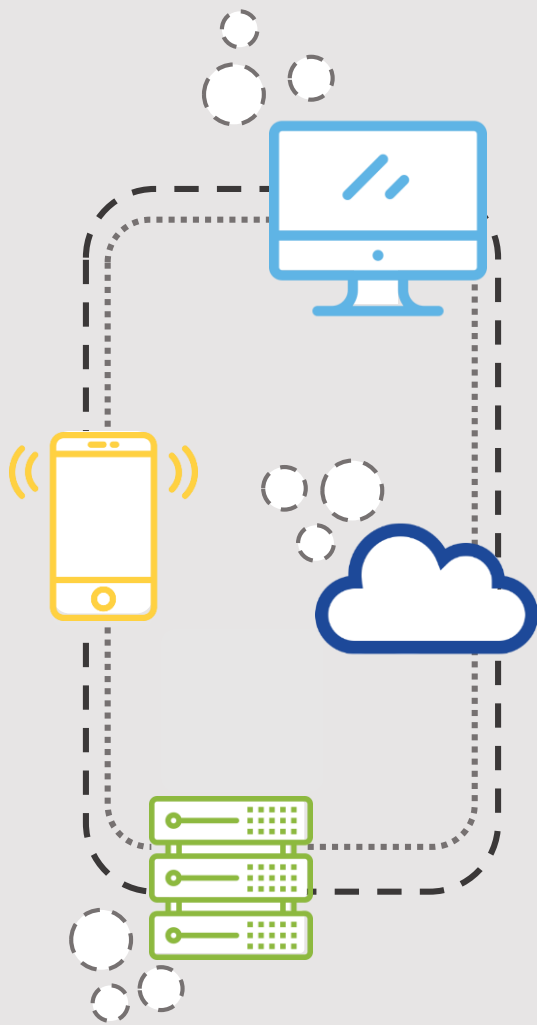
A Vertical Communications E-Guide

Moving to the cloud comes with a lot of benefits. But is it the right fit for your business?

Including information on how to:

- ✓ Learn if cloud is the right fit for you.
- ✓ Choose the right product.
- ✓ Assess cloud providers.





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Introduction

When you're deciding between a cloud and on-premises communications solution, it's critical to understand that the right solution is unique to your needs.

This e-guide provides easy tools for discovering your best communications solution.



Chapter 1

Why is cloud important to you?

Cloud communications is a powerful tool, but that doesn't mean that it's the right tool for everyone.

Before moving to the cloud you need to consider "why". Why do you want to transition to cloud? What are your reasons?

Understanding if your reasons and needs can be supported by cloud communications is the first step.

To get started, contemplate your reasons for wanting cloud. This will help you clarify your priorities as you move forward. We've got a list started for you to consider on the right. Don't forget to write down any additional reasons, too.

What are your reasons for wanting cloud?

- I prefer OPEX vs. CAPEX expenses.
- I want to reduce IT spend.
- I want to accelerate change in the company.
- I want to improve communications reliability.
- I need to replace a failing communications solution.
- I need to integrate with other types of cloud solutions.
- Other reasons: _____

Now that you've identified your reasons for wanting to move to cloud it's important to address whether or not cloud communications are really better than on-premises communications.

In short, the answer is no. Many communications companies position cloud as the best solution. But really, the best solution is the solution that meets and supports your unique requirements. That solution is different for every business.

Understanding if cloud is truly the best fit for your business can seem difficult. But really, it's fairly straightforward. You just need to align your specific needs with the features that cloud and on-premises offer.

To help, we've included a cloud vs. on-premises checklist on the next page. Check off the features your business requires for a clear-cut understanding of which solution is truly better for your business.

Further Reading:

Remote work recently spiked in popularity due to the Covid-19 pandemic. Cloud communications make remote work a lot easier. Check out how this article on "Preparing for the Future of Remote Workers" by clicking [here](#).



The Cloud vs. On-Premises Communications Checklist

When you're considering whether a cloud or on-premises communications solution is right for your business, you need to understand what each option has to offer, and how those options align with your business requirements.

Check your business' requirements off the lists below to start learning which solution is better for you.

Cloud Communications

- Your business prefers an OPEX model
- You want to stay on the leading edge of technology.
- You need the flexibility to add capabilities quickly.
- Your growth requires the ability to scale up quickly.
- You want to reduce IT resources needed.
- You have strong remote worker needs.
- You have multiple locations to connect.

On-Premises Communications


- Your business prefers a CAPEX purchase model.
- You want more stable, slower change.
- You require full control of the system.
- You need complete, local ownership of the data.
- You have significant investments to keep.
- You have custom applications or integrations built.

If you used the checklist and found that your needs fell under both cloud and on-premises, don't worry. Cloud and on-premises are the common solutions that providers mention, but for some businesses, neither a cloud or an on-premises solution is the right fit. We can't say it enough: every business is unique which means that their communications solution should be tailored to support them.

That's where hybrid solutions come in. Hybrid solutions combine cloud and on-premises technology to allow businesses to find a middle-ground that best supports their needs.

Further Reading:
Need to learn more about hybrid solutions? Read the "Selecting a New Phone System: How the Hybrid Phone System Can Work for You" article by clicking [here](#).

You can also get in touch with Vertical to learn more.

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How do you choose the right product?

Now that you've confirmed that cloud is the right fit for you, you need to learn how to choose the right product.

When it comes to cloud there are a lot of features out there. But digging into all of the products and features can be overwhelming. And not necessarily beneficial. To streamline your efforts, follow the easy guidelines to the right.

The most crucial piece of product review will be asking questions. But knowing the right questions to ask can be difficult. Use the product investigation guide on the next page to ensure you cover all your bases.

Product Review Guidelines

- Just focus on your needs. Don't let everything else distract you.
- Make sure to consider value vs. price.
- Think long-term. Will the product grow with you? Does it have the technology you need?
- Ask your vendor every question you can think of.

Product Investigation Guide

When you're reviewing cloud products, it's important to consider more than the features available. You also need a deep look into how the service is for the product, what upgrades look like, and more. This guide will help you gain a full understanding of the products you're considering and what they have to offer. Make sure to review and take notes below and on the next page about every question with the vendors you're considering.

How reliable is your service?

- Are all your applications redundant in the data center?
- How many data centers do you have and where are they?
- How long does fail over take?
- Do all UC applications fail over?
- Who is monitoring your servers? What data and what steps can they take?

How often do you roll out major feature upgrades?

- Can you give a couple of examples?
- Are the updates rolled out seamlessly?
- When will I experience planned outages?
- Do you own all of your technology or are major features provided by 3rd parties?
- If there are 3rd parties, how do I get support?

Notes:

Product Investigation Guide, Continued

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How do you guarantee call quality for customers?

- Are you monitoring call quality on your network? How?
- If there's a problem, how do you proactively respond?
- Can I see the call quality information myself?

And...

- Can I try it out for a couple of weeks?
- How do you deal with carrier outages?
- What was the last big failure on your product platform? How was it fixed?
- How long have you been delivering cloud communications?
- What's the biggest weakness of this product?

Notes:

How do you choose the best provider?

If you're new to communications you might not know that there are multiple types of providers. The first step to choosing the best provider is to choose between a Master Agent / Sub-Agent and a Value-Added Reseller (VAR).

Master Agents / Sub-Agents work with all major brands and offer their sub-agents the ability to sell any cloud product on the market. This is the most common model for buying cloud communications.

A Value-Added Reseller (VAR) is how most telephone systems have been sold. A company resells a product and provides install, training, support, and owns the customer experience. This model is now coming to cloud communications.

Did you know?

Vertical is both a VAR for cloud providers as well as a sub-agent. Because of that Vertical is able to:

- ✓ Tailor the solution to you.
- ✓ Own the installation from start to finish.
- ✓ Deliver service and support.
- ✓ Craft customer contracts to meet your unique needs.

Understanding Master Agents / Sub-Agents

When you're choosing between Master Agent / Sub-Agent or a VAR to partner with, you need to understand what each option has to offer, and how those options align with your needs. Review the below list and the list on the next page to question the providers you are working with, and ultimately choose the best provider.

Master Agent / Sub-Agent Pros

- Agents can offer many different products giving you lots of choice.
- Agents are focused on selling so they may have the cheapest price.
- Your local phone vendor may be a Sub-Agent and you can maintain the relationship.
- The install and support will come from the national cloud vendor.

Master Agent / Sub-Agent Cons

- Because of the wide variety of products, agents may not be very expert on the details of a given product.
- Agents are offered a lot of sales incentives to sell specific products. They may be pushing a product because it's the best deal for them, not the right fit for you.
- Agents do not own the relationship. They don't own implementation, support, or the long-term customer experience.
- The cloud vendor often offers one cookie-cutter install program with little training or customization.
- A common complaint is that long-term support from the national cloud vendor is weak or difficult to reach.

Understanding Value-Added Resellers (VARs)

When you're choosing between Master Agent / Sub-Agent or a VAR to partner with, you need to understand what each option has to offer, and how those options align with your needs. Review the below list and the list on the previous page to question the providers you are working with, and ultimately choose the best provider.

VAR Pros

- VARs are generally focused on a few carefully selected products. They are experts on that product.
- VARs are more focused on your individual deal and can tailor solutions to your specific needs.
- VARs own the customer experience. Your contract is with them and they are accountable for the success of your experience.
- VAR success is predicated around building a long-term stable of happy customers so they tend to provide very high quality support.

VAR Cons

- VARs may not offer enough variety of products to provide the right one that meets your needs.
- Some VARs are very small and may not have adequate resources to properly support you (especially for larger and multi-location organizations).
- VARs may not have a strong enough relationship with the cloud vendor to fix issues that arise.
- VARs may have little experience with cloud products as this is a very new area for the VAR model.

Critical Aspects to Review with Each Provider

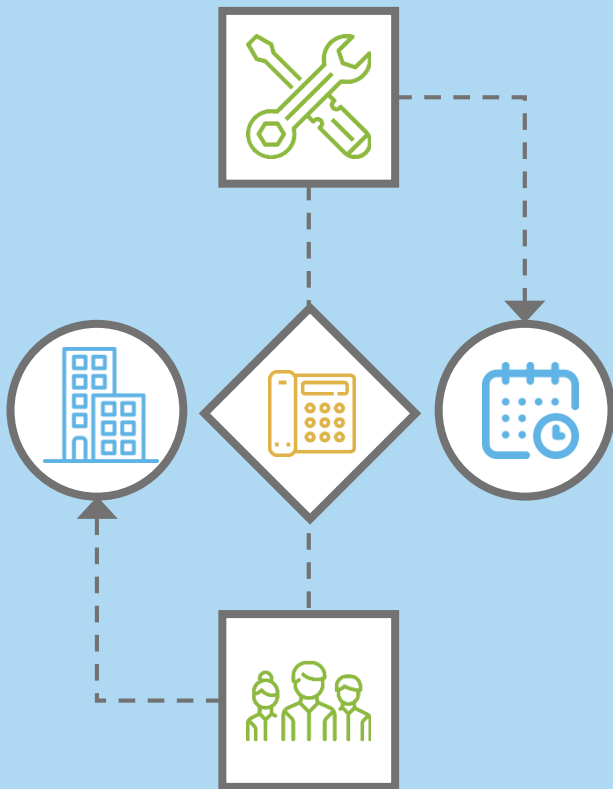
Now that you understand the difference between providers, you need to understand what to look for when assessing them. There are three crucial aspects to review when choosing a provider: project planning, project management, and service and support.

1. Project Planning

Cloud isn't something that you just sign up for and immediately start using. For it to work right, an expert needs to architect and plan your system to your exact needs. Your provider should have a detailed planning process that they follow. And it should be documented so that you can review it.

Further Reading:

If you want to learn even more about the critical role of project planning, check out our in-depth article by clicking [here](#).



2. Certified Project Managers

Quality project management is critical to implementing your communications solution.

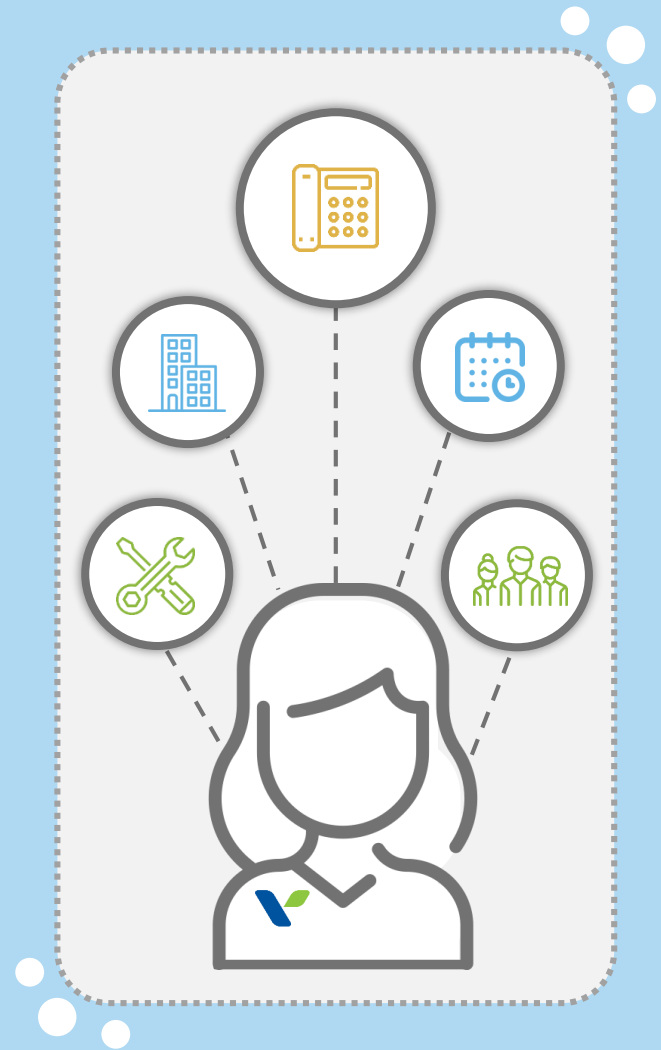
70% of organizations have suffered at least one failed major project in the last year.

Project Managers (PM) are heroes and, in this case, communications experts, who will navigate the cloud installation for you to guarantee your project doesn't fail. They have deep experience that will help during your solution design and implementation.

Much like anything else, not all PMs are the same and you need to ensure that your provider has PMs that are experienced and knowledgeable.

Further Reading:

We dive more into what a successful installation looks like in our webinar on "Guaranteeing a Successful Implementation." You can watch it by clicking [here](#).



3. Award-Winning Long-Term Support

Long-term support is crucial to the success of your communications system, because you will experience an issue at some point, no matter what solution you select.

When you're reviewing service and support, the vendor needs to do more than say they have great support. In addition, they should have documentation that the support team has deep experience. They should have both on-site and remote support options. And the provider should also have support tiers. Your communication needs are unique, which means the type of support you need is, too.

And finally, they have to deliver a clear cut service escalation process so that you can escalate the issue if you aren't getting the results you need when you need them.

To help you review your potential providers' planning, project management program, and service and support, we've put together a checklist on the next page for you with all of the items you should review with your provider.



Evaluating A Providers' Planning, Project Management, and Support

This checklist will help you assess your providers' planning, project management, and service and support. Make sure to review every check box with potential vendors to make sure they can meet your needs.

When reviewing planning, evaluate:

- If your provider can share detailed processes.
- That the provider asks you questions and for feedback.
- The quality of the provider's installation technicians (certifications, years of experience, etc.).
- That the provider will advocate for you throughout the entire process.
- That the provider can deliver on-site options for training and troubleshooting.
- That the provider can share a clear understanding of steps after installation.
- That the provider's honesty is obvious.

When reviewing project management, evaluate:

- That the provider uses dedicated PMs.
- The provider can provide a list of the certifications their PMs hold.
- The provider can share their documented standard project plan.
- You're able to meet your PM prior to signing the contract.

When reviewing service and support, evaluate:

- The experience of their service technicians.
- Do they have both on-site and remote support?
- Do they have a documented escalation plan?

Bringing It All Together

The most important thing to realize before moving forward with cloud communications, is that it takes every concept mentioned in this e-guide to be successful. First and foremost, cloud can only be a success for your business if it fits your unique business needs. If your needs are different, your provider can help find a on-premises or hybrid solution.

Don't forget, cloud isn't a sign up and go solution. Selecting the right product will ensure your investment is a success. And selecting the right provider will ensure that your system is architected, planned, installed, and supported in a way that means your system will support your needs for years to come.

Steps to Remember:

Each step outlined in this e-guide is important for your success. Make sure you've completed each of the steps below before selecting your solution.

- Outline your reasons for wanting cloud.
- See if your needs align under cloud or on-prem.
- Thoroughly investigate your product options.
- Do a deep dive into your provider.
- Review Master Agents vs. VARs.



Meet Vertical

Did you learn if the cloud is the right fit for you? We hope so.

Whether you're just starting learning about the cloud, or if you're nearing the end of your education, Vertical is here to help you transform your communications.

Vertical delivers the best cloud, on-premises, and hybrid solutions on the market. Our expert solutions engineers ensure that your system is designed exactly as you need it to; now and in the future. If an issue does arrive, our award-winning service team is available 24/7 so that your business doesn't miss a beat.

We're here for you when you're ready to chat. Just reach out at your convenience.



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Let's give the artists a hand!

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