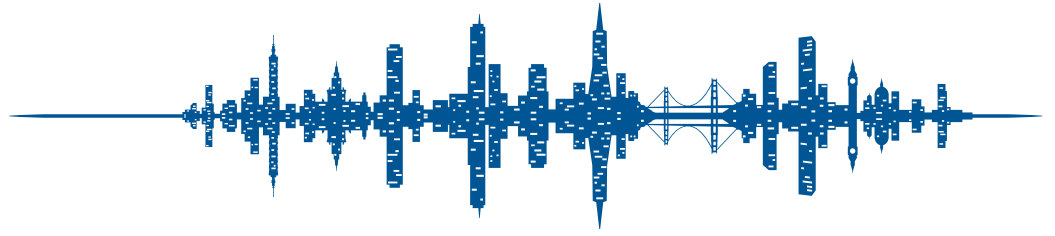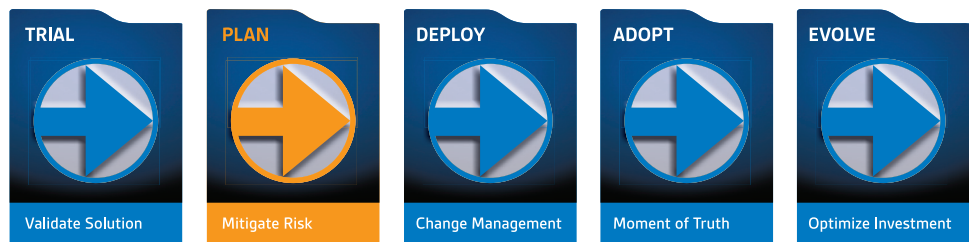**plantronics**®

Smarter Working UC Toolkit
Planning Guidelines for Success

Communications in today's enterprise are undergoing dramatic changes as a result of the convergence of computer and voice technologies. As an IT manager, you know that introducing audio devices such as headsets and speakerphones into your environment changes the way users communicate and work. Preparing for that change, providing the right audio device — corded, wireless, speakerphone and so on — based on each user's functional role, personal characteristics and work location, making it easy for people to obtain products, and ensuring they have a positive experience from the initial call, and ultimately increasing user adoption is key to your success.

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 *Smarter Working UC Toolkit, Guidelines for Success* that provides best practices for integrating new audio technology into enterprise environments. It offers suggestions learned from helping enterprises prepare for successful audio device introductions. The *Smarter Working UC Toolkit, Planning Guidelines for Success* focuses on user requirements, communication strategies, and preparatory activities needed to ensure a smooth rollout that meets business objectives. Other guides in the 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, 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.

- *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 Planning Process

We believe the most critical aspect of the planning process is helping employees learn how to deal with the changes to their work environment brought by a new communications platform. In this guide we offer best practices to help you prepare for the deployment of the UC audio devices. The major activities addressed during this phase are:

• **Establish a strategy.** Determine how the audio devices will be acquired, distributed, installed, and how users will be trained and supported.

• **Integrate with the UC strategy**. Determine how best to integrate the audio devices into your UC environment.

• **Identify and analyze users' needs.** Gather and assess necessary information to ensure users have the most appropriate audio devices for their job types and environments.

• **Communicate.** Establish a plan that defines messages, identifies key stakeholders, and lists major communication methods and vehicles.

• **Prepare for change.** Work with the user community to get them ready for the introduction of audio devices into the daily routine.

• **Define success**. Determine the data needed to measure success and specify the goals you wish to achieve.

Creating a detailed and comprehensive plan will help you get management approval and commitment to proactively support your audio device deployment. At the same time, the information you collect and analyze during the planning process will assist you in achieving a successful implementation and high user adoption.

Establish a Strategy

A solid audio device introduction strategy is the foundation for meeting goals and key business objectives associated with your UC deployment. The percentage of employees who have a positive experience on the very first call and continue to use their new audio device from that day forward, as well as the resources required and effort expended by IT, varies based on the strategy employed. The most common strategies are: *IT Managed, IT Business Partnership,* and *IT Standards Driven.*

IT MANAGED

In the *IT Managed* strategy, IT evaluates business priorities, user needs, and job functions and creates a list of approved audio devices for each type of user. IT controls the acquisition and distribution of the equipment, and supports all of the devices. In most cases, corded equipment can be installed by users. IT should consider whether wireless audio device installation should be handled by IT staff.

In fact, the *IT Managed* strategy is particularly effective when wireless audio devices are deployed due to the active involvement of IT throughout the process. IT can plan for wireless setup, optimize wireless bandwidth, and control wireless density. See the *Smarter Working UC Toolkit, Wireless Voice in the Office Environment* white paper for more information. Also see the *Smarter Working UC Toolkit, Wireless Voice Office Assessment Tool*, a Web-based aid that helps IT assess environments for wireless audio device usage.

Depending on how well the approved list of audio devices meets the needs of users, the actual initial usage rate may vary. Users who feel the equipment is not satisfactory are not going to be highly motivated to install and use it. Therefore, giving users the ability to instantly exchange or upgrade an audio device for a model that better meets their needs can boost long-term satisfaction and adoption. (See the *Smarter Working UC Toolkit, Deployment Guidelines for Success* for an explanation of the differences between exchange, upgrade and replace.)

IT BUSINESS PARTNERSHIP

With the *IT Business Partnership* strategy, IT collaborates with department managers to assess the needs of workgroups and together they create a customized UC audio device strategy. This alliance of IT and the business unit can craft an optimal solution by focusing on specific factors affecting the workgroup including work practices, user characteristics, and environmental conditions. Employees work with their managers to determine their audio needs early in the process, potentially resulting in greater buy-in and end user satisfaction and adoption.

In most cases, corded audio devices can be installed by users. IT should consider whether wireless audio device installation should be handled by IT staff. In fact, the *IT Business Partnership* strategy might be most appropriate for wireless audio device implementations. IT can plan ahead and control hardware installations as well as address wireless environment conditions and bandwidth.

IT STANDARDS DRIVEN

The *IT Standards Driven* strategy encourages departments, groups, and users to choose from a list of approved audio devices that meet the standards of, and have been qualified by, the IT department. Control of audio device acquisition is with business management and typically employees select their own equipment. Users are informed that using unapproved devices could result in IT being unable to provide effective support.

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Typically, users self-install corded audio devices, such as headsets. The *IT Standards Driven* strategy, however, makes the process of optimizing wireless bandwidth and managing wireless density more challenging. Consider handling the installation and setup of wireless audio devices as part of a comprehensive and integrated process in which IT is notified and aware about the audio devices that are acquired. IT should deal with potential wireless density issues as audio devices are purchased and appear in the work environment.

Since IT cannot control when and how the audio devices arrive, scheduling for both training and support needs to be considered and appropriate processes implemented.

CHOOSING YOUR STRATEGY

Each of these strategies has its own merits and strengths. Given your specific requirements, it might also be reasonable to implement a composite plan, taking aspects from each of the three major strategies.

STRATEGY SUMMARY

A summary of the key features of the three primary deployment strategies:

	IT MANAGED	IT BUSINESS PARTNERSHIP	IT STANDARDS DRIVEN
Acquisition Rate	Users are provided audio devices	Users are provided audio devices	Employees decide on an audio device
Long-term Utilization Rate	Limited audio device selection could impact buy-in; can be mitigated through instant exchanges and upgrades	Groups get to determine which audio devices meet specific needs	Users discuss audio device options and preferred models are gradually acquired
Support	IT can efficiently provide support to a limited set of approved audio devices	IT can efficiently provide support to a defined suite of products	IT has less control over a potentially large set of audio devices
Wireless Conformity	IT can efficiently plan and control audio device installations	IT can efficiently plan and control audio device installations	IT has less control over installations and potential density issues
Training Effectiveness	Starts immediately	Starts immediately but may need to support a large set of audio devices	Users self train

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Integrate with the UC Strategy

There are essentially three ways to integrate new audio devices into your company's UC direction. These integration methods are:

- **Rip and replace**. After the audio device is installed for use with the PC, the desk phone is retired.

- **Hybrid strategy with sunset plan**. The audio device is installed and the desk phone is retired at a future date.

- **Hybrid**. The audio device is installed and the desk phone remains.

Understanding your company's UC strategy helps you determine the most suitable process for integrating the new audio devices with the current technology and, ultimately, replacing the current technology if and when appropriate.

Identify and Analyze User Needs

The process of matching audio devices with users is based on factors such as job functions, work location, wireless requirements, working hours, job type, mobility, learning style, and special requirements such as disabilities.

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- **Determine user needs.** Survey business managers and selected end-users about their audio communications use and requirements. Consider how job functions help determine the way that audio devices are used. For example, office workers whose work primarily at their desks (such as accountants or human resources personnel) have different needs than mobile workers (such as field sales and service representatives) whose needs are different from phone-intensive workers (such as contact center staff). You should also consider employees that require multi-device connectivity, such as a headset that connects to a PC and to a mobile phone. The *Smarter Working UC Toolkit Planning Survey* is a resource to help IT develop the pertinent questions to ask users during the Planning Phase (see *Additional Resources* section).

BEST PRACTICE

- **Identify principal users**. Determine users who should have audio devices with enhanced functionality and who should receive special attention, during installation and setup such as executives, executive admins, and business managers.

- **Identify special users.** Identify individuals who may need special attention and work with them early in the process to address their issues. Users who have a characteristic that might impact the use of audio devices, such as the hearing impaired, should be considered. If necessary, a different, more appropriate audio device can be chosen for them.

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- **Identify other users**. You should also identify contractors, temporary employees, consultants, and other non-full time workers who might receive a different audio device, or might not be eligible for a new audio device.

- **Understand emotional needs.** Remember that a headset is the only office equipment that is worn on a person's head. As such, it can be a very personal and subjective experience. This is an important concept to embrace and understand. Vanity should not be discounted.

Communicate

It is important for communication to start significantly before audio device deployment and it should be seen to originate from corporate executives. Communicate the intent and expected benefits of the audio devices to the entire organization. Users might otherwise wonder about the purpose of the project, believe it will create an additional burden, and worry that their productivity will be impacted.

The messages should emphasize corporate management's support and commitment to the process and focus on the expected benefits for users and the company. Explain in practical terms how the audio devices will make their work experience better.

IT can, and should, provide logistical and technical information. However, information about benefits, commitment, and the importance of participating should come from senior management.

RECRUIT A CORPORATE SPONSOR

Early in the process, obtain the buy-in and commitment from an executive to act as the corporate sponsor for the audio device project. The sponsor should be a senior business executive who acts as the voice of the UC audio device integration and explains the major concepts including:

- The business reasons for making this transition
- How users will benefit from audio device use
- The extensive support resources that are available to help users
- Special prizes or charitable activities that employees can participate in

The integration should be viewed by the employees as a business function that is endorsed by the corporation. The sponsor can be invaluable to show that management is behind the implementation of the new audio devices and that this was not a decision made lightly.

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SEGMENT AUDIENCES

Different groups of employees have different concerns and want to know different information. For example, contact center workers are most interested in how comfortable the headsets are over a long period. On the other hand, the human resources staff may want to be able to take a call seamlessly into a conference room for confidentiality. The people in accounting may want the freedom to go into the records department to access a file without having to discontinue, put on hold, or miss a call. Or, mobile workers may need to take a call on their PC or desk phone and then be able to run out of the office and have it seamlessly switch to their mobile phone.

To address the different needs of multiple groups, we recommend you determine the various user types and design targeted messages and delivery methods for each type. Typical target audiences include:

- Executives and executive admins
- Managers
- Office workers
- Remote workers
- Mobile workers
- Phone-intensive workers

By focusing messages on the unique needs of the various categories, users will receive information that addresses their concerns. This will help them feel that their particular issues have been considered and reduce anxiety.

DEVELOP A COMPREHENSIVE COMMUNICATIONS PLAN

Employees often are too busy with their jobs to deal with change proactively, or to pick what's important out of all the communications they receive. Once made aware of change, they may be hesitant to embrace it. Develop a comprehensive communications plan to make employees aware of the upcoming changes, to help them feel better about it, and to get them to commit to adjusting to the new way of communicating. See *Smarter Working UC Toolkit, Deployment Guidelines for Success* for more information.

Prepare for Change

As is the case with most major projects, preparing users for change can save time and minimize difficulties later. Change is never easy, but with change comes benefits — after the learning curve. Communicate effectively and ensure resources are in place to help foster the acceptance of audio devices.

EDUCATE USERS

Some users are not as concerned about learning to use a new audio device as they are about having to change the way they work. During the Planning Phase of the implementation, we recommend the focus be on helping users understand the need for this change and what is involved in making the change. Describe the drivers for these changes, such as the convergence of PC and voice communications technologies, and explain how these innovations make their work experience better.

One of the main messages particularly with respect to wireless audio devices should center on the concept of increased freedom and flexibility. Describe how users might be able to move seamlessly from their office to a conference room for privacy, to a fax machine to pick up a document, then to the cafeteria to continue working over lunch. Describe how their availability is enhanced since audio device technology enables easier and more frequent collaboration with colleagues, resulting in less voice mail and phone tag.

The key factors most users are concerned about:

USER CONCERNS	DESCRIPTION
Workflow	Using a computer for voice communication instead of a telephone
Usability	Using an audio device and soft-phone instead of a handset Putting the audio device on and taking it off should be easy Conversation quality should be preserved
Special Needs	Hearing impairment, allergies, special physical characteristics
Professional Image	Understanding how an audio device may affect the user's image Ensuring they can maintain a professional look
Comfort	Keeping a proper fit, especially over the long term

You can mitigate some of these concerns by allowing users some latitude in choosing the type and style of audio device they can have, for example: monaural (covers one ear) instead of binaural (covers both ears). In addition, giving users time before having to remove their original phone helps to lower anxiety about using the new technology. If their desk phones will be removed, make it clear how long employees have to get comfortable with the new communications platform and audio device.

RECRUIT SUPERUSERS

During the process of integrating audio devices into the environment, some employees will be unaware of who they can turn to for help. Many groups have one or more individuals who have significant influence and whose opinions are highly regarded. These people often can be offered additional training and the opportunity to become the group's expert (superuser) on audio devices.

If possible, select people with an affinity for technology and who also have an ability to explain it to others. Superusers should be role models of efficient and effective audio device users, and a go-to person for help in their group.

Superusers may be designated as the program manager for the group and asked to visit with users and help the organization measure and determine the success of the UC audio device integration. Of course, none of these tasks should be perceived as just additional work and responsibility. They should come with appropriate benefits.

BEST PRACTICE

You might consider setting up a Superuser group that meets frequently to share advice and ideas with each other and IT.

GET READY FOR DISTRIBUTION

You should have a plan for handling the logistics of delivering the new audio devices to the users and removing the packing materials and any old devices. Some key factors to consider include:

- **Prepare to receive audio devices.** If you select the *IT Managed* or the *IT Business Partnership* strategy, you should make sure you are prepared to receive the audio devices from the vendor and store them until they are distributed. Some equipment may require preparation, such as charging batteries and attaching asset tags.

- **Customize packaging.** Consider creating a unique package in which to deliver the audio devices. A carrying pouch or other meaningful container shows users the value the company puts on the UC audio device. Include instructions for making the first call, *Quick Setup Guides*, or other relevant information inside the package. More information on preparing for and executing deployment logistics can be found in *Smarter Working UC Toolkit, Deployment Guidelines for Success*.

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Define Success

Defining success criteria will help you stay focused and maximize cost-effectiveness and audio device adoption rates. Work with the business units to establish exact definitions for success in the UC audio device deployment and adoption process. Create quantitative and qualitative metrics that helps provide insight into the progress achieved.

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Deploy the Audio Devices

Once all the necessary plans and preparations have been made and approvals obtained, you are ready to begin audio device deployment. Best practices and recommendations for a successful deployment can be found in *Smarter Working UC Toolkit, Deployment 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.

Additional Planning Resources

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The following resources, available at *plantronics.com/uctoolkit/plan*, provide supplementary information to help in the planning process.

PLANNING RESOURCES	
Planning FAQ	Provides responses and direction to typical questions IT organizations raise when planning UC audio device integration
Planning Guidelines for Success	Helps IT organizations prepare for the successful introduction of UC audio devices on a UC platform
Planning Checklist	Provides IT with a high-level list of items to consider when planning UC audio device integration
Planning Survey	Provides a list of suggested questions IT organizations can use to assess user UC audio device needs and environmental conditions
Wireless Voice in the Office Environment White Paper	A technology overview for IT organizations covering the most common wireless technologies used for UC audio devices
Wireless Voice Office Assessment Tool	An online tool that provides a recommended direction for an installation of DECT 6.0 wireless UC audio devices
Global Deployment Workbook	Guides IT tasked with global, or national, deployments of UC audio devices consisting of multiple locations

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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