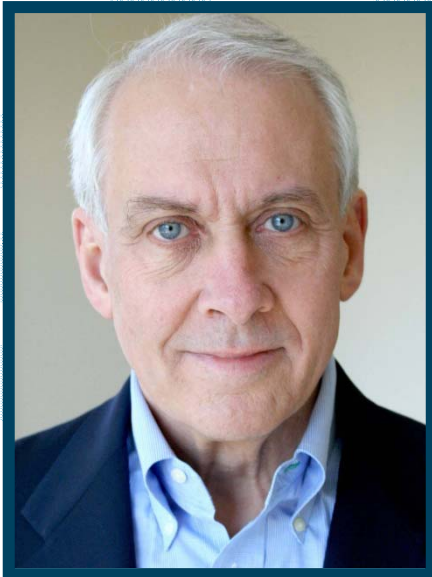




Welcome to “Introduction to UC”

An online training course
with Marty Parker

About The Instructor ...



Marty Parker

- Communications consultant with focus on enterprise UC planning and implementation
- Founder, Communication Perspectives
- Co-founder, UniComm Consulting LLC
- Co-founder, UCStrategies.com

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UCStrategies.com

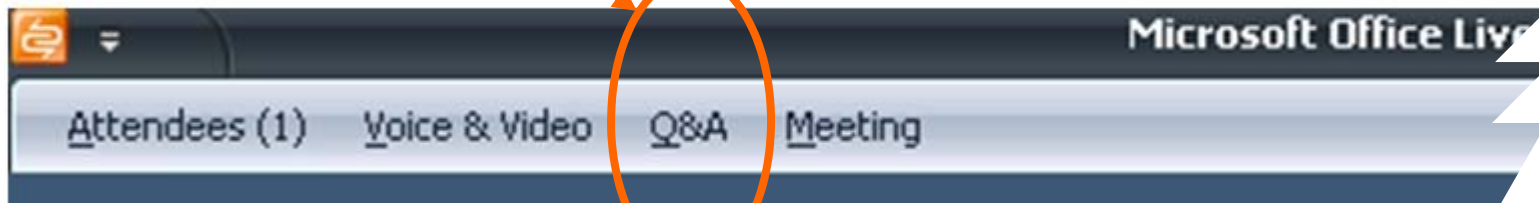
*The Premier Unified Communications forum
for customers, vendors, channels, experts*

The screenshot shows the UCStrategies.com website. At the top, there is a navigation bar with links for Home, Article Categories, Industry Events, Webcasts, Surveys, UC Forum, Add Bookmark, and Articles By Category. Below this is a banner for a webinar titled "Intro into Unified Communications" on Thursday, September 18th, at 10:00 am PDT. The main content area is divided into several sections: a left sidebar with a menu (UC Information, UC Views, UC Research, UC Professionals, Ask An Expert, UC Forums, About Us, UC Blogs), a central "Industry Buzz" section featuring an article titled "Genesys GETS It" by Blair Pleasant, and two "UC Expert Views" sections. The right sidebar contains "UC Alerts" and "RFP Templates". A search bar is located at the bottom left of the main content area.

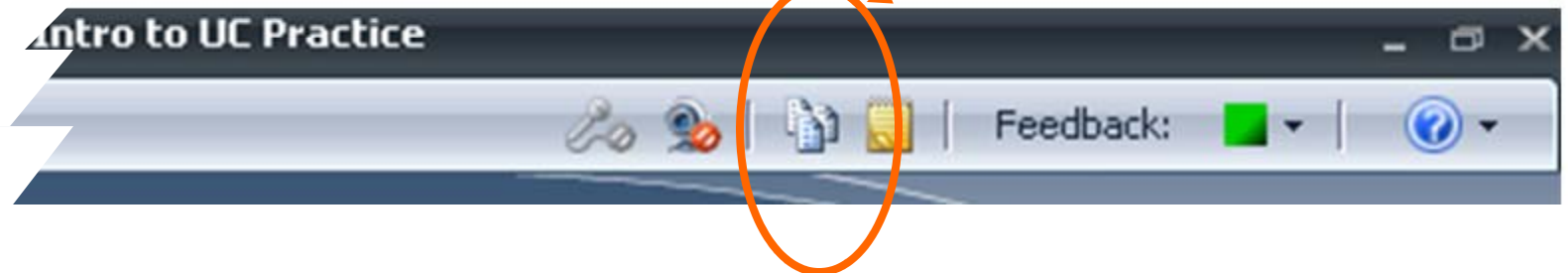
- ✓ Independent resource for UC information: blogs, articles, resource libraries, “Ask-the-Experts,” and more
- ✓ Organizer for UC Sessions at VoiceCon and other conferences
- ✓ Facilitator for industry and channel development

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

To send a question to the presenter



To download "Quick Reference"



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Please think of your top two
questions about
Unified Communications



Sales Professional

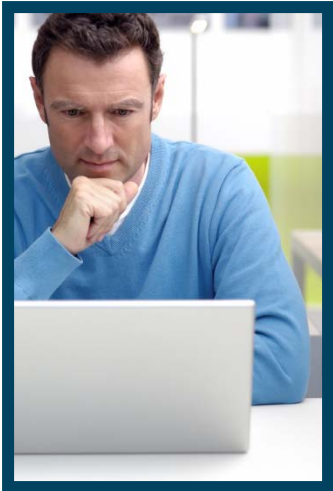
What do I say when
My customer asks
About UC?
How can I introduce
UC to my prospects?

What is the business
opportunity for UC?
Do customers expect
UC from us?
Are UC providers a
threat to our business?

Do I have to care
about UC now?
If so, what do I need
to care about?



Enterprise Telecom / IT Managers



Vendor / SI

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why Is It Important to Know about UC?

- Key part of your career development
- Be able to evaluate whether UC can help your enterprise to:
 - Improve business results
 - Strengthen competitive position
 - Facilitate growth

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why Is It Important to Know about UC?

- Vendors are circling! To make good decisions, you must be informed
 - Invest for a solid business reason
 - Avoid wasting time and money
 - Avoid re-works and backtracking
 - Ensure that products and services you buy will make a real difference to your business
- With a good UC plan, each investment can enable the next step

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

What We Will Cover

- Definition of “Unified Communications” (UC)
- Why the buzz over UC now?
- New communications methods that enable UC
- Business processes before and after UC
- How UC can optimize business processes
- Major UC applications and opportunities
- UC value proposition

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Let's Begin...

- **Definition of “Unified Communications” (UC)**
- Why the buzz over UC now?
- New communications methods that enable UC
- Business processes before and after UC
- How UC can optimize business processes
- Major UC applications and opportunities
- UC value proposition

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

What is Unified Communications?

“Communications integrated to optimize business processes”*

* www.ucstrategies.com

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

© Communication Perspectives 2007-2008

What is Unified Communications?

- Similar definitions from other sources:
 - “Unified Communications is the **integration of communication functions into business processes.**”
– *Editor, CIO Magazine*
 - “Microsoft Office Communication Server will allow people, teams, organizations to communicate simply and effectively while **integrating seamlessly with business applications and processes.**” – *Microsoft*

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Let's Take the Definition Apart

“Communications integrated to optimize business processes”

■ Communications:

- “*the technology and systems used to facilitate personal interaction via speech, video or text*”
- We mean: NEW communications methods, technology and systems

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Let's Take the Definition Apart

“Communications integrated to optimize business processes”

- integrated:

- “*to make something part of a larger whole*”
- We mean: communications linked to or built directly into a business process

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Let's Take the Definition Apart

“Communications integrated
to optimize business processes”

- optimize:

- “to make something function at its best or most effective”
- We mean: make business processes function most efficiently and effectively

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Let's Take the Definition Apart

“Communications integrated
to optimize business processes”

- business process:

- “A sequence of related tasks performed to achieve a specific business outcome”
- That’s what we mean, too



So ...

- To implement Unified Communications is *to build new communications methods directly into the sequence of tasks in a business process to make that process function most effectively.*
- In other words:

“Communications integrated
to optimize business processes”

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC “Concept” Is Not New

- Businesses have always integrated new communications capabilities to optimize business processes
 - Voice Mail
 - Email
 - IVR (Interactive Voice Response)
 - Internet and websites
- What’s **NEW** is the unprecedented explosion of new communications technologies

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Go to your Quick Reference Guide

My Quick Reference Guide for Introduction to UC

As we complete each section in the course, we will pause to let you line item the points from the section that were most important to you.

Definition of Unified Communications

*Make a note of
whatever was
important to you
in the section we
just covered.*

Why the "Buzz" Over UC Now?

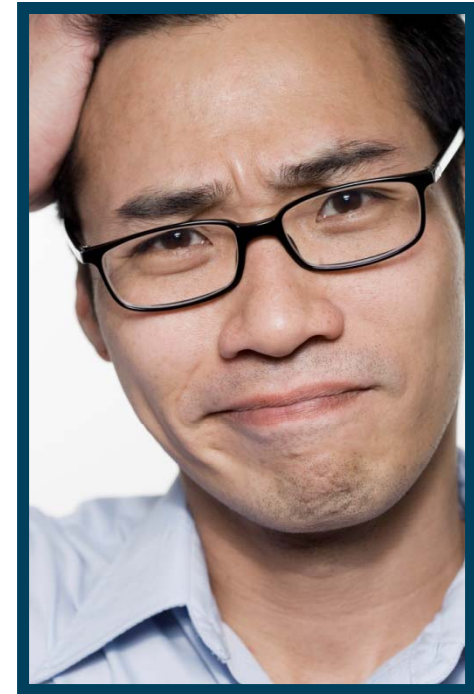
Moving Along ...

- Definition of “Unified Communications” (UC)
- **Why the buzz over UC now?**
- New communications methods that enable UC
- Business processes before and after UC
- How UC can optimize business processes
- Major UC applications and opportunities
- UC value proposition

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why the Buzz over UC Now?

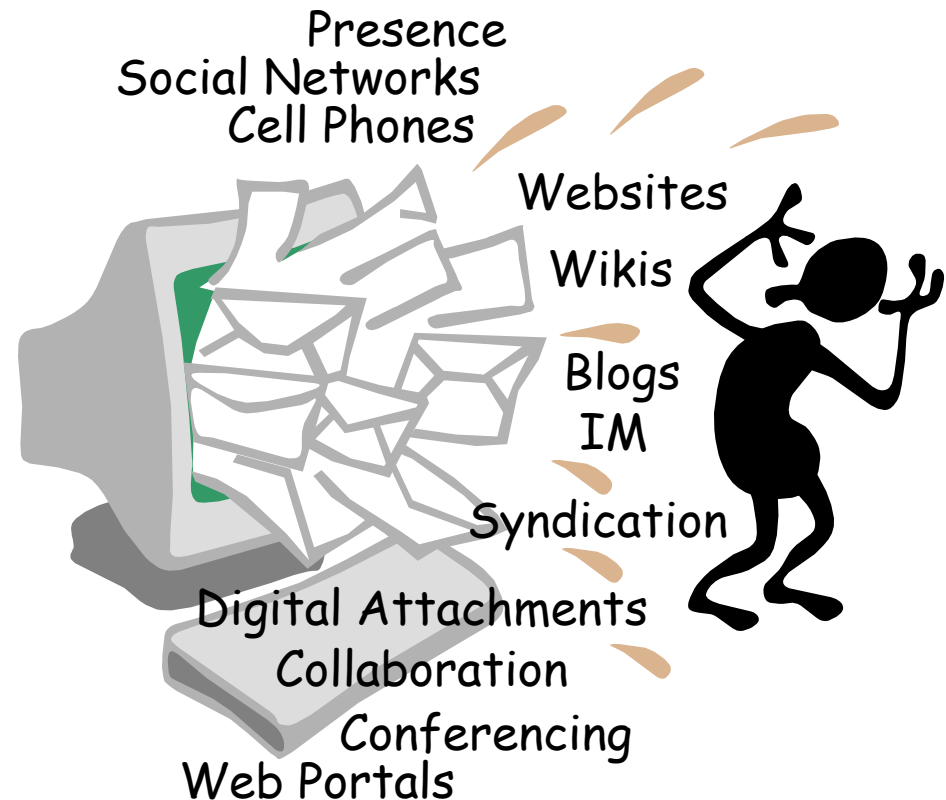
- Customer are confused!
 - Some vendors present UC as a “thing” instead of a smart business practice
 - Different products have same “UC” label
 - New vendors challenging traditional vendors
 - Some vendors selling “solutions” without understanding business problems
 - You want to know:
 - How market will evolve
 - Who will win
 - How to place your bets



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why the Buzz over UC Now?

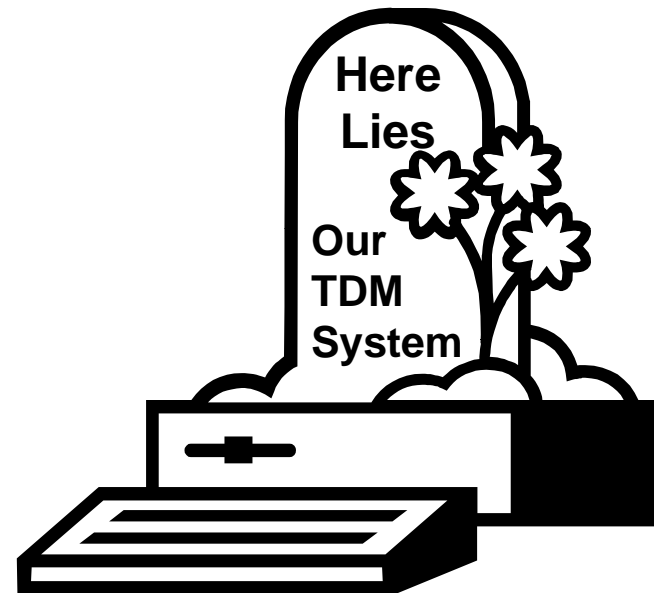
- Unprecedented explosion of new communications capabilities
- Advances in software, networks, digitization
- You need to know how to use these to improve business



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why the Buzz over UC Now?

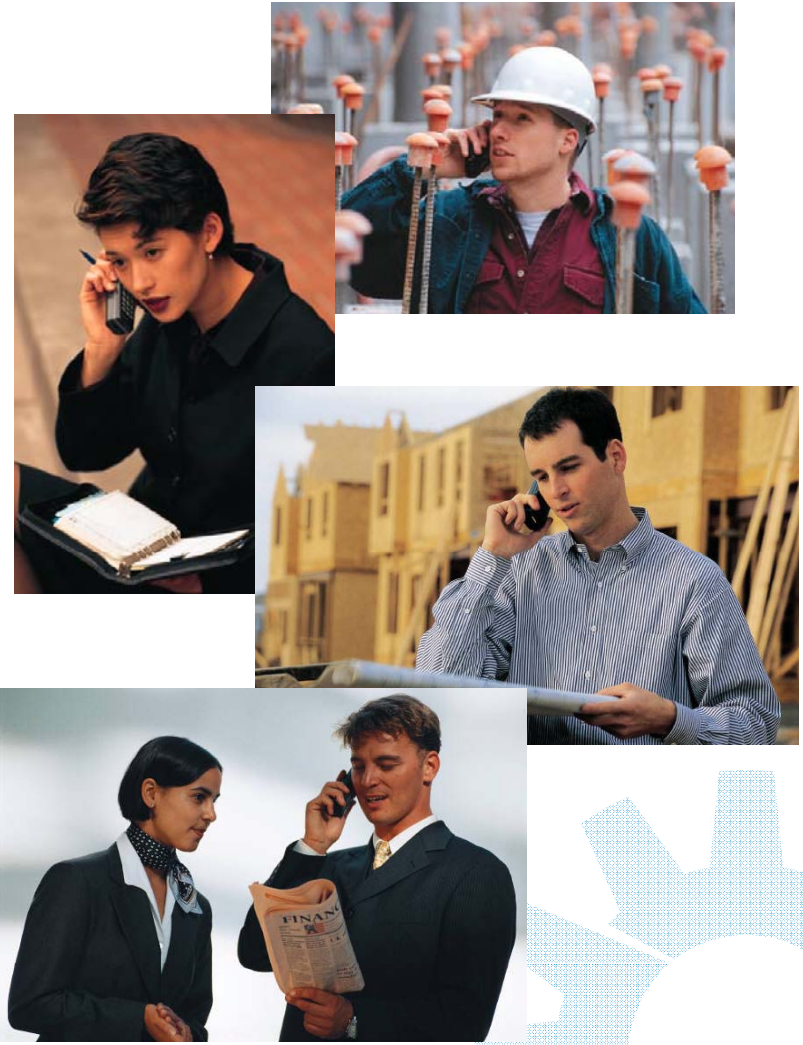
- Many communications systems at end of life
 - You want to use replacement opportunity to get “what’s new” to improve business
 - BUT don’t want to overspend or mis-spend
 - You need to know what to buy and why



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why the Buzz over UC Now?

- **Mobility rules!**
 - Cell phones are dominant endpoint
 - Wireless voice and data merging in smart phones
 - Desktops anywhere
 - You need to know:
 - How to capitalize on mobility
 - How to best equip, serve your mobile workforce



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why the Buzz over UC Now?

- Organizations have new communications requirements


Activity	Requirement
✓ Growth / Globalization	Move and track work among global locations and workers
✓ Collaboration	Make collaborative work faster, easier, more effective, more predictable within and between organizations
✓ Mobility	Sustain effectiveness of mobile workers: <ul style="list-style-type: none">Information delivery and accessLocation, status, availability
✓ Information-based work	Most efficient data access, data capture, and coordination <ul style="list-style-type: none">Single client / portal for information and communicationsTrack communications events to allow software/application assistance

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Why the Buzz over UC Now?

Activity	Requirement
✓ More emphasis on business metrics	Capture events, activities in business process for analysis <ul style="list-style-type: none">▪ Best application, use of resources▪ Eliminate wasteful steps
✓ More work flows through computers and networks	Integrate automated business processes with communications activities for related jobs and roles
✓ Customer and employee self-service	Enable customers, employees to control and perform tasks quickly, easily
✓ More emphasis on fast response	Make business go faster <ul style="list-style-type: none">▪ Find right resource immediately▪ Automate administrative, clerical work or move to less qualified resource▪ Eliminate wasteful steps

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



You need to know how to best meet these new communications requirements and optimize your business.

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

© Communication Perspectives 2007-2008

Interesting Questions

- How much does a call center agent make?
- How much do companies spend on the technology to support an agent in the job?
- How much does a top sales representative make?
- How much do companies spend on the technology to support the sales rep in the job?
- Why should companies spend so much more on the call center agent?
- Why do companies spend more?

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Ideas from Contact Centers

Workflows can be defined

Work can be shared across teams

Metrics matter

Service levels matter and can be met

What you know is important

Software helps the people and processes



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Ideas from Contact Centers

Workflows can
be defined

Work can be
shared across

UC uses these call center principles
and applies them to business processes
throughout the enterprise.

What you know
is important

Software helps
the people
and processes

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Go to your Quick Reference Guide

My Quick Reference Guide for Introduction to UC

As we complete each section in the course, we will pause to give you time to note the points from that section that were most important to you.

Definition of Unified Communications

Why the "Buzz" Over UC Now?

*Make a note of
whatever was
important to you
in the section we
just covered.*

Moving Along ...

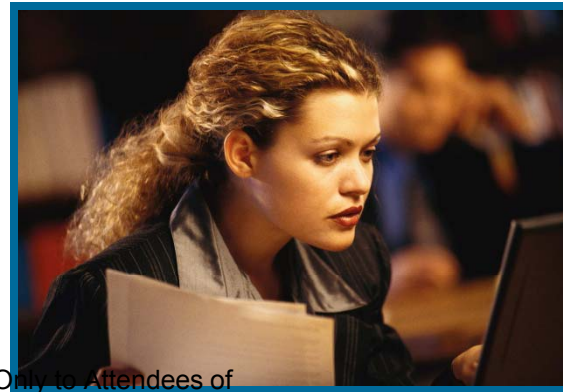
- Definition of “Unified Communications” (UC)
- Why the buzz over UC now?
- **New communications methods that enable UC**
- Business processes before and after UC
- How UC can optimize business processes
- Major UC applications and opportunities
- UC value proposition

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

We said ...

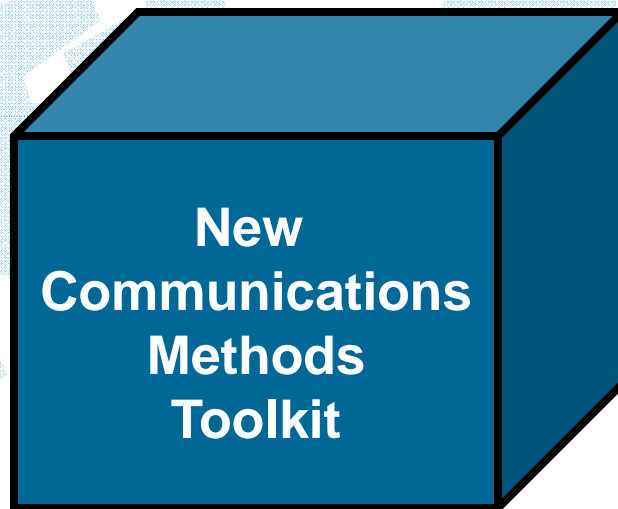
“To implement Unified Communications is to build new communications methods into the sequence of steps in a business process to make that process function most effectively.”

What are these “new communications methods”?



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

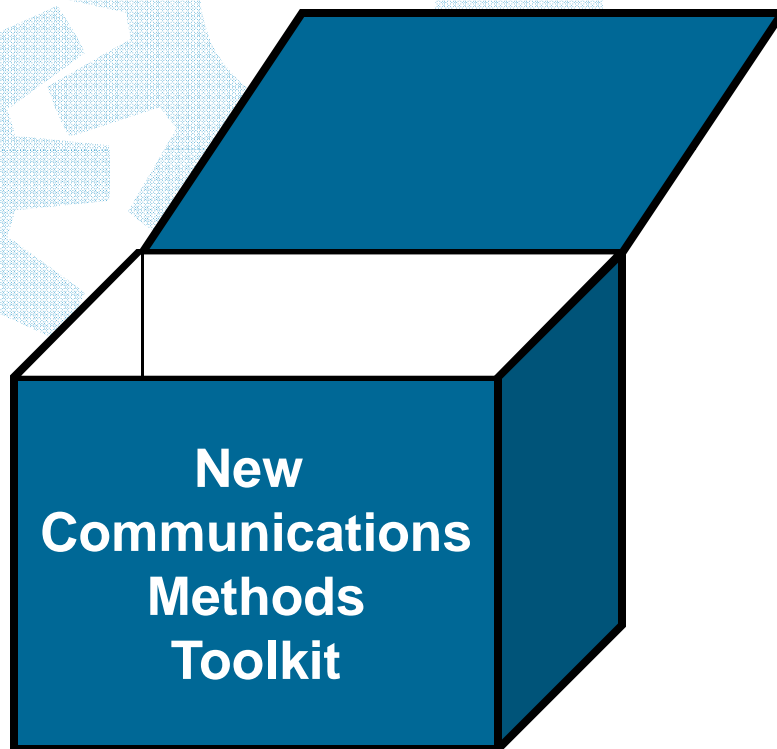
New Communications Methods



- There are MANY !
- They enable UC, but you do not need all of them for UC
- Pick and choose the methods that enable your UC application

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

New Communications Methods



- ✓ **Presence**
- ✓ **Smarter, cheaper software-based solutions and controls**
- ✓ **Pervasive (wireless) IP networks with multimedia endpoints**
- ✓ **Instant messaging / chat**
- ✓ **Enhanced conferencing**
- ✓ **Collaborative workspaces**
- ✓ **Application-embedded communications**
- ✓ **Natural Speech Recognition**
- ✓ **Dashboards with metrics**

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

New Communications Methods

- Many existed in some form before but:
 - Had less functionality
 - Did not interoperate
 - Worked only with selected, expensive endpoint devices
- Let's look at them one by one

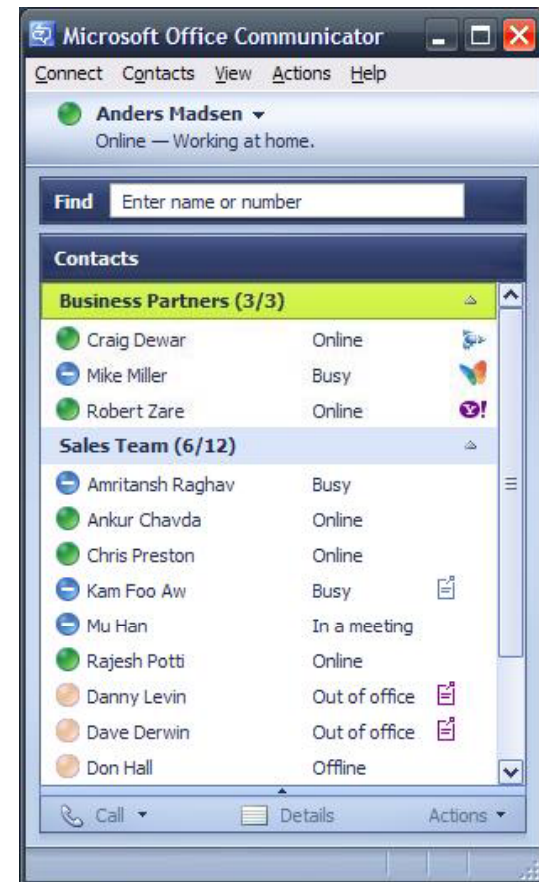
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



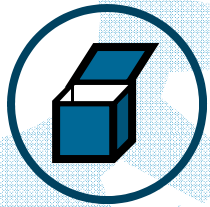
Presence

(with or without Instant Messaging)

- Enables authorized users (or software programs) to see status (location, activity, availability, profile, skills, etc.) of others on network
- Optimizes business processes
 - Enables users to find best / right resource to complete process steps
- Application areas:
 - Customer response
 - Supply chain
 - Collaboration



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Software-based Solutions

- Software is now core of communication technology
 - Can be built into or control communication-based process steps
 - Tools constantly improving to deliver better solutions
 - Examples: click-to-call, Presence search, information pop-ups
- Optimizes business processes
 - Enables greater efficiency in performing complex jobs
 - Makes processes faster, more accurate
- Application areas:
 - Jobs / processes with high complexity or need for precise steps
 - Jobs / processes that depend on information access, updates, records

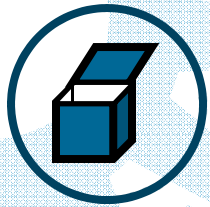
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Pervasive (Wired and Wireless) IP Networks with Multimedia End Points

- Users connect to networks via multimedia device nearly everywhere - mobile and desktop
 - Can integrate network endpoints into enterprise network
- Optimizes business processes
 - Enables workers to:
 - access information from any place, any time
 - reach resources on most appropriate device
- Application areas:
 - Jobs / processes requiring mobility or extended hour access
 - Jobs / processes with many communications events

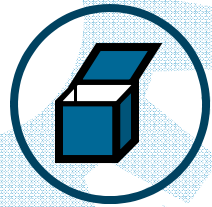
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Instant Messaging/Chat

- Real-time text interaction across a network with ability to include images, files, voice, video
 - Can be in parallel with multiple individuals or groups
 - Overcomes “one at a time” limitation of phone call
- Optimizes business processes
 - Reduces time spent in live interactions and processes
 - Enhances calls and conferences with sidebar information or chat
- Application areas:
 - Jobs / processes requiring on-demand interactions
 - Calls, negotiations, conferences where sidebar has value

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Enhanced Conferencing

- Adds presentation, file, and application sharing; white boarding; recording; cheaper video -- all with IP transport
- Optimizes business processes
 - Reduces cost and increases efficiency of meetings
 - Shortens cycle time for complex processes
- Application areas:
 - Collaborative processes / jobs
 - Customer communications
 - Supply chain communications



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

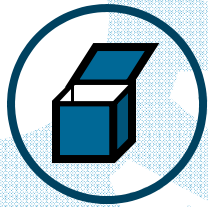


Collaborative Workspaces

- Shared space with complete suite of tools for team-based work
 - Communication tools for presence, IM, e-mail, conferencing
 - Web 2.0 tools and collaboration methods (blogs, wikis, podcasts)
 - Coordination tools (calendar, RSS, etc.)
 - Skill profiles
 - Access via secure network links



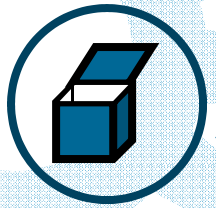
A team workspace based on a project template



Collaborative Workspaces

- Optimizes business processes
 - More efficient teamwork, reducing total labor costs and “time to results” for internal and external collaborative projects
 - Improving quality of results via broader, more diverse contributions to collaborative product
- Application areas:
 - Project-oriented work, creative projects, team-oriented work
 - Research and development

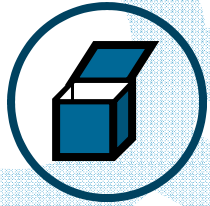
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Application-embedded Communications

- Communication functions and tools embedded in software applications to enable fast, efficient transactions / processes
 - Enhances existing applications by enriching user interfaces via Service Oriented Architecture (SOA)
- Optimizes business processes:
 - Reduces transaction and process delays, eliminating wasted time, minimizing business process errors
 - Ensures consistency of communications and regulatory compliance

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Application-embedded Communications

- Application areas:
 - Jobs / processes in regulated industries
 - Health care, government, finance
 - Repetitive, tedious, error prone tasks
 - Logistics, sales records, etc.
 - Process-oriented tasks
 - HR, finance, logistics, services, etc.


Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Example 1: Purchasing Application with Embedded Communications

- For purchasing managers and staff
- Provides on-screen, multi-pane workspace for
 - New order contracts
 - Monitoring backorders and exceptions
 - Tracking prices on key components
 - Tracking vendor performance
- For example, to purchase a product:
 - Click on part number
 - All available suppliers are shown with ratings
 - Toolbar to request quotes via email
 - Quote responses highlighted with click-to-call option

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Example 1: Purchasing Application with Embedded Communications

- Provides support for negotiation and contract through IM/chat, voice and web-sharing conferences, collaborative workspace
- What new methods are used? 
 - Application-embedded communications
 - Software-based controls
 - Enhanced conferencing
 - Dashboard

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Example 2: Communications in Sales Contact Management Portals

- Communication controls built into sales portal by Salesforce.com
- Incoming calls automatically linked to contact information
- Outgoing calls can be started directly from application record
- Communication controls are visible in pop-up box

The screenshot displays the Salesforce CRM interface. At the top, the Salesforce logo is visible, followed by navigation tabs: Home, Console, Accounts, Contacts, Cases, Solutions, Policies, and Reports. Below the navigation, there's a section for 'Cases' with a dropdown menu set to 'All Open Cases' and buttons for '[Refresh]', 'Create New...', and 'Mass Action'. A table lists several cases with columns for 'Case Number', 'Contact Name', and 'Subject'. Below the table, a 'Contact' pop-up window is open for 'Carole White'. This window shows a call log for 'Line 1 Incoming Call' with details like 'Caller ID 4155551212', 'Contact Carole White', and 'Title Director, Eastern Region Sales'. It includes 'Answer' and 'End Call' buttons. To the right of the call log, the 'Contact Detail' section shows 'Contact Owner Admin User [Change]', 'Name Carole White', 'Account Global Media', and 'Title Director, Eastern Region Sales'. Below this, the 'Address Information' section shows 'Mailing Address 150 Chestnut Street, Toronto, Ontario L4B 1Y3'. At the bottom left of the pop-up, there's a 'Recent Items' section listing 'Carole White' and 'What Does Umbrella'.

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

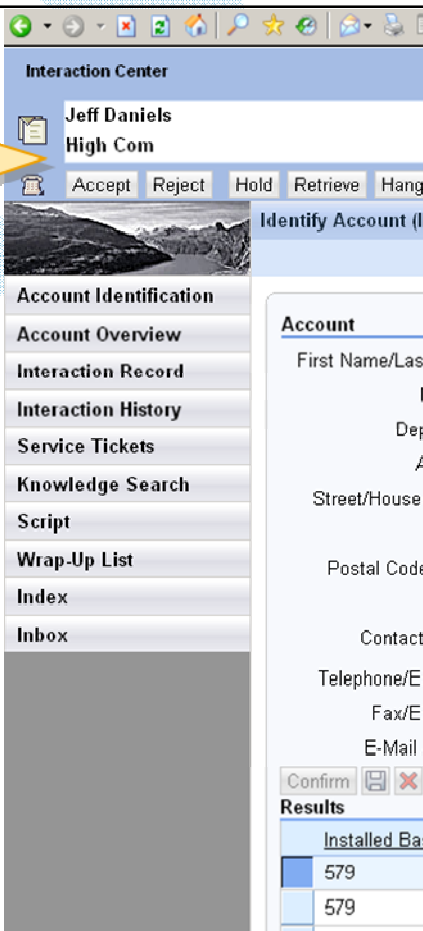
Example 2: Communications in Sales Contact Management Portals

User interface


SAP BCM softphone behind the IC telephony toolbar

BCM Server

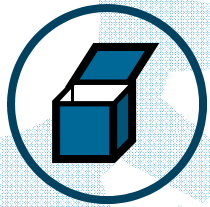
Contact channels and routing logic, monitoring, reporting and management in SAP BCM platform



The screenshot shows a web-based user interface for an Interaction Center. At the top, it displays the name 'Jeff Daniels' and 'High Com'. Below this is a toolbar with buttons for 'Accept', 'Reject', 'Hold', 'Retrieve', and 'Hang'. A central panel shows a landscape image and the text 'Identify Account (I...'. To the left is a vertical menu with options: 'Account Identification', 'Account Overview', 'Interaction Record', 'Interaction History', 'Service Tickets', 'Knowledge Search', 'Script', 'Wrap-Up List', 'Index', and 'Inbox'. On the right, there is a form for 'Account' with fields for 'First Name/Last', 'F', 'Dep', 'A', 'Street/House', 'Postal Code', 'Contact', 'Telephone/Ex', 'Fax/Ex', and 'E-Mail'. At the bottom right, there is a 'Results' table with columns for 'Installed Bas' and values '579'.

- Similar application built into customer relationship portal by SAP
- What new methods are used?
 - Software controls 
 - Application-embedded communication

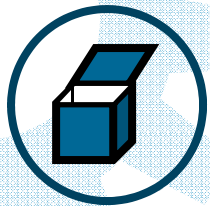
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Natural Speech Recognition

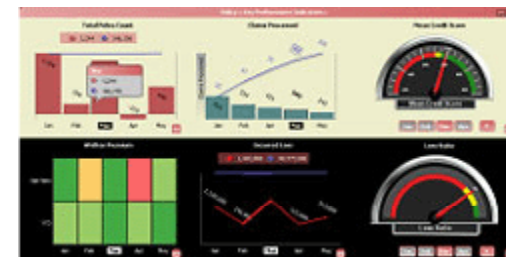
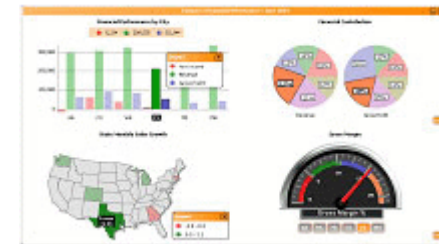
- Speech recognition for key words, actions, commands
 - Mobile employees work hands-free, eyes-free
- Optimizes business processes
 - Enables mobile users, customers, clients to access information and perform tasks without delays, limitations, errors
 - Eliminates errors in transcription and their costs
- Application Areas:
 - Mobile jobs / processes (sales, service, logistics)

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



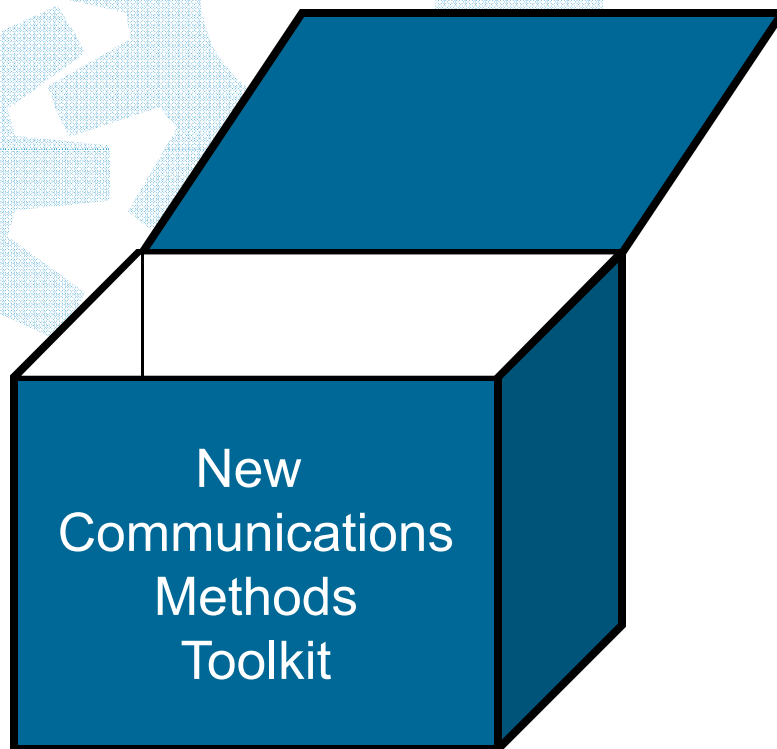
Dashboards with Metrics

- Display of key data about process or job
 - Data collected, analyzed via software and databases
- Optimizes business processes by:
 - Enabling rapid adjustment and learning as a result of feedback to employees and managers
- Application areas:
 - Transaction-based jobs / processes to reduce delays, measure throughput (sales, service, logistics, manufacturing)
 - Creative jobs / processes to reduce project time (development, marketing, management)



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Recap: New Communications Methods



- ✓ **Presence**
- ✓ **Smarter, cheaper software-based solutions and controls**
- ✓ **Pervasive (wireless) IP networks with multimedia endpoints**
- ✓ **Instant messaging / chat**
- ✓ **Enhanced conferencing**
- ✓ **Collaborative workspaces**
- ✓ **Application-embedded communications**
- ✓ **Natural Speech Recognition**
- ✓ **Dashboards with metrics**

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Go to your Quick Reference Guide

The screenshot shows a document titled "Quick Reference Guide for Introduction to UC" on page 2. It features two sections with checkboxes: "New Communications Methods that Enable UC" and "Business Processes Before and After UC". An orange oval highlights the text "Make a note of whatever was important to you in the section we just covered." which is positioned between the two sections.

Quick Reference Guide for Introduction to UC Page 2

New Communications Methods that Enable UC

Make a note of whatever was important to you in the section we just covered.

Business Processes Before and After UC

© Communication Perspectives 2008 9/19/2008

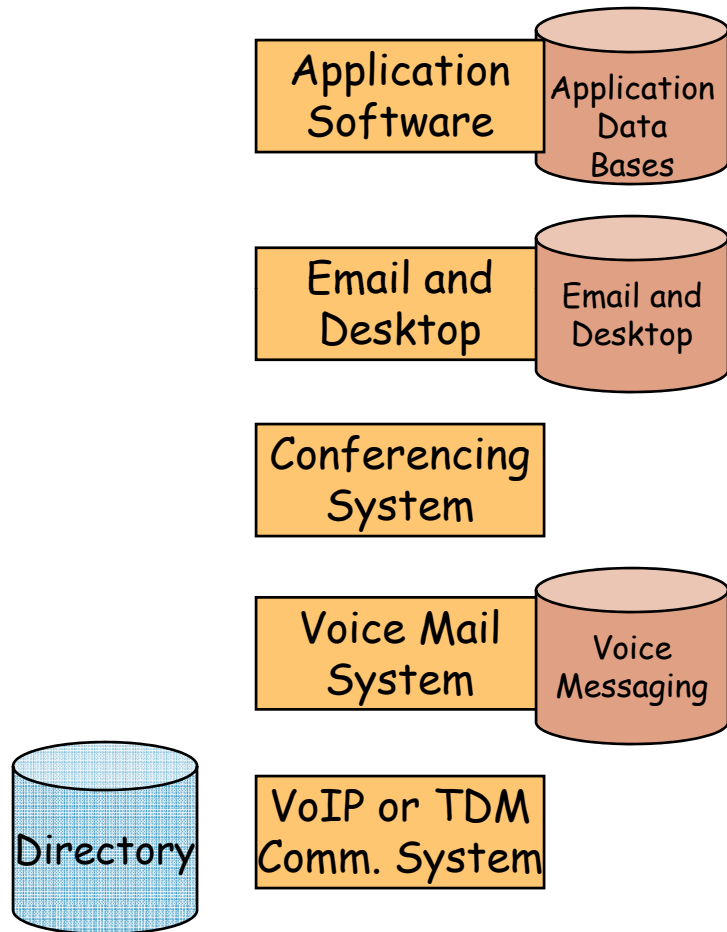
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Moving Along ...

- Definition of “Unified Communications” (UC)
- Why the buzz over UC now?
- New communications methods that enable UC
- **Business processes before and after UC**
- How UC can optimize business processes
- Major UC applications and opportunities
- UC value proposition

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

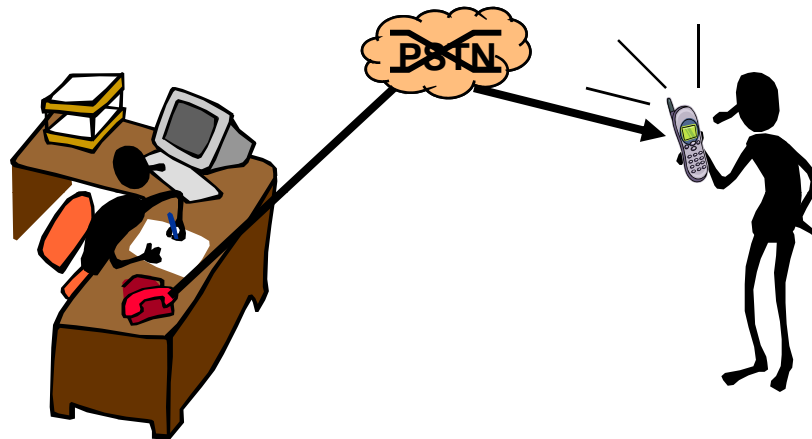
Communications without UC: Systems Probably Not Integrated



- ✓ Workers had to “connect the dots” and manually coordinate functions
- ✓ Communication was slow, uncertain; often wasted time
- ✓ Applications did not talk to communications tools
- ✓ Voice mail did not talk to email
- ✓ PBX did not talk to conferencing system

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Communications without UC: Users Made the Process Go

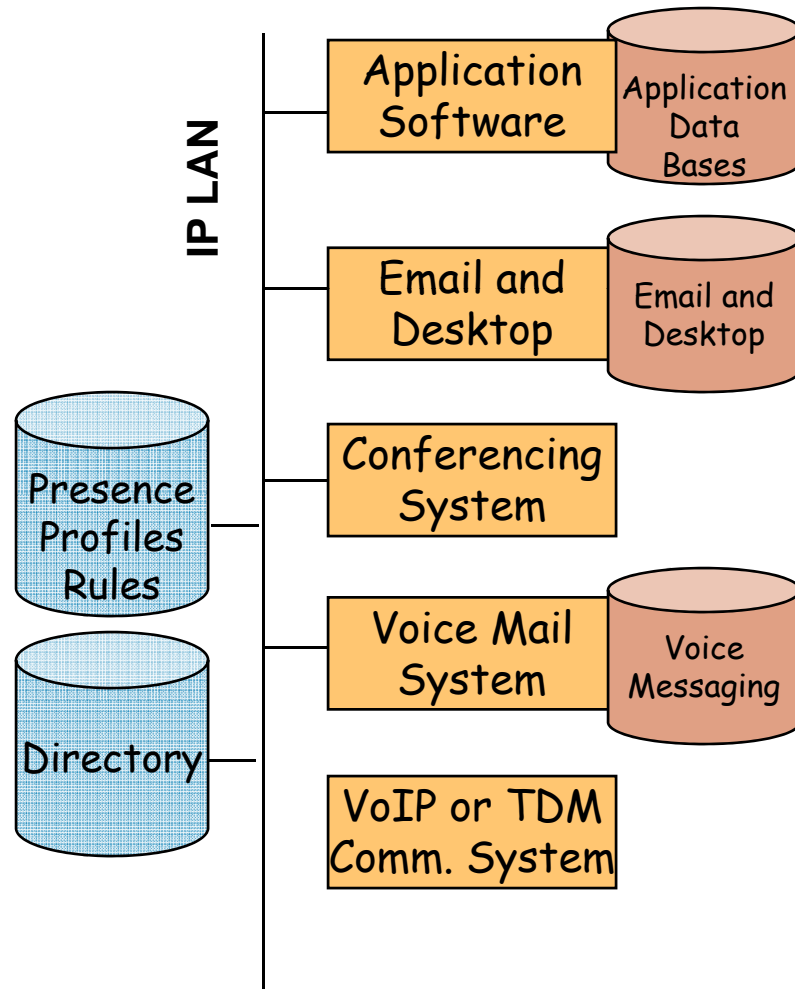


- 1** Users looked at information or application on data device.
Example: sees order problem; needs to talk to account rep

- 2** Users called or sent messages to each other to perform task, get help
Example: look up account rep for order; call / VM / EM; wait for response

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

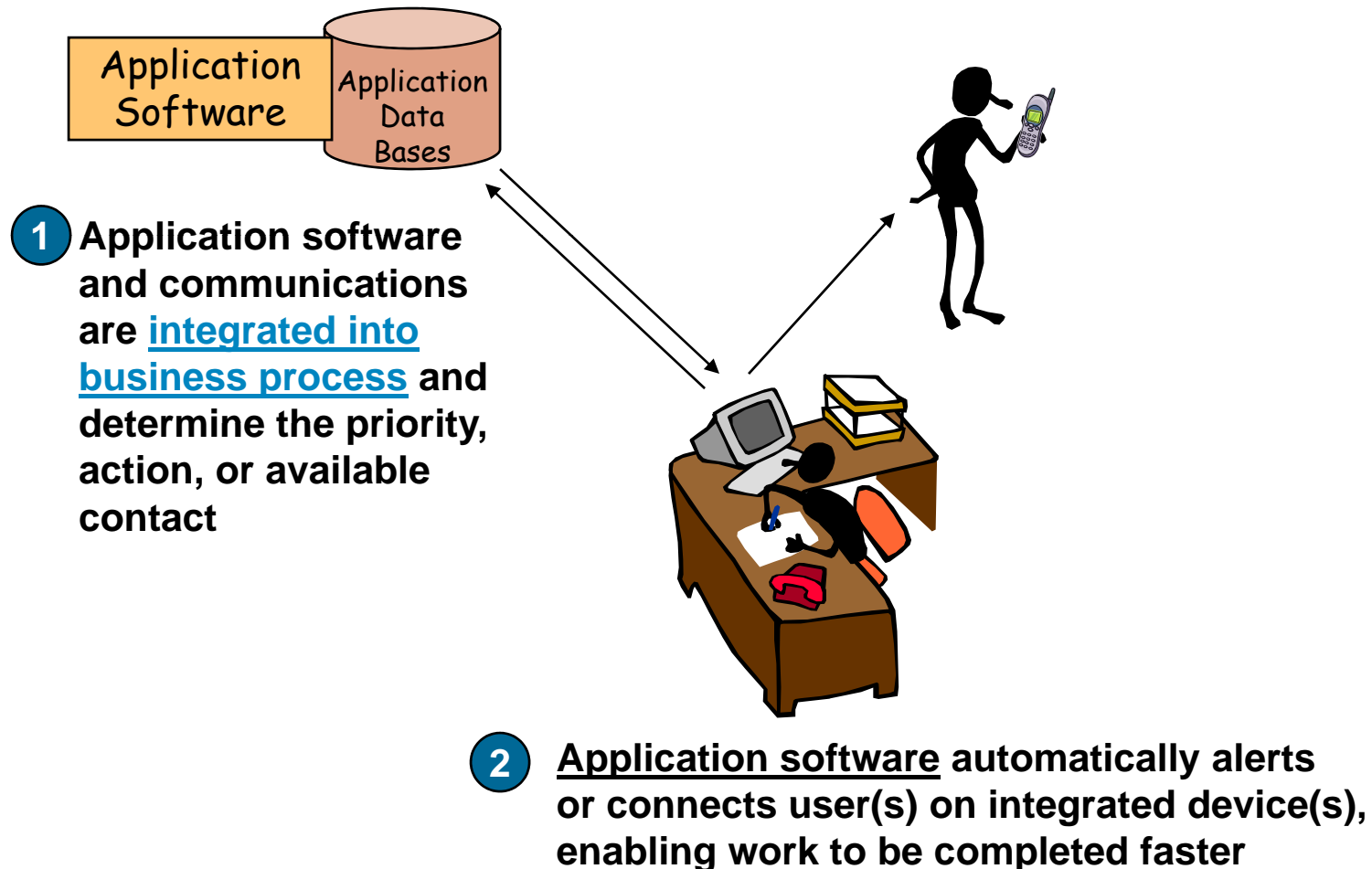
Communications with UC: Systems Are Integrated



- ✓ Software helps “connect the dots”
- ✓ Communications are immediate, up-to-date, more efficient
- ✓ Applications can control communications tools
- ✓ Messaging is unified into single client or store
- ✓ Conferencing is integrated to desktop, apps, PBX
- ✓ Seamless interfaces for desk and mobile

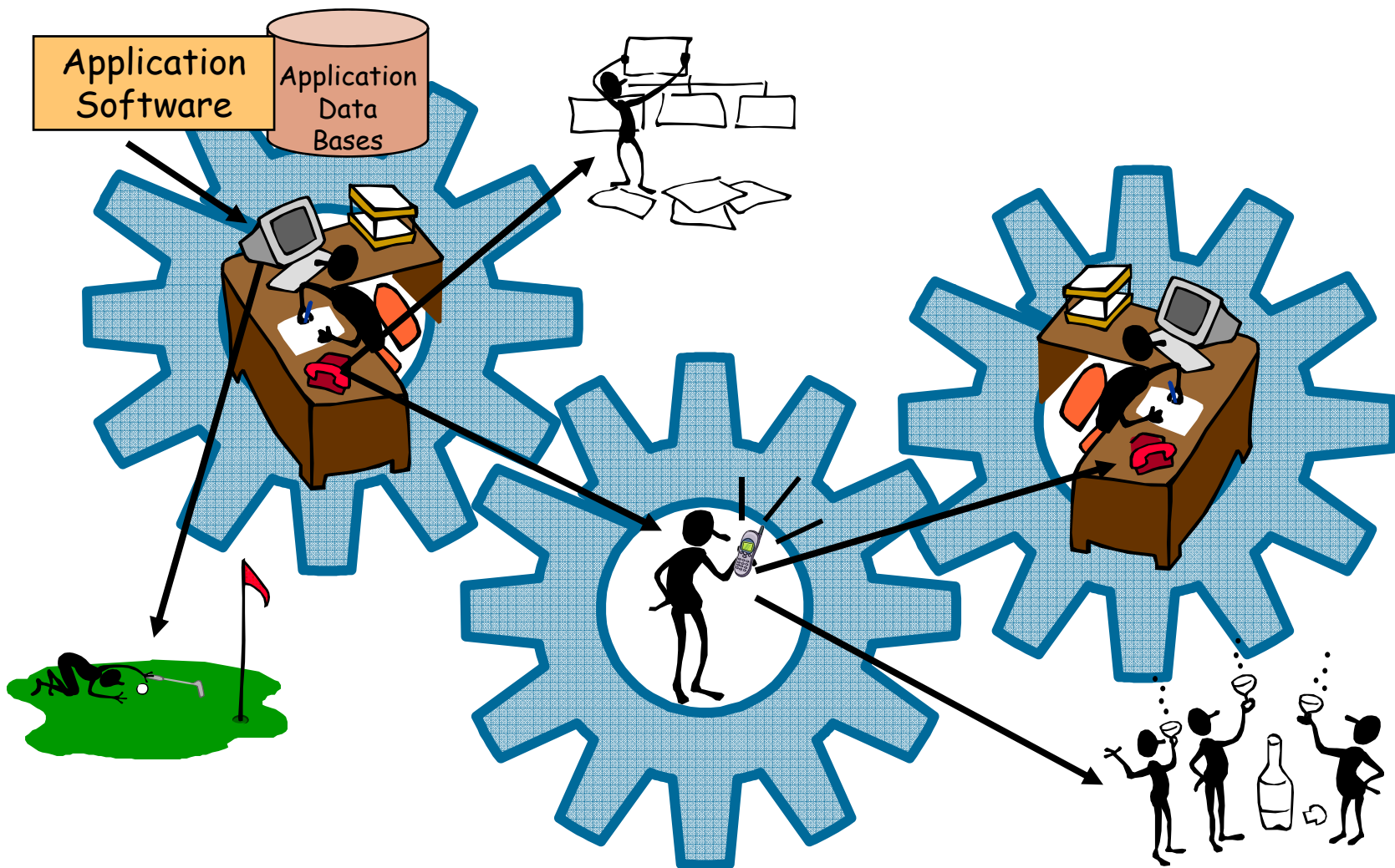
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Communications with UC: Software Helps the Process Go



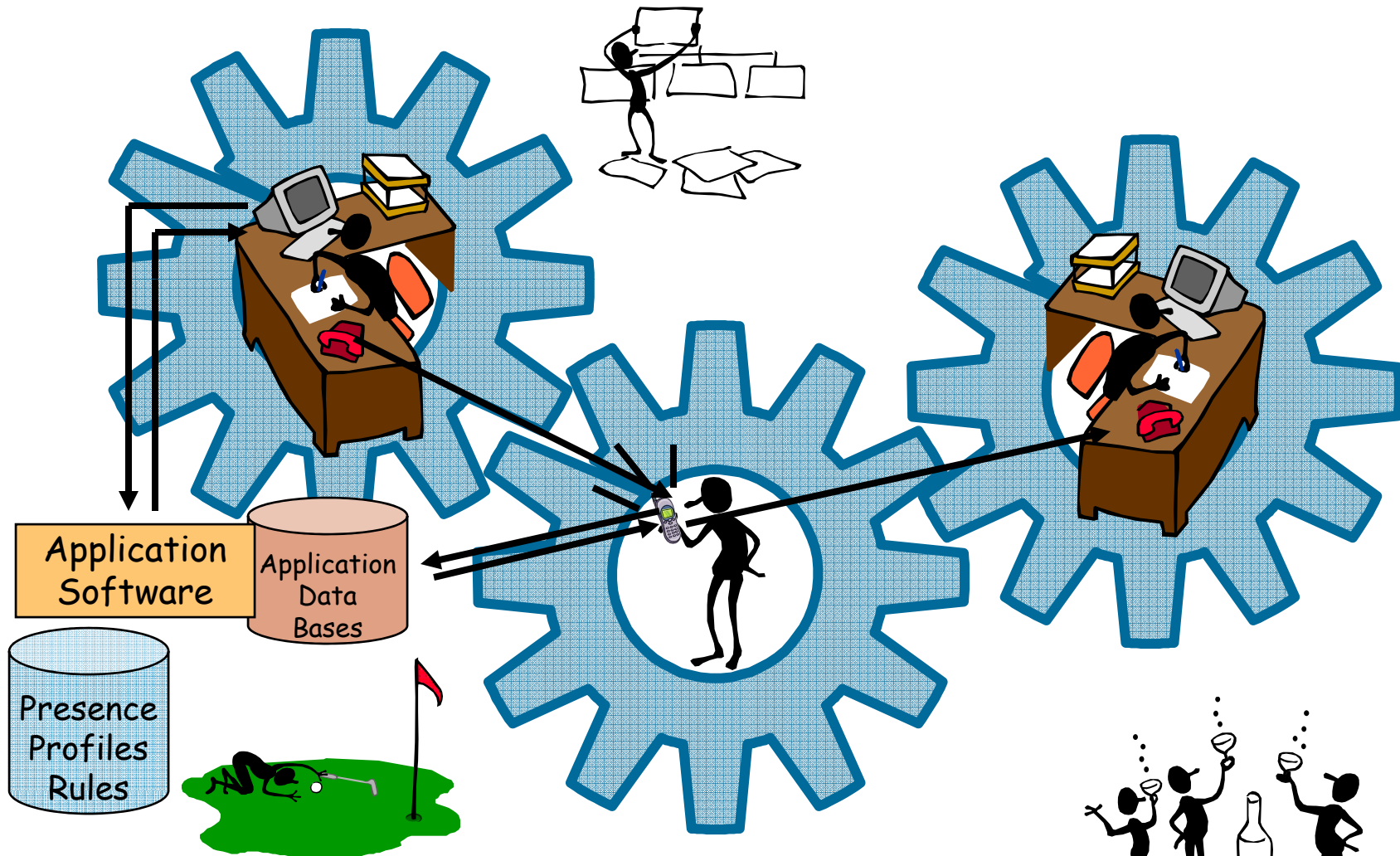
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Example: Without UC ...



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Example: With UC ...



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

So UC is NOT ...

- A “product” like email, voice mail, or conferencing that customers buy and install
- VoIP, although VoIP supports UC
- Unified Messaging, although UM can be a part of UC
- Interoperability for interoperability’s sake
- “Many any” – any time, any place, any device

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Is a Concept and Solution ...

**“Communications integrated
to optimize business processes”**

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Recap:

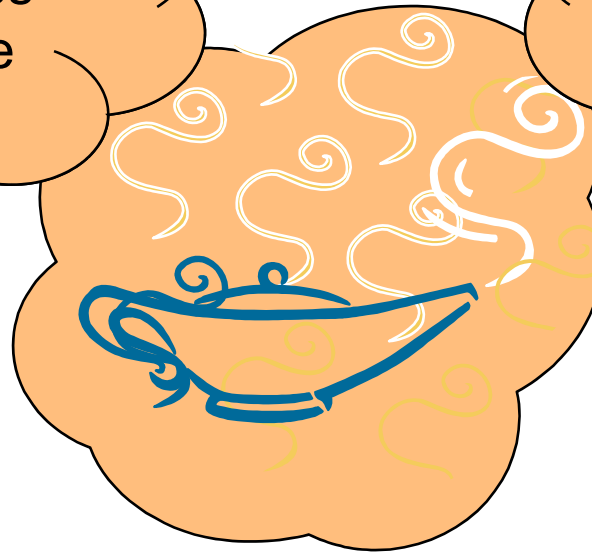
- New communications methods are the key to UC
- In the past:
 - Communications was mostly an **ISOLATED** process step
 - Communications had high **MANUAL** content
 - Communications had location and network limitations
- In UC era:
 - Communications are an **INTEGRATED** part of the business process flow
 - Communication processes are **SOFTWARE**-assisted
 - Communication is uniform across locations, networks
 - Many communication tracks can occur in parallel

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Beware the Myths ...

“Some companies have a complete UC solution”

Right now, one vendor can NOT do it all – BUT one vendor can integrate with a customer’s existing systems to create UC applications



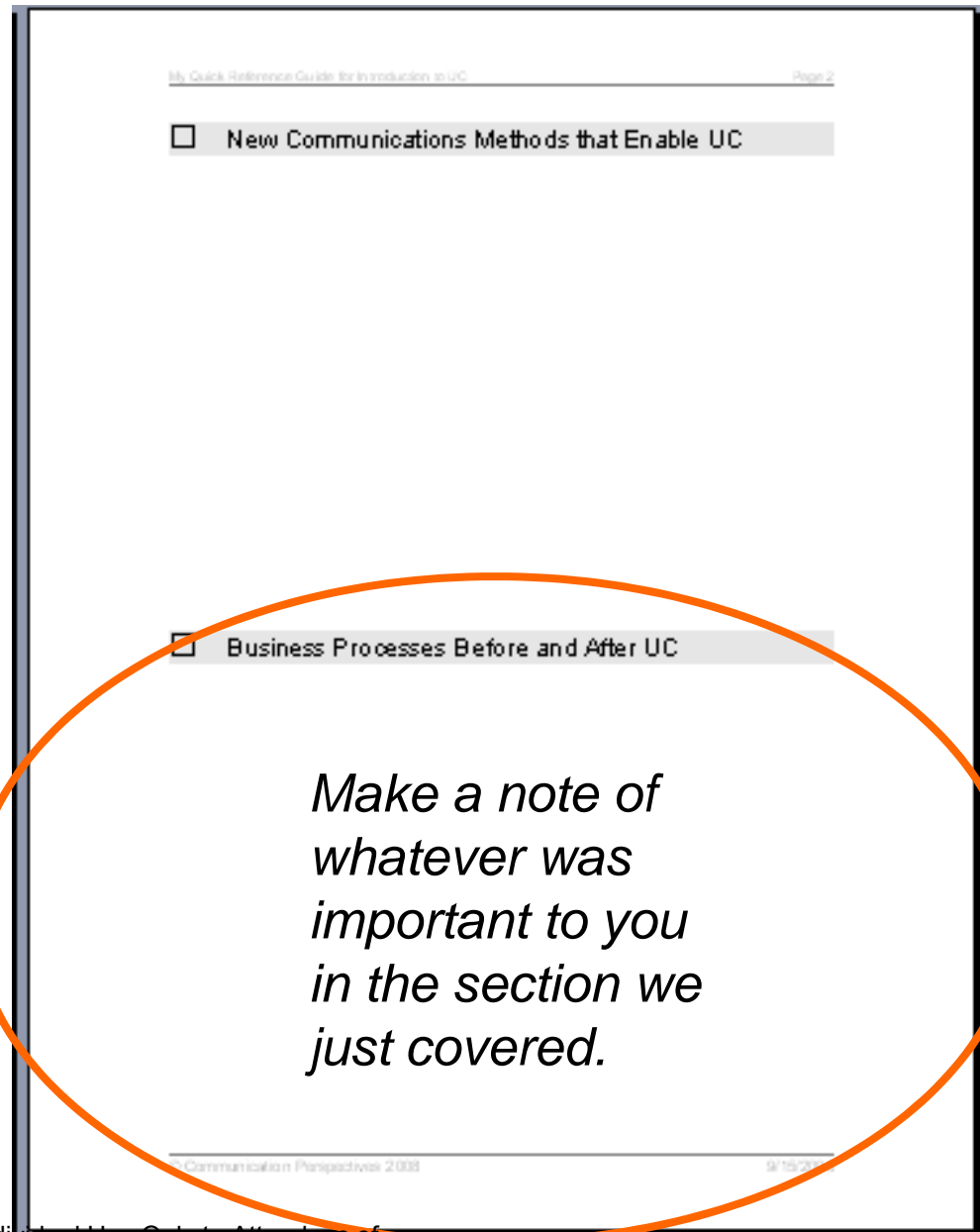
“Customers must update all their systems to UC”

Companies do not have to make a large investment all at once to get started with UC.

Most UC solutions are incremental additions in selected processes for specific users

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Go to your Quick Reference Guide



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Moving Along ...

- Definition of “Unified Communications” (UC)
- Why the buzz over UC now?
- New communications methods that enable UC
- Business processes before and after UC
- **How UC can optimize business processes**
- Major UC applications and opportunities
- UC value proposition

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



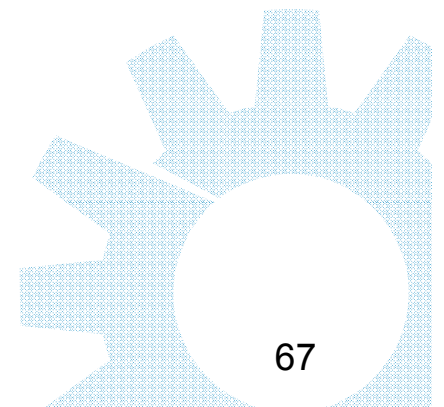
VP Sales

“Could Unified Communications help us shorten the sales cycle?”

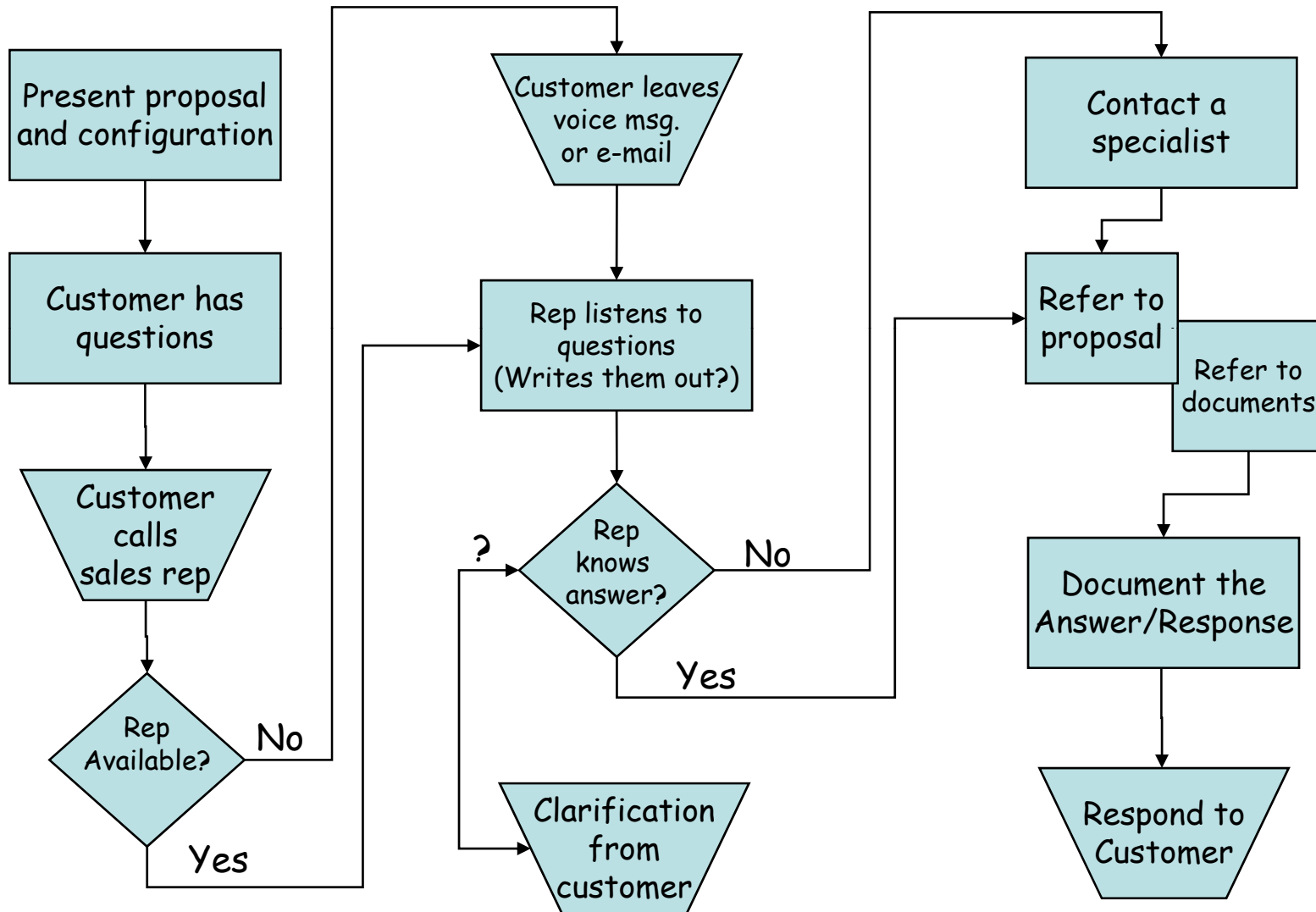


Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

© Communication Perspectives 2007-2008

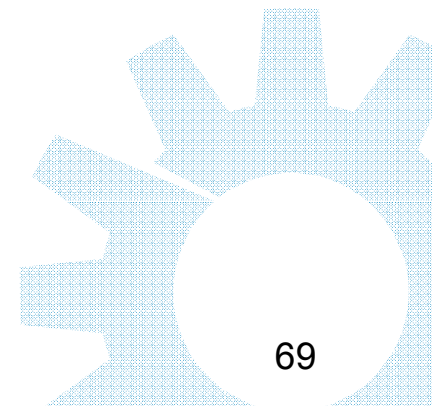
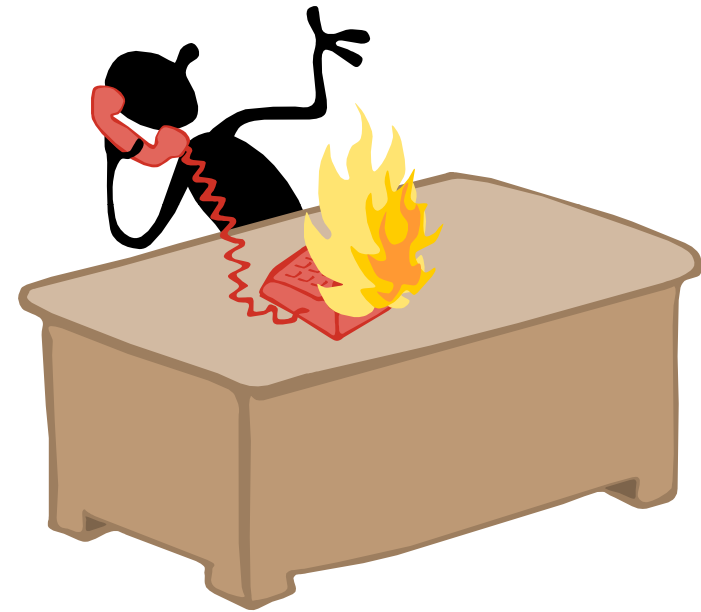


Process Segment in Sales Process



Ask: Where Are the Communication “Hot Spots”?

- What types of communication events are in the process?
 - Direct personal telephone communication
 - E-mail
 - Voice mail
 - Collaboration work
 - Information management
 - Other
- Where are the “hot spots”?
 - Communication steps in the process that often cause delays or errors
- There are clues to where hot spots might be ...

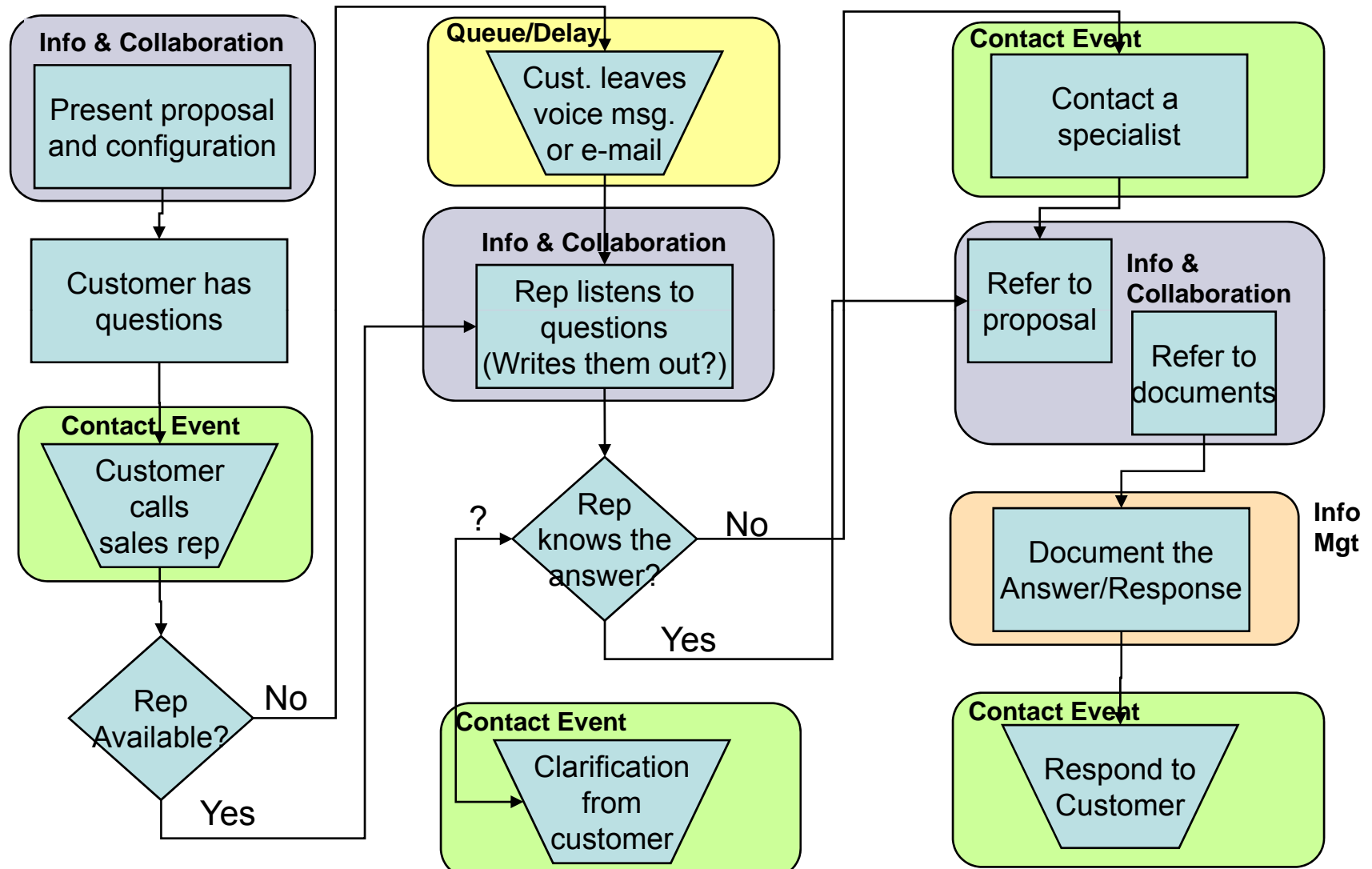


Top 10 Clues to a “Hot Spot”

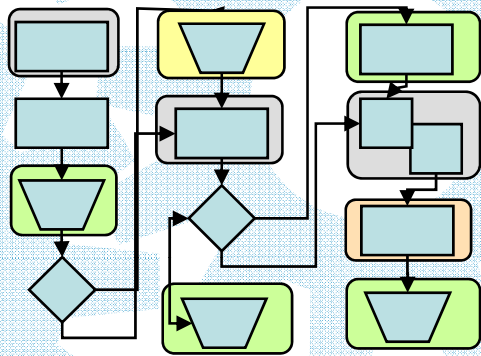
1. Serving or routing incoming contact requests
2. Finding / waiting for specific resource, skill, or person
3. Queues (e-mail, VM, tasks), especially from customers
4. Prioritizing, scheduling, logging responses to queues
5. Communication (now or future) triggered by process step
6. Getting approvals to continue or complete process
7. Consultative processes (analysis, negotiation, decision)
8. Calling / messaging for information, especially when mobile
9. Collaborative processes (R&D, Marketing, HR, Legal, Management)
10. Interruptions (EM, VM, IM, Call) with / for info, status, question

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Communication Events in Sales Process



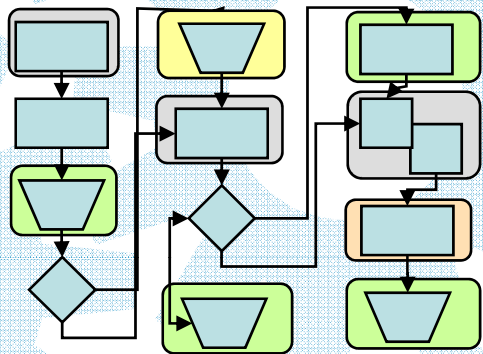
In This Sales Process ...



- Customer can't reach sales rep on first call
- Sales rep can't reach customer on return call
- Sales rep can't reach specialist on one or more calls
- Messages don't get prompt attention from rep or specialist
- Rep or specialist doesn't understand request
- Information is missing for analysis or for conference call

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

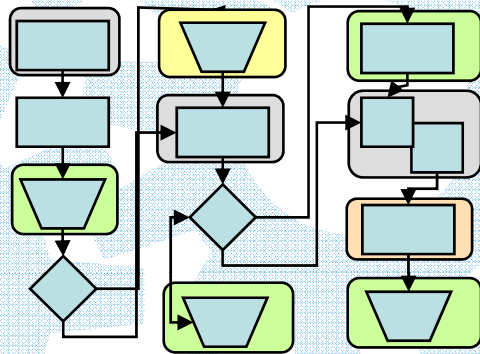
But UC Can ...



- Facilitate first contact success and minimize message queues with directories, Presence, and /or routing to qualified person
- Improve responsiveness of message and task queue with notification to mobile devices, service level tracking, escalation, prioritization
- Eliminate transcription time and errors with recording or documentation tools

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

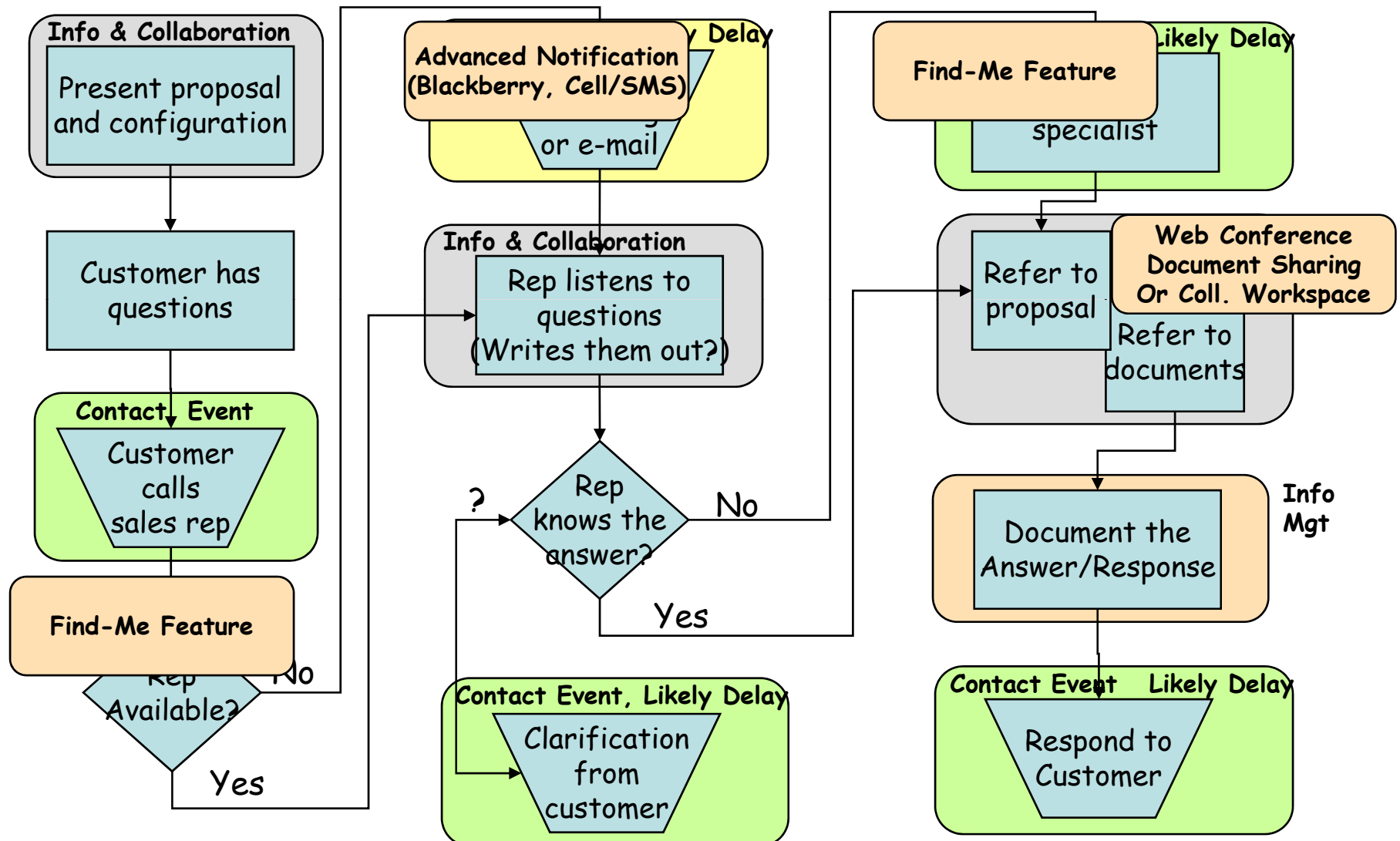
And UC Can ...



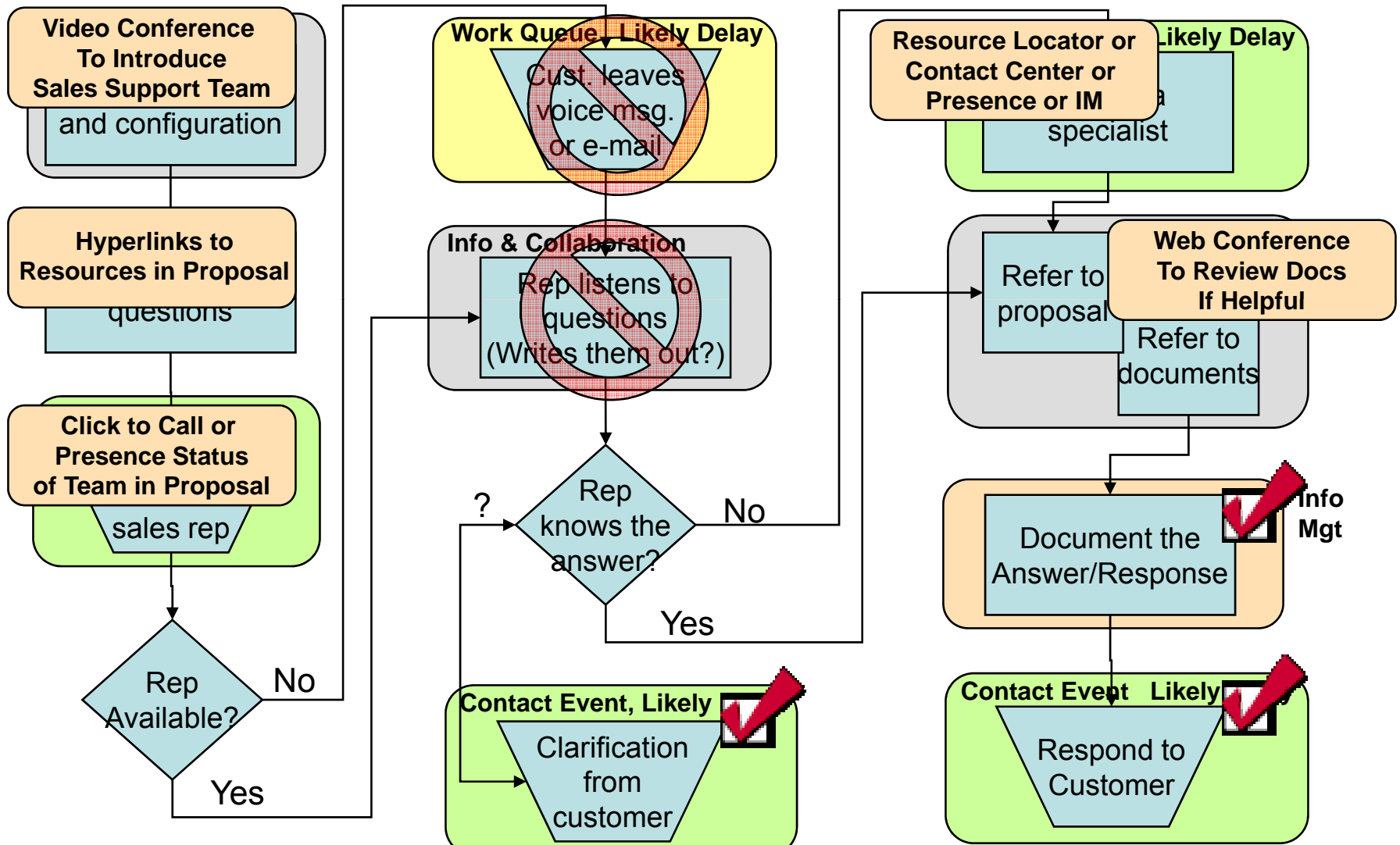
- Optimize productivity by allowing reference documents to be shared in collaboration workspaces
- Optimize contact by using click-to-call in proposal, optionally with presence
- Eliminate need to repeat customer requests by conferencing specialist on customer call
- Improve relationships by using videoconference for sales team and customer

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Basic Solutions for Sales Process



UC Advanced Solutions for Sales Process

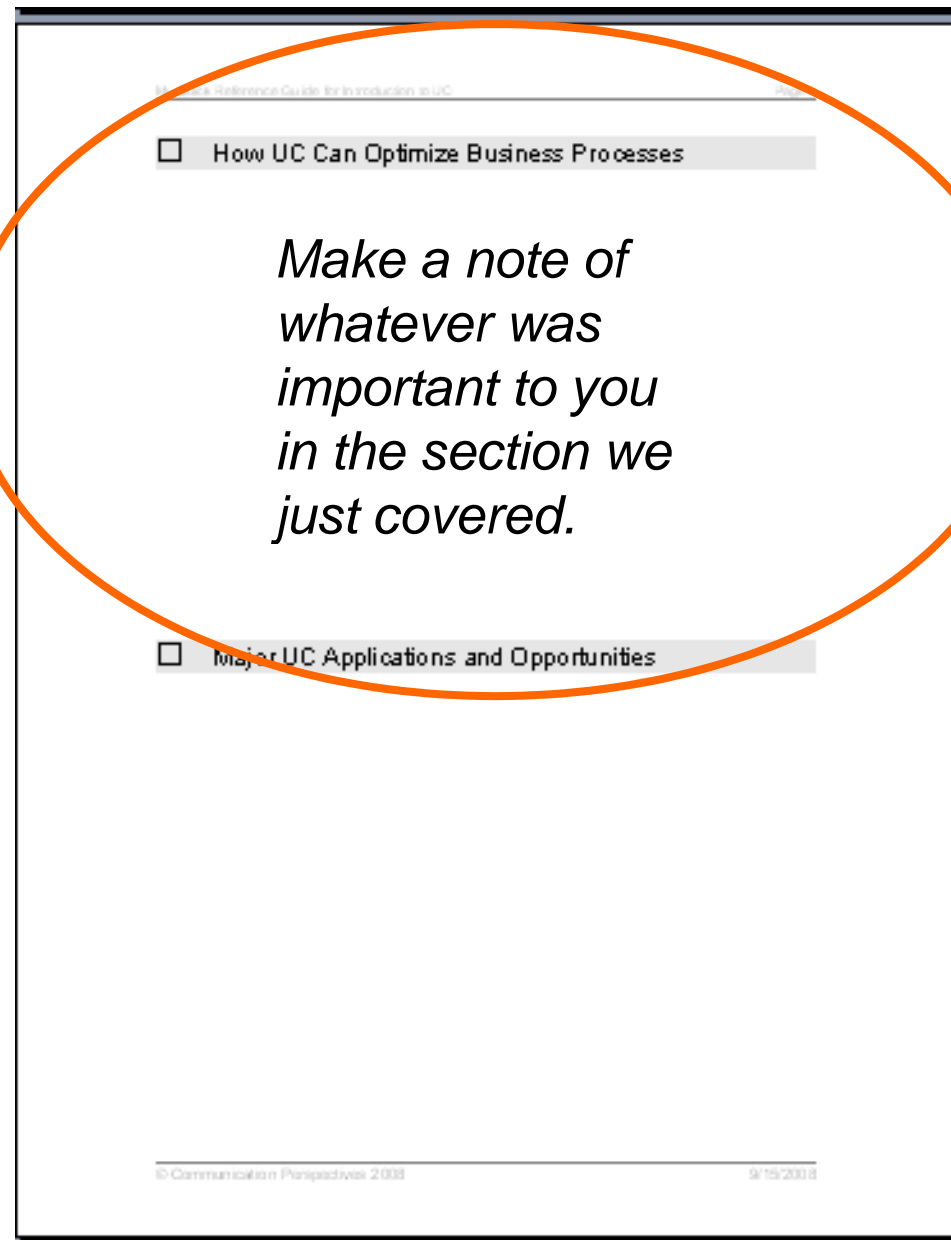


Recap: How UC Can Optimize Business Processes

- 1 Business process analysis often reveals bottlenecks caused by communication hot spots.
- 2 Applying new communications methods can eliminate, minimize delays and errors caused by hot spots and optimize the business process.

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Go to your Quick Reference Guide



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Next ...

- Definition of “Unified Communications” (UC)
- Why the buzz over UC now?
- New communications methods that enable UC
- Business processes before and after UC
- How UC can optimize business processes
- **Major UC applications and opportunities**
- UC value proposition

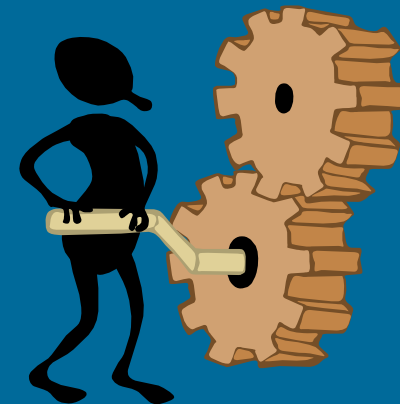
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Shows Up in Two Major Zones

UC-User Productivity



UC-Business Process



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

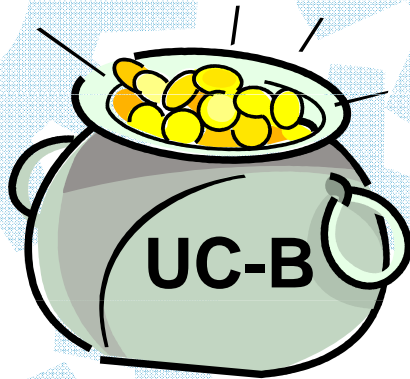
UC Value per User per Year*

UC User Productivity Value	
<ul style="list-style-type: none"> Improve Conferencing: Increase Utilization; Reduce Travel, Setup Time 	\$3,034
<ul style="list-style-type: none"> Reduce Wasted Time: Avoid calls and messages via IM & Presence 	\$1,137
<ul style="list-style-type: none"> Eliminate Delays: Find resources via IM and Presence vs. e-mail, VM 	\$1,005
<ul style="list-style-type: none"> Save Toll Costs: Especially for Int'l calling (assumes 25% Int'l calls) 	\$246
<ul style="list-style-type: none"> Reduce Admin TCO: One directory; fewer servers 	\$43

UC - Business Process Value	
<ul style="list-style-type: none"> Increase sales via UC contact management 	\$115,909
<ul style="list-style-type: none"> Speed projects via collabo- ration acceleration 	\$95,000
<ul style="list-style-type: none"> Lower process cost via communication-enabled job portals 	\$12,880
<ul style="list-style-type: none"> Cut operational costs via resource ID resolution 	\$11,875
<ul style="list-style-type: none"> Drive transactions via info to mobile devices 	\$7,813

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

* Based on ROI modeling



Jackpot is in Business Process Zone

Dramatic differences in ROI repay the effort to identify and implement business process improvements.

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Major UC Applications for Business Process Zone

- 1 Contact Management
- 2 Seamless Information for mobile personnel
- 3 Resource identification for issue resolution
- 4 Collaboration acceleration
- 5 Communication-enabled portals

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

1 Contact Management

- Presence-enabled and software-based resource matching across multiple media
- Dramatically increases “first call” resolution
 - Shorten sales cycle
 - Shorten time to issue solution
 - Improve customer service
- Typically uses Presence, software pervasive networks, speech recognition



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Application Example: Contact Management

- Vertical Market: Manufacturing
- Business Process: Distributor sales
- Job Type: Field sales reps
- Business Problem: Customer contact delays
 - Distributors cannot reach sales rep promptly
- Business Impact: Lost sales, customer dissatisfaction



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Application Example: Contact Management

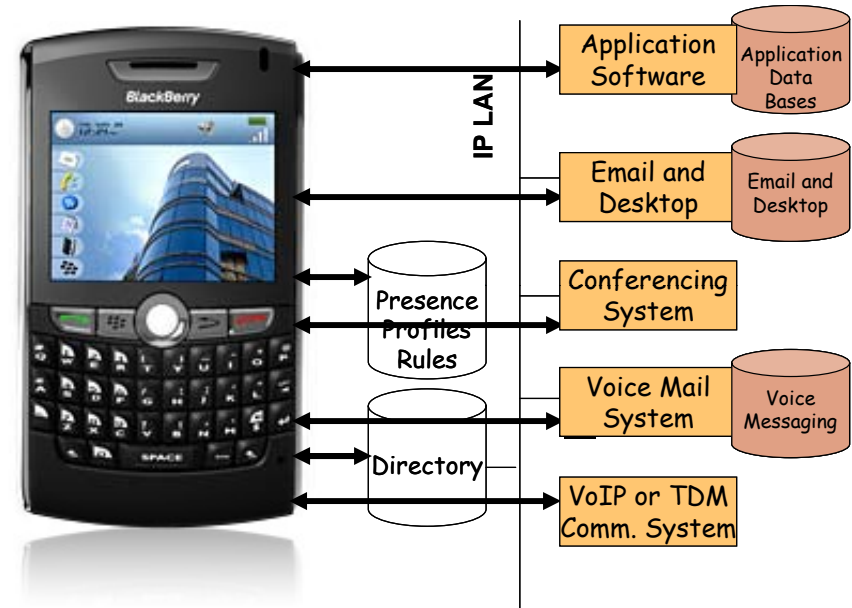
- UC Solution: One-number, find-me software, presence
 - Reps publish one number; system “finds” them
 - Reps access staff support via “find me” and presence
 - Users use IM, directory dialing
- Measurable results: tracking revenue increases



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

2 Seamless Information for Mobile Personnel

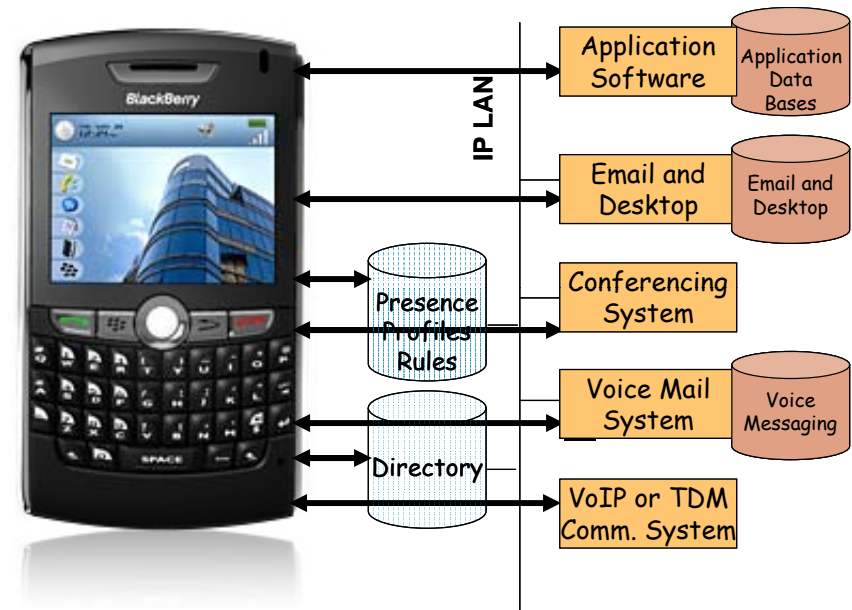
- Bring information to mobile user without delay
 - E-mail (and voice mail)
 - Directory
 - Relevant info portal
 - Notices and alerts
- Enable effective action
 - Message forwarding
 - Resource locator
 - Click-to-call
 - Process action, approval



With mobile voice and data devices, users can have complete connectivity to the UC technology stack, enabling integration of communications and business processes.

2 Seamless Information for Mobile Personnel

- Avoid callbacks, speed problem resolution, reduce support costs
- Typically uses:
 - Software controls
 - Pervasive networks
 - Communications portals



With mobile voice and data devices, users can have complete connectivity to the UC technology stack, enabling integration of communications and business processes.

UC Application Example: Mobile Information Delivery

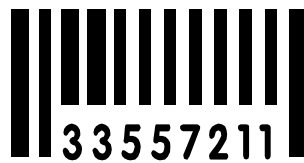
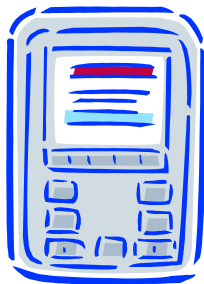
fff enterprises
Helping Healthcare Care®



- Vertical Market: Healthcare
- Business Process: Healthcare sales
- Job Type: Field sales, in-house sales, customer care
- Business problem: Coordinating customer information
 - Field sales could not complete transactions
- Business Impact: multiple phone calls, delays
- UC Solution: mobile device “portal”
 - Field sales reps access information directly, reducing number of calls
 - Reps call / message from client on Blackberry
 - Reps update records right after meetings
- Measurable results: Eliminate calls, speed process

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Mobile Information Delivery Customer Example in Retail



Size 8M
available in red,
beige, green.
Pull?
Yes No

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

3 Resource Identification for Issue Resolution

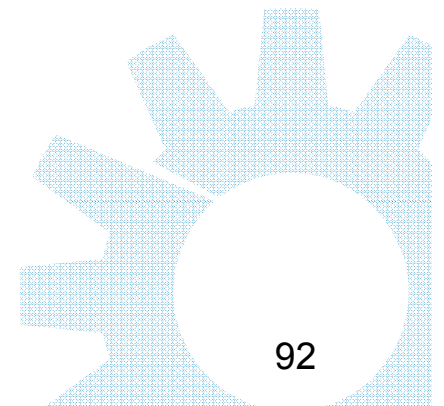
- With software assistance, find right skill or knowledge to resolve issue
- Eliminate delays
- Speed transactions
- Increase revenues
- Typically uses Presence, software controls, IM, conferencing



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Application Example: Resource ID for Problem Resolution

- Business Process: Logistics Flow
- Job Type: Production Management
- Business Problem: Order fluctuations caused production delays, missed shipments
- Business Impact: higher costs, customer dissatisfaction



UC Application Example: Resource ID for Problem Resolution

- UC Solution: Link production software to presence and conferencing systems
 - Supply chain alert triggers process routine
 - Identifies available “roles” for problem solving
 - Establishes “immediate” conference
- Measurable results: reduced time to respond from hours to minutes



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

4 Collaboration Acceleration

- Teams work in software-defined “spaces” with information and tools needed for job / process:
 - Documents and files
 - Reference information
 - Calendar, tasks, timeline
 - Assignments and status
 - Team profiles, status, info
 - Presence, calls, conferences wikis, blogs and podcasts
 - RSS Syndication and alerts
 - Security



IBM Quickr™

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

4 Collaboration Acceleration

- Accelerate, improve collaborative processes
- Have metrics and audit trails
- Typically uses collaborative workspaces, conferencing, software



IBM Quickr™

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Application Example: Collaboration Acceleration

- Business Process: Ethical drug development
- Job Types: Researchers and product developers
- Business Problem: Speed to market and maximum patented revenue cycle
- Business Impact: Profits, ROI and share

AstraZeneca 



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Application Example: Collaboration Acceleration

- UC Solution: UC-based Collaboration Tools
 - Microsoft OCS for desk and mobile workers
 - Immediate access to skills and knowledge
 - Rapid, virtual meetings – ad hoc and scheduled
 - Secure calls to protect information prior to patent filing
- Targeted Results:
 - Shorten development cycle by 6 months or more
 - Increase revenue life of new drugs by more than 1 year
 - Expect margin increases exceeding \$1 billion



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

5 Communications-enabled Portals

- Build communications directly into the application environment
- Enable worker to use best communication tool for job
- Improve speed, accuracy of business process
- Typically use applications-embedded communications, software controls, Presence, IM, dashboards

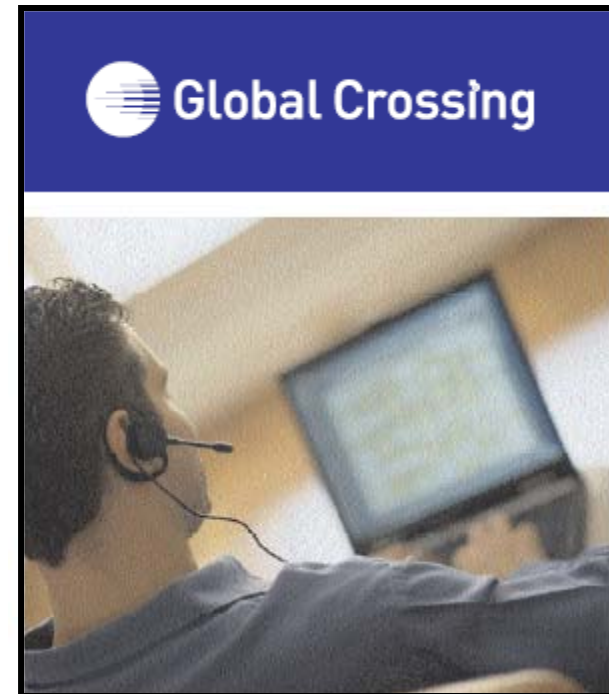


Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Application Example: Communications-Enabled Portal

- Vertical Market: Telecommunications
- Business Process: Network Provisioning
- Job Type: Network Operations Engineer
- Business Problem: Customers wanted faster changes
- Business Impact: Customer dissatisfaction; high costs

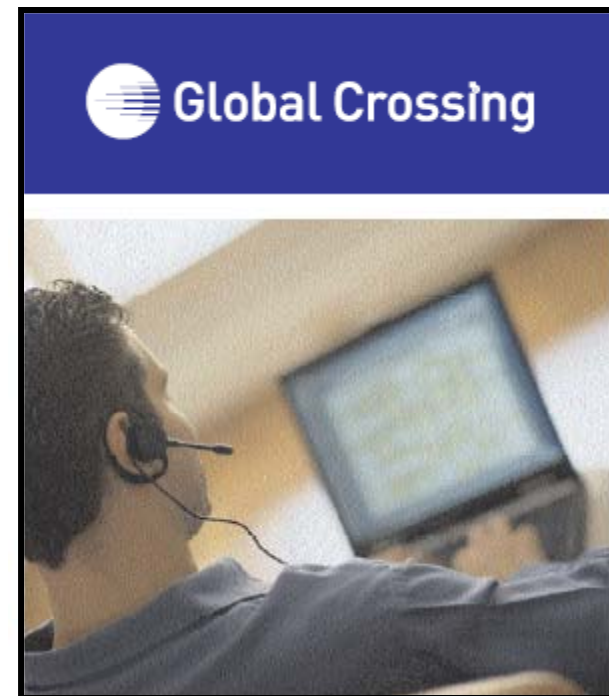
(continued next slide)



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com


UC Application Example: Communications-Enabled Portal

- UC Solution: Integrate Presence/IM with ERP Network Management System
 - Software immediately finds right engineer
 - Opens IM/Chat window
 - “Click for voice call” available
- Measurable results:
 - Reduced costs by 75%
 - Improved response time by 80% even as volumes increased by 70%



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Recap: Major UC Applications

<i>Application</i>	<i>Application Effect</i>	<i>Business Benefits</i>
 Shimano Management	Dramatically increase “first call” resolution	Shorten sales/customer cycles; Increase customer satisfaction


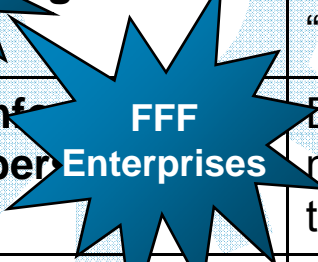

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Recap: Major UC Applications

<i>Application</i>	<i>Application Effect</i>	<i>Business Benefits</i>
Shimano Management	Dramatically increase “first call” resolution	Shorten sales/customer cycles; Increase customer satisfaction
Seamless info for mobile per Enterprises	Deliver information when needed without requiring time, effort by others	Speed issue resolution; reduce support costs

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Recap: Major UC Applications

<i>Application</i>	<i>Application Effect</i>	<i>Business Benefits</i>
 Shimano Management	Dramatically increase "first call" resolution	Shorten sales/customer cycles; Increase customer satisfaction
 Seamless info for mobile per Enterprises	Deliver information when needed without requiring time, effort by others	Speed issue resolution; reduce support costs
 Whirlpool identification resolution	Immediate access to "right" skill or knowledge; automatic follow-through	Speed transactions; increase revenues; automate administrative tasks


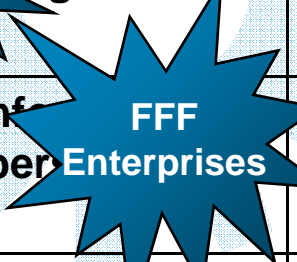



Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Recap: Major UC Applications

<i>Application</i>	<i>Application Effect</i>	<i>Business Benefits</i>
Shimano Management 	Dramatically increase “first call” resolution	Shorten sales/customer cycles; Increase customer satisfaction
Whirlpool Resolution 	Immediate access to “right” skill or knowledge; automatic follow-through	Speed issue resolution; reduce support costs
Collaborative acceleration 	Speed project completion with less effort, improved information access	Speed transactions; increase revenues; automate administrative tasks
		Eliminate delays; improve quality of result; cut meeting costs

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Recap: Major UC Applications

<i>Application</i>	<i>Application Effect</i>	<i>Business Benefits</i>
Shimano Management 	Dramatically increase “first call” resolution	Shorten sales/customer cycles; Increase customer satisfaction
Seamless info for mobile per Enterprises 	Deliver information when needed without requiring time, effort by others	Speed issue resolution; reduce support costs
Whirlpool Identification resolution 	Immediate access to “right” skill or knowledge; automatic follow-through	Speed transactions; increase revenues; automate administrative tasks
Collaborative acceleration 	Speed project completion with less effort, improved information access	Eliminate delays; improve quality of result; cut meeting costs
Global Crossing 	Communications functions embedded at point of need	Improve speed and accuracy; use best communication tools for job

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

These UC Applications Show ...

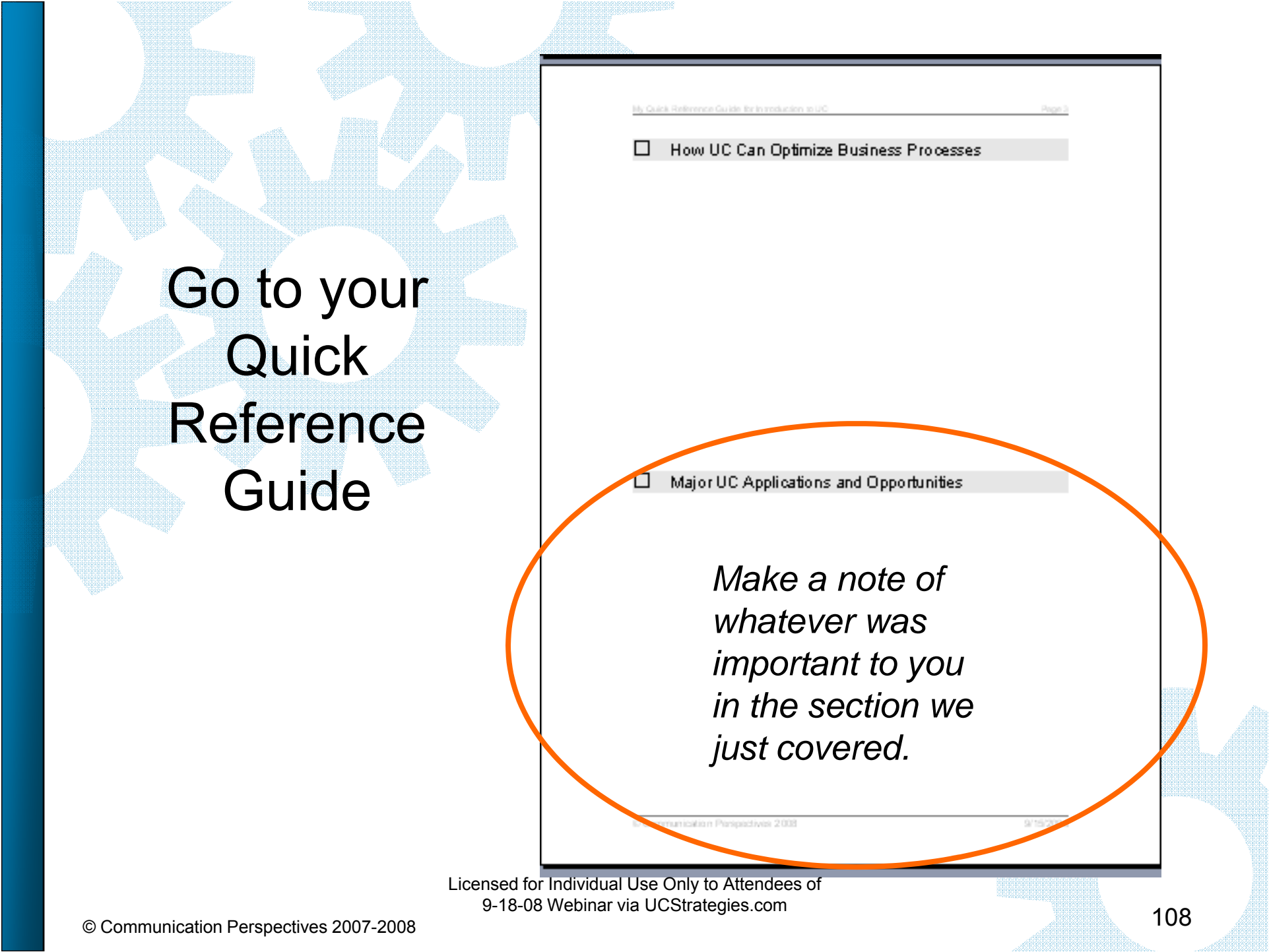
- Customers can start small and get impact
- Customers don't need to do everything at once
- BUT – they do need a plan !

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC or Not UC ? (according to the definition)

- Buy a VoIP PBX to reduce toll charges
- Install collaborative workspace system and monitor improvements in time to market
- Replace TDM phones with IP phones
- Install business applications on the IP phones
- Install “UC client” on user PCs
- Integrate incoming calls with customer data base to assure customers are served on first call

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Go to your Quick Reference Guide

How UC Can Optimize Business Processes

Major UC Applications and Opportunities

*Make a note of
whatever was
important to you
in the section we
just covered.*

Finally ...

- Definition of “Unified Communications” (UC)
- Why the buzz over UC now?
- New communications methods that enable UC
- Business processes before and after UC
- How UC can optimize business processes
- Major UC applications and opportunities
- **UC value proposition**

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

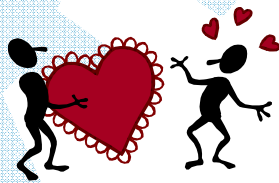
UC Value Proposition



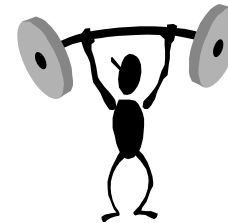
Increase revenue



Reduce costs



Enhance customer satisfaction, loyalty



Strengthen competitive position



Optimize productivity



Address growth and globalization

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Value Proposition

- Sound familiar?
 - Same value proposition as many other business innovations
 - You are competing with other innovation choices
- You can find hard dollar justifications for UC applications

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Remember ...

- You are buying communications capabilities that can be integrated into your business processes to optimize them
- So -- focus on specific capabilities rather than on something that just has a “UC” label

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

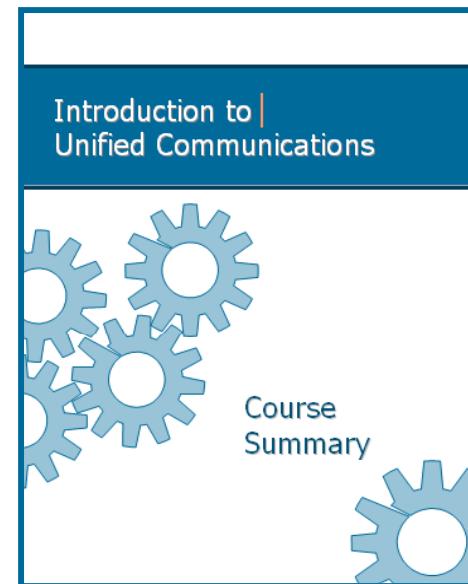
We Have Covered ...

- Definition of “Unified Communications” (UC)
- Why the buzz over UC now?
- New communications methods that enable UC
- Business processes before and after UC
- How UC can optimize business processes
- Major UC applications and opportunities
- UC value proposition

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Learning Support for This Course

- Downloadable slides for the course in PDF format
- Downloadable written course summary in PDF format
 - Contains key points from course



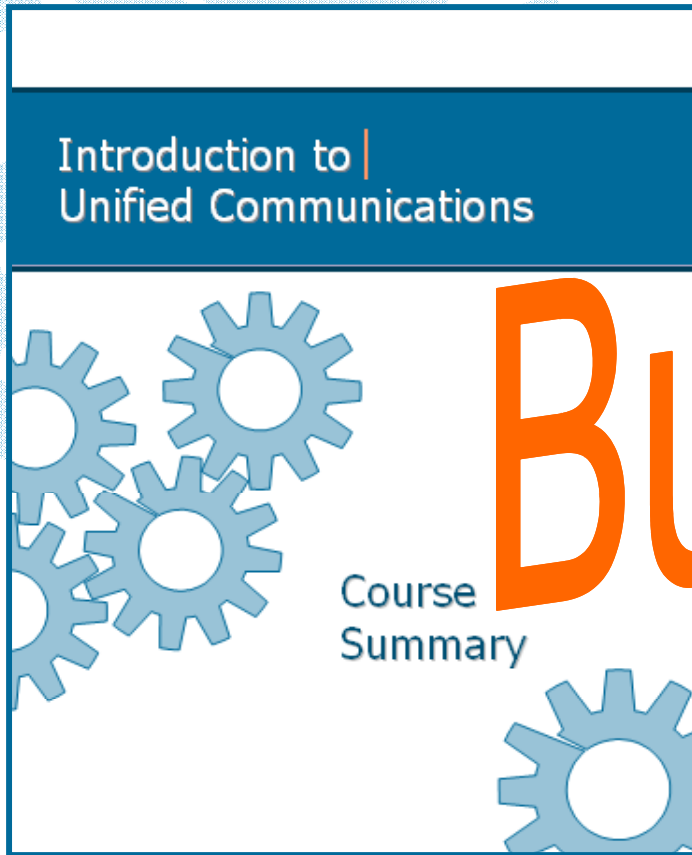
Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

To Download Slides for Course

- Go to www.UCStrategies.com
- Login (right side of gray toolbar) or Register (also on gray toolbar) and Login
- Click on UC Views (in left navigation column)
- Click on Webinars (in drop-down menu)
- Download link is in the Article:
“Intro to Unified Communications Webinar”

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Text Summary of Course



But Wait !!

- Handy, easy-to-read reference summary
- 20-page booklet
- Regularly \$29.95
- Free for attendees only!
- Go to: www.UCStrategies.com
- Link in same article as the slides (see prior page)
- Password: IntroUC918

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Next Steps and Other Resources

- UC Planning and Implementation Workshop
 - 2-day workshop, public or on-site
 - Led by Marty Parker
 - Public courses sponsored by BCR Training
www.bcrtraining.com
 - Custom on-site courses available
- UC Tutorials on Vendor Offers
 - VoiceCon San Francisco (November 10, 2008)

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Next Steps and Other Resources

- Resources at UCStrategies.com

- UC application descriptions
- Technology/RFP templates
- Customer cases
- Implementation resources
- UC alerts, blogs, and articles by UC experts
- UC training

- UC Consulting Support

- UniComm Consulting at www.UniCommConsulting.com

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

UC Training Offerings

Created by Communication Perspectives with Parker and Associates
Offered through UCStrategies.com

▶ Foundation Courses for Anyone

- Introduction to UC
 - Archived webinar
 - Offered at no charge as service to the industry
- UC Market Overview
 - Fee-based course

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

Coming Soon: UC Training Offerings for Sales Professionals

▶ Foundation Courses

- Introduction to UC for the Sales Professional
- UC Market Overview for the Sales Professional

▶ UC Applications

- How to Find UC Applications and Solutions
- UC Applications in Vertical Markets (5 modules)
- UC Applications in Cross-Market Key Business Functions

▶ How to Sell UC Solutions

- Fundamentals of UC Solution Selling
- How to Sell UC Solutions

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com

If You Are Interested in Training

- Go to www.UCStrategies.com
- Follow training links
 - (Circular Training Logo in right navigation column)
- Scroll to bottom of the FAQs and Outline
 - Check one or both boxes that match your interest
 - Enter your e-mail address
 - Press “Submit” button
 - We will then keep you informed when as the courses become available.

Licensed for Individual Use Only to Attendees of
9-18-08 Webinar via UCStrategies.com



Thank You!
Much Success with UC!