Unified Communications Strategic Planning
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1. Executive Overview

In spite of the untold dollars spent on marketing the term, Unified Communications (UC) has been the victim of unclear definitions at best and is often defined differently by vendors and their customers. UC is not a single product or technology. It’s a collection of functions that, ideally, are integrated into a single user interface. These services most often include all or a subset of the following:

- Voice over IP (VoIP), IP Telephony (IPT) and/or IP Contact Center (IPCC)
- Unified Messaging (voicemail and email)
- Secure Instant Messaging (IM)
- Audio, video, and web conferencing
- Desktop productivity software
- Scheduling and calendaring tools
- Shared online workspaces
- “Service enablers” – Presence awareness and management, Location-based services, Directory services

Unified communications is a strategy that allows organizations to improve overall business communications across all business units. It is critical that a unified communications strategy makes good business sense and delivers tangible value. An effective strategy should include an organization’s specific business challenges and priorities. Each unified communications strategic plan is a unique representation of an organization’s specific business processes and relationships with customers, partners, staff and suppliers.

ViTel has developed a unified communications strategic planning tool that can be used by organizations to define what they expect to do by migrating to unified communications. When considering migrating organizations should look for both the direct and indirect benefits by understanding the needs of the business units, and identifying how unified communications can reduce the Total Cost of Ownership (TCO), improve user productivity, and enhance business processes.

Unified communications can be used to improve business processes by integrating communications with business applications. A business process is a collection of related structured business activities that produce a product or service. This is called: “Integrated Business Communications”. Integrated Business Communications provides business processes and applications with the ability to sense events, respond, and track real-time multi-channel communications between decision makers.

The decision your organization will have to make is not “Why”, but “When” will you begin the migration to Unified Communications and “What” is your Unified Communications Strategy.
2. Strategic Planning Tool

The migration to unified communications is a transformation requiring an effective strategy that considers the current and future business and technical needs, and the overall impact and cost. It is critical to implement a strategy that makes good business sense and delivers tangible value. An effective strategy should include the organization’s specific business challenges and priorities.

The Unified Communications Strategic Planning Tool has eight steps. (See Figure 1: Unified Communications Strategic Planning Tool)

Figure 1: Unified Communications Strategic Planning Tool

![Figure 1: Unified Communications Strategic Planning Tool](image)

Every organization has its own business processes that facilitate the delivery of core products and services to their customers. These processes are unique to each organization and are often a source of competitive advantage and or differentiation from competitors. This uniqueness is the reason that all unified communications strategic plans are unique.

Each unified communications strategic plan is a unique representation of an organization’s specific business processes and relationships with customers, partners, staff and suppliers. This unified communications strategic planning tool can be quickly and efficiently reconfigured so that your unified communications solution evolves as the organization’s communication requirements change.

The unified communications strategic planning tool is designed to act as a flexible framework to facilitate each organization’s processes resulting in a strategic plan that will meet their specific process and environmental requirements.
3. Communication Requirements

An organization’s business objectives are the end points envisioned for the strategy. Clear objectives enable the corporate executive to focus on the final outcome of the strategy.

Unified communications has the potential to dramatically improve corporate communications and support an organization’s business objectives. By integrating various forms of communications, such as voice, video, instant messaging, conferencing, and presence users can more effectively control and manage their inbound and outbound communication sessions. The integration of communication services with enterprise business applications and processes enables improvements in workflows. Enterprises that adopt unified communications will see significant competitive advantages, including more efficient operations and improved customer interaction.

Communication requirements describe what is needed by an organization, business unit, or end user to solve a communication problem or achieve a business objective. There are three types of communication requirements:

| Strategic   | 3 – 5 years | Supports the communication requirements for the entire organization.  
|            |            | How will the organization communicate in three to five years? |
| Tactical   | 1 – 2 years | Supports the communication requirements for a specific business unit.  
|            |            | How will a specific business unit communicate in 1 to 2 years? |
| Operational | < 1 Year    | Supports the communication requirements to maintain and operate the system.  
|            |            | What updates or modifications are required to the existing communications network? |

Steps:

1. Identify the executive, business, and ICT stakeholders.

2. Use workshops, interviews, surveys, and other strategic plans to identify the organization’s communication requirements.

3. Prioritize and organize the communication requirements for the next 12 – 18 months.

4. Be able to map the benefits of a unified communications strategy to the priority communication requirements.
4. Unified Communication Applications

It is critical that an organization must implement unified communication applications that directly support their priority communication requirements. There are two types of unified communications applications.

1. Unified Communications User Applications (UC-U)

Unified communications user applications are used to improve a user’s productivity. These applications remove the barriers between voice, email, conferencing, video and instant messaging. Once these barriers are removed users are able to reduce the time to make a decision, and increase productivity. User applications provide the ability to provide a simple and consistent user experience across all types of communications.

2. Unified Communications Business Applications (UC-B)

Unified communications business applications are used to automate business processes. This is often referred to as Integrated Business Communications (ICB). Integrated business communications provides business processes and applications with the ability to sense events, respond, and track real-time multi-channel communications between decision makers. The core idea is to integrate communications capabilities into software-enabled business processes, by providing applications with “the ability to initiate real-time communications”.

Steps:

1. Identify the unified communication applications that will support the prioritized communication requirements.

2. Using case studies and reference material demonstrate how the unified communications applications will support the communication requirements.

5. Network Specifications

A network specification specifies a function or attribute of the underlying network. The outcome of the specification phase is a set of network specifications that transfers the communication requirements and the applications into network specifications. A network specification document is created and used to communicate the network requirements to the stakeholders.

Examples of network specifications are:

- Replace the TDM-PBX with an IP-PBX
- Interoperability between IP-PBX and Customer Relationship Management (CRM) application
- Upgrade Local Area Network to support both voice and data traffic

A network specifications document provides:

- The opportunity for communication and feedback to the stakeholder;
- A means to identify problems or misunderstandings;
- The baseline for decisions, disputes, and changes;
- Ability to develop and release a Request for Proposal (RFP).

Steps:

1. Complete an assessment of the current Local and Wide Area Network.
2. Evaluate the gaps between the “to be” state and the current state of the network.
3. Document the required network specifications.
6. Infrastructure Assessment

A Unified Communications strategy may include the integration of communication services with business and messaging applications. As a result it is imperative that included as part of a Unified Communications strategy is an assessment of the current IT infrastructure.

Application vendors such as Microsoft, SAP, and Oracle are integrating communication services into their current applications to enhance or improve an organization’s business processes. As example the Microsoft Exchange server can support unified messaging which includes the integration of e-mail, voice mail, and faxing in a single inbox.

Enterprise application vendors such as SAP and Oracle have been integrating presence-based capabilities into their product lines since 2008. These presence services include click-to-call and click-to-IM interfaces.

A typical organization may have multiple database, file, e-mail, directory, and application servers. In addition client devices may include PCs, MACs, and Pads. The objective of this phase is complete an inventory of all the components of the Information Infrastructure. This assessment is comprised of four sub-assessments that include:

- Database and File Assessment
- Application Assessment
- E-Mail/Messaging Assessment
- Client Assessment

Interoperability between the future communication servers and an organization’s business applications is critical to the success of a unified communications migration strategy. It is important the each of the communication and application vendors support the same underlying communication protocols.

Steps:
1. Complete the four sub-assessments.
2. Research the integrated communication services supported by each application.
3. Document the communication protocols supported by each vendor.
7. Migration Strategy

The goal of this phase is to create a migration strategy using the network specifications. The migration strategy provides a realistic roadmap to support the organization’s communications objectives. As with any introduction of new technology capabilities into an enterprise there are a wide variety of key considerations that must be addressed to deliver the desired results while minimizing risk. It is critical to understand the dynamics of the technologies, their impact on the organization’s environment, and how to deliver performance, consistency, scalability, and integration into the business needs.

A communications strategy can be developed from two different perspectives:

1. **IP Communication Vendors**
   Traditional IP Communication vendors see unified communications more as a natural evolution of the PBX. How are voice calls integrated into new business applications that improve productivity and mobility? (Examples: Avaya, Cisco, and Mitel)

2. **Business Application Vendors**
   The business application vendors are coming from a software-only perspective. The PBX may or may not be a component of the unified communications strategy. They are driven by core business processes and data, presence and new types of communications such as Instant Messaging. (Examples: Microsoft, IBM, and Oracle)

Organizations have large investments in communication and application infrastructures that must be preserved. Existing vendors may view a migration to unified communications very differently and have developed migration strategies specific to their products and services. These vendor specific unified communication strategies must be taken into account when developing your migration strategy.

**Three Phase Migration**

A typical unified communications migration strategy evolves three phases:

1. **Operational Efficiencies**
   The primary objective in the first phase of the migration is to reduce the Total Cost of Ownership (TCO) of the network or to improve operational efficiencies.

2. **Productivity Improvements**
   The second phase of the migration includes the implementation of communication services such as unified messaging, mobile applications, and video conferencing.

3. **Business Process Improvements**
   A business process is a collection of interrelated tasks which support a business goal. Business process improvement is a systematic approach to using communications to improve a business process.
Steps:

1. Define the appropriate end-state design and overall communications architecture.

2. How will the unified communications capabilities fit into the existing platforms and provide an optimal architecture that will support the communication specifications?

3. If required develop a mobile communications strategy.

4. Recommend a 1, 3, 5, and 10 year migration strategy.
8. Business Case

A Return-On-Investment (ROI) calculation is used to build the business case for an investment in unified communications. It is calculated using both the direct and indirect benefits against the Total Cost of Ownership (TCO) of the migration.

Return-On-Investment is calculated as a percentage. As example a organization will get a 25% return in a one year for investing in unified communications. There are two different Return-On-Investment calculations:

\[
\text{ROI} = \frac{\text{Direct Benefits}}{\text{Total Cost of Ownership}} \times 100\%
\]

\[
\text{ROI} = \frac{\text{Direct Benefits} + \text{Indirect Benefits}}{\text{Total Cost of Ownership}} \times 100\%
\]

Direct benefits can be observed and measured and is an estimate of the difference between the current costs and the projected future costs. Examples are to reduce operating and monthly recurring costs.

An indirect benefit can not be directly observed and measured. An indirect benefit example is improve user productivity. New technologies often claim to help meet productivity benefits through the implementation of value-added features. Indirect benefits should be viewed as evolutionary.

Total Cost of Ownership (TCO) is used to measure the total costs of a project over a period of time. Total Cost of Ownership (TCO) can be used to compare the current network costs and the expected costs of a future IP network over a period of time and calculate the costs of an investment in unified communications.

\[
\text{TCO} = \frac{\text{Capital Expenses} + \text{Operating Expenses}}{\text{Time (1, 3 or 5 years)}}
\]

Steps:

1. Calculate the Total Cost of Ownership (TCO) for both the existing architecture and the proposed migration.

2. Use the Total Cost of Ownership (TCO) calculation to estimate the Return-On-Investment and payback period.
9. Communications Risk Assessment

A Unified Communications Strategy can introduce complex communications technologies into a business, these technologies drive business growth, but can also place a great deal of stress on the mission-critical systems that keep the business working toward its defined objectives. As the number of critical applications and the technology required to support them increases, there is a broader range of risks to mitigate. Risk management is a process for reducing risk to the infrastructure and its assets by identifying and eliminating threats. Risk management is an ongoing and everyday responsibility for ICT departments. Ongoing risk management includes conducting periodic risk assessments on an organization’s unified communications’ assets.

Unified communications risks can be defined three ways:

1. **Loss**
   The risk of loss resulting from inadequate or failing internal processes, people, and systems. By associating the loss with risk, risk becomes more urgent and quantifiable.

2. **Uncertainty**
   Uncertainty is tied to events outside of the organization’s immediate control. By acknowledging the importance of uncertainty and planning for it, firms convert a risk management strategy from the defensive to the offensive.

3. **Service Disruption**
   Service disruption approaches the issue of risk from effect rather than cause, forcing the internal ICT department to recognize the consequences of a service disruption to the organization.

After the unified communications risks are identified, they must be assessed as to their probability of occurrence and potential business impact. A probability and impact matrix is used to make the risks easy to understand and their impact on the business. Upon completion of the matrix, the risks are prioritized by the consultant and or the organizations’ stakeholders.

**Steps:**

1. List the communications, application, business continuity, financial, and security risks.

2. Complete a risk assessment. Estimate the probability and business consequence.

3. Compare the business consequence and cost to mitigate.
10. Implement the Strategy

When the strategic plan is complete and approved, the effort to turn it into results begins. Create a project plan for the strategy. A project plan is a formal document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and document approved scope, cost, and schedule baselines.

A project plan answers basic questions about the strategy:

- **Why?**
  What is the problem or value proposition addressed by the project? Why is it being sponsored?

- **What?**
  What is the work that will be performed on the project? What are the major products/deliverables?

- **Who?**
  Who will be involved and what will be their responsibilities within the project? How will they be organized?

- **When?**
  What is the project timeline and when will particularly meaningful points, referred to as milestones, be complete?

**Steps:**

1. Develop a project and communications plan for the strategy and market it to the stakeholders across the organization. Consider the expectations you want to create and the audiences you want to have these expectations. Create different versions for different stakeholders: executive, business managers, and ICT.

2. Institute Key Performance Indicators (KPI) tracking. Begin tracking the plan’s initiatives using their performance indicators. Select a few of the most indicative metrics from these initiatives and roll these up into a simple view of the strategy that you can present to the stakeholders.

11. Consulting Services

ViTel Consulting can assist your organization to develop a Unified Communications strategy.

ViTel Consulting has developed a unique Unified Communications strategic methodology that allows an enterprise to sift through the market hype to build a Unified Communication strategy that supports their current and future business requirements. A Unified Communications strategy is rolled out in a series of phased projects implemented over time. Unified Communications provides the ability for a company to be able to communicate and collaborate across locations, time and devices. This ability can lead to significant business benefits, but because each company is unique, there is no single strategy for migrating to Unified Communications.

Let our unified communications experts help you determine your unified communications needs, assess your current environment, plan and design your unique solution, create your roadmap, and navigate this complex migration to unified communications.

Contact:
Allan Bly
Principal
780.452.5205 (w)
780.233.5205 (c)
allanbly@vitel.ca
www.vitel.ca