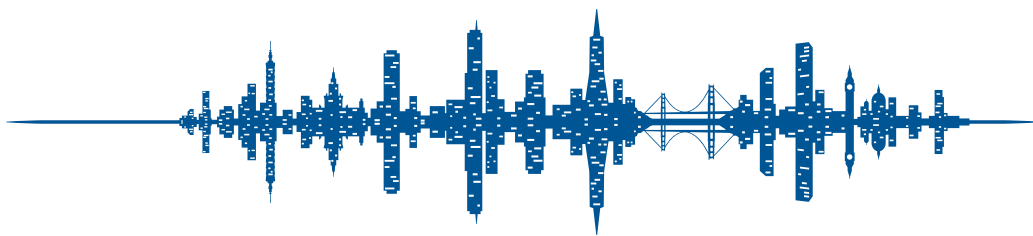


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Smarter Working UC Toolkit  
Evolve Guidelines for Success

During the Adopt phase of your UC audio device integration, the UC audio devices were delivered, installed and employees successfully made their first calls — the moment of truth. In the Evolve phase, your goal as an IT manager is to optimize investment in your UC platform through better utilization of your UC environment. During this phase, we recommend you ensure that the changing technologies in today’s UC environments are aligned with the ongoing needs of individuals and the company’s business communications.

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



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 UC audio devices into enterprise UC environments. The *Smarter Working UC Toolkit, Evolve Guidelines for Success* describes best practices and recommendations for assessing utilization rates, reviewing user needs, developing an upgrade process, and upgrading UC audio devices as needed. Other guides in the series include:

RESOURCE

- *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.

RESOURCE

- *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.

RESOURCE

- *Smarter Working UC Toolkit, Deployment Guidelines for Success* provides IT best practices, and recommendations for managing the physical delivery and installation of UC audio devices and for assisting users through the changes associated with the integration to a UC platform and the way they work.

RESOURCE

- *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.

## The Evolve Process

Your company has made a substantial investment in UC technology. Having integrated the UC audio devices into the workflow, it is important that every effort is made to optimize that investment. More employees using UC audio devices more often, and in more creative ways, results in greater return on investment.

UC platforms, along with UC audio devices, dramatically improve employee at-work presence. Fewer voicemail messages, less phone tag, reduced email, increased availability, and improved collaboration via desktop sharing are just some of the benefits of the UC environment. The work experience evolves as users learn how to take advantage of innovative communication techniques. At the same time, UC communications technologies and capabilities also evolve, changing the way users communicate. The combination of these two developments results in users with growing needs wanting UC audio devices with increased capabilities. Awareness of these changes helps you as an IT manager proactively manage the environment and ensure user business communication requirements are accommodated.

Over time, UC audio devices may require updates (through the installation of more functional firmware and software), upgrades (to newer devices with more advanced features), and in warranty and out of warranty replacements. Prepare for these changes and, at the same time, improve IT services to ensure support for new technologies. The key areas to focus on during the Evolve phase are:

- **Drive utilization.** Encourage use of UC audio devices throughout the organization by reassessing user needs and adjusting device and usage policies accordingly. Communicate user successes and inform employees of ways to improve their business communications.
- **Refresh services.** Evaluate and enhance the IT organization's services and performance through a proactive plan of rapidly introducing new technologies, features, and capabilities based on ongoing assessments of changing user needs. Support growth in the number of users as well as the addition of new UC technologies, features, and capabilities.
- **Support upgrades.** Develop and implement a process to replace and upgrade UC audio devices as appropriate, including taking advantage of available manufacturers' warranty offerings.

Implementing an ongoing process of increasing utilization, improving services, and renewing technology helps to ensure the long-term success of UC audio devices.

## Drive Utilization

During the Adopt phase, you invested a lot of effort in helping employees have a successful first call — the moment of truth. Now the focus is on maximizing the integration of UC audio devices throughout your company's communications infrastructure. As users become familiar with their UC audio devices, and as new technologies become available, occasions for upgrading and purchasing UC audio devices increase — driving the utilization rate. This section offers help on finding and cultivating opportunities for employees to expand their knowledge and use of UC audio devices in order to take advantage of a state-of-the-art UC environment.

### PROMOTE SUCCESS

The UC audio device is one of the most visible and personal parts of the UC deployment. It is one of the few pieces of technology that you wear on your person. Comfort and style play an important role in the successful integration of UC audio devices into the company. Users are naturally interested in other options and motivated by the success of colleagues who embrace the technology and use it in new ways.

We recommend publicizing profiles of users who make the UC audio device an important part of their daily routine. Create Web sites, blogs, and social networking pages to show employees how these leading adopters have improved their productivity by making better use of the UC audio devices. Consider offering awards to people who find innovative uses for the UC platform.

In addition, collect and publish information on growing utilization rates, productivity increases, and cost savings. Some of the ways to communicate these messages may include:

- An IT UC Web site to provide information about innovative and effective ways to take advantage of UC platforms and audio devices
- Newsletters featuring user profiles and success stories
- Blogs written by the executive sponsor and by IT specialists to provide updates and product information
- Social networking pages to enable an exchange of ideas
- Executive reports to present utilization statics and performance against goals
- Town hall meetings and department meetings to spotlight innovative users and to demonstrate advanced features

### COMMUNICATE COMMITMENT

In order for the company's UC strategy to be successful in the long term, it's important to show evidence of the company's ongoing commitment to making the strategy a success. In some organizations it is not unusual for a new program to be announced only to be superseded by the next new program. When new corporate efforts come along, the UC strategy should

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continue to have high visibility throughout the company. Provide examples such as equipment upgrades or availability of new models, demonstrating that the company remains committed to the UC strategy.

An ongoing communications effort emphasizing the benefits of the UC audio device integration is particularly important. Consider working with the corporate communications department to create consistent company-wide messaging.

### **ENGAGE SLOW ADOPTERS**

Having grown up with telephones, it's almost second nature for most people to make and answer phone calls using the traditional desk phone and handset. For some, transitioning to a UC audio device such as a headset can be difficult, particularly if they were disappointed with their initial experience. (This is the major reason we recommend that users be cautioned not to use the embedded microphone and speaker in their computers. The quality of the communications often is unsatisfactory, leading users to believe the UC platform is not worth using.)

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Identify potential user satisfaction concerns as early as possible. Engage slow adopters with activities such as focus groups, user surveys, and evaluation teams. Unhappy users can have a dramatic influence on others. Make the effort to address their concerns and help them understand the benefits that can be achieved through UC audio device use. For people who just want the familiar feel of a traditional desk phone, there are UC audio devices that are configured as a handset enabling these users to pick up the phone in a familiar way.

### **ASSESS EMPLOYEE SATISFACTION**

Once the UC audio devices have been in use for awhile, a follow-up study and analysis of employee satisfaction can be revealing. While initial reactions of users may vary, they can improve dramatically as users discover the benefits of the advanced features of their UC audio devices. Of course, it's possible — but unlikely — for satisfaction levels to decline after the initial excitement of using the new UC audio devices. If this is the case, it's even more important that you are aware and take steps to address the causes of potential user dissatisfaction as early as possible.

In addition, users' environments may change. Some employees may need IT assistance to assess noise levels in their offices and potential interference with UC audio devices that may be causing a less than satisfactory experience. Consider preparing an environmental assessment process for checking if workers' surroundings are causing difficulties.

Your appraisal should be as detailed and as thorough as time and resources permit. Even a relatively informal assessment based on ad hoc discussions with users and observations as you walk the office floor can be valuable. Informal sessions that provide users the chance to discuss issues in a relaxed setting are often helpful to discovering and addressing concerns. To help with your evaluation, you may want to use the *Plantronics UC Toolkit, Evolve Survey*,

(see *Additional Resources* section). It provides a list of questions you can use to assess user satisfaction with UC audio devices. An IT UC Web site and IT UC forums also offer low stress channels for providing feedback. See the section on *Offer Training* for suggestions on how to address the issues and concerns you discover during this assessment process.

### ADJUST POLICIES

Sometimes initial assumptions about user acceptance of a new technology have to be revised based on actual usage. For example, If you implemented a hybrid integration strategy with sunset plan (see descriptions of the integration strategies below), you may find that users are utilizing the old technology longer than expected.

The three UC audio device integration strategies are:

- **Rip and replace.** After the UC audio device is installed for use with the PC, the desk phone is retired.
- **Hybrid strategy with sunset plan.** The UC audio device is installed and the desk phone is retired at a future date.
- **Hybrid.** The UC audio device is installed and the desk phone remains.

For more information on UC audio device integration strategies, see the *Smarter Working UC Toolkit, Planning Guidelines for Success*.

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Consider revising your strategy and adjusting your policies, such as encouraging the use of a UC audio device when making internal calls and perhaps accelerating the removal of the desk phone if that's the ultimate company goal. You can also suggest that internal conference calls be scheduled using the UC platform in a way that requires employees to use the UC audio device not the telephone. The policies can be posted and kept current on the IT UC Web site.

KEY INSIGHT

### RE-EVALUATE USER REQUIREMENTS

Users of new UC audio devices may find it hard to describe the features or functions that are valuable for their jobs. Many people don't know how their productivity can be increased until they start using the technology. Mobile phones, email, instant messaging, and social media, once unknown capabilities, are now common components of the modern communications repertoire. Now UC audio devices are becoming part of today's business communications fabric.

RESOURCE

Earlier in the UC audio device integration, you probably analyzed user requirements and created typical usage scenarios. (See the *Smarter Working UC Toolkit, Planning Guidelines for Success*.) You may have used survey tools and interviewed employees and managers to uncover

business needs. User requirements evolve, however, so it is important to continue to assess them and make adjustments. You can assess user needs through activities such as:

- **User focus groups.** Offers an opportunity for users to describe how they want to communicate.
- **IT UC Web site.** In addition to providing information, the site can provide the capability for user feedback and comments.
- **IT hot line.** Enables users to report their concerns and comments to an IT representative.
- **Online user community forums.** Offers multiple discussion threads focussed on various aspects of UC audio device use, such as conference calls, comfort, going mobile, and so on.

### LEVERAGE SUPERUSERS

Superusers are your eyes and ears in the work environment. They are likely to hear positive comments, as well as potential issues, before you do. They might perceive early indications of shifting user requirements. Meet with the superusers frequently to keep abreast of user concerns and evolving needs. You may also discover innovative new practices that help users realize the maximum benefits. These can then be publicized through communication vehicles such as the IT UC Web sites, newsletters, and blogs.

#### KEY INSIGHT

Executives and their admins are also a valuable resource. Check with the admins on a regular basis and make sure that you understand how they and their executives are doing. Once the company executives fully understand the benefits of the UC technology, they may become your strongest allies in helping to communicate the advantages of fully utilizing the UC platform.

### OFFER TRAINING

People do not generally learn about new capabilities with their UC audio devices all at once, and they will have additional questions as their use and comfort level increases. Some UC audio devices have features that might require additional training. Consider offering supplementary or advanced training such as speech and best communication practices as well as self-help information focused on advanced UC audio device features and capabilities. Creating online or classroom courses can greatly improve user efficiency and help them get more from their UC audio device.

#### RESOURCE

You may also consider utilizing the *Smarter Working UC Toolkit, Video Setup Guides (VSG)* that were described in the *Smarter Working UC Toolkit, Adopt Guidelines for Success*. The VSG's provide short, menu-driven video clips showing how to setup and adjust many Plantronics UC audio devices, and how to make and end calls on specific UC platforms. These can be invaluable for training and for quick refreshers.

Educational materials, audio courses, and training videos can be offered on the IT UC Web site. In fact the Short videos are excellent for explaining or demonstrating specific functions or operations. For example, a quick (three minute) video can be useful to describe how to transfer a call from the UC audio device to the mobile phone so employees can leave the building yet stay on the call using the same UC audio device.

## Refresh Services

Typically the number of support calls can reach its peak during the Adopt phase, when users make their first calls, or during the early part of the Evolve phase, when users try out more advanced functions such as conference calling. Some of the major aspects of the service organization to consider include:

- **Ensure support capacity.** Make sure you have the capacity to handle the demand. Consider leveraging your manufacturer's support resources, training, and documentation to enhance the services you provide.
- **Analyze services.** Periodically analyze the type and frequency of support calls to determine if there are recurring issues. If so, remediate them and incorporate the solutions into your documentation, training, and self-help tools, helping to keep your resources up to date and relevant.

## SCHEDULE UPDATES

Changes to the UC platform are inevitable. Make sure that when you upgrade the UC platform, UC audio devices are able to take advantage of any new features. Describe the new features to users and explain how UC audio devices can take advantage of them. Of course it is a best practice to test any new functionality before making it available to employees.

## ONE-ON-ONE SUPPORT

Consider initiating health checks on a regular schedule where employees can talk to someone knowledgeable who can address any questions or concerns. They could take their UC audio device with them and have the service person demonstrate the procedures they may be concerned about. This could include a minor repair service providing new ear pads and microphone covers, replacing batteries, checking the structural integrity of the microphone booms, and even replacing damaged UC audio devices. You should endeavor to provide a similar service for remote and mobile workers if possible.

The IT representative could also review setup and operation with the users. This could include checking UC audio device settings, determining whether the UC audio devices are being properly utilized, and providing help on best practices to maximize the return on investment. Keeping a record of these check-ups can help you to see the key areas for optimization at a glance and enables you to act on the ones you feel are most pressing. Another useful service could have the IT representative meet with employees to answer their questions, demonstrate various operations and functions, and help them fully utilize the UC audio device.

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## Support Upgrades

As employees become accustomed to using UC audio devices, they continue to uncover unique features and capabilities. Many discover new ways to communicate, or identify changes to work processes that were unforeseen when they started using UC audio devices. As a result, it's common for some users to request different styles or types of UC audio devices. Some may determine that they need a wireless device rather than a corded one. Some might discover that a different UC audio device enables them to use the same headset when they are on their mobile phone and working at their desk. Still others might decide that a binaural device is preferable to a monaural device. This section provides several best practices and suggestions for setting up upgrade and replacement processes.

### ESTABLISH AN UPGRADE PROCESS

Make the upgrade process simple and easy to understand. You should be clear about the circumstances and conditions under which employees are allowed to upgrade. Define which UC audio devices are approved and explain any eligibility rules.

It is useful to provide guidance on which devices are supported and are appropriate for upgrades. Consider making comparison charts available so that people can order the appropriate UC audio device based on their requirements. You can also include pictures and descriptions of the UC audio devices to help employees decide which one to acquire. Check with the manufacturer for resources they may be able to provide.

Due to the growing consumerization of IT, people are increasingly comfortable with selecting and buying small electronic devices such as UC audio devices and bringing them into the workplace. Known as *rogue purchasing*, the independent acquisition of UC audio devices by individuals and departments can result in higher prices being paid by the organization. Furthermore, rogue purchasing can result in difficult to manage support situations, and the UC audio devices that are procured by individuals may provide poor audio quality which can reflect badly on the entire UC initiative.

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It's best to minimize the potential of employees bringing in UC audio devices without IT's awareness and involvement. Communicate that only UC audio devices on the approved list will be supported. Keep the list current and easily accessible. Continue to test UC audio devices and add them to the supported list as appropriate and remove older models from the list that have reached their end of life.

Because of the rate at which technologies evolve, it pays to be proactive about testing new features within your UC environment. Waiting until you receive requests for new features might lead to delays in deploying the UC audio device and might create frustration among users. You may want to contact the UC audio device manufacturer and ask if they have an Early Access Program (EAP). Taking advantage of an EAP enables you to test and evaluate devices as soon as possible, helping you to offer the latest UC audio devices to users.

You can develop a *New UC Audio Device Support Request* form. Making it available on the IT UC Web site helps formalize the new feature request process and set appropriate expectations.

Keep a list of the UC audio devices that appear to be the most popular. Keep the list current by adding new UC audio devices and removing older or discontinued models. This allows for a continued alignment of your support strategy to the UC audio devices in the workplace. In addition, the purchase of individual UC audio devices, paid for by different groups, might result in paying higher prices than you would if you centralized acquisition.

### **DEVELOP A WARRANTY PROCESS**

While you tested the warranty process during the Trial phase, and you may have had some experience with the warranty process during the Adopt phase, the Evolve phase is typically the first time when the warranty really comes into play. It is important that the warranty process is easy to understand and use. You should provide instructions on where to get questions answered, how to determine if a device is under warranty, and the steps for making a warranty claim should be clearly spelled out and readily accessible to all users.

When a UC audio device malfunctions, users need to feel confident that the problem will be resolved quickly. Make sure your support staff is well versed on the process and can articulate it to users. Arming the IT support staff with documentation that clearly explains the steps can help streamline the process and reduce delays and frustration.

### **SUPPORT REPLACEMENTS**

There are many reasons for replacing a UC audio device. Regardless, it is very important to make the process easy to understand and implement. Consider creating an online self-service tool. Making the tool available on the IT UC Web site helps facilitate the process of replacing UC audio devices. You can also provide explanations of replacement situations, how to request a replacement, and how to obtain approvals.

There are several ways to manage replacements. You can manage it in house, use a distributor, or work directly with the manufacturer. Make it clear which organization is responsible for replacements — it may not be the same group that funded the initial purchase. Often it makes sense to keep inventory of the most used UC audio devices so that business interruption is minimized.

Often employees can decide on the appropriate UC audio device when given the right resources such as comparison charts, photos, and descriptions. If they do not have these resources, they might call IT staff for guidance on what UC audio device to purchase. Clear visuals of what the UC audio device looks like and an understanding of who will do the installation and support is helpful. Create a process that addresses the installation needs of more feature-rich UC audio devices, with a focus on controlling the impact on your support

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resources. Loading pictures of the UC audio devices onto the IT UC Web site can be helpful since some devices look very similar. Having pictures can be useful to employees who aren't sure which UC audio device they have and which UC audio device they might want to acquire. The photos can also highlight the location of model numbers.

## Just The Beginning

Having navigated through the phases of integrating UC audio devices into your UC environment, you have accomplished each of the major tasks in the integration process including:

- Validate the solution
- Mitigate the risks
- Manage changes to the environment
- Support the moment of truth
- Optimize the investment.

Take a moment to relish a job well done.

As an IT manager, you are well aware that technology marches on. Your challenge is to keep abreast of the ongoing developments and trends in the world of business communications and information technology, as well as the changing demands and requirements of users. Your UC audio device manufacturer can be an excellent source for information. Through meetings, training, seminars, webinars, and conferences offered by the manufacturer, you can learn about trends and technologies that may help as you continue to effectively and proactively manage your company's UC investment.

## 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](http://plantronics.com/uctoolkit). We'd like you to be part of our community of learning.

RESOURCE

RESOURCE

## Additional Evolve Resources

The following resources, available at [plantronics.com/uctoolkit/evolve](http://plantronics.com/uctoolkit/evolve), provide supplementary information to help in the evolution process.

### EVOLVE RESOURCES

<b>Evolve FAQ</b>	Provides responses and direction to typical questions IT organizations raise when evolving the use of UC audio devices
<b>Evolve Guidelines for Success</b>	Helps IT organizations prepare and respond to evolving UC audio device requirements and maximize the company's UC platform investment
<b>Evolve Checklist</b>	Provides IT organizations with a high-level list of items to consider for increasing UC audio device usage
<b>Evolve Survey</b>	Provides a list of suggested questions IT organizations can use to assess ongoing user satisfaction with their UC audio device
<b>iPad App</b>	Enables off-line access to resources, mobilizing IT so they can provide in-person office assistance to end users

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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