

Provider no longer answering the call?

8 Things to consider as you make a teleconferencing vendor transition.



2022 saw substantial upheaval in the teleconferencing market, with vendors acquiring and divesting business, changing or reducing services, or simply exiting the market. As a result, many government and enterprise organizations have been forced to make and manage vendor transitions. If you're faced with a change, here are eight key points to consider.



1. Migrating and managing user accounts

Migration starts with an inventory report from your incumbent. You could certainly transmit that directly to your new vendor but consider this an ideal time to audit and clean up your account list.

With a clean and clear picture of your users, you can make good decisions on how to approach transitioning them – taking an incremental approach by department or division, an 'executives last' strategy, or making a hard cutover, for example.

Timing will be another factor, so you'll need to understand your new vendor's provisioning process and timeline. Equally, you'll want to understand the process and timing for moving, adding, changing, or deleting users in the future. Finally, evaluate the support you'll need and what your new vendor can provide.



2. Moving scheduled, future calls

Successfully moving a scheduled call from the incumbent to your new vendor begins with feature/service mapping.

Calls where feature parity exists – even with nuance like different DTMF commands for common features – should be simplest to move.

Calls where feature parity is lacking – or features differ fundamentally – may require longer runway and greater user communication, training, and support.

Call series – which may have persistent dial-in and/or PIN information – also benefit from special care.



3. Executing a communications plan

Your users are going to have to update calendar invitations, Federal Register notices, IR Newsrooms. Giving them plenty of runway to expect a transition is the first step. Building and executing a communication plan with multiple touchpoints on the path to launch – with migration schedule information, call transition plans, support contacts, directions to training modules, access to user guides and other resources – is key.



4. Training users

Your users are going to have to learn new DTMF commands, a new visual conference monitor, where to reserve calls or services, what features and capacities are available to them, how to get support, and more.

Your new vendor will likely provide standard materials of varied types – quick start guides, short videos, etc. – but you'll need to complement those resources with specifics. Which of the vendor's services are available to your users? What are the internal and external support resources? And so on.



5. Accessing technology

While teleconferencing may sound blissfully hands-off for IT, there's still a devil in the technical details. Will your users need access to vendor systems to request or change accounts? To reserve services? To leverage a visual conference monitor for call management? To download call recordings? IT will need to ensure these resources are accessible.

Additionally, users may need to send large files – pre-recorded audio, custom hold music, etc., and so a mutually accessible file transfer protocol will be needed.



6. Documenting policies and procedures

You're used to the incumbent, but BAU may look different for your new vendor.

Make sure you're mutually agreed to a documented set of policies and procedures for the relationship that include a support matrix, user approvals, VIP handling, call standard operating procedures, and any other key priorities.



7. Defining reporting requirements

Your inputs and implementation may substantially impact your new vendor's ability to deliver the outputs you want.

Be sure to define utilization reporting requirements and, in particular, segmentation requirements (e.g. department or division) early and work with your vendor to achieve the best available reporting. And don't forget to ask about access – should you expect a monthly PDF? Will you have online access to exportable data?



8. Billing for your business

You know how your organization wants to attribute charges, receive invoices, and pay. Now is the time to determine what your new vendor can accommodate and navigate any required internal process changes.

You'll also need to explore what billing data your vendor can provide, in what format, and at what interval.

In short, if you find yourself making a teleconferencing vendor transition, you'll want to develop and manage a project plan that considers at least these eight areas to ensure success.

If your current provider is no longer answering the call, talk to Intellor.

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