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John Doe
XYZ Company
123 Street Ave
Milwaukee, WI 53225

Dear John:

It was a pleasure interviewing XYZ Company staff in regards to its current and future telecommunications needs. Your fellow staff members are friendly and courteous, sharp and professional. Everyone had great feedback and suggestions for improvements that are within the realms of technical and fiscal possibility.

This document summarizes the feedback I received from the 14 members of the telephone group. Members of this group are one or all of the following; department heads, technical staff, or staff members who rely heavily on the telephone system as part of their job description. All locations within XYZ Company were represented by either department heads or by the staff at each location.

Each XYZ Company location is unique. Each location currently has a separate telephone system ranging from the larger system based at your headquarters, to remote locations with 1-2 telephone lines, to remote staff off-site using mobile phones. Some staff is using phones provided by a 3rd party, such as some of the staff in Chicago. Some remote locations are very small, some are so distant from metropolitan areas that anything less than digital (ISDN or T1) phone/Internet service is unreliable, and there are locations across several counties and even state lines. With all of this diversity, the existing features and the features requested vary.

This report will attempt to summarize all existing features staff can't live without and all features various staff has suggested. Whenever possible the suggestions are generalized, however, some suggestions can lean towards specific departments. In addition, some generalized features are not necessities for each department but are "it would be nice" features. Logistics and costs may prohibit many of these features at remote locations.

In addition, this report will summarize staff suggestions for making a transition to a new or upgraded telephone system.

Features

Caller ID – Enabled phones can provide incoming caller details such as their name and phone number.

- Some people currently have this feature, and others do not. While not everyone felt that this feature is a necessity for each member of their department, everyone agreed that it has its place within XYZ Company.
- Common uses include:
 - o Call Prioritization – Answer calls that are time sensitive, let less time-sensitive calls go to voice mail.
 - o Call Prioritization – If a second call comes through, rather than put first caller on hold to answer a non-important call, view the display and decide if the call should be interrupted.
 - o Customer service – Confirm the caller's information by looking at the telephone display.
 - o Customer service – Allows staff to be prepared for a call before answering the call.
 - o Customer Service – Anyone who calls, receives voice mail, and forgets to leave their number, can be found on the Caller ID log.
 - o Helps determine if a call is an internal XYZ Company call or external.
- Negatives
 - o May be abused—Some may ignore “problem” or difficult clients, or other internal staff. However, all parties agreed that the positives of this feature outweigh the potential negatives.
 - o May not be available for remote locations or locations using third party equipment.
 - o Requires additional line charge and display phones—smaller locations may not be able to justify the cost.
- Additional Requests
 - o Should include caller's name and phone number.
 - o Information should be able to transfer when calls are transferred.
 - o Calls that ring at multiple locations/phone sets should all receive caller ID data.

DID (Direct Inward Dialing) – Feature from the local telephone service provider which interacts with the telephone system allowing all or some staff members to have their own unique ten-digit telephone number.

- Some people currently have this feature, and others do not. Some interviewees didn't believe that this feature would benefit their department. Others felt that key staff would benefit from this feature.
- Common uses include:
 - o Freeing Staff – Rather than have one person answer all calls and transfer as necessary, outside callers can dial their party directly.
 - o Customer service – Allows calls to go directly to their destination without dealing with an automated system.
- Negatives
 - o Anyone working with several people within XYZ Company may end up with a list of phone numbers, which can be confusing.
 - o Service requires a DID phone system and DID service from the local service provider - smaller locations may not be able to justify the cost.

Call Groups – Allows calls to a certain number or extension to ring on multiple phones at once. Subsequently, unanswered calls after a certain number of rings can be transferred to a 2nd call group.

- This feature is currently being utilized within XYZ Company. Many people interviewed felt that this feature is unnecessary for their department. Other departments felt it would help.
- Common uses include:
 - o Customer Service – Common staff that provides the same service can become part of a call-group helping to ensure that incoming calls are answered promptly.
 - o Customer service – From a reception standpoint, the ability to transfer certain calls to a group of people rather than individual extensions may be a time saver.
- Negatives
 - o Groups may be over-created linking many people within departments adding more extensions and linking people who should not be connected.
 - o Call groups may be created for departments that rarely receive calls.
 - o Feature requires a call group enabled phone system - smaller locations may not be able to justify the cost.
- Additional Requests
 - o Existing call groups do not share caller ID information nor a common voice mail. All members of a call group should receive caller ID information and should be notified of a “group” voice mail.
 - o A related request—the ability to forward or send voice mails to a group of people rather than just individual extensions.

Auto Attendant – An automated system that allows callers to browse a directory of extensions or departments and automatically transfer to the appropriate extension.

- XYZ Company is currently using this feature within some locations.
- Common uses include:
 - o Freeing Staff – Rather than have one person answer all calls and transfer as necessary, outside callers can dial their party directly.
 - o After Hours Answering – This feature allows the telephone system to continue answering and directing calls after normal business hours – this can also be turned on or off throughout the day as necessary.
- Negatives
 - o Requires callers to use and understand an automated system which is not always intuitive.
 - o Some calls are for questions so narrowly defined that they can't determine which department to select from the broad menus.
 - o Feature requires auto attendant enabled phone system - smaller locations may not be able to justify the cost.

Computer Interface— Integration between the telephone system and the computer network—in any and all ways imaginable.

- Common uses include:
 - o Customer Service – When combined with Caller ID, incoming calls automatically query database software to automatically pull up a caller's record
 - o Call Management – Ability to create custom reports for incoming calls beyond call reporting available on the telephone system—and in real-time.

- Negatives
 - o Software may require upgrades, replacement, or complete overhauls.
 - o XYZ Company infrastructure may not be able to handle this—limited voice and data availability.
 - o Due to costs and logistics, is likely something to implement when technologies have improved.

General Features Requested:

These features may or may not be in use at certain locations but do not fit in one of the larger categories listed above. Many of these features are either standards on new systems, requested by a few people, or require more information before they can be implemented.

- o Headsets for heavy telephone users.
- o Integration or migration to a mobile option with unified messaging (voice mail, e-mail, etc).
- o Better integration, communication with existing mobile options.
- o Ability to leave a pre-message before forwarding a voice mail.
- o Transferring calls is cumbersome for people who don't do it often.
- o Centralized system management – One system for voice mail, extensions, and other features. No need for outside help.
- o Overhead paging via telephone system.
- o Ability to cancel a transfer before call is received-release destination.
- o Ability to break in on calls if urgent call comes through—for key staff by key staff, not everyone.
- o Camping—telephone system notifies internal caller when individual extension is no longer busy.
- o Encouragement of staff to change voice mail to update their schedule, “I'll be out on appointments this morning but will return in the afternoon.”
- o Hands-free speakerphone.
- o Voice mail is a requirement for most staff.
- o Greater access to, and more intuitive conference calling. Ability to conference 20+ lines at once for full departments or board members.
- o Access to video conferencing for key remote sites, staff.
- o Better integration of TTY with computer network or telephone system.
- o Any additional ways to help hearing impaired employees/callers would be greatly appreciated.
- o Ability to call a certain number for information only—Chicago: menu options, Retail locations: donation sites & times, etc.
- o Centralized voice mail for some locations/departments—better control over messages left on one extension that may not be picked up for hours or days.
- o More reliable phone and internet access for many remote and smaller sites—ISDN is currently only reliable option. Makes communication difficult and, at times, impossible.

- Ability to park calls for a general hold instead of exclusive hold on one phone—allows someone to park a call and walk to another location to pick up the call. Currently this requires transferring to another phone and rushing to the phone before the call goes to voice mail.
- Call Center options, queuing – Some departments have staff who receive numerous calls at any given time. Setting up some sort of a queue that allows callers to wait until the staff is available, instead of being transferred to voice mail, would make customer service in these departments far more efficient.
- The collective ability to temporarily change a group or department's voice mail to a common message during meetings.
- Ability to turn on DND—Do not Disturb during important meetings. Currently, all calls come through regardless of the person's situation. This can interrupt or distract from meetings.
- Sets at headquarters have “two” lines available so that if someone is on a call, a second call comes through. Currently, the second call distinctly interrupts the first call, breaking the first call's conversation. Removing this interruption will help.

Suggestions for transition/installation

- **TRAINING** – Every staff member stated that training is the number one way to make the transition to a new phone system as trouble-free as possible.
 - o Many types of training were suggested ranging from one-on-one training, to group training, to train-the-trainer.
 - o Effective training and ongoing training are the most important ways to utilize the investment in new technology. The best technology with poor training and support is worthless technology.
 - o The trainer should be a trainer, not a technician. Someone with training experience knows when to slow down and how to simplify complex concepts.
 - o Manuals, webinars, help-desk, hands-on training—all are important. One type of training for every single person is not effective. People learn in different ways. Some people prefer one-on-one, real-time training. Others prefer to read a manual to learn. Others want to sit in a group learning the system. For best results, leave training options open and ongoing.

- **Planning** – You can not over-plan a technology installation. Everyone must be a part of when the installation will take place, how the installation will happen, and what will happen if the installation does not go according to plan.

- **Redundancy** – Before a system goes completely live, it should run side-by-side the existing system, whenever possible. Let it prove that it works before it's taking or making calls.

- **Communication** – Ongoing communication between each location, IT, and the vendor installing the system is essential. Each department-head knows what's best for each of their locations so keeping in contact is very important.

- **Installation** – Test sites should be set up as “guinea pigs” for any new system before rolling out new technology everywhere. Staggered installation after working out the bugs will help limit other location's down-time.

- **Timing** – Every department has a different time of the year that is more advantageous than others. Based on staggered installations, each site's time requirements can be met.