

6 STEPS FOR A SUCCESSFUL UC DEPLOYMENT

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The deployment of a unified communications and collaboration (UC&C) solution holds the promise of tremendous boosts in efficiency and productivity for organizations. But to realize that promise, users actually must adopt these new capabilities in their daily work lives. In some cases that could call for a fundamental change in how people go about their jobs- the kind of change that is not always easy to bring about. Further, if we're talking about the "collaboration" part of UC&C, that change will of necessity be more widespread, as it must touch all parties involved in that collaboration.

Having a platform that is stable, reliable and provides an appealing user interface is only the starting point in a successful UC&C deployment. It is important to recognize that a solution no one uses delivers no value to the organization. Unfortunately, many UC&C deployments only look at delivering a solution that works, but ignore the bigger issue of user adoption. It's time for IT departments to look beyond the short-term goal of implementing a workable solution, to the real goal, which is to deliver value for the organization. That "value" stems from actual user adoption.

One of the myths that hampers the commitment to training is the "No Manuals" myth. Taking a lead from the mobile industry, where manuals for smartphones are a thing of the past, some in IT (often mimicking overblown claims from the UC&C vendors) now promote the idea that UC&C systems are so intuitive and user-friendly (like smartphones), they no longer need manuals. Users should simply be able to "Turn the key and drive it off the lot!" Let's take a closer look at that.

The first thing to recognize is that UC&C is not just another 'telephone system'. And to be honest, most users didn't learn how to use a fraction of the features in old fashioned PBXs. Yes, UC&C solutions have developed significantly over the past several years, and once the user has gained basic familiarity with the tools, the rest is relatively simple. But make no mistake about it, these are complex, business-oriented tools and comparing them to consumer smartphones is an overly simplistic view.

We see this challenge particularly when we look at the collaboration capabilities. On our UC&C platforms we can arrange secure meetings with multiple participants, some connected via the web and some dialing in over the phone. We can also have multiple presenters sharing their desktops and passing control from one speaker to another, adding in additional internal and external participants- that's a lot different from sending a couple of tweets from your smartphone.

Not only are we looking at tools that are inherently more complex than what we find in the consumer space, there is also the challenge of choosing the best tool for a particular task. UC&C solutions offer voice and video calling, text, email, audio/video/web conferencing, screen sharing and increasingly functions like collaborative workspaces. How can a user know which of these is the best choice for a particular task without some type of guidance?

In short, the benefits of a UC&C deployment come from adoption, but you will not see that type of widespread adoption if the rollout plan ends once you confirm that the phones will ring. IT must think past the task of delivering basic functionality to the real objective, which is to see these tools embraced by the user population which in turn will spur greater agility, flexibility and productivity. Here is a comprehensive 6-step program that helps ensure the organization gets the greatest value out of its UC&C investment.

DEVELOPING A UC&C PROGRAM

To have a successful UC&C deployment, users must adopt the capabilities and use them intelligently on a regular basis in their day-to-day activities. Dumping a set of tools that are this complex on an unsuspecting user and expecting they will be able to figure out how to make them work effectively is simply unrealistic. Rather than thinking of a “deployment” plan, IT needs to think in terms of an “adoption” plan. For that, we see a six step program:

1. Study/Needs Discovery
2. Design
3. Marketing
4. Training
5. Monitoring
6. Remarket/Retrain

Let’s take a look at each of the steps:

1. Study/Needs Discovery

The first step in deploying a successful UC&C capability is understanding what users need. Different organizations and departments within those organizations work in a variety of ways and have needs that determine which UC&C capabilities will be most useful and appropriate for them. The first step is to meet with users in different functional areas to understand what their jobs are, who they interact with, the nature of those interactions and the challenges they face.

Generally you will find there are several different job roles or use cases to be addressed. Too much focus in UC&C has been on the needs of knowledge workers who represent a small minority of the workforce in many organizations. Sure, UC&C

can help those workers, but it can also be a boon to users in other collaborative roles (e.g. marketing, product development, R&D, etc.), including those that are mobile as well as those who work from their desks.

There will also be any number of mobile and desk bound task workers, retail clerks, field sales and field service workers, admins, corporate staff, and the list goes on. In the study phase, the task is to identify those various users groups, identify their needs and document the findings. While no two jobs are completely identical, when we look past that to the types of interactions people have and the nature of those interactions, you will identify sets of users with very similar UC&C requirements.

2. Design

With an understanding of your organization's needs, you are now equipped to begin shopping for the best UC&C platform for your organization. Focus first and foremost on the capabilities most important to the largest number of high-value users. Also, when you are evaluating vendors, review the marketing and training materials they provide - that will reduce the cost of your training program. Along with the implementation, testing and cutover plan for the UC&C solution, you should also be planning for your training and adoption stimulation programs. For that you will need tools that allow you to measure and track user adoption.

3. Marketing

To be truly successful at a UC&C deployment, you should train users and build expectations even before the system is deployed. Training users in specific functions is useless if they don't have the ability to actually use the training immediately; however, you can start marketing to build awareness of what's coming and how it can best be used.

Generally video is the best option for this, and it should be delivered in small doses. The goal of this initiative is two-fold. First is to generate general awareness (and hopefully "anticipation") that a new set of important communication and collaboration tools are on the way. Second is to start planting the seeds of where and how these new tools can best be used so those users can start thinking about how they might be useful in their job roles. Again, the choice of the "best tool for the job" is not intuitively obvious so the job of "pointing the way" will be an important part of IT's role.

4. Training

There are a number of philosophies about how and when UC&C training can best be done. With regard to the "when", the rule is: as close – within a day or two – of the

actual deployment. Without the ability to put that knowledge to work immediately, most users will forget what they learned before they have the opportunity to use it.

The training should be incremental; UC&C is too complex to be absorbed in one session. The focus of the first session should be familiarity, basic navigation and the use of fundamental capabilities like presence, making and receiving voice calls, programming voicemail, sending and receiving texts and working with unified messaging. This is also when you should stress the importance of using compatible headsets and speakerphones. Your UC&C system can be functioning perfectly; however, if your users have inferior headsets (or are using the microphone and speakers in their PCs) they will likely not be happy with the results.

The next session should cover the basics of scheduling meetings, inviting users, logging in and conducting meetings. That should also include tips on how to make online meetings as productive as in person meetings. A follow on session might address more complex functions like screen sharing and collaborative workspaces.

The biggest question is always, how should we do the training? As a rule, in person training is the best and most effective approach- typically; it's also the most expensive. However, that cost should be weighed against the cost of implementing a high-end UC&C system that nobody knows how to use and as a result, generates no benefits. Pre-recorded video training is the next best, because the users can actually see the screens and the processes to make each function work. The other benefit of pre-recorded video is the user can view it when they are ready (or when they really need it). It also aids the help desk, because when they get calls about how to use the various UC&C functions, then can simply refer callers to the video.

Some organizations take the “train the trainer” route and don't attempt to have IT train everybody, but rather have designated trainers in each department who can be the local go-to contact for users. They too can point users toward the video training.

The most critical period will be the first 2- to 3-days the system is installed: first impressions are lasting impressions! The IT posture for those first few days should be “All hands on deck”- that includes both IT personnel and any department level coordinators that have been trained in advance. Everyone should be made available to respond to any questions and or problems that arise. That type of response not only takes care of initial startup problems, it also demonstrates to the users that you are serious about getting this right.

The most important thing to recognize is that the design of this training program is just as important as the design of the UC&C system itself. Determine what types of training materials the vendor can provide. Look very carefully at the training resources your reseller or systems integrator can provide. And most importantly, don't forget about ongoing training.

Users will be joining and leaving the organization continuously. Training is not just about training the people who are in place when the system is first installed, it's about maintaining the knowledge base as time goes on. Also, if you use video training, the user interface may change with each new software release, so videos must be updated continuously. You don't want to teach your users how to operate Version 2 while you're running on Version 8.

5. *Monitoring*

On an ongoing basis, monitor which UC&C features are being used, by whom, and to what extent. In evaluating a UC&C solution, tools for adoption monitoring are critically important- and generally overlooked. Monitoring feature adoption gives you visibility into exactly how effective your UC&C solution really is. It is important during the ramp up, and it is equally important as time goes on.

A good feature adoption capability allows you to quickly and easily see which features are being used, to what extent, and by which departments and users. If a feature isn't being used, there are generally three reasons: users have no need for that feature; they don't know it exists, or they know it exists but they don't know how to use it.

Without visibility into user feature adoption, you are essentially "flying blind" with regard to your UC&C system. What you need to be looking for are anomalies. The initial needs discovery that was conducted to help guide the purchase selection should provide a basis for understanding.

If that initial assessment determined that two groups of users had a specific need for a particular feature and you now find that one of them is using it and the other is not, what's the problem? It may be that one group really did need it and the other did not. The other is that one group figured out how it could be used and the other didn't put the picture together. Or possibly, the people you initially trained realized how to use it but as staff turned over, new hires didn't get the message.

The analysis of this usage information should be rigorous, directed and assessed over time. Did this group ever use it? Did they use it for a while and then stop? If they stopped, was it because the capability no longer mattered or did they find another (and potentially more expensive) way to get the job done. Conferencing and collaboration should be a major focus here, as taking conferencing services in-house is typically one of the biggest hard dollar savings to be gained from a UC&C deployment. If you see your conferencing usage drop it could well be that the salespeople from one of the many outside conferencing services are selling to various departments in your organization, and the "free" conferencing capability your UC&C platform can provide is going unused.

6. Remarket/Retrain

The real world dynamics of adoption dictate that the job of keeping your UC&C solution viable and productive in meeting organizational objectives takes ongoing attention and focus. When a department migrates to an alternative solution, it is IT's job to show how the solution they are offering is viable, functional, and in line with organizational objectives like saving money and ensuring all departments can collaborate through a shared application- in short, IT's job is to win them back.

The primary strategy to do that is to retrace the marketing and training steps that had worked the first time around. Perhaps requirements have changed, so it will be necessary to redo the needs assessment. But, more likely than not, your UC&C solution has simply drifted out of mind and it will be necessary to sell it again. If the users are dead set on a more costly alternative, it may be necessary to make the case to upper management that your internal UC&C solution can be a viable and lower cost alternative.

CONCLUSION

In the real world, success in IT is measured by usage because usage is what yields results. Certainly the UC&C solution must be functional, reliable and provide a good user experience (or the users will have ample reason not to use it), but delivering a sound solution is only table stakes. IT network planners must think through not just the technical design and implementation, but the entire process of how users integrate the platform with their daily work lives and maintain that level of usage as time goes on. It's that "as time goes on" factor that is typically the most difficult to master, because IT enthusiasm often fades after the initial system is installed and everyone moves on to other projects.

However, the UC&C solution should be a part of every user's day-to-day work processes and it will be critical to maintain that knowledge base over time. And unlike traditional telephone systems that remained relatively unchanged for the life of the system, the UC&C vendor will likely be adding new features with each new software release, so ongoing training will be required to ensure those new features are adopted.

The payoffs from a well-designed UC&C solution can be significant, but you need to spur adoption for that to prove true.

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