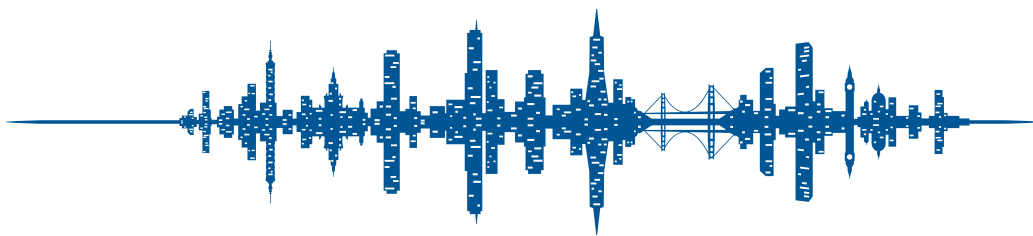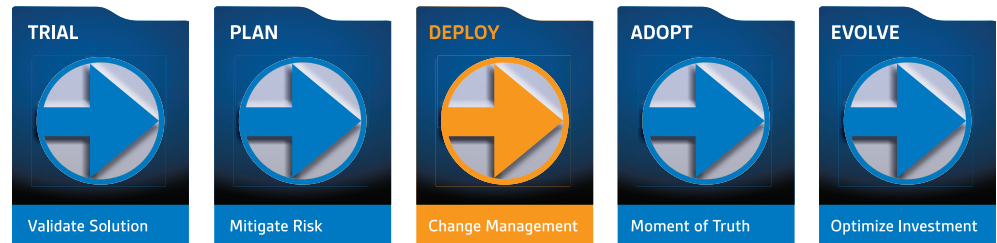**plantronics**®

Smarter Working UC Toolkit
Deployment Guidelines for Success

As you embark on implementing UC audio device technology throughout your organization, you may have numerous questions and concerns. How do you get all the audio devices charged and ready to use? How do you make sure users get the right audio device? What level and type of support do you need to provide?

In our experience, we find that the introduction of audio devices into an organization usually follows the five steps shown in this figure:

TRIAL	PLAN	DEPLOY	ADOPT	EVOLVE
Validate Solution	Mitigate Risk	Change Management	Moment of Truth	Optimize Investment

Phases of a unified communications (UC) platform and audio device introduction

This guide is one of a series of Guidelines for Success that provides best practices for integrating audio devices into enterprise environments. It provides insight, advice, and recommendations for managing the physical delivery and installation of audio devices and integrating them into your company's overall UC strategy. The *Smarter Working UC Toolkit, Deployment Guidelines for Success* offers best practices based on our understanding of the behavioral changes users experience during the implementation of a communications platform. It provides suggestions to help prepare users for the moment of truth — the successful first use of their audio devices with the UC platform. Other guides in this series include:

- *Smarter Working UC Toolkit, Trial Guidelines for Success* provides IT best practices and recommendations for conducting an effective evaluation of an organization's communication needs by collecting user, manufacturer, and product data, and analyzing it to make the most informed decisions when selecting UC audio devices.

- *Smarter Working UC Toolkit, Planning Guidelines for Success* provides IT best practices and recommendations for the successful integration of UC audio devices through assessing user requirements, developing communication strategies, and preparing the logistical infrastructure needed to ensure a smooth rollout that meets business objectives.

- *Smarter Working UC Toolkit, Adoption Guidelines for Success* provides IT best practices and recommendations for ensuring users have a positive initial experience with their UC audio devices, resulting in a trouble-free transition and operation with the UC platform beginning with the very first call.

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- *Smarter Working UC Toolkit, Evolve Guidelines for Success* provides IT best practices and recommendations for increasing UC audio device utilization, accessing and responding to changes in user needs, maintaining the right level of support, and planning for UC audio device upgrades or transitions.

The Deployment Process

Deployment seems like a straightforward process but it isn't simply about handing an audio device to users. It's also about arming IT with the best practices to effectively manage the technological, operational, and emotional changes resulting from the use of a new communications platform and audio devices. Toward this end, it is important to:

- **Communicate the process.** Articulate the installation and setup processes, the deployment schedule, and the milestones. Providing clear and detailed information up front about what is going to happen encourages users to commit to what they need to do to adjust to the new technology.

- **Provision support and conduct training.** Ensure the IT department is staffed with trained experts and that executives, executive admins, managers and superusers are prepared. Develop appropriate training materials and resources for users. Be sure to launch support functions for audio device use and problem resolution prior to product distribution.

- **Handle logistics.** Prepare to receive, store, package, and deliver audio devices. (See the *Smarter Working UC Toolkit, Planning Guidelines for Success* for recommendations on preparing to deliver audio devices.) Be ready to support installation, manage upgrades and exchanges, and remove empty containers. Note these activities apply only to the *IT Managed and the IT Business Partnership* deployment strategies (as determined in the *Smarter Working UC Toolkit, Planning Guidelines for Success*).

- **Support installations.** Let users know what resources are available to help with the installation process. Prepare the Help Desk with technical, human, and knowledge resources, and consider ways to address the disposal (recycling) of packaging materials.

Communicate the Process

Different people learn in different ways. Some people are more visual and prefer the use of pictures and diagrams. Others like to read about a task, while still others prefer a more interactive environment in which they can ask questions and get immediate answers. Providing information just one way risks isolating individuals who may not have access to that particular format.

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We recommend the use of multiple media and venues to flow information throughout the organization, increasing the likelihood that employees will participate. Depending on your corporate culture, this can be done with videos, Webinars, and in-house social media including wikis and blogs. Communication vehicles to consider include:

- **Online resources.** Today, the most useful and ubiquitous media is the company's intranet. Information can be available for immediate access and in downloadable format to be viewed and studied offline. Plantronics provides a variety of resources that are available for use on your company's intranet. Supplementary documentation and supporting materials can be easily linked. Online information can be kept current when new devices or accessories become available. Email, blogs, and social media are good vehicles for providing updates and keeping employees informed about schedules or the location of distribution sites.

- **Videos.** Videos are an excellent vehicle for delivering information about the purpose, goals, and benefits of the project. Also, they can instruct users on installation and operation procedures by showing the actual audio devices, where the various controls are located, what the cords and plugs look like, etc. Consider creating videos that users find entertaining or inspirational and are likely to share among themselves, enhancing the possibility they might go viral throughout the organization.

- **All-hands and departmental meetings.** Management presentations and question and answer sessions are an effective way to communicate with users. At these meetings, managers can explain the objectives and rationale for the planned use of the new communications platform and the key role audio devices play throughout the company. Users have the opportunity to be heard by asking questions and expressing concerns directly to executives.

- **Posters.** Displays in the cafeteria, meeting rooms, and common areas can be an effective— and relatively low cost—method for creating awareness and showing corporate commitment.

Provision Support and Conduct Training

For some employees, their biggest worry is that they will have to spend considerable time figuring out how to install and operate the audio device with the UC platform. Some will avoid even plugging the audio device in because they do not want to spend time dealing with a new technology. A comprehensive training and support program is one of the most useful resources to help employees feel comfortable about using their new audio device. Plantronics offers materials to assist in your training efforts including a series of *Smarter Working UC Toolkit, Interactive Setup Guides.* These guides are menu-driven, media-rich, on-demand clips providing instructions on the use of a wide range of Plantronics UC audio device and UC platform combinations. (See *Additional Resources*.)

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TRAIN PRINCIPAL USERS

Special training courses and classes should be developed and made available to designated users including executives, executive admins, superusers, and business managers. Webinars can be useful for remote participants. Training should be not only in the use and operation of the devices, but also on the messages and benefits of the communications platform.

TRAIN AND SUPPLY SUPPORT STAFF

Just as it's important to provide information in multiple formats to meet the different needs of users, it is also important to provide support in multiple services for different types of users. Although multiple support strategies can be expensive, alternative methodologies often can be provided at little or no cost. When they are not answering support calls, technicians might be able to provide real-time chat and email support services.

BEST PRACTICE

If appropriate for your environment, we recommend on-site support staff at least for a limited time during the installation and initial use. Knowing that technicians are walking around the facility providing assistance with start-up issues can be very positive. Superusers can be helpful for this purpose as well.

BEST PRACTICE

Make sure your Help Desk is staffed and they have early access to the new audio devices in order to become familiar with the devices and be trained prior to the distribution. Ensure the necessary infrastructure and resources needed to provide the support is installed and working. For example, create a knowledge base and consider providing a Web portal for user self-service that is integrated with the knowledge base. Update job ticketing, problem logging, and asset management software to support audio devices.

DEVELOP RESPONSES

The support team needs to be up and running on the day the UC audio devices are distributed. Ensure the support team has as much time as possible using and learning about the audio devices to help them be the go-to experts for the rest of the company.

A properly prepared support team will expect, and be able to answer, the majority of questions that start coming in on day one. Develop a comprehensive list of tips and tricks, as well as a set of answers to assist Help Desk personnel in responding to common questions.

PREPARE FOR UPGRADES, EXCHANGES, REPLACEMENTS

In projects where a substantial number of audio devices are being deployed, exception cases will arise. It is possible there may be a misfit between device and user requirements. Users may determine that an audio device doesn't fit their needs, or the device may not operate properly.

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IT should have audio devices tested and in stock to meet these needs, such as speakerphones, wireless audio devices, and USB phones. If you are using either the *IT Managed* or the *IT Business Partnership* deployment strategies (see *Smarter Working UC Toolkit, Planning Guidelines for Success* for descriptions of each of the deployment strategies), consider implementing a process for handling the following types of replacements:

- **Instant upgrades.** Even with careful planning, some users may discover that the audio device they received is not appropriate for the nature of their job and needs to be upgraded.

- **Instant exchanges.** Exchange audio devices that users are not comfortable with, such as monaural instead of binaural headsets.

- **Instant replacements.** Replace an audio device in the rare case that a newly installed device is found to be faulty or defective.

Handle Logistics

Delivering the audio devices into the hands of users can be relatively easy or somewhat complex depending on the size of the organization, the number of facilities involved, and their geographical distribution. In any case, it is critical that the distribution process lets employees know that the company is providing them an important and valuable tool. They shouldn't feel that the audio devices were just dropped on their desks and now they are "on their own" to make them work.

Most of this section applies to the *IT Managed* and the *IT Business Partnership* deployment strategies (as determined in the *Smarter Working UC Toolkit, Planning Guidelines for Success*). For companies using the *IT Standards Driven* strategy, IT should encourage standards and provide user support such as online resources and Help Desk assistance.

DELIVER AUDIO DEVICES

Giving some thought to the process and how you communicate to users when audio devices are delivered can significantly influence how they feel about the entire project. When implementing the *IT Managed* and *IT Business Partnership* strategies (see *Smarter Working UC Toolkit, Planning Guidelines for Success* for information on deployment strategies), customize your delivery strategy for each major user type from a physical location perspective within the organization.

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USERS BY PHYSICAL LOCATION	DELIVERY AND SUPPORT METHOD
Executives, Executive Admins, Managers, Superusers	These users should have their audio devices delivered by an IT engineer who can install and show how to operate the device, and answer questions.
Office Workers	These are the majority of users. Support is provided by the company's IT organization and designated assistants (such as superusers), supplemented with online resources.
Remote Workers	This group includes home-based workers, telecommuters, and consultants who are typically not physically located at a company facility.
Mobile Workers	These employees, such as sales representatives, field service engineers and non-permanent workers, may not have access to a company facility. Support is similar as for remote workers.
Temporary and Contract Workers	Non-permanent workers may not have access to a company facility. Support is similar as for remote workers.
International Workers	These employees may require special handling including country specific packaging, translated documentation, and country compatible connectors.

Consider a staggered or phased audio device distribution if you are concerned about the strain on your support resources.

In cases where IT distributes the audio devices, you can adapt delivery methodologies to the type and location of your users with one or more of these approaches:

KEY INSIGHT

- **Central distribution site.** Ask employees to pick up and sign for their audio devices in person. A raffle with appropriate prizes can provide incentives to encourage participation. Suggest employees watch a short video running at the distribution site that provides an overview of the project from the executive sponsor.

- **Drop off package.** A team visits offices and delivers audio devices directly to users. This method is most convenient for employees and gives them a chance to get a quick-start tutorial from the team and provides an opportunity to ask questions.

- **Ship audio devices.** This method may be necessary for remote and international users. It is an opportunity to include positive information and reiterate the benefits of the new audio devices. You can even consider including a small gift or conducting a drawing for users who sign and return a receipt.

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INSTALL AUDIO DEVICES

Take into account the communications system being installed and the technical aptitude of employees when deciding on installation methods. Consider segmenting the employees into groups that can self-install and those that need help. Plan for critical users and influencers who should receive special attention, such as executives, executive admins, and the IT support team.

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Wireless installations can be evaluated by Plantronics or use the *Smarter Working UC Toolkit, Wireless Voice Office Assessment Tool* to help approximate your requirements. Also see the *Smarter Working UC Toolkit, Wireless Voice in the Office Environment white paper for more information on wireless deployments.* For corded audio devices, self-installation is appropriate for the majority of users.

Provide a variety of resources to help with the installation process. Installation aids to consider include:

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• Quick Setup Guides and User Guides

• Online training and demo videos

• In-house social media, wikis, and blogs

• IT chat

BEST PRACTICE

We suggest including the *Quick Setup Guides* (QSG) when you distribute the audio devices. Plantronics recognizes QSGs as a best practice and has created a portfolio of QSGs featuring many of the Plantronics UC product families for specific UC platforms. You can customize these QSGs even further by adding your own company logo, support contact details and internal resource Web sites. Keep in mind that the most effective resources you can offer are

RESOURCE

customized specifically for your environment and discuss the attributes of the audio devices you've selected. Review the materials Plantronics offers and consider how these resources can best be adapted for your use. See *Additional Resources* at the end of this guide.

SUPPORT INSTALLATIONS

Once the audio devices are delivered and installed, your goal is to make sure users have a successful first experience. Throughout the preparation for the deployment, continually

KEY INSIGHT

encourage users to make their first call to the IT Help Desk. Consider a phased rollout or temporarily supplementing the number of support staff in order to handle the initial volume.

Prior to the installation, ensure the Help Desk is prepared with the technical, human, and knowledge resources to support these calls and enable user adoption. Consider providing a card packaged with the audio device and *Quick Setup Guide* with the number users should call first.

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Although the audio devices are physically quite small, the packing materials they are shipped in can be, through volume, significant. Manage disposal of shipping and packing materials, as well as recycling of outdated equipment that is replaced by the audio devices. Consider coordinating disposal with a local recycling facility. You may find that unpacking the audio devices at a central location helps to manage the recycling more efficiently.

With proper preparation, communication, training, and support, your audio device deployment can be a positive and successful experience for your users. This will greatly enhance the likelihood of a successful first call — the moment of truth — and help ensure the audio devices are used on an ongoing basis and that your company's UC project will ultimately be viewed as a success by all.

Ensure Audio Device Adoption

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Once the audio devices have been delivered and installed, you have arrived at the moment of truth — the first call. Ensuring these calls are successful and determining the overall success of the project is discussed in the next best practice guide, *Smarter Working UC Toolkit, Adoption Guidelines for Success*.

For More Information

The Smarter Working UC Toolkit is the collective wisdom of customer experiences and lessons learned while integrating audio devices into a UC environment. It's a portfolio of best practices, recommendations, and off-the-shelf training tools designed specifically for IT organizations to leverage — ensuring accelerated end-user adoption. To access the Smarter Working UC Toolkit visit *plantronics.com/uctoolkit*. We'd like you to be part of our community of learning.

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Additional Deployment Resources

The following resources, available at _plantronics.com/uctoolkit/deploy_, provide supplementary information to help in the deployment process.

DEPLOYMENT RESOURCES	
Deployment FAQ	Provides responses and direction to typical questions IT organizations raise during deployment of UC audio devices
Deployment Guidelines for Success	Helps IT organizations prepare for the successful deployment of UC audio devices on a UC platform
Deployment Checklist	Provides IT organizations with a high-level list of items to consider during a UC audio device deployment
Deployment Survey	Provides a list of suggested questions IT organizations can use to assess end user satisfaction levels with audio device deployment
Quick Setup Guides	A library of step-by-step instructions for installing and configuring many Plantronics UC audio devices
UC Audio Device Catalog Tool	An online tool that assists IT in managing their supported UC audio devices and guiding employee selections

For more information, contact Plantronics at 1-855-UCTOOLS (1-855-828-6657) for US and Canada, or (001) 831-458-7628 (all other countries).

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