



# Guide to Finding a New Phone System

For Small to Medium Businesses



Thinking about updating your business phone system? The options can be truly dizzying, especially considering businesses frequently wait up to ten years between system upgrades. Business phone systems are a long-term investment, and it's important to find a solution that will last. But the entire communications landscape is changing—what do those changes mean for your business? This guide is here not only to help you find a phone system to meet your communications hardware needs, but also to find a system that will improve your customer experience and boost employee productivity.

## STEP 1: IDENTIFY WHO'S USING YOUR SYSTEM

To get to know what your business needs, first you need to find out exactly who will be using the system. In most cases, your user base will fall into two camps: internal users, or external users (customers, contractors, etc.).

### INTERNAL USERS

Solicit feedback from the people who interact with your phone system most frequently. Get input from staff—both technical and nontechnical, light and heavy phone users. Ask them what's working about the current system and what's not working. What frustrates them? Watch some of them interacting with the phone. Is it easy to use, easy to program and comfortable ergonomically? What about remote workers? Some specific user types to consider:

**Remote Workers:** How many (if any) do you have? Do they prefer to use business desk phones or their mobile devices? Are they geographically dispersed or consolidated into a few regional or global offices? Are your remote workers easy to locate and connect with? Are secure communications a concern? What other communications needs will remote workers have?

**Power Users:** These are your heavy phone users, likely among administrative staff, who will need specific functions to keep your company going.

**Rare Users:** How many need a more simplified setup?

### EXTERNAL USERS

Don't forget about the users on the other side of the handset either. Ask your customers, partners and vendors about their experience contacting your business. Are they able to reach your staff easily? Are dropped calls an issue? Are your customers looking for other ways to contact you beyond voice? Assess what your competitors are doing well or not so well in the area of communications, too, so you have a benchmark to compare to.

### SIZE AND FLEXIBILITY

The size of your business is a big factor in the selection of a phone system. Consider not only how many employees you currently have but also how many you expect to have in the coming year and beyond. What are your staffing projections for the next three and five years?

Business needs are constantly evolving. Gaining an accurate picture of your company's user scope is important so the system you choose has the proper usage capacity. You don't want to invest in a system that you'll outgrow too quickly. On the other hand, you also don't want to pay for a bunch of users that you won't have for another year or two. The key is finding balance with a system that can grow in lock step with you. You'll want to understand how each potential supplier accommodates upsizing requirements. Every manufacturer has a different definition of small and mid-sized business, so be prepared to clarify your terms.

## STEP 2: SEPARATE YOUR NEEDS FROM YOUR WANTS

Once you've identified your key players, you can start to build an idea of what features your business needs to function. This is a great time to put all the options on the table and have users give feedback on what is most important for their roles. Once you've gathered all the user information you can, you'll be able to track patterns in the flow of work that will help separate what your company needs in a new phone system from a list of nice-to-haves that would give your team a chance to reach the next level.

Putting necessary time and thought into your requirements will ensure you end up with a system that meets or even exceeds your expectations.

### CUSTOMIZE YOUR NEEDS

There are so many features and capabilities available with today's advanced phone systems, it's important to sort through what your unique needs are. What kind of mobility and team collaboration needs do you have? What about Active Directories? Would you like the ability to program your speed dials through a computer interface? Do you need multiple voicemail boxes? Do your employees share desks? How about a message service to greet callers and route calls to the appropriate staff member? Do you want audio, Web and video conferencing? Think about what kinds of functionality will give you a competitive edge. There's likely to be a hardware and/or software solution.

While you certainly don't need to pay for options you won't use, it's better to grow into a system's features than regret their absence. Retrofitting is not feasible with most older phone systems.

Some capabilities to consider

### HOT DESKING

In some offices, it may be more convenient to have a pool of phones that are shared by multiple employees. For example, salespeople, who are often out of the office, may not need dedicated phones. Perhaps the office has 10 or 15 desk phones for 20 employees to use. Hot desking allows users to enter an access code into any phone on the system and automatically have access to personalized phone settings, speed dials, voicemail and more. Then, when they're finished, they just log out and a different user can log in. Hot desking makes phone sharing possible and can help businesses save on equipment and office space.

### INTRA-OFFICE MOBILITY

Many businesses have employees with explicit requirements to move around the office. Campus mobility through a DECT (Digital Enhanced Cordless Telecommunications) can give your employees the ability to roam freely without losing the qualities of a desk phone. Look for DECT systems that can support both voice and data, with a single point of provisioning to keep your installation, setup and maintenance streamlined.

### MASS NOTIFICATIONS

Many people associate mass notifications with emergency contacts, and for many institutions like education and government systems, this can be the case. But mass notification software can also be leveraged by businesses looking to automate outreach to customers. Many businesses utilize mass notification systems for billing requests, special offers, and other types of marketing outreach messages.

### REMOTE TELEWORKING

Businesses with remote teleworkers have a few options available when looking at phone systems. One option is to push desk phone units out to each teleworker. For businesses who want to avoid investing in hardware for teleworkers, a cloud solution that enables their workers to use a softphone or mobile device can be a great option. Cloud solutions can also provide teleworkers with unified communications and collaboration applications, which can help boost remote teleworkers' productivity by reducing downtime and email overload.

## MOBILE INTEGRATION

Mobile integration on the desktop enables a user's mobile phone to pair directly with a Bluetooth interface to deliver access to mobile phone features from the desk phone, allowing both cellphone and IP calls to be managed from a single device. Doing this allows mobile phone users to leverage their hardware and accessories for both IP and cellphone calls.

The average cost of a bad or non-existent mobile strategy is \$9,283 per information worker, per week.<sup>1</sup> Make sure you're considering your mobile workers when you're building a phone system plan.

The phone series that BCS sells is the latest innovation in premium desk phones, designed with the mobile workplace in mind. BCS's MobileLink capability enables the user's mobile phone to pair directly with the office phone's Bluetooth interface, to deliver access to mobile phone features from the desk phone and allowing both cellphone and IP calls to be managed from a single device.

With crystal clear audio, the our series works with a platform to create personalized, flexible communications at the touch of a button.

## MANAGEMENT AND ACCOUNTING

This feature records all phone system activity and logs the information based on data you want to capture. Many phone systems offer standard reports, but customizable reports are available as well. For example, you may want to monitor call patterns within certain departments or track employee availability and call length.

## AUTOMATED ATTENDENT

You're already well-acquainted with this feature, often simply called auto attendant, even if you don't know it. It is the voice that greets you when calling a business that provides you with menu options so that your call is routed to the correct extension. For instance, you might be instructed to, "Press 3 to speak with someone in billing," or fan-favorite, "Press 0 to speak with a representative." The auto attendant can also prompt callers to change the language of the spoken menu, dial an extension or listen to a prerecorded message, such as the business' address, fax number or hours of operation. Auto attendant has become a widely available business phone feature and comes standard with many systems.

## AUTOMATED DIRECTORY SERVICE

Like auto attendant, this feature allows callers to be connected to a department or an individual within an organization without knowing which extension to dial. Some systems allow callers to search the directory by entering the first three letters of the individual's last name while others allow callers to speak the person's name or department.

Necessary features are what you must have to keep your communications operating in your current business state.

Beneficial features are options you may be able to live without, but could substantially impact ease of communication and help your bottom line.

## AUTOMATIC CALL DISTRIBUTION

Automatic call distribution helps direct your customers to the right person to solve their problems the first time they call. System administrators can build directories to help distribute calls within an organization, and they can even set up priority systems for distributing those calls among workers by certain worker characteristics. For example, if a cable company wants to connect customers with technical support staff, the system administrator can use the automatic call distribution feature to route calls to



technicians who have been idle the longest. Calls can also be routed to staff in order of seniority, technical expertise or location.

## AUDIO AND VIDEOCONFERENCING

Most phone systems include a conference call, or audio conferencing, feature, which allows users to join more than two phone lines on a call. Depending on the system, though, that number of participants can range from three to many. More advanced systems also include the capability for videoconferencing. Collaborating in person is so rare these days, the right audio and videoconferencing system can reduce travel costs significantly for your business.

## UNIFIED MESSAGING AND TEAM COLLABORATION

Do you ever get tired of having to check several different devices or applications to retrieve your messages? Unified messaging is designed to take care of that. It is the collection of all your voice mail, email, fax and text messages in one interface. The access point for these messages can be an application that you can access from mobile devices, or from your standard desk phone or computer. Taking it a step further, team collaboration applications can provide internal and external communications streams to store and share information and correspondence. Keeping all your communications in one application connected to your phone system helps keep your team focused on the work they need to do, with the information they need right at their fingertips.

## PRESENCE

If you've ever dialed more than one number to track down a colleague, you know the value of this feature. Presence is a status indicator for each person in the system. Being able to see what communication method is available for

a particular user at any given moment helps each user save time and effort. For instance, if a user sees that the person she needs to speak with is on the phone, she may choose to instant message him instead. Another user would benefit from seeing his co-worker's status set to "gone for the day" so she doesn't waste time trying his desk extension again and again.

## FOLLOW ME

This feature is pretty much the polar opposite of DND. It's a type of call routing that allows you to program a list of numbers you wish to be tried, in order, for locating you when you're not at your desk. For example, you could set the feature to route calls to your desk phone but if you don't answer in a certain number of rings to try your cell phone. And if you don't answer that, you could have it call your home phone. The phone system will attempt each phone number you've programmed in succession until the call is answered or the list is exhausted, in which case, the call is sent to voice mail.

Be strategic when thinking about which phone features your company needs versus the features that would be beneficial to your team. Don't overlook the value of a beneficial feature just because it's not on the needs list today, either. Today's benefits can very quickly become tomorrow's needs, so it's important to think through how your communications system will change over time.

# STEP 3: DO A TECHNICAL INVENTORY

Once you've addressed who your users are, and identified some key features that will help your business run smoothly, it's time to take stock of what you have. Give your current system an earnest, thorough once-over.

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Get to know your infrastructure by performing a technical inventory of all the moving parts in your communications system. You'll want to make note of every piece of hardware and software your business owns (and more importantly, uses). As you start your inventory, it helps to remind yourself of some of your general goals for your new phone system. Why do you want to purchase a new phone system in the first place? Some of the most common reasons include: poor voice quality, outages or dropped calls, the need for better call routing, a reduction in contract or maintenance costs and wanting additional features.

Many of these reasons will be linked with what technical equipment you have and use, and how well what you have will work with newer technologies.

A basic technical inventory should cover five main areas:

## 1. SERVER INVENTORY

Take stock of your servers, making note of hardware limitations like CPU type and speed, RAM, RAID configuration, etc., as well as software versions and licensing.

## 2. PERSONAL COMPUTING COMPONENTS

How many users do you have? What software and hardware are being used at each workstation? Depending on the size of your business, it may be beneficial to establish a weekly inventory percentage (e.g. 10% of your network) to stay on top of what your users are actually using. If your business is less complex, do a complete workstation inventory.

## 3. NETWORK INVENTORY

You'll want to include switches, routers, and internet connection hardware.

## 4. NETWORK DRAWING

Using your network inventory, sketch out physically where all of your components are located. Highlight redundant systems or components, or bottlenecks.

## 5. SERVICE PROVIDERS

Some of your business activities may be hosted by external service providers. Having a concise list of who your vendors are, what services they provide, along with contact information for each vendor in the event of emergency will help your business be prepared for anything while also creating an opportunity for integrations (where possible).

## NETWORK CONSIDERATIONS

The type of network infrastructure you already have can impact the communications options available to you. Traditional phone systems rely on voice networks, while VoIP services require voice to run on the same network as your data services. If you've already got a traditional infrastructure in place, it may be more cost-effective to use it. If you have a good data network in place, however, you might be better set up for a VoIP phone system. Underperforming networks can significantly affect the performance of other critical applications. Conduct a complete analysis of the data network and record measurements such as bandwidth and quality of service.

## INTEGRATIONS AND INTEROPERABILITY

Take stock of your business-critical applications. Is there a way for a new phone system to streamline your employee's workflow through an integration with a key application?

Make a note of where your communications are or are not connecting with each other, and consider the business cost associated with these connections. In terms of interoperability, it's important to consider your physical components as well. If you are currently running an on-premises solution, and are considering upgrading a portion of your network, or of moving to a hybrid cloud solution, you may need to consider whether your on-premises components will work well with the newer technology.

## RELEVANCY

In addition to usability, review your current system for relevancy. How old it is? Has it been discontinued, making replacing parts and service challenging? Are maintenance costs becoming too much? Take a look at where you stand and where you want to go.

## STEP 4: LAY OUT YOUR BUDGET

First and foremost: what does your budget look like? If you have a very small budget, with limited funds for long-term support, that will shape the infrastructure choices you're making now. Likewise, if your business prefers running lean, and emphasizes service-based purchases, you'll be looking for less asset-heavy options. One option to keep in mind is that with any budget size, you can look for a vendor who can help transition your infrastructure over time, rather than investing immediately in a new system. Rather than making a big investment up front, some vendors offer hybrid solutions to help you phase in a new system while you phase out the old one. You can minimize downtime and reduce the budgetary issues that may come up with a full, immediate system migration.

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### CAPITAL EXPENDITURE VERSUS OPERATING EXPENSE

Businesses approach communications expenses in one of two ways: capital expenditures or operating expenses. There are benefits and costs to each model, so the final decision is a subjective one. On-premises solutions are capital-heavy, and require a high initial cost up-front. These capital expenditures may be more costly up front than a cloud model, but they also allow for amortization over time and have no additional monthly costs. Cloud solutions, in contrast, have minimal initial investment in assets, with a predictable monthly cost model that can grow or contract as needed. A cloud model is more flexible than an on-premises solution, which can be attractive to growing businesses, but could end up costing more in the long-run if user seats run extremely high.

### TOTAL COST OF OWNERSHIP

Phone systems are priced all over the place. Some that boast low monthly fees have hefty up-front costs and vice versa. Others are reasonably priced at the outset and on a monthly basis but then require regular and costly upgrades or service fees. The best way to compare apples and oranges is to look at the total cost of ownership. Your vendor can help you determine this number.

A word of caution, however, on focusing too strongly on total cost of ownership: be careful not to overemphasize cost in choosing your phone system. Finding a system that will serve your business well for the length of time you plan to have it is what's most important. Short-term savings on a system that offers lower quality of service will ultimately have a negative impact on customer satisfaction and worker productivity. Selecting a higher quality system even at a somewhat higher price point secures your future in ways that are well worth the initial investment.

### LEASE OR BUY

Like a vehicle, your phone system can be leased or purchased. As with any other capital expense, there are upsides and downsides; both are legitimate options. Leased equipment can be replaced more frequently, allowing your technology to stay up to date, which can be great if your company is focused on being cutting-edge. But the downside of leasing equipment is that you don't fully own the product, and you lack some control over the product. Purchasing a phone system outright can be a great option if you want full control and to minimize future cost in the form of interest rates and fees. The downside of buying your system, however, is that once you've invested in a particular solution, you're basically stuck with the technology until you are ready to overhaul your system again.



## STEP 5: CHOOSE AN INFRASTRUCTURE AND DEPLOYMENT MODEL

You know who your users are, what your system looks like, the specific aches and pains you're trying to alleviate with this new purchase, and how much you're looking to spend to do it. What's next? Determining the right infrastructure and deployment model. There are two basic types of infrastructure for your phone system: on-premises and cloud-based. Each has unique deployment models that provide their own benefits and challenges.

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### ON-PREMISES PHONE SYSTEM

Traditional phone systems use landlines and trunks, and transmit voice using analog or digital devices. Each employee has his or her own phone extension and voice mailbox as well as such features as conferencing and caller ID. Traditional phone systems are ideal for businesses who make mostly local calls.

With an on-premises solution, your entire phone system is housed on your organization's premises and your staff maintains the network. Some organizations insist on this model because they want to maintain control over all their voice and data.

If you don't already have a system in place, the investment in a new one can be significant and costly. A full system purchase is also a one-time investment with no additional monthly charges and no contracts, and can make it easier

to upgrade to a hybrid solution. As long as you plan ahead correctly, to allow for future growth for additional lines and an IT staff in place to maintain your network, on-premises systems can be a great long-term solution. From a security perspective, on-premises systems offer an element of control over your phone system, and can be very secure against external threats.

If you already have the infrastructure in place, it may be cost effective and advantageous to look into upgrading certain elements for advanced functionality rather than completely replacing your system

### CLOUD PHONE SYSTEM

Cloud phone systems use a dedicated or shared Internet connection for one or more locations. These systems reduce telecommunications costs by delivering calls over the Internet, requiring that you only pay for extensions actually being used, reducing the need for technical support staff, and eliminating costly voice lines and local and long distance contracts. You can buy a basic cloud phone system and add extensions and features as your business grows. Adding new users, multiple offices, remote workers, and contract employees is simple with a cloud phone system.

The most popular of all deployment models, with public cloud your cloud provider manages all hardware and software. This is the most asset-light of the deployment models, and offers excellent scalability and minimal capital expenditures. A great option for growing businesses with fewer than 500 employees.

And for those businesses with strict data regulations, like healthcare and financial services, private cloud is a popular



model that utilizes dedicated hardware and software for an added layer of security.

A subscription service may be perfect for a growing business, but over time a subscription service may become more expensive for a fast-growing business than an on-premises system with room for growth

## HYBRID APPROACH

Hybrid systems combine the benefits of on-premises and cloud phone systems. They allow you to use traditional phone lines for local calls and the cloud for long distance and international calls, plus other features. A hybrid system lets you maintain control where you want it and use your existing infrastructure, resulting in a significant cost savings, flexibility and scalability. A solutions engineer can help you design and implement a hybrid system to work for your business' needs.

## A NOTE ON SECURITY

Private cloud solutions can be highly secure and reliable. In fact, in times of major disasters, such as weather-related events, they can be more secure than their on-premises counterparts.

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## STEP 6: CHOOSE A VENDOR AND DEVICE

The hard part's over: you've done your research, taken an inventory, assessed your budget, and you have your needs and wants fully planned out. You've got a basic idea in mind of what kind of system you'd like, and what kind of infrastructure and deployment model you'll use. Now it's time to choose a vendor and a device.

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Here are a few considerations you'll want to bear in mind as you approach your vendor and device search:

### SETUP AND SUPPORT

When choosing a phone system vendor, consider who will install the system and provide support for technical issues. Ask vendors how much experience they have in installing this particular system in businesses of your size and structure. You want to find a reputable vendor who's had years of experience in this industry. Do they offer training and support? Ask for customer references and call them. Visit their website and look for case studies from previous

customers. Find out if they charge for installation, and get an itemized list of maintenance and service fees. Lastly, inquire if the phone manufacturer itself offers support for the hardware—some do and some don't.

### AESTHETICS AND ERGONOMICS

Now comes the part in the phone shopping process that you may have been tempted to start with—the design of the device itself. Depending on your business and whether or not your customers will ever see or directly interact with your phones, phone design may be an important factor in choosing a system. After all, you wouldn't want to junk up your sleek doctor's office or modern boutique hotel with clunky telephones, would you?

The design of the user interface is key, too. Is the phone easy to use? Will employees (and customers, if they'll be using them, too) be able to figure out how? Do the desk phones come with cordless headsets? What about touchscreens and full-color displays? Desk phones are now being designed to replicate and complement the smartphone experience your users experience every day. The last thing you want is to invest in a communications system for your business only to find that employees are opting for email or their own personal mobile phones because they can't or don't want to use the new phone system. In that same vein, you also want to be sure to

choose a device that is comfortable to use for extended periods of time. Does the handset feel natural to hold? Is it comfortable on the ear? Are accessories such as headsets or cordless handsets available?

## TAKE MOBILITY INTO ACCOUNT

With the rise of mobile communication, the anytime/anyplace nature of business and the realities of multi-tasking have raised the stakes for all of us. Look for a phone system that integrates with the mobile devices your employees are already using. Some desk phones have the ability to twin with a mobile phone, right from the base. These features are only going to become more necessary as the digital transformation continues. On top of that, if you have multiple offices, a number of employees who travel regularly or staffers who work remotely, your phone system requires particular flexibility. That's why it's more important than ever to have a central hub that can seamlessly manage your telecommunications traffic without compromising quality or productivity. The right system offers freedom and flexibility for all users.

## REPUTATION AND RELIABILITY COST

Because your phone system is instrumental to the day-to-day operations of your business, you want to get the best

product from a reputable manufacturer. Compare product reviews. A great way to measure reputation is to look for recognition from reputable third parties, like Gartner, in their Magic Quadrant Reports. Frost & Sullivan and Forrester are other industry experts who offer independent research and vendor reviews. Don't rely solely on testimonials; seek out user references from businesses like yours. And ask about warranties, service agreements and costs.

## VENDOR OUTLOOK

It's important to take the whole picture into account: not just where your vendor sits today. Pick a vendor with a long history of innovation, who can adapt to the way technology is evolving. The digital transformation is affecting all parts of business today, and your phone system is no different. You should look for a vendor who is innovating on the Internet of Things, cloud communications, and mobile-first design. The vendor you want in your corner is looking forward and showing signs of being here to support you in the future.

## DON'T FORGET TO ASK ABOUT PROMOTIONS

Larger vendors, like BCS, sometimes offer special pricing and promotions. It never hurts to ask about any promotions that might be running, or to subscribe to their communications so you're always in the loop.

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# STEP 7: IMPLEMENT!

Now that you've considered all your options, it's time to make a selection and get your new system in place. It may seem as though your work is almost done—and, don't worry, it is—but it's crucial not to rush this last step in the process. Failing to plan the implementation process with care could lead to mistakes that are costly not only in time and resources but also in perception. You could choose the perfect phone system for your business, but if it's not implemented well, then employees may resent the change and executive management will take notice.

For more information on these and other platforms, visit [bcsip.com](http://bcsip.com)



## Here's a quick rundown of what you'll need to do when implementing your shiny new system:

1. *Notify staff. Give employees a heads-up that a new phone system is on its way so they can get used to the idea of change. Assure them that there's no need to worry—they'll get all the training and support they can handle.*
2. *Take inventory of the delivery. Go through all of the equipment, including cables and peripherals, to make sure you received everything you ordered and that you have everything you need to get started.*
3. *Set up a test network. Select a small group of early adopter end users and test the system with them before deploying it company-wide to work out any kinks. These early adopters will be your advocates for the new system – they can help other users get comfortable with the system and answer questions when IT isn't around.*
4. *Train users. Once your vendor installs the system, provide staff with training from a professional. Group training is great for giving an overview of the system and basic features, but it's important to conduct individual training so users can ask questions and get tours of the features and functionality most important to them. Give everyone a cheat sheet with instructions for common actions and settings.*
5. *Party! It's been a long process but you hung in there. Pat yourself on the back and start planning your next major project.*



Don't feel overwhelmed on your search for a new phone system. Sticking to these seven steps will keep your search focused and strategic. As an experienced vendor in on-premises, hybrid, and cloud deployment models, BCS is here to help you find the phone system best for your business. Our business phone systems cover a range of digital and IP phones, consoles, conference phones and peripherals suited for businesses of all sizes. Visit [bcsip.com](https://www.bcsip.com) to learn more.

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