Shortcuts to Selling UCaaS:
The Busy Salesperson's Playbook

A once-in-a-generation transition to cloud communication is imminent.

Service providers must be ready with the right product and market strategy.

Selling UCaas doesn't have to be difficult or complicated. With an ever-increasing number of applications and services moving to the cloud, businesses of all sizes and from all industries are contemplating what that means for them. Cloud-based communications can provide increased flexibility, better operational efficiency, and potentially reduce costs overall.

As businesses continue to search for cost efficient, end-to-end, single provider solutions as well as fewer vendors to manage, now is the opportune time to be selling UCaaS solutions.

Improved Productivity
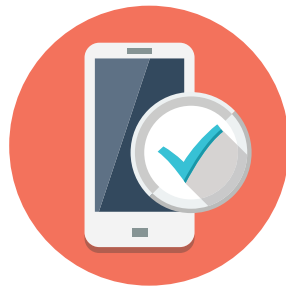
Mobility
Better services for mobile/remote users

Agility
no need for manual upgrades; service is automatically updated

Operations
Reduced need for staff IT and on-prem support

80% concerned about security/privacy

78% concerned over less control over systems/services

70% concerned that quality of cloud communications may be lower than on-prem

Identifying Customers

Before educating a customer on why they should consider implementing a UCaaS solution, you need to first ensure their business is a viable fit for the solution.

The following are characteristics of the ideal customer and/or environment for a UCaaS solution:

What Are the Characteristics of a Potential UCaaS Customer?

- Organizations with multiple locations with branches across the country or globally

- Distributed workforce — companies that have/want to implement remote working

- Smaller organizations wanting the perception of strength and marketing dominance without the expenditures

- Companies that embrace a BYOD culture

- Businesses already using cloud applications

- Looking for single platform to integrate communication/collaboration tools

- Organizations that require adherence to privacy laws such as HIPPA and GDPR

What Verticals Should You Target?

UCaaS addresses the unique business needs for many industry verticals but particularly for the industries below:

Manufacturing/ Logistics

IoT: mobile apps interface with machinery and notify employees

Collaboration and connection allows inidivudal locations or disparate employees ability to stay connected and work quicker

Compliance and industry regulated services

Same user experience at each location for chat, audio, phone, conferencing and video

Professional/ financial services with multiple branches

Ability to engage customers directly on mobile devices

Multiple ways to communicate and collaborate across teams, vendors, and locations, employees

Enterprise-grade call, fax, text and meet online using smartphones and tablets

Global transparency into branches, easier to manage entire organization online and access to advanced administration and analytics from anywhere

Strict compliance and industry regulation communication protection

Retail with multiple branches

Collaboration: allows HQ to quickly get locations up-to-date information on promotions, marketing and all information

Employees can use handheld devices on shop floor for inventory lookup price comparisons

Presence, instant messaging, and video conferencing: employees can communicate easier and quicker with other stores

Compliance and industry regulated services to protect customer data

Improved customer loyalty programs with personalization from CRM integrations

Engage customers directly on mobile devices

Healthcare

Video & audio conferencing and chat enables virtual patient care

End-user enablement: patients the can schedule appointments or ask questions

Collaboration allows quick connection between care providers

Multiple offices stay connected and work quicker

Compliance ensures protection of patient privacy

Improved QoS for critical applications

The UCaaS Target Audience

MID-MARKET

GATEKEEPER

ROLES

IT Director/Manager

Network Manager

Operations Manager

PAIN POINTS

Needs to support office moves/expansion

Struggling with disparate systems

Wants to deliver on strategic initiatives (i.e. business system integrations, mobility, etc.)

Fast deployment is a must

DECISION MAKER

ROLES

C-Suite Execs

VP of IT

PAIN POINTS

Technology needs to support rapid growth

Transition to more digital business

Communications system is last thing on their mind

Revenue generation/news sources of revenue

Needs mobility – geography/time constraints don't factor in

INFLUENCER

ROLES

VP of Sales/Sales Director

VP of HR/HR Manager

VP Marketing/CMO

PAIN POINTS

Prove ROI

Growth of business

Productivity-focused

Effectively engage customers & workforce anywhere

Easy to deploy

Run the department/business easily

ENTERPRISE

ROLES

IT Director/Manager

Telecom Manager

Operations Manager/Bus Sys Manager

PAIN POINTS

Consolidating communications systems across multiple locations

Complex integrations; needs white-glove deployment/service

Too many systems currently being managed

Too many vendors to manage

ROLES

VP of IT/Systems

PAIN POINTS

Optimize bottom line across global company

Concrete ROI analysis

Solution must be global

Existing ELA's (Enterprise License Agreements) may be a road block

Hard to navigate and gain approval with procurement involvement

ROLES

C-Suite Execs:

VP of Sales/Sales Director

VP of HR/HR Manager

VP Marketing/CMO

PAIN POINTS

Prove ROI

Growth of business

Achieving each dept business objectives

Tool integrations

Security and compliance are big concerns

Each department has own systems/vendors

Discovery Questions

Here are several conversation starters for UCaaS opportunities that can uncover a company's basic communication needs, assess their current communications systems and understand long-term objectives.

> What communication systems do you have in place today? Are they on-premise, how old and have they fully depreciated?

> Do you have a contract with a service provider? If so, when is the contract up?

> How many employees do you have?

> How are your employees dispersed? Are they in multiple offices? Do they work from home and/or are they on the road?

> How do your offices/branches call, communicate and share documents with each other? Are you able to dial an extension and reach other branches or remote workers? Do you have a company directory that has all offices/branches connected to each other?

> Do employees have or bring their own devices to work/use? Are there any current frustrations with conferencing and remote dial-ins?

> What email client is deployed throughout the organization?

> Do you have a CRM?

> Have you deployed any systems or applications to the cloud already? If so, which ones and what benefits are you realizing from those deployments?

> What are the barriers holding you back from deploying cloud communications?

> What is the number of vendors you currently manage to keep your current communications going? Example phone, instant message, video and audio conferencing?

> Does your current phone system have a business continuity plan? If you experience an outage how long would it take to have the phone system back up and running?

> Are you currently (or do you have interest in) utilizing any of the following communications applications: mobility, auto conferencing, video conferencing, instant messaging, contact center?

Pending how your prospects and customers answer, consult with TBI to determine which provider fits best. Not yet a partner? Visit tbicom.com.

RECOMMENDED UCAAS PROVIDERS:

8x8 · airespring · AT&T Alliance Channel Solution Provider PLATINUM 2020 CHAMPION · bcm | one · calltower · cbts · EVOLVE IP

fusion connect · fuze · GENESYS · Granite · ISI · inteliquent · Intrado · LogMeIn

LUMEN Diamond Partner · MASERGY · MetTel · Mitel · MOMENTUM TELECOM · net2phone · netcarrier

nextiva · NEXVORTEX · NTT Cloud Communications Services · RingCentral · TELSTRA · TetraVX

verizon partner program platinum · VONAGE · WINDSTREAM ENTERPRISE