Support to Win

Guide

Building the Business Case for Automated PBX Audits

September 2020

Julie Mills

0333 006 9999 / 07810 631433

julie.mills@supporttowin.tv

Table of Contents

Introduction **2**

Why discovery is critical in comms 2

Goodbye manual discovery, hello automation 2

Business Case **3**

EXHIBIT A: Conserving resources 3

EXHIBIT B: New intelligent insights and a better customer experience 4

EXHIBIT C: Capturing new revenues through additional services 5

Introducing: Automated Discovery with Support to Win **6**

About Support to Win **7**

Support to Win Services **8**

Introduction

Why discovery is critical in comms

In customer comms projects, the discovery phase of obtaining detailed, multi-site PBX settings information is vitally important. This step is particularly critical in the pre-sales process for onboarding customers, planning upgrades or migrating them to new solutions because, without it, you are 'flying blind'.

But there are other reasons why PBX discovery audits are important, such as for proactive maintenance, asset management, business continuity planning, managing change and even M&A due diligence. These provide opportunities to deliver additional value to customers, and form the basis for a host of potential revenue-generating services.

Goodbye manual discovery, hello automation

The problem with traditional discovery processes is that they are manually intensive and typically take days or even weeks to accomplish. Part of the issue is the necessity of using different approaches to obtain data from different platform technologies rather than a standard data model for all. Typically, an engineer must be physically onsite with the PBX in order to extract the required information.

All this creates the following issues:

- A significant resource overhead diverted away from other priorities
- Delays completing projects; slowing 'time-to-cash' and jeopardising future business
- Awkward conversations with the customer, presenting your need for detailed information as a roadblock to progress
- Unknown risks arising from relying on third-party PBX maintainers to grant access to assets
- Delays exacerbated by navigating local/national Covid-related site visitation restrictions
- Issues with data accuracy caused by human error
- Imposing unpopular and disruptive 'change freezes', post-audit, that may affect individual sites for weeks or even months

Many operators and channel partners will be resigned to these issues and their impacts, but there is another way; and one that radically reduces cost and time, enabling the provider to differentiate their offering and provide additional revenue-generating services.

This guide explains how the game-changing introduction of automated data discovery rewrites the business case for deploying discovery processes, reducing cost and enabling deep, rapid insights to be monetised.

Business Case

EXHIBIT A: Conserving resources

Just how much time can you expect to save?

In the traditional, manually-driven model, the following steps must be taken:

- Initiate contact with client and relevant third parties
- Develop discovery scope
- Identify asset list
- Request and arrange site visits
- Commission one audit per site
- Collate data
- Rationalise into single data model
- Finalise analysis and action plan

With automation, the process is massively truncated:

- Initiate contact with client and relevant third parties
- Request and arrange remote IP access to assets
- Complete audit into single data model
- Generate report and associated action plan/s

Automation of the discovery process thrives off simplifying complexities and delivers the greatest benefit from being deployed in the most challenging situations.

In a typical enterprise environment (as per the example below), automation can reduce the discovery phase from 6+ weeks down to a matter of days – freeing up valuable engineering resources to redeploy onto pre-sales duties, support desks and professional services projects

Example Scenario

A 3,500 seat enterprise running a multi-platform environment (e.g. hosted Mitel and on-premise Avaya) across a total of 12 UK sites.

Traditional Manual Approach

- Multiple engineers qualified on each PBX technology may need to go to each site
- Larger sites may need extended visits of several weeks
- Even the smallest sites may need several days each
- Travel, hotel and subsistence expenses would be incurred (estimate £250/day/engineer)

Automated Approach

- A single qualified engineer would be required
- No site visits may be necessary and each site/instance may only take 1 hour or less
- No additional expenses incurred

EXHIBIT B: New intelligent insights and a better customer experience

What additional customer value can automated discovery deliver that benefits the provider's bottom line?

The latest breakthroughs in automated data discovery are game-changing, bringing undeniable commercial benefits to providing a faster and more seamless customer experience.

- Far less disruptive to the customer and third parties
    - The client (or its maintainer) need do nothing more than provide access details for the connected PBXs
- Change freezes are very short term
    - Audit snapshots from across the estate can be acted upon immediately, meaning an end to months-long change freezes impacting the first (or any) sites
- Clear and complete visibility, potentially for the very first time
    - Complex environments with technical debt and legacy are no longer 'a mystery' to business and technology leaders – enabling informed decision making
- Greater data accuracy feeds go-live success and less post-activation snagging
    - Complete, up-to-the-minute data is collected, collated and cross-referenced without human error – vital for a smooth implementation
- Augment with other data to create rich insights
    - Surfacing new insights on PBX settings and correlating them with adjacent datasets like Active Directory and call logging can pinpoint problematic usage patterns and under/over-utilisation

Automation of this kind enables enhanced levels of customer experience, which are in turn associated with greater customer loyalty, increased customer lifetime value and the ability to positively differentiate from competitors.

And as far as deeper data insights go, this automation can quickly and accurately generate actionable intelligence to inform business decision making about communications usage/spend, workflows, business processes and more. All of which makes the comms provider/partner more strategically valuable and visible to executive leadership as a trusted technology advisor rather than a mere supplier.

EXHIBIT C: Capturing new revenues through additional services

What new revenue streams are possible through automated data discovery and how much could they be worth?

Looking beyond customer acquisition or switching customers to new platforms, automated data discovery is a powerful means of delivering innovative new services and value. For example:

- Business continuity and disaster recovery planning services
    - Providers can deliver valuable insights by benchmarking and constantly monitoring the state of customer setups, enabling customers to plan effectively for unforeseen events and avoid disruption to communications.
- Asset management, governance and controls auditing services
    - Providers can deliver regular health checks and inventories remotely, efficiently, quickly and regularly
- Change management services
    - Providers can deliver live before and after reporting for MACs with complete audit trails
- M&A transaction advisory services
    - Providers can deliver detailed insights into customer deployments to help buy-side and sell-side recognise accurate business values in M&A transactions

All of the above services readily attract premium charge-out rates, with the provider able to use their discretion to generate revenues versus delivering added value in kind. As well as driving additional income, these services are compelling in their own right and could prove decisive in winning business that would otherwise be lost to a specialist third party.

The other revenue generating aspect of automated data discovery is its role in technical pre-sales, upselling and cross-selling. Providers can use it to spot upsell opportunities for replacing or novating end-of-life components and identify opportunities for optimisation with related products and services. Every quote and proposal will be fast, accurate and business relevant.

Introducing: Automated Discovery with Support to Win

Partners and providers targeting faster client acquisition, onboarding and migration can look forward to reduced cost, more satisfied customers and additional revenue opportunities, without complicating sales with requests for detailed information or risking delays caused by third parties.

The Support to Win automated data discovery solution can remotely interrogate all existing settings of any connected PBX with no need to visit sites.

- At its heart is a powerful software application delivering detailed, standardised reporting on the configuration and setup of individual PBXs or multi-vendor PBX estates
- It is able to rapidly and autonomously generate a detailed database of all key information that can be updated remotely as required. Any authorised user can inspect the results from anywhere in the world via secure browser login.
- Sequential scans can be used to provide a comparative record to show changes to PBX setup over time.
- The software is platform neutral and will provide a full system blueprint entirely through automation to a standardised data model.
- It requires only the PBX log-in credentials and can interrogate any networked system across worldwide locations from a single interface.

Leveraging the advantages of the Support to Win automated data discovery solution enables partners and providers to replace manual processes, saving time and resources to be redeployed to more productive ends. Additionally, it enables a new, more strategic posture with customers that elevates the provider's status within each account. This directly relates to an increase in customer loyalty and enlarged lifetime value, and to greater opportunities for upselling and cross-selling, and the development of new revenue-generating services.

About Support to Win

We are Support to Win and we provide the professional and support services for resellers and operators to succeed.

What we do

We offer a complete range of services – from project management and deployment to complex migrations and in-life customer care – white-labelled to your brand and bespoke to your needs. We do whatever it takes to remove your operations headache and optimise your customers' experience.

How we can help you

"Support" doesn't do justice to the value we create. We light a path through the technical obstacles of your business strategy. We free you to accelerate your revenues, without worrying about keeping customers happy.

Perhaps you don't employ the internal skills, have the time or want the risk. Maybe operational distractions are in danger of diluting your core business competencies. But you still need the job done to your high standards – swiftly and safely. Use us for special projects or 'business-as-usual' – or use us for both.

Why work with us

You'll love how we slot into your teams and processes; how we know your market already, take care to learn your business backwards and don't need schooling on how the channel works.

Support to Win Services

Design	**Define a purpose-built solution to your business opportunity** • Get the optimum professional services skills and resources to achieve your business opportunity • Tailor a bespoke service aligned with your unique requirements and objectives • Harness years of experience to innovate new service models under your own brand • Assure project/service governance and cost control • Execute a solution that maximises the utility of your existing team and processes, where applicable
Discover	**Unlock data insights in minutes with no need to ask the client or maintainer** • Accelerate project delivery by replacing time-consuming manual discovery process with fully automated approach • Gain previously hard to reach data insights to enhance customer value and adopt more strategic 'trusted advisor' customer relationships • Leverage automation to develop new revenue streams e.g. through BC/DR planning, asset management, change management, governance/audit, M&A transaction advisory services • Reduce costs associated with sending engineers to site for long periods, and maximise resource value by redeploying them to other priorities
Deploy	**Remove the risks of onboarding customers to a new telephony/UC service** • Deliver on customer promises with confidence • Tailor your deployment approach without fuss, to suit individual customer needs • Achieve deployment objectives to time and budget • Maximise customer experience and value from the solutions you sell • Optimise deployment velocity and accuracy regardless of site access restrictions • Minimise post-deployment support calls

Migrate	**Enable strategic shifts in platform and network** • De-risk decision making with full confidence that platform changes and customer base consolidations run to plan • Optimise customer revenues from existing customers • Increase business agility in response to market challenges and opportunities • Continue to operate streamlined internal support function focused on BAU activities • Avoid the cost of hiring additional headcount and investing capex in support infrastructure • Minimise user disruption and maintain a great customer experience that enhances your brand
In-Life	**Outsource customer care management under your own brand** • Allows you to focus more time and resource on sales, consulting and other core business activities • Safeguards your reputation with uncommonly high standards of customer experience • Extends qualify processes and brand values to a mature support organisation without adding headcount or other overheads • Achieve service consistency at expert levels for every customer • Target continuous improvements and fewer support enquiries by virtue of making customers more knowledgeable and autonomous • Scale your business – no longer be a 'victim' of your own success • Identify and convert more upsell opportunities
Academy	**Create a lasting legacy of support skills and knowledge to exploit** • Create your own professional services and support capability by learning from the best • Shift cost base from external to internal with complete predictability • Develop at your own pace in line with business objectives and market change • Scale-up internal capabilities and skills without disrupting your customers' experience • Flexibly augment your internal capabilities as project needs dictate • Minimise risk with the ability to 'fall-back' onto Support to Win at any point during transition process