



# HEALTH CHECK CHECKLIST

## Top 4 Must-Ask Questions about Collaboration Solutions to make Hybrid Work a Success

When it comes to collaboration solutions, there are many choices so it's critical to find the right one to suit your customer's needs. Today's successful businesses are embracing the hybrid work model and supporting a mix of in-office and remote workers with secure, flexible, and affordable collaboration tools.

The right solution should be easy to use and allow improved efficiencies for the business as well empowering staff to be collaborative from wherever they work. Here are the 4 questions you should consider when evaluating your customer's Unified Communication solution.

# 01

### When does your telco contract come up for renewal?

- This discovery call should be all about their current provider. Ensure you never make negative remarks about their current provider and always say something nice about them
  - When does your customer's telco contract end?
  - Who are your customer's current telco provider?
  - Will they provide you a copy of the bill?
- Ask your customer what they like about their current phone system setup and their provider
- Discover any pain points your customer is having with their current provider, i.e. what's an ongoing issue that's not being resolved? What makes you go "arghhh" with your current provider?
- Provide the benefits of not renewing with the current provider and investigate alternative options
- Determine how your customer would benefit from switching to Access4



# 02

### What existing solution does your current customer host - on premises or cloud?

- Determine if your customer has on premise, cloud, or a hybrid solution
- What are the annual maintenance costs?
- Provide the benefits for moving to 100% to the cloud – this should form part of the sales presentation in a subsequent meeting. Here, the BDM should be health checking only.
  - Agility / scalability
  - Ease of implementation
  - Less on-site maintenance required
  - The ability to manage from anywhere
- What's something they would love to have but aren't getting with their current setup? i.e. change a diversion without having to call their provider.
- Does the customer know how many Users they have? Important to know how many lines/channels/licenses the system has.
- Are there upcoming plans for your customer to hire more staff to scale for seasonal/promotional reasons?
- How old is their phone system? Is it capable of adding new features required in today's environment? Is there a business risk due to SPoF or a required fix due to age – what would an hour or days without this capability mean to them? How much would this cost the business in profits?
- Is your customer looking at replacing desktop handsets altogether or do they still require them?
- What does the future-state look like? i.e. in 3 or 5 years' time, would your customer's requirements change and will the phone system/collaboration tools evolve seamlessly with them?



## 03

### What Mobility Solutions do you require for your hybrid workforce?

- Determine the customer's requirements to be able to offer a remote workforce
- Is the customer's experience as good as it should be? Does the current system route calls within the customer's business well, or are calls lost in 'call routing hell'?
- Does the current system provide insights into how well the business communicates with its customers? Does the current solution provide call analytics or actionable reports?
- Provide the benefits for being able to offer flexible working - this should form part of the sales presentation in a subsequent meeting. Here, the BDM should be health checking only.
  - Work-life balance
  - Staff recruitment/retainment could be a problem if this solution is not offered
  - Ability to enable your customers with the tools to provide a collaborative and effective workforce
- Does your customer have a remote workforce today? If so, how many are working remotely?
- Will the business introduce flexible working policies to allow staff to permanently work from home?
- How easy is it for the customer to provide communications solutions to new staff, can they easily provide a new team member a telephone number, softphone?
- Are they providing mobile telephones to staff?
- Are staff being asked to use personal mobile phone numbers and recouping expenses from work? Are these costs captured in overall communication costs for the business (in addition to telco bill and PBX maintenance)?

## 04

### What does your current workforce look like and how do they collaborate?

- What tools are in place for collaboration?
- Have your customers got the right level of tools to ensure their organisation is successful?
- What tools would you suggest to streamline communications and collaboration?
  - Microsoft Teams
  - Webex
- Does your customer have a digital strategy for communications? If so, what does that look like? If not, why not?

**Make sure your customers have the right collaboration tools in place to enable them to deliver a world that works from anywhere.**