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Fonality Special Edition

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Cloud VoIP
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FONALITY SPECIAL EDITION

by Stephen P. Olejniczak



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Publisher's Acknowledgments

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Introduction

The Internet was destined to be the future of communications since the early 1990s when we were all accessing it via dial-up modems. The complexity of the system, and the applications supported by the cloud, have evolved since then, growing in leaps and bounds as eBay, YouTube, Facebook, and Twitter have taken center stage.

During the Internet's growth, there has always been Voice over Internet Protocol (VoIP). It too started out in the public realm as a simple technology that grew. The industry embraced VoIP, refining it, packaging it, and developing it. It's possible today to use a provider in the Internet for every telecom feature that was once solely offered by a legacy phone system that sat in your office.

This book covers the basics of VoIP, Unified Communications (UC), and how they have come together to create the new technology of Cloud VoIP. Many companies have made it their mission to develop this technology, one of the leaders being a Texas-based company named Fonality. This is the pinnacle of evolution of Cloud VoIP, and the basis for this book, *Cloud VoIP For Dummies*, Fonality Special Edition.

Note: The naming conventions of *legacy* and *traditional* are used throughout this book. *Legacy* applies to the predecessor for tangible things like phone systems, and *traditional* to the forerunner to intangible things such as how we do things, the mindset or technology behind it.

How This Book Is Organized

The five chapters in this book walk you through the constituent parts that make up Cloud VoIP and Unified Communications. They are

- ✔ **Chapter 1, Introducing VoIP**, explains basic VoIP structure and the advantages over traditional telephony in terms of bandwidth efficiency and new features.
- ✔ **Chapter 2, Exploiting the Cloud**, takes a business-minded view of the technology and how it saves money.
- ✔ **Chapter 3, Realizing the Fonality Advantage**, runs through the financial savings and technical advantages offered by Fonality.
- ✔ **Chapter 4, Managing Everything with Fonality Heads Up Display (HUD)**, covers the greatest tool available today for unifying all of your communications, call queues, voicemail, e-mail, and chat.
- ✔ **Chapter 5, Ten Places Where Fonality Shines**, runs down what Fonality can do for you.

The chapters are designed to stand alone, so if you already know everything there is to know about VoIP, you can jump directly to Chapter 3. If you're already aware of Fonality, Chapter 4 may be the big draw so feel free to choose where you start with this book.

Icons Used in This Book

Every *For Dummies* book has small graphics, called icons, sprinkled throughout the margins that call attention to text we think is worth special attention. Here's what they mean.



These are bits of information that you should keep in the back of your head as you think about Cloud VoIP; they'll save you time, money, or hassle.



Telecom has a wealth of nitty-gritty details that help explain why things work like they do. If you're an inquiring mind, read this information and learn a little more.



There may be a more efficient way to do something in the communications world. When I have a shortcut for you, I tell you the secret in the paragraph beside this icon.

Chapter 1

Introducing VoIP

.....

In This Chapter

- ▶ Learning the basics of VoIP
 - ▶ Getting the most out of your IP Bandwidth
 - ▶ Familiarizing yourself with great VoIP features
 - ▶ Collecting it all with Unified Communications (UC)
-

Cloud VoIP is an amazing technology that couldn't exist if it wasn't for Voice over Internet Protocol (or VoIP as it's commonly known). That breakthrough freed us from traditional telephony where a single phone line could only carry a single phone call.

VoIP calls are transmitted using the basic Internet Protocol (IP) architecture that makes up the fabric of the World Wide Web. The same IP infrastructure used for e-mails and IM chat sessions is now handling billions of phone calls globally every day. VoIP has evolved along with the Internet. It's grown more efficient, continually achieving higher quality standards while opening up telecom features to small and mid-size businesses (SMBs) that used to be the sole domain of Fortune 500 companies. This chapter covers the basics of VoIP and how its structure has enabled it to evolve and become the fastest growing technology of our time.

Understanding VoIP Benefits

VoIP calls look like traditional phone calls at the most basic level. There's a phone on each end and a network of some kind in the middle. A traditional telephony call uses the Public Switched Telephone Network (PSTN) that gives the

call its own private bandwidth pipe from end to end. The 56 or 64 kbps allocation is established from the originating phone to the terminating phone for the life of the call, and no other call can traverse that bandwidth during that time.

At least, that's the way it worked for many years. It was a good system, but it didn't make the most of the infrastructure supporting the call. The pair of copper wires that each phone is plugged into can actually support 23 more calls, even with traditional telephony.

The bandwidth within the PSTN was being wasted as well. A 64 kbps pipeline was created every time a call was placed. It's kind of like someone giving you a private two-lane road whenever you and a friend want to drive somewhere. It'd be wonderful, but there's a lot of space in front and behind you on the lane that you simply aren't using.

Maximizing bandwidth

Even if you imagined one car on the road for every word spoken, there's still a lot of space left. Half of the time, one person is listening while the other one talks, so one of the lanes on your private highway is completely empty. Then add in the pauses between words and sentences while you think of what to say next. When you finish, you can see how you still have plenty of free space left on the road.

Figure 1-1 shows how the traditional telephony call has a rigid connection from end to end. The entire length and breadth of the call is using 64 kbps whether someone is speaking or not.

Even the VoIP packets save bandwidth

VoIP is built to sample the voice of the people speaking by using a software tool called a CODEC (short for Coder-Decoder). There are a variety of CODECs available, but they fall into two categories: the standard

uncompressed CODEC, or the CODEC with compression. The most common CODEC with compression allows for an 8:1 compression ratio, allowing you to reduce your bandwidth overhead.

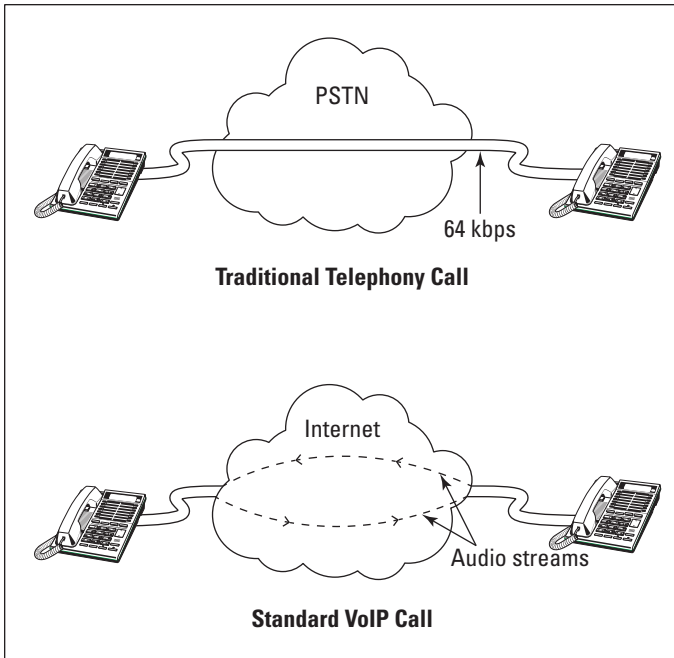


Figure 1-1: A TDM versus VoIP bandwidth comparison.

The standard VoIP call has dashed lines for the audio streams because it doesn't have any bandwidth reserved for its use only. The individual packets of audio pass through the Internet, surrounded by every other VoIP packet as well as e-mails, web browsing commands, and all other varieties of IP traffic.

The packetized nature of VoIP, along with the IP-based architecture in which it operates, gives it a tremendous advantage over traditional telephony. A small business that had 15 individual phone lines and an Internet connection for e-mail and web surfing can now combine all of these over a single Internet connection. The ability to avoid paying roughly \$50 per line to simply have dial tone and Caller ID (not including local and long distance minutes) from a traditional local exchange carrier like Verizon or AT&T means an annual savings of up to \$9,000.

A time-tested technology

VoIP may seem like it burst on the scene a few years ago, but long-distance carriers have been exploiting the efficiencies of it for decades before it was released to the public. The handwriting was on the wall in the late 1980s as the Internet began to evolve into more than a nationwide network of universities into a commercial and social environment.

The telecom networks had been using a transmission protocol called Signaling System Number 7 (colloquially known as SS7) since the late 1970s. They took much of the structure of this protocol and adapted it to an IP environment, hammering out the kinks of their new VoIP networks. The technology was leaked out to the public in the late 1990s when the Internet Engineering Task Force published the guidelines for the most common version of VoIP today, the Session Initiation Protocol put forth in RFC 2543.

This, and the release of the first open-source VoIP Private Branch Exchange, or PBX, software in the same year, allowed anyone to download and build their own very basic phone system. The next ten years saw an unprecedented growth in VoIP as it became available to everyone.

There were some bumps and bruises along the way, but the industry learned, grew, and elevated VoIP to the same consistent quality of a normal, legacy telephony call. By 2010, maintaining VoIP quality was easy as most of the long-distance networks were gearing much of their networks to VoIP, and eliminating the obstacles that it stumbled on along the way.

Every phone call is a little VoIP

Every long-distance carrier in the U.S. now allows its customers direct VoIP access into its networks. Even if a call comes in with traditional telephony, it probably won't avoid being converted to VoIP before it reaches the phone that's receiving it.

Long-distance carriers don't have direct connections to every telephone in America, much less to every phone in the world. They use a series of underlying carriers to terminate calls to, or from, every active phone on this planet. Many of these underlying carriers have other carriers they use as well, to the

point where there may be four or five different carriers that handle a phone call from end to end, and more than that if the call terminates internationally.

The phone call you are making is probably converted to VoIP at least once as it's sent through the network of your long-distance carrier. It may be handed off to an underlying carrier as VoIP, or converted back to traditional telephony before being delivered. Even then, the underlying carrier may convert the call to and from VoIP depending on its network needs and on the requirements of the underlying carrier it's connected to.

Every industry has pressure to provide a product with the lowest price at the highest quality; telecom is no different. This pressure is especially true in the case of international calls where the monthly fee on the cable or fiber optic connection between the U.S. and the foreign country is the biggest expense. Every international carrier is finding no alternative but to upgrade its networks to VoIP. The ability to send eight calls over the same bandwidth as one traditional call makes the technology essential to remaining competitive.

The bottom line is that almost any call made in America today will have been converted to VoIP for at least one portion of its transmission. If you're calling internationally, you're almost guaranteed that it is VoIP as soon as it leaves our shores.

Software Advances: Providing More Features for VoIP

Legacy telephony phone systems are rigid, restrictive, and expensive. The greatest feature of a small phone system was the ability to transfer a call from one extension to another. If you were lucky, you'd have voicemail and maybe a "Press 0 for the operator" message. All this changed when software programmers had the ability to view voice calls as just another program.



The biggest jump in telephony features available with VoIP came with the release of the open-source PBX software. It raised the bar from the old phone systems that charged extra for every feature and every line you wanted to add, and gave you a complete suite of features.

Enjoying a customized IVR

An Interactive Voice Response (IVR) system was the sole domain of huge companies back in the 1980s. SMBs couldn't afford the dial-by-name directories of huge corporations, much less provide interactive options of "Press 1 for customer service or 2 for sales."

VoIP programmers changed all of that. They created software allowing an SMB to create its own personal IVR, as complex or as simple as it wanted. You now had the ability to provide options for service, sales, or service/sales based on the specific categories of products you offered. It was almost overnight when a small company with 20 employees could appear to the outside world as sophisticated and technologically advanced as one ten times its size. Every company and competitor now had the same ability to project a professional image to potential customers.

Redirecting a call

Bandwidth is a precious commodity. Unless you're spending top dollar on an Internet connection that can burst to accommodate any level of IP usage you need, you've got to work with the fixed limits of your connection. Many businesses have remote employees or satellite offices and can set up their VoIP to maximize their bandwidth on calls that get transferred to remote locations.

Figure 1-2 shows a comparison of the bandwidth consumption of your typical call transfer from the main headquarters (HQ) to a remote office (RO). The legacy transfer model receives the call into your HQ where your receptionist or the phone system transfers it by simply dialing out to the RO and bridging the two calls together. The end result is that your customer is now talking to her sales agent, or technical rep, and you've tied up the bandwidth of two phone calls at HQ to make it happen.

If the inbound call was received via VoIP, all of the call's audio could be transferred to the RO and save all the bandwidth that the HQ location was supporting. The phone system at corporate tells the VoIP server that sent the call to rescind it and send it to the RO.

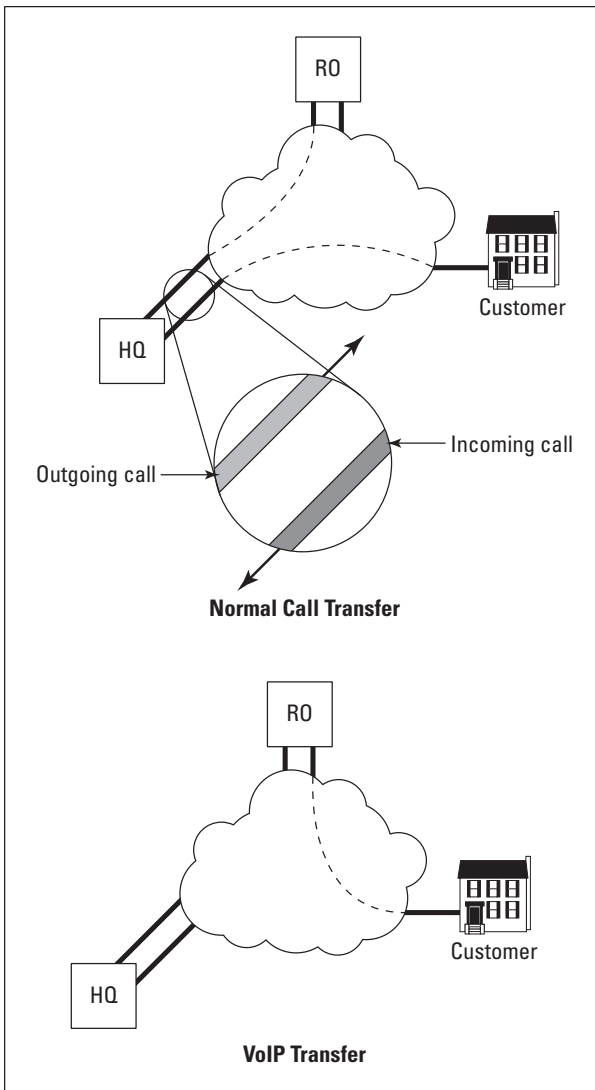


Figure 1-2: Remote office transfer.



This type of transfer is called a *Re-INVITE*. The transfer is sent by the receiving VoIP server to identify the new end-point for the audio streams of the call. Some overhead messages still get sent to the server requesting that the audio be moved, but the bandwidth use is negligible.

Using *find-me/follow-me*

The simple re-direct call is only the first step in one of the best VoIP features out there, commonly referred to as *find-me/follow-me*. VoIP's ability to rescind and redirect calls is best used when built in a sequence so that incoming calls try multiple locations for the person you're dialing.

The scenario is pretty simple: Your salesman is in the office sporadically, sometimes he's at his desk, sometimes he works from his home office, and sometimes he's out on calls and available on his cell. VoIP allows you to configure the system so that any call dialing into his extension rings first to his office line for three rings, tries his home office line for three rings, and finally goes to his cell phone for three more rings. You can also avoid the caller waiting for the chain of devices to be cycled through by using a simultaneous ring where every device and extension for an individual rings at the same time.

As long as your salespeople have one phone on them, they'll never be out of touch again. The only question then is, where do you want the person calling in to leave the voicemail?

E-mailing your voicemail

Voicemail is a much more dynamic creature in a VoIP environment. It seems like standard logic to leave a message on a cell phone's voicemail if the person is unavailable, but it may be better to have the message drop in the main company voicemail.

Most of the advanced VoIP systems give you the ability to send out voicemail messages as e-mail attachments. The person trying to reach you leaves a message just like normal, but the system converts it to an audio file and sends it off to your e-mail.



For some reason, when I'm traveling for work, the last thing I want to do is check my voicemail. I check e-mail about 20 times a day when I'm not in the office. The idea of popping open an e-mail and listening to it is a lot easier, especially if

you can fast forward and skip past the boring parts. It also allows you to easily forward the voicemail to other members of the company if they need to be aware of it. A traditional phone system makes you select “7” to transfer the voicemail, then input the three-digit extension and record a message to introduce the forwarded voicemail, with the possibility of even a few more options and commands. If you go through all of that once, you’ll opt for handling it as an e-mail from that day forward.

Integrating It All with UC

The idea of taking an e-mail and merging it to your voicemail is the first step in bringing everything together in a concept called Unified Communications (UC). The intent of UC is to bring together each method in which we communicate, from the real-time transmissions like chat, VoIP, and video-conferencing to the slower transmissions like voicemail, e-mail, fax, and Short Message Service (SMS). Almost everything we use to communicate with today can, or does, work in an IP environment.

UC isn’t one specific technology, or one platform. It’s the culmination of many types of communication that can make us all more efficient. Why call your co-worker if you know she’s on the phone, and has been for the past 20 minutes? It’s just easier to know she’s on the line and send her an Instant Message, or e-mail if it requires more detail.



Use the three e-mail rule

If it takes more than three e-mails to explain something to a coworker, call him, or set up a meeting. It’s impossible to hear the tone in a short

e-mail, and he may completely mistake your intent. Know when to say “when” with e-mail, and when to say “hello” with a call.

Chapter 2

Exploiting the Cloud

.....

In This Chapter

- ▶ Reducing cost by eliminating legacy phone lines
 - ▶ Enjoying Cloud VoIP scalability
 - ▶ Keeping the cash flowing by avoiding CAPEX
 - ▶ Learning the lessons of comparative advantage
-

Technical diagrams frequently use the image of a cloud to represent the Internet. In fact, cloud imagery has become so synonymous with the World Wide Web that the two of them are bonded together in our psyches, turning “The Cloud” into shorthand for the Internet. The cloud is not only where VoIP calls traverse between one phone and another, but it’s also the site of a variety of new services and applications (or APPs) that can help make your business more profitable and efficient.

Moving your phone system and servers into the cloud can save you time and money. Doing so releases you from being trapped within the confines of your company walls by the simple geography of having both your phone system and your servers exist in cyberspace. Everything in the cloud is available at any time from anywhere you find yourself. Salespeople who live on the road and remote employees working from home immediately find cloud architecture easier and more efficient.

This chapter covers all the things that cloud computing offers. With all the benefits that come from cloud computing, it’ll make you stop and wonder why you still have servers in your office.

Streamlining Communications Costs

In this section, I walk you through an office with standard copper phone lines from a legacy “Baby Bell” phone company and compare it with one that’s moved everything to the cloud (see Figure 2-1).

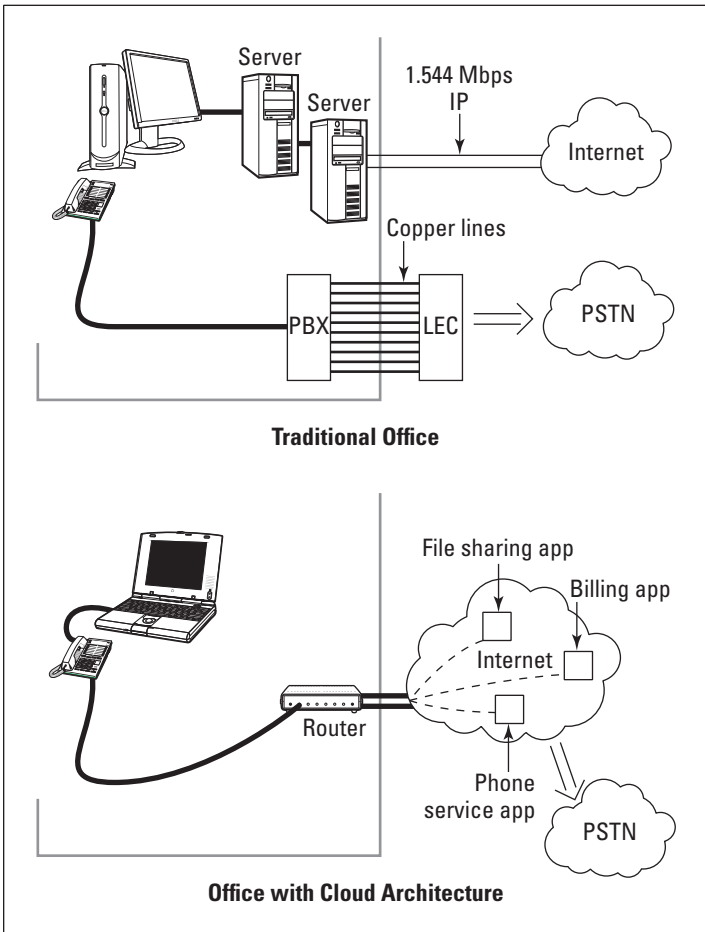


Figure 2-1: A legacy versus cloud architecture comparison.

The figure shows a standard setup for an office with eight or nine employees. The office has ten phone lines coming in from its Local Exchange Carrier (LEC), as well as an Internet connection from its data provider. The office is pretty busy, so it has one server for all of its invoicing and accounting applications as well as a second server holding all of its company files, documents, and records. In addition, it also has a third piece of hardware that's a legacy Private Branch Exchange (PBX) phone system that receives all the lines from the LEC. Inside the office, the IP connection links together the servers and every desktop computer in the office. Overall, it's a pretty basic setup.

The cloud architecture has an empty spot where all those servers were. They've placed all their computer and phone service in the cloud, which every desktop computer and phone accesses through a single 1.544 Mbps Internet connection. It's a much cleaner and elegant configuration, but beyond its beauty, it's also very smart.

Referring to Figure 2-1, the ten phone lines coming in from the LEC can cost roughly \$50 per line. That cost represents the biggest monthly communication cost for the company. Eliminating those lines and using a Cloud VoIP system puts up to \$6,000 back into the company's pocket every year, and that's only in access fees. We have yet to calculate the usage savings against what they *were* paying.

The existing 1.544 Mbps IP connection shown in the figure can easily handle the addition of the VoIP traffic without any loss of throughput. A typical compression ratio of 8:1 knocks down the IP bandwidth used for VoIP calls. The sporadic nature of data transmissions like e-mail and web surfing make it easy to partition off enough bandwidth to accommodate the real-time services like VoIP from the lower priority transmissions.



The one cost you can't avoid when you set up a new office is running an Internet connection to every desk. Even an office running legacy telephony still needs e-mail and access to surf the Web. If you use a VoIP phone system, you can avoid the charges for your electrician to install a second set of cables for your phones. One IP connection per desk can cover all your voice and data needs.

A quick note about compression

The packetizing of the audio in a VoIP call is done through the use of Coder-Decoders, generally called CODECs. Despite the fact that there are many CODECs available, most carriers rely heavily on only two of them: G.711 uncompressed and G.729 compressed. G.729 works great for all voice calls and provides the 8:1 compression ratio that makes VoIP so attractive. The only challenge with it is that the compression techniques don't work well for fax transmissions.

The big "V" in VoIP is for Voice, and the initial mindset in developing

protocols was geared toward sampling a transmission of the human voice. Shortly after VoIP was released, the industry realized that the CODECs with compression weren't working on the squeaks and squawks of fax transmissions. If you have a lot of fax calls, you either need to use the uncompressed G.711 CODEC or upgrade to hardware that specifically uses the fax compression of T.38. It provides the same compression ratio as G.729, but it has some additional requirements in configuration and, potentially hardware.

Scaling up

The second challenge with legacy phone lines and legacy phone systems is their inability to scale up as your business expands. Adding a single phone line will cost you an upwards of \$50 per month (plus the cost of the phone), as well as \$100 or more for installation. The money is only half of the expense because you still have to spend the time to wait for your order with the LEC to be scheduled and a technician dispatched to your office.

The LEC portion of your new circuit only takes it to your phone closet. There is still the matter of taking the line from the phone closet, integrating it into your phone system, and running the line to the desk of your new employee. The manual labor is then done, but there's still a lot of work left for you to handle. Most SMBs don't have an in-house phone technician, so you need to schedule with your service company to configure the new extension into the phone system, assign a voicemail, and possibly integrate the person's name or department into the company directory.

If you're lucky, your in-house phone system will have an available port to add the line. If you're not lucky, you'll have to drop a few hundred dollars to buy a new card of ports to be added to your phone system. If you're really not lucky, you'll be out of expansion slots as well, and you'll need to scrap the phone system you have, drop about \$10,000 or so, and buy a new, larger phone system with more room to grow.

With any luck, you'll get five or ten years out of the new system before you outgrow it and face the same problem, meaning you need to replace it yet again. If you don't grow and fully utilize the new phone system, you sit there with a huge piece of infrastructure that's actually too big and too expensive for what you really need. Either way, you're faced with a disadvantage.

A cloud-based system avoids any concerns about scalability. The system is maintained within cyberspace, and you'll never lose a wink of sleep fearing that you'll max it out, run out of ports, run out of cards, have to pay for more capacity, or wonder if you bought something too expensive and too large for your needs. It always fits.

Handling moves, adds, and changes

Even if your phone system has the room to grow, it still takes time for your phone technician or the LEC to have additional lines brought in. Large companies with nationwide networks of technicians frequently have to schedule any move, add, or change orders up to a week out. If there's a holiday in the mix, or a priority customer is down, you may be waiting longer and paying exuberant fees for minimal service.

This is one of the areas where a cloud-based phone system really shines. Since you pulled the Internet connections to every room and desk, the only thing left is to plug in a phone, maybe do a little configuring from the web-based portal, and start dialing out. It can be done by a techie person at your company, or if your Cloud VoIP provider is really good (in Fonality's case), they'll send you a pre-programmed phone that's ready to plug-and-play.



VoIP phones are identified by their IP addresses, so moving them around the office (or even to your home office) is as easy as unplugging them from one wall jack and plugging them into another. Minor changes, like adding a service or permission to a phone can be done through a simple programming change to the main communication system within the cloud. Your company administrator could be on vacation trekking in Nepal, pick up your e-mail requesting the change, and make it all happen while sitting in a cyber cafe in Katmandu. The funny thing is that it'll probably still be done before a legacy phone company could have rolled out a truck to your office.

Leveraging OPEX and Saving CAPEX

Two forces that accountants wrestle with to keep the cash flow healthy and the company profitable are capital expenditures (CAPEX) and operating expenditures (OPEX). These are two varieties of expenses that can make the difference between the financial life and death of any organization.

OPEX bills are the monthly expenses every business has allowing them to buy the raw materials of their business, plus keep the employees paid, the lights on, and the roof over their heads. If you aren't paying off loans or old debt, this is the number you compare to your total revenue for the month to determine your profit. In a perfect world, no companies would be struggling under debt, and we'd all be finding ingenious ways to reduce our monthly OPEX.

Sometimes you need to break into the piggy bank for more money than is coming in from your monthly profit. You may be a trucking company and need another vehicle, or a health-care provider in need of new CAT scan equipment. These are big-ticket items that aren't purchased every month, and they fall in the category of CAPEX.

It would be wonderful if everyone could have a massive cushion in the bank for CAPEX items. Even if you don't have a fat wallet, it'd be great if the stock market was flush with capital they were willing to loan to you. The economy today isn't swimming in cheap money, so it's good that "The Cloud" is there to help.

Borrowing from global economics

There is a great economic theory called the “comparative advantage” that was first used in an analysis of global economics. The first application of the theory may have been internationally macro in scale, but it’s just as useful if applied at an individual company level.

The premise behind the theory is the belief that every entity, or person, has a skill set that allows them to excel at a job. The theory continues that even if the entity CAN do another job, they are better off outsourcing it. The classic example is that of a neurosurgeon who likes to answer phones for the hospital. He may be doing a great job answering phones and transferring them to the correct extensions, but he’s horribly

under-utilized while he’s riding the reception desk.

The reality is that the neurosurgeon does more for the people who need him by performing surgeries, as well as maximizing his revenue on the higher-level skill-set of a surgeon. Hiring a full time receptionist allows the doctor to stay focused on what he does best (his comparative advantage) and leaves tasks outside his focus to someone else.

The moral to the story is that, unless your company is in the business of managing phone systems, your customers and your bottom line are better off if you focus on what it takes to make your business run, and let someone else deal with the phones.

The servers and phone system most companies believed they must have on site involved massive capital investments. I know of one company that regularly spent in excess of \$100,000 for the hardware and associated software licenses required to bring up a new DS-3 (672 phone lines) in their tele-marketing business. Even a small scale office with 15 employees can expect to spend a few thousand dollars for a simple phone system.

The best solution is to avoid that huge CAPEX payment and replace it with a smaller monthly outlay that can fit within your OPEX budget. You have the option of some kind of lease-purchase arrangement (with high interest rates), but in the end you’ll still find yourself with a piece of rapidly aging technology that you must maintain, house and manage. A Cloud VoIP option allows you to avoid the huge CAPEX outlay and replace it with a very manageable payment that can comfortably fit within your OPEX budget.

Hiring another company to provide all your phone service removes not only the PBX from your office, but also your need to spend the thousands of dollars to buy the PBX in the first place. That company takes care of all the hardware maintenance, upkeep, backup, and management of the fine details. It's quite a load off your shoulders, not to mention the estimated \$500 per year, per server you spend in electricity just to keep those red and green lights on it blinking 24 hours a day.

Accessing Your Communications Matrix from the Web

The greatest benefit of a Cloud VoIP system is the geographical freedom it provides. Coworkers and clients can seamlessly reach you, wherever you may be. It doesn't matter if you're at your desk, working from a remote office, or attending a seminar on the other side of the country. The system can effortlessly find you and ensure that in whatever manner people try, their calls, e-mails, and chats will reach you.

From your perspective, it's just as easy. You aren't isolated any more when you're on the road or working remotely. Everyone in the company is connected via the same application sitting on the Internet, so no matter where you are, everyone is just as accessible as if you're in the next office down the hall.

Chapter 3

Realizing the Fidelity Advantage

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In This Chapter

- ▶ Using software for your phone system without using the hardware
 - ▶ Employing the advanced routing available with Fidelity
 - ▶ Tying your iPhone or Android into your business communication solution
 - ▶ Maximizing the Fidelity system with your CRM software
-

The first two chapters of this book cover VoIP technology, and the way in which the industry has grown to maximize its potential. Most people heard about VoIP more than a decade ago, probably through a techie friend who downloaded or wrote his own software. It was cool back then to see someone make a free call over his 128K ISDN connection to his buddy across town.

Today, VoIP is an established technology, and it's easy to get 1.544 Mbps of bandwidth to the Internet. The communications industry pushed both VoIP and the Internet far into their potential with Cloud VoIP and Unified Communications (UC). There's now a single nexus where all forms of communication can be pulled together, maximizing hardware and bandwidth.

Fidelity is one company that's learned from the past and planned for the future. This chapter talks about how Fidelity has taken the best the industry had and made it easy to use, simple to manage, and affordable to deploy. Its core focus started with a solid solution for the communications problems of small and mid-size businesses (SMBs) and has evolved after almost a decade of refining the system, making it better and more user friendly.

Enjoying a Purpose-Built SMB Solution

Fonality built its communication system from the bottom up with one goal in mind, to solve the communications problems of SMBs. Many of the more advanced phone system features enjoyed by huge companies were never available to the little guys. If you called the main line and a receptionist answered, the company was obviously not big enough for an auto-attendant or even a rudimentary dial-by-name directory. If an SMB did spend the thousands of dollars to buy those sophisticated features, they inevitably ended up with more of a phone system than they'd ever need.

Transferring calls can be clumsy and even bridging two calls together may be a challenge with a legacy phone system. You've all been in the situation where you're speaking to someone and trying to reach another person to bridge up, only to have that third person dial in to you. Now you have two inbound calls that you can't easily tie together. The flash/hook button only allows you to make another call out and bridge the person up, but does nothing if the person calls you.

These are a few of the challenges that Fonality began working on. It built its system to be easy and intuitive because every hour spent training new employees on how to use its system was an hour the employee wasn't being productive.

Software as a Service (SaaS) model

Fonality doesn't sell hardware per se. The plug-and-play phones it provides are just so that you have something to speak into. The actual nuts and bolts of the phone service that handles the call transfers, voicemail, and all the advanced Unified Communications (UC) features is contained in "The Cloud" (see Chapter 2 if you're wondering what that is).

Fonality rolled out so many features that there was no option but to organize them in a stream-lined point-and-click interface, called the Fonality Heads Up Display (HUD). The HUD (covered in detail in Chapter 4 if you can't wait to see it) gives

you a dashboard view of options where you can easily initiate any kind of communication. The system allows you to answer and transfer calls, initiate a secure chat, send a SMS message, or start an e-mail, all with a single click.

Fidelity is an SMB just like you

The biggest challenge for any business is getting to know its customers and learning what challenges they're facing; it's a disconnect that plagued the communications industry in the past. Huge monolithic companies made phone systems with a single-minded focus on increasing their revenue. They didn't worry about concerns of scalability and delivering a phone system with all the features of their larger Fortune 500 customers.

The entrance to the PBX or key system market required a large capital investment that reduced competition. In the end, people bought what was available and paid what the manufacturers charged. There was no alternative.

The ubiquitous access to high-speed Internet connections across America has finally opened competition in the market of communications hardware. For once, the companies that make phone systems aren't apathetic toward the needs of their customers. The reality is that if they won't cater to their customers, someone else will.



Fidelity isn't a huge company. It's an SMB just like its target market. It faced the same struggles of any rapidly growing company and treated every communication challenge it faced as an opportunity to make a better communication solution for itself, and its customers.

Creating More Than Simple Telephony Features

The complex legacy phone systems in the pre-VoIP days prided themselves on features like the Interactive Voice Response (IVR) system. IVR was the hallmark of a huge faceless company at the time. I always imagined some huge super-computer the size of a bus, blinking lights and prompting me to "Press 1 for customer service or 2 for sales." All of the

systems had a standard format and seemed to function more to delay and disorient you than to quickly connect you with someone that could help.

The Fonality take on the IVR system is light years ahead of the old maze of confusion. They've added intelligence to the equation. A person calling in can still make a selection for a department, but they aren't a nameless and faceless customer.

All incoming calls are processed by the system and cross-referenced for background information. If the phone number originating the call is in your list of contacts, the system will bring up the rest of their information. If they aren't an existing customer in your database, the communication system can automate a screen pop to look up the caller information on any web browser before they even hear a second ring back in their ear.

What's more, the IVR was only the tip of the iceberg. There was a whole suite of features built into the phone systems deployed in Fortune 500 companies that simply weren't available to SMBs. The exclusive capabilities of the high-end phone systems were part of their cache.



Fonality changed that. Now you have that same suite of features available that were formerly the domain of only the biggest corporations and more. You can “record a call for training purposes” or just park a customer for someone else to pick up just like the folks at IBM or Ford Motor Corp. The technological advantages of the big boys are now at your disposal, so enjoy the level playing field.

Businesses with five or ten employees are easy to organize. At that level, everyone needs to speak to everyone else, probably on a daily basis. As you increase the head-count to 100 or 200 employees, each person may still only need to speak to five or ten coworkers on a daily basis. The new person in customer service may never need to speak to the remote sales staff, or the executives of the company.

Fonality gives you the ability to take a large mass of coworkers and make contacting them more manageable by assigning them into smaller groups. Your designated administrator inputs everyone's information into the Fonality HUD, and the calls you make are realized by the system that auto-generates

a “HUDDY” list of the employees you communicate with the most either by phone or chat. (Go to Chapter 4 for pictures and a detailed discussion of the wonderful HUD.)

Streamlining communications not only involves ensuring people can call their coworkers, but making some people less accessible also helps efficiency. Every company is going to have a wide variety of employees from executives, to sales, operations, and possibly even non-employee contractors. Defense industry companies may have employees that they choose to shield from everyone else for security reasons. You don’t want your new hire in the mail room sending a secure chat to your CFO inquiring about paid holidays and the number of exemptions on his W-2 form while the CFO is working on the 10-K filing for the quarter. It’d be a distraction to the CFO and not the best use of her time.

Fidelity HUD allows you to build permissions into the communications matrix to define the tasks allowed to each employee. The permissions can be as basic as restricting international dialing and executive conference rooms from the average employee, or as targeted as granting barge and monitor options to team leaders and management. These simple refinements help streamline the communications within your company and keep everyone efficiently doing their jobs.

Integrating Your iPhone or Android

Technology loves the Internet, and the Internet loves technology. So it’s obvious that the user friendly interface to your communications system located in the cloud is going to love your iPhone or Android smartphone, and they are going to love it too.

The most basic way to bring your smartphone into the Fidelity communications network is to simply input your cell phone number in the control panel for the find me/follow me features. These features list your cell phone number in the Fidelity system as another end-point to find you for voice calls, but your smartphone has more potential than that.

The truth is that “there’s an App for that” when it comes to the Fonality HUD. Not only can the phone system access your phone for a call, but with the iPhone (or any smart device on the Apple platform) and Android apps, your phone can access the communication system too. The app gives you the same rich features of the HUD dashboard of contacts, queues, and information you see from your office computer with the same access and functionality. You have the ability to work from anywhere with a full suite of UC features to assist you: quickly reply to within a chat session, review employees presence to quickly address an action, or even barge, monitor, or whisper customer service reps directly from your smartphone device.

Pocketing the Savings

Every business strives to increase efficiency and reduce price while keeping the quality of its product the same or better. Fonality’s cloud VoIP communication solution allows you to do just that, saving time and money while increasing the level of service that your customers experience.

Cutting time

Fonality makes the most of the cloud-based architecture and deploys communication systems up to 70 percent faster than traditional telephony systems. The configuration is all done before phones are sent to you so there are no delays or stress at your office. All you need to do is plug them into your IP connection, and you’re up and running.



Fonality is also there to help save time as you’re growing. You never have to wait for a local technician to be dispatched to your office to add a phone. Just order one through your account manager, and it’ll be delivered to you in less than 72 hours.

Making it easier

The cloud-based architecture eliminates your need to manage and maintain the hardware on which your communication system resides. It’s all in the cloud and Fonality does all of that for you, as well as real-time monitoring to ensure that the system is running smoothly.

Eliminating the hardware from your office saves you an estimated \$500 per year, per server in electricity costs, as well as reduces the time your IT staff has to spend managing the system. Your IT department can focus on more strategic projects now that 33 percent of its work has been moved to the cloud.

Just because your staff isn't monitoring the system every day, doesn't mean that the system is stagnating. Every year, Finality deploys two system upgrades that don't require you to lift a finger or pay a dime for the latest revision. They handle all the release roll outs quietly behind the scenes so they never interfere with your daily business.

Avoiding CAPEX

Capital Expenses (CAPEX, discussed in Chapter 2) are increasingly difficult to pull together. The one-time cash outlay for a large piece of hardware is a major source of stress to coordinate, and a constant weight on the company's shoulders until the expenditure is paid off, ranging up to multiple thousands of dollars.

The Finality solution doesn't require a large up-front purchase. It's like getting a top-of-the line phone system for free with every bell and whistle possible, and only paying a small monthly fee per user.

Pulling It All Together

Unified Communication (UC) is made even more powerful by layering it over contact management systems like MS Outlook or Customer Relationship Management (CRM) software.

Empowering MS Outlook

Integrating MS Outlook is as simple as making a few clicks from a drop-down menu in the Finality HUD. The integration allows you to import all of the contacts from HUD into Outlook, while also sharing your MS Outlook contacts. This gives you the ability to simply right-click on a contact or e-mail message in MS Outlook to initiate a call.

The Fonality HUD also uses your MS Outlook as an enhanced Caller ID, comparing any incoming call against your contacts and displaying the name and image of the person as the call rings to your extension.

Turbo boosting your CRM software

The Fonality HUD can use your CRM software just like it references MS Outlook to identify individuals calling you. HUD not only references your existing databases of names and phone numbers, but it can also initiate a web search on the incoming caller ID.

The depth of information displayed is limited to what is available in your MS Outlook, CRM software, or through web searches like Google or Firefox. You still get a small screen popup of information on the Fonality HUD about the incoming call, even if it's just the geography of the area code or company name associated with the Caller ID number.

The Fonality HUD integrates with several of the main CRM software packages, including

- ✓ Salesforce
- ✓ Sugar CRM
- ✓ NetSuite or any web-based CRM system

CRM software holds more information than your normal MS Outlook, and the Fonality HUD capitalizes on that. Every time you speak to someone in the CRM system, the date, time, and duration of the call is logged (a recording of the call can also be stored with the CRM system). This allows you to track how often you call the client and to judge from the call durations whether you actually reached the person or just left a voice-mail. This information gives visibility into the level of contact with the client and helps you remain focused on deals, follow-up, and managing those relationships.

Salesforce is one of the more widely known CRM packages, and the added features available through integration with the Fonality HUD are similar to experiences with the other CRM packages:

- ✔ **Click-to-call.** This actually bonds together the essential parts of the Fidelity solution and the Salesforce system. It creates a small “phone” icon next to every contact number in the CRM software, allowing you to launch a call by clicking the icon. The Fidelity system automatically dials the number and pops you over to the notes screen for the Account/Opportunity/Contact you selected to call.
- ✔ **Deal size alert.** This is a helpful bit of information that Fidelity pulls from the CRM software and displays on a pop-up whenever a client calls. The status window not only tells you the contact, account, and opportunity name, but also the dollar figure the prospect represents. If you have two calls coming in, one that’s a \$5,000 deal and one that’s a \$75,000 deal, you’ll be able to put your time where it has the biggest return by letting the \$5,000 deal go to voicemail.
- ✔ **Advanced screen popups.** This represents the intelligence of the Fidelity HUD. A small screen pop-up appears whenever you receive an incoming call that pulls the pertinent data from the CRM software, such as:
 - Accounts
 - Cases
 - Contacts
 - Leads
 - Opportunities
- ✔ **Account ownership routing.** This feature eliminates the need for your prospects to waste time running through your IVR. It may only require them to spend two seconds to punch in the extension of their account rep, but it’s better if they don’t have to. Use configuring tools to route the incoming call directly to the Opportunity or Contact owner from the CRM software, and the client is instantly routed.
- ✔ **Call Detail Record (CDR) integration.** The biggest problem with any software system that has a “notes” section is getting everyone to use the notes. Integrating the Fidelity HUD with a system like Salesforce allows it to synchronize every call, inbound or outbound, into the

client history. Even if the employee didn't note what was discussed, the CRM software still records that a conversation took place.

✓ **Reporting.** The Fonality system provides the boilerplate reports you'd want to know for any CRM analysis of your business. The standard reports covering agent activity, responsiveness, and customer neglect are just the beginning. Also available are detailed reports pulled from the CDRs that can be distilled by:

- Date stamp
- Time stamp
- Call direction (inbound or outbound)
- Duration
- To or from a specific Caller ID

There are three elements that every company struggles to provide: value, quality, and speed. Standard logic has always been that any company can only provide two of the three. Delivering a product in half the time should result in either an increase of price, or a decrease of quality.

Technology has made this paradigm harder to sustain. The Fonality product line delivers more features and better quality than its competitors and is light years ahead of legacy telephony systems. The advancements in software allow it to be delivered faster than ever before, and still provide it at a competitive price point within the market.

I guess it's never too late to re-write the rules. Head over to Chapter 4 to see how the Fonality HUD UC client makes all the magic happen.

Chapter 4

Managing Everything with Fonality Heads Up Display (HUD)

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In This Chapter

- ▶ Getting acquainted with Fonality HUD
 - ▶ Accessing the right person with the right information every time
 - ▶ Understanding presence information
 - ▶ Getting a handle on call queues
-

Cloud VoIP can only evolve into Unified Communications (UC) with the help of a system that brings everything together under one roof. It takes solid management software to pull together key communications players, such as voice, e-mail, and chat, into a functioning team. Once the team is assembled, the call queues, conference rooms, presence information, and contact data tie in to the communications technology creating a system that is greater than the sum of its parts.

Fonality created the award-winning Fonality Heads Up Display (HUD) as the management element of its UC offering. HUD is a desktop client that pulls together every way in which you communicate. The dashboard style display allows you to quickly see which of your coworkers are on calls, in conferences, or available, while providing a handful of options for reaching them and your customers. According to a 2011 Webtorials Survey, this single tool makes your life easier and can save knowledge workers up to two hours a day in productivity.

Navigating Fidelity HUD

The lion's share of the Fidelity HUD configuration work is accomplished in the first 30 days of activation. This is when your Fidelity customer care specialist and your internal administrator (Admin) build all of the important sections of HUD that you will use, such as:

- ✓ Establishing extensions and input information about employees:
 - Employee name
 - Job title, department
 - Office location
 - Extension number
 - Remote office phone number
 - Cell phone number
- ✓ Building call queues
- ✓ Setting up conference rooms
- ✓ Assigning permissions

A simple web-based download sets up the Fidelity HUD on your desktop where it resides as either a floating icon or a quick-launch shortcut next to the “Start” button on your toolbar. Once you're set up with the HUD, you don't have to concern yourself with logging in and inputting your password. Just click the icon, and the application appears on your desktop.



The Fidelity HUD client has two levels of access. The User Panel is the interface for standard employees who are simply using the system to communicate. The Admin Panel is accessible only by the Admin and must be specifically logged into with a username and password to gain access to administrative powers over the system.

Figure 4-1 shows the general Fidelity HUD configuration you see when you launch the program. The top of the display identifies you and your extension in the upper left. The section directly to the right identifies detail information of the call you are currently on, including names and phone numbers.

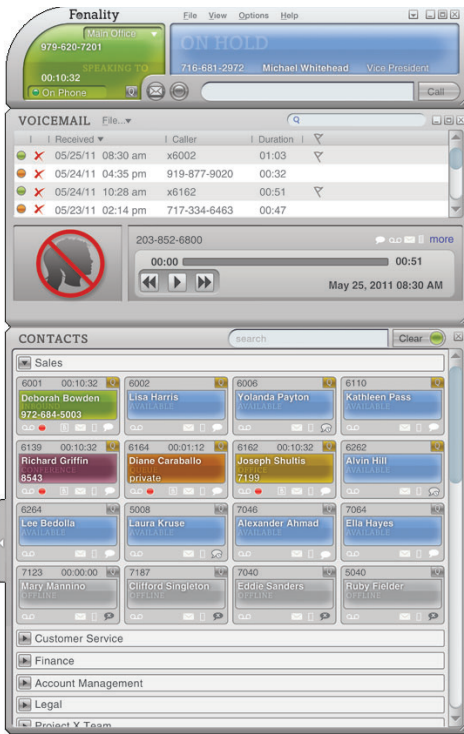


Figure 4-1: Fidelity HUD general interface.

Locating people and engaging possibilities

Below the section devoted to your current phone disposition is a block for your contacts (refer to Figure 4-1). This list contains all of the people within your company, including geo-dispersed business office locations, allowing you to see important presence information. The ability to know a coworker’s disposition is one of the great advantages of a Unified Communications solution. It prevents you from calling the person when he’s not available and gives you multiple modes of communication for contacting him.

The contact groups are identified by their group names on a single bar with a “+” sign to the left. The system works just like Windows Explorer and clicking on the “+” expands the list

to identify every individual in a group. This allows multiple groups to be listed without consuming your entire computer desktop displaying, detailed information on every individual.



You'll probably never need to reach the support staff, HR, AP, or AR in your international offices, so you may choose not to integrate those groups into your personalized contact groups panel. These missing people aren't entirely missing in your Fidelity HUD, they're simply tucked away. You can find a complete company directory, allowing you to reach every coworker at every one of your corporate locations around the world, provided you have the permissions to contact them.

Figure 4-2 shows the small tab on the left side of the contacts list that you click to reveal the complete corporate directory. Every contact group created by the Admin is listed along with a check box you can toggle to make the group available under your personal contact groups panel.



Figure 4-2: Complete contacts directory.

This is a good start, but you can also build contact groups based on your own criteria. Just create a new contact group from the section header and then drag and drop the contacts you require into it.



An extension can only be listed in one group. Dragging and dropping it into a new contact group removes it from the initial group. A simple reset button within the menu options will

move all contacts back to their pre-assigned groups, as input by your administrator.



If you forget the name of the contact group that holds a specific person's extension, you can always input the person's name in the search window to locate her.

Once the contact group is opened, it identifies every member's extension and provides their presence information. As shown in Figure 4-3, the detail shows the extension number in the upper left and if a group member is speaking to someone at the time, the duration of his current call appears in the upper right.

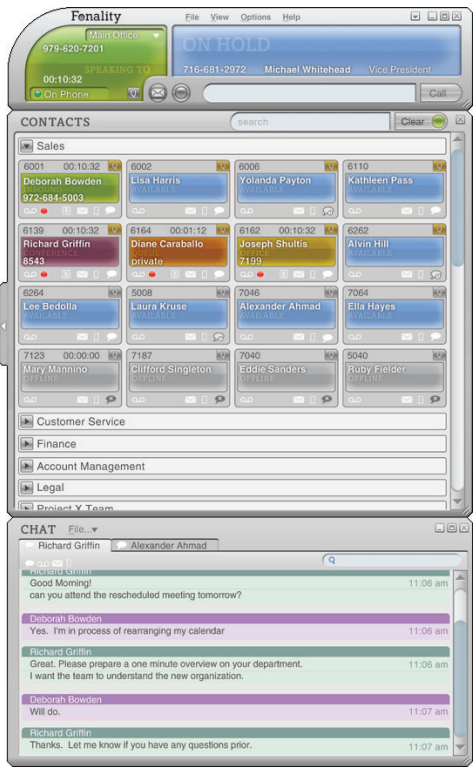


Figure 4-3: Fidelity HUD extension detail.

Identifying presence

The specific call disposition of a coworker is displayed by the background color of the person's contact block. This allows you to instantly know what kind of call the person is on, and what your communications options are. Here's what the colors represent:

- ✓ **Blue:** Available
- ✓ **Green:** Live on inbound or outbound call
- ✓ **Orange:** Inbound call from call queue
- ✓ **Yellow:** Intra-office call
- ✓ **Purple:** Conference call
- ✓ **Grey:** Individual not logged into HUD

Reviewing contact options

The bottom of the extension detail window provides contact options (refer to Figure 4-3). The icons not only allow you to reach the extension, but also to reflect the individual's presence and ability to receive each type of communication. Here's a list of the possible icons and what they allow you to do:

- ✓ **Two circles connected by a line:** Rings you directly into a person's voicemail where you can leave a message without first ringing into her office extension.
- ✓ **Red dot (Record):** Allows you to record any call that is currently going on, even if the person isn't speaking with you (you must have correct permissions to do so).
- ✓ **"B" in a box (Barge):** Some service calls require more diplomacy or a fresh negotiator. This button allows a manager to respond to an urgent chat message from your employee in the queue by coming in like the cavalry. For more about barging in, see the section, "Using Fonality Contact Center Features" later on in the chapter.
- ✓ **Envelope:** Initiates a new e-mail to the person assigned to the extension.
- ✓ **Cell phone:** Initiates a call to the person's cell phone.
- ✓ **Talk balloon:** Opens a secure chat window.

The Fonality HUD is designed to work with the extension assigned to the IP phone on your desk. For example, barging in on a call between a subordinate employee and a customer actually runs through a quick set of events to make it all happen.

1. Click on the Barge button for the call your employee is on with your biggest customer.
2. Fonality HUD rings the IP phone at your desk, prompting you to pick up the receiver.
3. Fonality HUD adds you into the current call between your employee and customer, just as if you were all in a conference room.



Not every employee has every option to reach every other employee. The Record and Barge features are obviously permissions-based and only allowed to management. You'd never want to give your new employees working in customer service the ability to barge in on or record the conversation your CEO is having.

The nuance of each small button tells you even more about the disposition of the person at that extension. For example, if the queue icon is orange, it indicates that the person at that extension is currently logged into their queue and accepting calls. The chat icon is even more expressive with different options available:

- ✓ **White talk balloon:** Available
- ✓ **Blacked-out talk balloon:** Unavailable
- ✓ **Gray talk balloon with clock:** Away

Clicking on the talk balloon of any contact opens a new window for your secure chat with that person. The chat window pops up as another section of your Fonality HUD client and has tabs across the top identifying every open chat conversation.



Even if you close a chat and it drops off the chat window, the entire conversation is still available to you via the Chat History, which is listed under the “View” header.

Figure 4-4 is an example of the Fonality HUD Chat History window. Fonality HUD remembers and records every chat session, listing them in ascending order by extension if you ever need to refresh your memory. Selecting any individual populates the right side of the window with all her chat sessions listed by date and time with the oldest first.

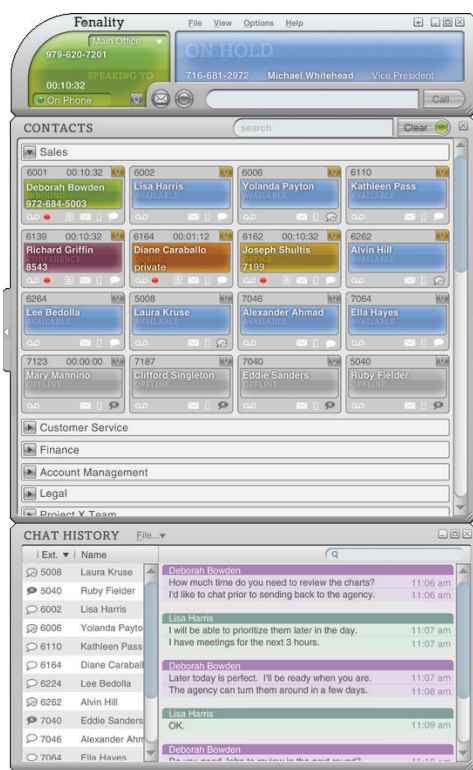


Figure 4-4: The Fonality HUD Chat History window.

Making It Happen with Fidelity HUD

Fidelity HUD works great to increase the efficiency of communication within your company, but it's also vitally important to maintain communication with customers and vendors outside your company. HUD makes it easy to handle calls and easily transfer and track them regardless of whether they were coming in from a customer or going out from an employee.

Incoming calls are sent to the VoIP phone associated with the extension, while the system also generates a small popup window on the employee's computer that announces the incoming call with the phone number and potentially the name of the incoming caller.

If the incoming call belongs to a phone number in the recipient's contacts or integrated MS Outlook, the company name and potentially a personalized icon or picture on file appears. The window only remains for a few moments before it disappears, and the information is then available in the top section of the user's Fidelity HUD. The VoIP phone receiving the call is answered and both parties are connected, just like in traditional telephony.

Transferring and parking

Every call doesn't end up on the desk of the first person that's reached. This is especially true if the first person to receive a call is the receptionist. An IVR is a wonderful tool of efficiency, but for many people, nothing beats the warmth of a human voice asking you "how may I direct your call?"

Fidelity HUD makes transferring a call the easiest task in any company. Simply click the highlighted section of your HUD that represents the call you are on, drag it to the desired extension, and drop it. It's just like moving .JPG files from your digital camera to the new "VacationPICS" folder you just made. Once the call is dropped on the extension in the HUD client, it rings through to the IP phone associated with that new extension. You are now ready to take another call.

Parking a call is equally as simple. Every HUD client comes with a company-wide parking lot built into it. An employee that's en route from her office to her coworker's office would "park" the incoming call. The call waits for her within the "call parking" widget (visible to everybody within the company) until she arrives at her coworker's office, where she then just double clicks on the call listed in the parking lot and she is instantly connected. The call is redirected, and the IP phone at her coworker's desk rings to complete the call.

Using conference rooms

Your Admin and the Fonality customer care specialist set up the bulk of your conference rooms during the activation period of your service. The easiest way to locate the conference rooms in Fonality HUD is to access them from the drop-down list that appears from the "View" option on the top toolbar.

The conference rooms are displayed in a new window, as shown in Figure 4-5, that identifies your extension and all the available conference rooms. Occupied conference rooms appear with a list of attendees to help ensure you join the correct meeting.



Conference rooms are a permissions-based feature of Fonality's solution. Even though you may be able to see every conference room number, you may be barred from entering. It's common for a group of conference rooms to be allocated for executive use only with the bulk of the remaining rooms open for general use.

Dropping a call or yourself into a conference room is just as easy as parking and transferring, provided you have permission to do so. Simply click on your extension or your call, and drag and drop it into the conference room. Fonality HUD works its magic, and you're instantly joined in to the meeting in progress.

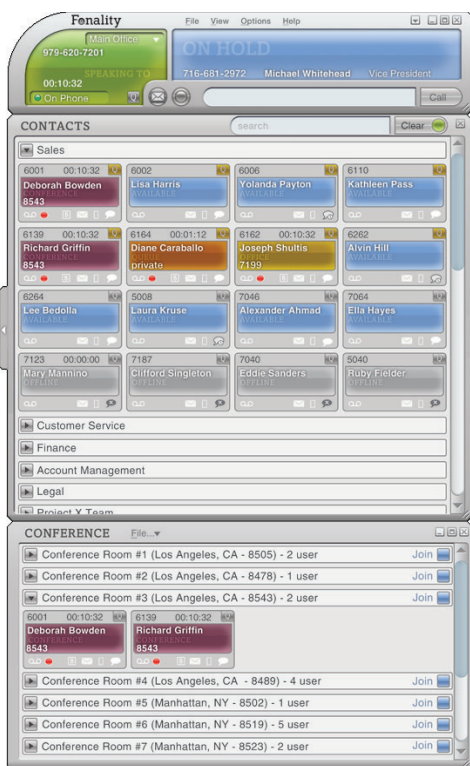


Figure 4-5: Conference rooms.

Working a widget

Fidelity HUD is created with task-based functions referred to as *wid-gets*. When launched, these features create a new layer to the HUD dashboard. They are accessible from the “View” option on the top toolbar and include:

- Call Parking
- Chat
- Chat History

- Conferences
- Queues
- Voicemail

One of the great features of the wid-gets is that they are detachable from the main Fidelity HUD dashboard. You can drag and drop them just like any other popup window, allowing your desktop to be very clean, or very messy.

Using Fidelity Contact Center Features

Fidelity takes the award-winning UC client a step further with the integration of contact center features. The Fidelity HUD Queues widget provides your employees with the tools they need to streamline the customer contact processes and ensure that customer satisfaction reaches an all-time high. Based on a May 2011 study by Distributed Networking, Fidelity customers save an average of 23 percent as compared with traditional contact centers and report an average productivity increase of 14 percent.

It's common for an SMB to grow their business in an organic and reactive mode. They're so busy with the day-to-day business that they only have the time and energy to focus on the crisis *de jour*. Essential infrastructure issues get pushed to the back burner until they finally reach a breaking point.

It's both painful and frustrating to cobble together an infrastructure for your contact center while you're in the middle of a growth spurt. Only after you've suffered through it do you realize that everything would have been easier, had your system been in place from the beginning. Then you wouldn't have lost calls, customers, and your patience because of simple communications breakdowns.

The Fidelity HUD has all the contact center features you need, tucked right under the hood. Select the "Call Queues" option under the "View" option on the menu toolbar to unlock these productivity-enhancing features. A new window appears listing all of your call queues, as well as a shorthand code for the disposition and performance of each queue.

The Fidelity HUD image (see Figure 4-6) shows a normal call queue display. Every queue is listed in alphabetical order in a small sub-window with a simple metric of the people assigned to the queue and their disposition.

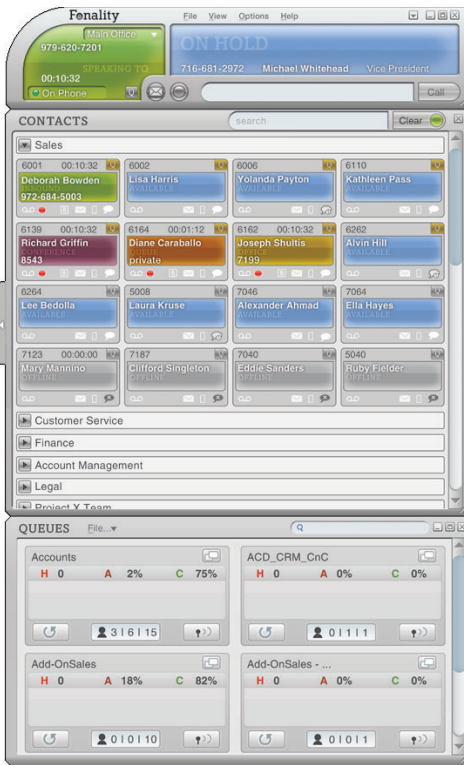


Figure 4-6: General call queues.

The top toolbar within each queue identifies the following:

- **H:** Number of calls on hold for that queue
- **A:** Percentage of calls abandoned before being answered
- **C:** Percentage of calls answered and completed

The preceding list provides a quick snapshot of the performance of the queue, but it only provides the highest level of visibility. The lower toolbar sheds more light and provides the first management tools for the queue.

- **The left button.** Looks like a refresh button from a web browser and is exactly that, a refresh button. It restarts the clock for the call holding, % abandon, and % complete stats located at the top of the queue listing.

- ✓ **The center section.** Has a person icon and identifies the following:
 - The number on the left = number of agents on calls
 - The center number = number of agents logged into the queue
 - The number on the right = number of agents assigned to the queue
- ✓ **The right button.** Looks like a microphone with sound waves and is actually the broadcast chat button. Clicking on this button allows the manager to send a single chat message to everyone assigned to the call queue.

This is only the 10,000 foot overview of the queue. The small icon to the right of the queue name in the header is actually another button that opens the detail view of the queue.

The detailed call queue window, shown in Figure 4-7, provides more information and tools for management. It restates the call stats to the left side of the window, and lists everyone assigned to the call queue on the right. The individuals listed have several status and management options available for the call they are on.

Reading the information in Figure 4-7 from left to right:

- ✓ **Call indicator:** A green button indicating the status of the individual. The color of the button uses the same color scheme as the extension disposition covered at the beginning of this chapter.
- ✓ **Queue indicator:** This identifies whether an individual is logged into the queue or not.
- ✓ **Chat presence:** The same chat presence options listed on the individual extensions are also used here.
- ✓ **Agent name:** This is the name of the queue agent.
- ✓ **Barge button (not depicted):** This button allows the manager to step in and help the agent by entering the call, essentially converting it into an ad-hoc conference call with the customer, the agent, and the manager.

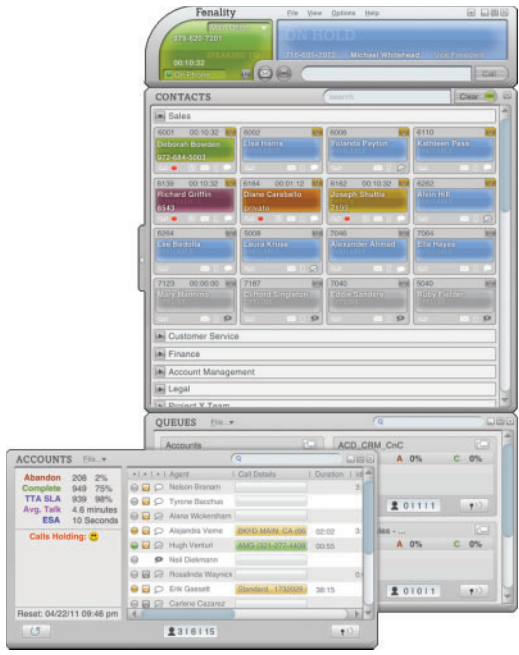


Figure 4-7: Call queue detail.

These call queue features round out the Fidelity HUD solution, providing everything you need to efficiently stay in touch with your customers and coworkers. It's always been the goal of Fidelity to not only make a great communication solution for SMBs, but also to do it by creating a great technology. Fidelity has kept this goal in mind at every step of the process to ensure that it is easy to use, simple to manage, and affordable to deploy.

Chapter 5

Ten Places Where Fonality Shines

In This Chapter

- ▶ Taking a look at Fonality advantages
-

Cloud VoIP and Unified Communications are great, but in some places Fonality simply outshines everyone else. It could be the fact that it's an SMB solution made by an SMB for SMBs. It could also be the fact that Fonality is always pushing the system to do more for everyone. When all is said and done, here are ten ways Fonality really makes it happen.

Eliminating CAPEX

You don't have to buy a new server to enjoy VoIP. It's like getting a more sophisticated telecom infrastructure for less than the monthly fee you pay a traditional local carrier.

Enterprise-grade Features

Fonality customers can save up to 50 percent on their communication needs compared to legacy solutions without sacrificing Fortune 500 telephony features.

Gaining Presence Info

The presence information shown with Fonality HUD lets you know if someone's on a phone call, available to chat, or has a cellphone you can call. It means reaching the right person with the right information every time.

Using Fonality HUD

The Heads Up Display (HUD) allows you to see communications within your company, and configure your contacts to work more efficiently.

Changing Voicemail to E-mail

Everyone loves checking their e-mail and hates checking voicemail. Fonality makes it that much easier to get the information you need, delivered where you prefer, regardless of how it's left for you.

Integrating iPhone and Android

The new Fonality app allows you to access many of the Fonality HUD features from any Apple or Android smartphone or tablet platform. Now you're always able to chat, make a VoIP call, and check the presence of your coworkers, wherever you are. Phone calls made through the mobile app utilize your Fonality account rather than your mobile minutes, creating even more value from your Fonality solution.

Transferring Calls

Transferring calls to extensions, conference rooms, or just parking them, is as easy as moving digital picture files from one folder to another.

Calling from Firefox

Fonality has teamed up with the web browser Firefox to create FONcall, a technology allowing you to call any phone number listed in a Firefox web browser with a single click of the mouse.

Exploiting Deal Size Info

You can tie the popup windows announcing your incoming calls to CRM software, allowing you to tag each prospect with their total revenue potential. The deal size of each company is listed in the initial popup, keeping your eyes on the prize.

Tying In to Your CRM

Fonality HUD can be meshed into your CRM software (like Salesforce, NetSuite, Sugar CRM, or Vanilla Soft) allowing information to be shared between the systems for superior management and visibility into your sales communications.

