
10 Golden Rules for Choosing a Telephony System

Until recently, organizations that needed more than one or two phone extensions had few choices when it came to telephony services. You installed an expensive, complex private branch exchange (PBX) at your facility, and then you passed out user manuals full of arcane keypad combinations for various call functions. But now, you can choose between analog and digital calls, switching to Voice over IP (VoIP) when your network can handle the additional traffic. If you're moving to VoIP, you can also choose between an on-site IP-based phone system, including an IP PBX, and a cloud-based service hosted by a telephony provider that delivers all voice functions over the Internet. Now that phone systems can be delivered over a network, even smaller companies can have access to enterprise-grade calling features. Like any business-critical system, a telephony system is a major deployment that should be undertaken only after a thorough discovery of both your existing infrastructure and users' needs. Following these 10 golden rules will help you choose a new telephony system for your organization:

1. Focus on the telephony systems that target your company's requirements.

IP-based phone systems are targeted to organizations primarily based on the number of employees you need to support, from the network hardware to the handsets. Although you want your system to scale easily as you add new users, you don't want to overprovision services — and pay for more system than you need now.

2. Identify the call features and functionality your organization needs.

Although many phone systems have the same basic calling and messaging features, the advanced features can vary significantly. Make a list of must-have features that includes call management and routing, conferencing, directory services, customer greetings and on-hold music, and auto-attendant functions. If you choose a premise-based phone system, identify also the IT management features you require.

3. Include a Software-as-a-Service (SaaS) solution in your assessments.

SaaS is no longer an alternative choice for delivering a phone system. Many traditional telephony vendors now offer hosted VoIP services, which includes all the call routing, voice mail and other phone system features you'd get from an installed IP-based system. SaaS offerings require little investment in new infrastructure, they're easier to deploy than an on-premise solution, and they can more easily be upgraded to include new communications services, such as unified messaging and presence capabilities, as soon as you want them.

4. Ask about each telephony system's roadmap.

Last year was a tumultuous period in the telephony market as many companies announced mergers, acquisitions and reorganizations. As a result, some phone systems have been discontinued and others have been consolidated within other product lines. If you were considering systems from Avaya, HP, NEC, Nortel or 3Com, ask how they were affected by changes in company ownership. Even if the systems on your list weren't part of this industry shake up, find out what plans the vendors have for these products, both short term and long term.

5. Plan for your organization's future.

Choose a telephony system that can grow with your organization, scaling to support both additional users and more network traffic. Consider not only the number of employees you need to support with phone service now, but six months from now. Find out how easily you can add additional extensions as new employees are hired. Find out, too, how extensible the system is to additional locations if your company plans to add branch offices. Voice and communications technologies are changing at breakneck speed, and users' expectations of their phone services are evolving just as fast — you need a phone system that can keep pace.

6. Investigate the vendor's other communications solutions.

VoIP is essentially the gateway technology to more advanced communications services. Once you have a VoIP solution, you can easily migrate to unified messaging, advanced collaboration, presence services and more until you're ready for a unified communications solution. Most companies want to be on that path, so make sure the phone system you're considering now will allow you to painlessly add those features as you're ready for them. Cloud-based solutions are often more flexible than premise-based solutions, allowing you to switch new services on as soon as your provider offers them. If you choose a premise-based solution, find out how seamlessly you can upgrade to new technologies.

7. Prepare for mobility services.

If some of your employees are highly mobile, working from the road or even from home offices, you'll need a telephony system that integrates smartphones. Look for a system that extends the calling features to a mobile phone as well as one-number call forwarding to a mobile phone.

8. Ask about vendors' partnerships with other software vendors.

Phone systems are no longer stand-alone solutions that sit next to your network. A VoIP solution that shares a converged network with your data can be integrated with other communications applications as well as business software. Find out if your phone system integrates with applications like video conferencing and collaboration tools. Ask, too, if the system integrates with customer relationship management (CRM) suites.

9. Assess the vendors' technical support and customer support services.

A new IP-based telephony system must be carefully designed and implemented, which you may want to outsource to your vendor. Find out also what kind of technical support you can expect after the system is deployed. If you're planning to purchase a cloud-based solution, find out what kind of service level agreements (SLAs) you should expect, for instance. Don't hesitate to ask for contacts at recent installations; other customers can help you assess vendors' support services based on their experiences.

10. Comparison shop different telephony systems.

Small and midsize companies are embracing hosted or cloud-based telephony systems for a few key reasons, particularly the discounts they may get by purchasing bundled services. Many feature sets are very similar among premise-based phone systems, so it's important to compare costs between the installed systems on your short list, too. For many companies, the price of the new phone system may be the deciding factor, rather than features or functionality.

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