Global UCaaS RFPs:

The Five Question Approach Every CIO Should Use

By 2021, 90% of IT leaders will not purchase new premises-based UC infrastructure — up from 50% today — because future cloud UC offerings will be far ahead in terms of features, functions, portals, analytics and dashboards.[1] Adoption rates are accelerating, driven in part by the fact that virtually all vendors are eliminating support for on-premises solutions. As enterprises continue their journey to digital transformation, more mobile, collaborative workforces are demanding communications solutions that help drive productivity with automation and integration tools that span business silos.

This paper looks at the way organizations create RFPs for unified communications-as-a-service (UCaaS) solutions and offers some timely advice as to how the procurement process must change to support today's demands and tomorrow's evolving requirements.

Enterprise Communications Trends

IT teams increasingly look to the cloud for a broad variety of tools and cost savings. It should be no surprise that communications is near the top of the list of cloud migration candidates—IT sees the value of not having to maintain communications traffic equipment and recognizes the flexibility that a cloud-first strategy for communications can deliver. And the vendor community sees the handwriting on the wall, as one unified communications (UC) provider after another begins to phase out support for traditional, on-premises offerings.

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IT offers little objection, as CIOs are also looking for ways to phase out their myriad on-premises PBX systems on end-of-life calendars and reduce UC's physical footprint in the data center. The challenge for many enterprises is how to transition. Many organizations require hybrid UC solutions that let the business transition certain functions to the cloud while continuing to run other legacy systems on existing on-premises infrastructure until they are ready to fully migrate to the cloud.

Larger enterprises face additional challenges. Many multivendor UC environments require hypercustomized solutions to achieve desired functionality, while interdepartmental management teams are looking for ways to more deeply integrate communications solutions with contact center and business processes to build a voice-powered enterprise.

The list of decision-making criteria is evolving as well. More organizations are realizing that security controls and compliance need to be central in the evaluation of any communications solution. Additionally, enterprises are increasingly turning to providers that are able to measure and hasten the speed of user adoption for the new cloud communications systems.

What do executive teams want from new communications solutions? Simply to demonstrate how their UC investments translate into digital transformation ROI, creating a productive and adaptive workforce that makes the organization more agile.

The RFP Dilemma

The usual first step in procuring a new UC system is issuing a request for proposal, or RFP, from a broad range of vendors and sifting through miles of boilerplate responses to find the actual answers. However, the entire RFP process is broken. Broad, vague RFPs could elicit nebulous responses, requiring hours of reading and discussion. RFPs that have too many questions only lead to confusion, lost time and energy, and misdirected scrutiny.

Certainly, a UCaaS RFP has lots of ground to cover. However, it's important to remember that features do not always map to benefits and business outcomes. It is important to look beyond the raw features to uncover the context; a vendor's implementation process and expertise, service-level agreements (SLAs) and support metrics are often much more relevant and more likely to identify what partners will do for you.

Why Chance How We RRP?

RFPs, for the most part, lack the conversational context required to deliver on customer outcomes. By changing the RFP process, enterprises can avoid the typical long response times and implementation delays built into the existing process. A new method can help identify the nimblest solutions and the best customer service experiences, which together create a seamless migration.

Rethinking the RFP:
Invert the Process

A more effective way of achieving RFP nirvana is to turn the entire process on its head by introducing a dialogue with the vendor community and creating a short list of potential partners before RFPs are distributed.

The first step: Engage possible vendors in a discussion or whiteboarding session that will determine which of them should receive the RFP in the first place. While discussions will distill the list of potential partners, the enterprise at the same time should clarify its business objectives and requirements—that is, the legacy PBX systems in place, locations in play, network connectivity types, integration use cases, etc.

Some key vendor attributes to consider during this initial whiteboarding session include:

- **Support for UCaaS multitenancy:** The solutions leading the way in cloud adoption, with their vendors driving UCaaS technology advancements.

- **Hybrid deployment models:** The vendor's ability to deliver SIP-enabled phased migration paths (i.e., trunking to existing PBX platforms) that introduce modern capabilities and let enterprises move gradually to the cloud.

- **Excellence in implementation and service:** Customized migration strategies, dedicated project management resources, lifetime employee training, and ongoing 24/7 technical support at no additional cost.

- **Ease of integration:** Tools to integrate with existing contact centers, SaaS applications and critical business processes.

- **Visibility and control:** A consolidated view of real-time performance metrics and user analytics as well as tools that simplify billing, administration and service management.

Time to write: What's in the RFP?

With the RFP process inverted and a short list of potential partners identified, the enterprise can accelerate decision-making with a five-question RFP approach that every CIO should consider:

1. Does your solution provide a globally consistent experience across all devices with guaranteed application performance? Explain and provide SLAs.

2. What options are available for network connectivity, integration tools, business process automation, contact centers, analytics and management portals, and security?

3. How will you provide a true service partnership that delivers a custom solution design, seamless implementation, lifetime training and support, as well as a relationship fostering transparency and accessibility?

4. Do you measure Net Promoter Score and customer satisfaction metrics for solution design, implementation, support and billing? Please provide metrics.

5. How are you planning to futureproof your solution in terms of technology innovation, solution flexibility and scalability?

What are the best possible outcomes of this new RFP method? Enterprises will identify a partner capable of helping them futureproof their investments in UCaaS, avoid the dreaded forklift upgrade and create the workforce of the future.

How Masergy Can Help

Masergy is an expert in communications, networks and security, and their interrelationships. Masergy delivers UCaaS with global availability and a truly localized experience, whether over an existing network, Masergy's high-performance, private network, or any broadband connection worldwide. Masergy has been positioned as a Niche Player in the Gartner Magic Quadrant for Unified Communications as a Service, Worldwide.[2]

Masergy offers customized designs and hybrid migration paths that provide global availability with unmatched customer support and analytics, augmented by implementation experts who provide white-glove service delivery.

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[2] Gartner "Magic Quadrant for Unified Communications as a Service, Worldwide" by Daniel O'Connell, Megan Fernandez, Rafael Benitez, Bjarne Munch, Christopher Trueman, Mihai Nguyen. October 10, 2018. G00342303. Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

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Schedule a free consultation with Masergy to discuss your cloud migration strategy.