Making the Seamless Transition to a Cloud Phone System
### Table of Contents

<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Making the Seamless Transition to a Cloud Phone System</td>
</tr>
<tr>
<td>5</td>
<td>Early assessment to ensure success</td>
</tr>
<tr>
<td>7</td>
<td>Pre-deployment assessment: beyond just a checklist</td>
</tr>
<tr>
<td>8</td>
<td>Comprehensive infrastructure readiness assessment</td>
</tr>
<tr>
<td>9</td>
<td>Planning for success</td>
</tr>
<tr>
<td>11</td>
<td>How RingCentral overcomes key transition risks</td>
</tr>
</tbody>
</table>
Making the Seamless Transition to a Cloud Phone System

The benefits of cloud VoIP are driving its rapid adoption across all business segments and sizes. Once organizations make the transition to the cloud, they are often amazed at how something as basic as a phone system can dramatically transform their business. However, changing a company’s phone system is a big project—one that touches a core function of the business. Ensuring your organization gets the most out of this new technology requires an experienced partner to facilitate a smooth transition.
RingCentral has unparalleled experience in the cloud phone system market. The RingCentral platform, the result of a decade of development and enhancement, has been successfully deployed in more than 350,000 companies worldwide. To ensure a smooth transition to a cloud phone system, RingCentral begins leveraging its experience early during the customer engagement process—starting with vendor selection. Once you choose to partner with RingCentral, you’ll continue to receive the benefits of industry-leading technical expertise all the way through implementation, training, and follow-up customer service and support.

RingCentral’s collaboration during the transition begins with helping you understand VoIP technology—which involves assessing your network and making any necessary configuration changes. This step is critical, because most customers are not moving to the cloud for a more cost-effective and easier-to-manage version of their legacy PBX system. Customers need almost all of the features of their current phone system, but they also want more functionality with easier administration. These enhancements can include better integration of multiple business locations, support for BYOD and mobile devices, improved ease of use and more streamlined management of the phone system.
Early assessment to ensure success

When transitioning from a legacy, on-premise PBX to a cloud phone system, capturing your organization’s requirements early helps avoid pitfalls. Phone system configurations can be fairly complicated, so evaluating existing workflows—such as how your current system routes calls or how the calling tree flows and voicemails are handled—is key to understanding how these same features should operate with a cloud phone system.

Starting the transition process early also helps make sure that the most important requirements are not overlooked and the additional capabilities afforded by cloud VoIP are thoroughly explored. Access to the right experts early in the transition process means that you ultimately deploy a system designed to take full advantage of cloud VoIP capabilities.
Once you purchase your phone system, RingCentral assigns an implementation advisor who will introduce you to the technology and walk you through the steps of a successful deployment. This comprehensive guidance spans everything from network assessment and readiness to system configuration and customer training. It can even extend to a discussion of skills that your internal IT team may be lacking and ways to fill those gaps with RingCentral.

To assess the best system design for each customer, RingCentral employs an implementation and onboarding methodology that has been developed and refined by more than a quarter of a million successful deployments. This initial discovery phase includes determining:

- Goals for your new phone system
- Current phone system features
- Quantity and types of mobile devices and phones
- Broadband capacity and bandwidth budget for employees
- Type of LAN
- Quality of service (QoS) settings
- Number of business locations
- Requirements for mobile or distributed employees and consultants
- Requirements for your auto attendant, call groups, and call routing
- Timeline and rollout approach (phased or all at once)
Pre-deployment assessment: beyond just a checklist

By analyzing the data from this initial discovery phase, RingCentral works with your team to craft a design and implementation test plan. This detailed strategy transforms the pre-deployment assessment into more than just a test for features/functionality (for example: voice quality) but also as a venue to test new capabilities such as voicemail-to-email. So in essence, the team uses a proven methodology to mitigate the risks of transition—prior to deployment.
Comprehensive infrastructure readiness assessment

As you move to the installation phase, a RingCentral implementation advisor guides you through a network readiness assessment to make sure your network is prepared to handle your new phone system. This includes assistance with:

- Testing for bandwidth capacity
- Evaluating bandwidth quality
- Recommending bandwidth upgrades (if needed)
- Configuring network devices to improve QoS
- Integrating fax lines, conference phones, and other infrastructure
- Enabling special requirements such as direct dial on pickup

This proven, step-by-step methodology ensures your transition to a cloud phone system is an enterprise-class service experience.
Planning for success

IT professionals understand that people often balk at change—which means maximizing user adoption is critical to the success of any technology deployment. RingCentral’s proven implementation methodology results in a companywide rollout that minimizes or eliminates user resistance to a new system. It begins by involving key stakeholders in the assessment phase to determine if the new system either replicates or enhances important aspects of existing workflows. It also specifies a phased rollout at a single location, which allows your implementation team to use key findings from one location or department and apply those to mission-critical systems across the company.
During deployment, RingCentral will train your administrators on the main features of the phone system, including online processes for:

- Adding, moving, and deleting users
- Organizing groups and departments
- Managing company and user greetings and on-hold music
- Setting call handling and forwarding
- Managing voicemail settings

Additionally, your users will be trained on how to manage their account settings—including their personal greetings, on-hold music, call forwarding, and call screening features. Users will appreciate the ability to manage their own settings through an easy-to-use web interface—accessible from their computers or smartphones. This self-help capability also diverts much of the tedious setup processes away from IT staff.
How RingCentral overcomes key transition risks

The RingCentral platform offers customers a number of innovative technical advantages that inherently simplify full-scale deployment.

Plug & Ring® ready phones

RingCentral phones arrive pre-configured and ready to go, right out of the box. With other cloud phone solutions, an IT employee must be physically present at the location and—in the case of certain carriers—must perform complex setup on the tiny LCD screen of each phone. Plug & Ring ready phones from RingCentral save time, simplify installation, and eliminate the potential for human error. In addition, technologies such as centralized web-based management mean that after your initial rollout, you can add lines or bring new locations online with just a tap of a button or click of a mouse.
Number porting: zero-downtime methodology

Your company phone number is one of your most valuable assets—and connecting employees with customers, vendors, and other stakeholders is vital to your business. Problems with transferring numbers, delays in number porting, or issues with bulk number transfers between carriers can interrupt your operations. Consequently, the risks associated with handling number transfers between different phone systems and carriers can be particularly worrisome. RingCentral alleviates porting concerns by providing experts with sophisticated tools to eliminate issues during the porting process. This includes proprietary techniques such as assigning temporary DIDs with call forwarding, which offers a transparent transition until the number porting process is complete. To help streamline the paperwork involved in transferring numbers, RingCentral provides you with a number transfer checklist and detailed instructions for your team to effectively use the list. A specialized porting team collects and reviews the information for accuracy, and then bundles the information and transmits it to the existing carrier. This process helps minimize errors and inconsistencies that can delay number transfers. This zero-downtime methodology delivers major advantages to customers who would otherwise have to wait for the process to be completed before being able to use their phone systems. In cases where these tools and techniques are not enough to solve the toughest porting issues, RingCentral will assign a team of experts to address your specific porting needs.

Cloud application integrations

Incorporating existing integrations into a new phone system is one of the more difficult challenges in any phone system transition. And this is where a cloud phone system provides significant advantages over a legacy PBX. These integrations typically include connecting to customer relationship management (CRM) systems, customer support systems, or other commonly used business software. However, as you identify your most important integration needs, you will find that many of these types of systems, and more, are included in a cloud phone solution. In addition, marketplace applications within Salesforce®, Zendesk®, Google, Microsoft®, and other cloud-based software make it easy to tie these widely used cloud services into your phone system. Using these simple marketplace applications, you can quickly enable enhanced capabilities such as one-click dialing, account histories, call recording, online storage, and many
other system benefits. RingCentral also provides a set of tools to point you toward the right marketplace applications and allows you to download many of the most commonly required applications directly from your administrator account.

Benefits of an open platform

Maximizing the potential business value of a cloud communications system requires an extensible platform based on open standards and open APIs. An open platform makes it significantly more time- and cost-effective to integrate communications into key businesses processes, enabling automated workflows.

This allows IT departments and third parties to rapidly roll out solutions that enhance employee productivity and deliver higher levels of customer satisfaction.

Summary

Whether it’s a cloud or on-premise PBX, deploying a business phone system is a major undertaking. Each step of the rollout—including user adoption—must be carefully planned and implemented according to a proven onboarding and deployment methodology. RingCentral offers experience, technology, and seasoned onboarding teams with a depth of IT and telephony expertise to ensure that your transition to a cloud phone system is a seamless one.
About RingCentral

RingCentral is the leading provider of cloud-based business communications and collaboration solutions. Easier to manage and more flexible and cost-efficient than legacy, on-premise communications systems, RingCentral’s cloud solutions are meeting the needs of modern distributed and mobile workforces. Delivered on a state-of-the-art cloud platform, RingCentral solutions unify communications by bringing together voice, video, conferencing, team collaboration and contact center solutions into a seamless experience that integrates with leading cloud-based tools and business applications. RingCentral enables more than 350,000 businesses, from SMBs to enterprises around the world, to empower their workforces, more easily connect with their customers, and streamline their business communications.