Enterprises have an unprecedented opportunity to transform workplaces and the ways teams communicate with peers and extended ecosystems of partners. The potent combination of unified communications (UC) and cloud computing is driving many of these innovations. But with a growing number of solutions now available, finding the right cloud-based UC platform requires a clear assessment of business needs and careful research into vendors and service offerings. Although the full acquisition process consists of many steps, one of the most critical is also the first: the request for information (RFI).

Unfortunately, some organizations are tempted to skip RFIs and advance directly to creating requests for proposal (RFP), which solicits more detailed information from a tighter group of solution providers. But savvy enterprises use both resources to quickly understand all available solution options and narrow their list of vendors. Together, an RFI and RFP help assure that the final choice will be the right one.

The challenge is to create an RFI that helps organizations scope out a large swatch of the UC market without being just a list of generic check-off items that elicits equally generic responses — often copied from earlier efforts. The result will do little to identify the UC strengths and weakness of available vendors and solution providers. A better approach is to use an RFI framework that clearly communicates the project’s business and technology goals, and poses questions that will deliver useful responses. This guide will help you achieve these goals.
First, the executive in charge of UC acquisition must understand the purpose of an RFI — it’s a formal document that enterprises send to a broad spectrum of vendors, systems integrators and managed service providers that work in the communications market. The ultimate goal is to develop a short list of UC candidates that deserve closer scrutiny. The process of writing the RFI has the added benefit of helping the team come to an agreement on the potential business value of a UC modernization and the overall scope of the project.

Before diving into the specific questions for vendors, the RFI should set the scene: start the document by describing the current business and technology trends across all industries that influence the choice of a UC solution. For example, mobile workforces are accelerating the rise of what some analysts are calling the virtual workplace, where organizations need reliable communications and collaboration tools across traditional workspaces, in ad-hoc, on-the-road locations, at client sites and in home offices. Because partners and outside contractors are increasingly part of these project teams, the communications systems should easily scale up or down to accommodate the expansion and constriction of workgroup members. Global supply chains add an additional requirement — the ability to easily extend collaboration across geographical borders.

But even as service demands like these arise, many enterprise IT departments face a dilemma — how to address the strict financial controls that are forcing them to expand the services they deliver while managing static or decreasing technology budgets. The result is that CIOs often prioritize investments to cover specialized tools that can give their organizations a competitive advantage, while outsourcing “utility” functions, such as email, to outside services. Partly in response to this challenge, enterprises of all types are moving to public, private and hybrid clouds.

Next, the RFI authors should outline the specific needs of their particular vertical market, including any unique business opportunities and compliance issues.

Finally, the RFI should explain any pain point particular to the enterprise itself. For example, does the organization rely exclusively on separate voice, email, instant messaging, call center and videoconferencing solutions that are all maintained by the internal IT department? Likely challenges will include a lack of integration among these systems. How effectively does the IT staff manage this diverse environment — do they spend most of their resources keeping everything running, which leaves little time to develop new innovations requested by the business or demanded by customers? Is the capital budget adequate to fully support the environment?

Clearly outlining the importance of these types of issues will help potential vendors determine if they are appropriate candidates for a cloud-based UC project of this scope.
STEP 2: Drill into the Specific UC Project Plans

Next, dive deeper into the UC project itself. Explain the enterprise’s specific goals for cloud-based UC in terms of improved business operations, customer interaction and a more efficient technology infrastructure. For example, many organizations are looking to cloud-based UC to accelerate their business- and decision-making processes, support a mobile workforce and spur innovation. Ask RFI respondents to explain how their solutions will help the enterprise attain each of these goals.

Make sure the RFI is a forward-looking document by describing the types of new business capabilities the enterprise expects to achieve once the modernization is implemented. How will the solution serve these needs? In addition, the RFI should describe the importance of having an open UC architecture that will be able to accommodate future business requirements and technologies. This will be especially relevant for mobile innovations.

Every organization works within budgetary limits, which will help determine what exact features and functions the eventual cloud-based UC solution must have to meet its needs. Acknowledge these constraints and clearly delineate the features that are “must-haves” versus those that can wait for funding in future budget cycles. The key is to provide only broad financial parameters so respondents can offer practical proposals; divulging financial information that’s too detailed could give potential service providers an upper hand in eventual budget negotiations.

Valid estimates of return on investment (ROI) and total cost of ownership (TCO) will be essential for getting final approval from senior executives for the cloud-based UC modernization. Ask RFI respondents to provide statistics for each of these areas based on their previous engagements. If possible, the data should come from past projects with clients that are similar in size and market segment to the UC team’s organization. The summaries should also include breakdowns on how the solutions helped previous clients reduce capital expenditures and costs associated with IT maintenance and support.

STEP 3: Detail the Technology Requirements

Include detailed questions about the service delivery models the respondents will recommend for UC solutions, such as private, public or hybrid clouds. The recommendations should include a justification for the top choice and secondary options, along with the pros and cons of each alternative.

Many organizations are already moving to the cloud and more companies will be migrating to the cloud in the future. If you are looking to implement on premise, but need to retain an option to migrate to a cloud-based solution in the future, is your investment in software, licenses, devices and training protected? How does the system behavior change when moving to the cloud?
Respondents should pay particular attention to key UC factors such as agility, dynamic resource allocation, scalability, cost, availability, compliance and security.

Then explore these seven key areas:

1. UC applications and modules. Will voice, voicemail, IM, video, chat and Web presentations be part of the package? Will they be discrete point solutions that incur time and professional service costs for integration? Or will they come as a pre-integrated package from a single source? Again, the pros and cons of the recommendation should be clear.

2. What IT frameworks have you adopted? How will the UC solution fit with these IT frameworks? To take advantage of common business processes shared among other enterprise applications, the best cloud-based UC solutions can connect with a variety of IT frameworks. Examples include the VMware virtualization and data center environment, Google’s application and Web development frameworks, Salesforce.com and Microsoft solutions.

3. Mobility. Categorize your users by whether they are office-based process staff, knowledge workers, home-office workers or full-time mobile workers. For each category, assess their communication needs and derive device and application requirements accordingly.

4. Extensibility. The UC solution may need to connect with other communication platforms and applications. Identify these systems, understand interface requirements and specify them in the RFI.

5. Videoconferencing flexibility. Many organizations have deployed standalone video conferencing systems in a limited way. This often results in underutilization and restricted access to the resources. By choosing a UC solution that facilitates widespread video deployment across smaller meeting rooms, desktop and mobile devices, video becomes a natural way of doing business.

6. Industry standards. Does the solution support Web remote procedure calls for mobile applications and the industry standard Session Initiation Protocol (SIP) for communications over IP networks? What other industry standards are accommodated?

7. Differentiating features. In addition to standard UC capabilities, does the solution offer any specialized tools? Do you need to incorporate specialist tools, such as applications that help you manage your customer base, customer feedback or social media interaction?

Answers to these questions will give UC buyers important information for comparing the features of a broad range of solutions. The next set of inquiries will cover topics beyond technology to help the acquisition team further refine its research.

**NEED TO KNOW**

- What’s your cloud strategy for UC?
- What specific UC does your solution include?
- What IT frameworks do you support?
- How will you accommodate mobile workers?
- How will you enable the solution to incorporate members of the extended supply chain?
- What do you do to simplify videoconferencing?
- What industry standards do you support?
- What’s unique about your UC solution?
Solution partners that sign on to the project should already have extensive real-world experience.

STEP 4:
Profile Potential Vendors

The cloud-based UC solution itself isn’t the only factor to consider in a large communications project. Your chosen vendors should be able to demonstrate:

• The necessary technical and commercial skills to implement and support. Look for vendor certification and a track record in delivering similar solutions.
• Geographic presence to support your entire organization.
• Financial stability: You need to know your solution provider with be there for the long term.
• Specialist knowledge of your industry sector, chosen IT frameworks or mission critical applications. Ask for reference sites and case studies.

At the top of the vendor evaluation list is expertise — because UC is a core enterprise solution that will impact internal efficiency and market competitiveness, solution partners that sign on to the project should already have extensive real-world experience. Ask candidates to list their previous UC engagements, particularly those that used a cloud infrastructure. A list of some reference accounts should be part of these summaries.

Candidates should also provide a picture of their financial stability. For public companies, that means the latest financial statements. Private companies will be less revealing, but nevertheless should be able to provide anecdotal information about their market strengths, how they plan to stay competitive in the UC industry as it continues to evolve and their commitment to R&D. Ask for biographies of senior managers, which will provide insights about the vendor’s culture and expertise. Also get a list of the names, titles and backgrounds of the key people who will be assigned to the UC project.

Any large UC project comes with the risk of disrupting daily business operations. Ask respondents to explain what they’ve done in previous UC engagements to mitigate these challenges. Also probe whether the solution rollout will happen in a series of phases or if the vendor recommends a cut-over approach. The UC implementation team can later decide which philosophy is best for its organization.

Set deadline parameters for the project based on business requirements and ask respondents to confirm their ability to meet this schedule.

IMPORTANT QUESTIONS TO ASK POTENTIAL PARTNERS

• What expertise and real-world experience do you have with cloud-based UC solutions?
• What customers can you provide as reference accounts?
• What statistical and anecdotal information can you provide about your financial condition?
• What competitive advantage do you have in the UC market?
• What precent of your budget goes to R&D?
• Who will be the senior managers and on-site professionals who will be devoted to this project?
• How will you keep the modernization from disrupting business operations?
STEP 5: Release the RFI

Developing the RFI will provide a framework to help the UC acquisition team crystallize the project's goals, business and technical requirements, and partner preferences. With those details and relevant questions mapped out, the RFI is ready to be distributed to vendors and systems integrators in the UC industry. The subset of companies that respond will make the first cut of potential partners. These responses will allow the UC team to consolidate the list even further in preparation for the RFP. From there, interviews with reference accounts, as well as on-site demos and pilot projects will help the team choose the right solution and tap into the transformative potential of cloud-based UC.

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