



The UCaaS Buyer's No-Nonsense Toolkit

Looking for a UC solution? From investigation to selection, use this checklist for actionable tactics and best-practice strategies you can put to work right away.



1. Investigation



WEBSITE

Get the value proposition — what their UCaaS does and doesn't do. Expect succinct descriptions. Check for industry awards, security seals, and customer logos.

BLOG ARTICLES

Look for collaboration, mobility, and productivity themes. You want tastemakers, not sales-pitchers. Expect third-party syndication of the vendor's content.

WHITEPAPERS, EBOOKS, AND REPORTS

Scan for best practices, fresh stats, big benefits, and workplace advantages. See an analyst's logo? Consider that a vote of approval.

WEBINARS

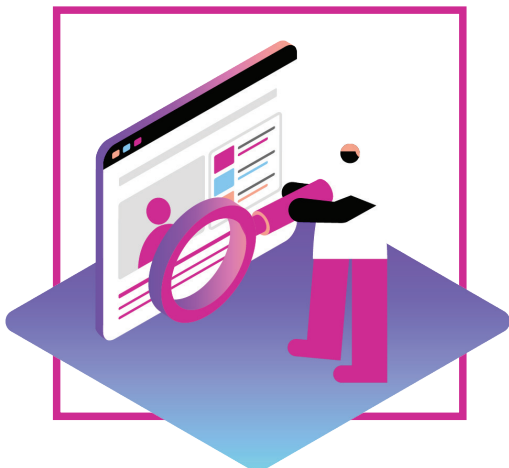
Look for notable analysts — they add legitimacy. Watch for thought leadership, timely advice, best practices, and a sense of "UCaaS drives business."

CASE STUDIES

Read for benefits AND challenges. Review stories about your SECTOR, not just your INDUSTRY. Expect a spirit of innovation throughout.

CUSTOMER, COLLEAGUE, AND ANALYST REVIEWS

Read customer reviews on third-party sites. Chat with colleagues about vendors they trusted in previous roles. Rely on analysts to ask the tough questions you won't know to ask.



2. Exploration

INTEGRATIONS

Be sure these UCaaS tools will integrate into your existing CRM and productivity apps. Don't have those apps yet? Your UCaaS choice will help you make THAT choice.

FEATURES

Expect to see dozens of features you didn't even know existed. Three must-haves: team video collaboration, all-in-one-place SMS/social messaging management, and AI for voice-enabled customer self-service.

CALL CENTER FUNCTIONALITY

Watch for IVR, virtual receptionist, and skills-based routing. Will call center features suffice or might you need contact center features, too?

SERVICE-LEVEL AGREEMENTS

Good, generous SLAs specify the vendor's responsibility for service outages and suggest that you'll rarely — if ever — need to actually rely on those SLAs.

ENTHUSIASM

They should be eager to show you the product, tout its benefits, and build a relationship. Listen for first-hand stories about how they use UCaaS themselves.

3. Preparation

☐ VITAL STATISTICS: PHYSICAL

Have stats handy. Headcount. Number of offices and remote employees. High-speed internet availability. Upcoming acquisitions and hardware changes. Share it all.

☐ VITAL STATISTICS: USAGE

Minutes per month. Calls per month. Minutes per call per month. High-volume days and seasons. Think about what you can share about your roadmap and growth goals.

☐ SECURITY DEMANDS

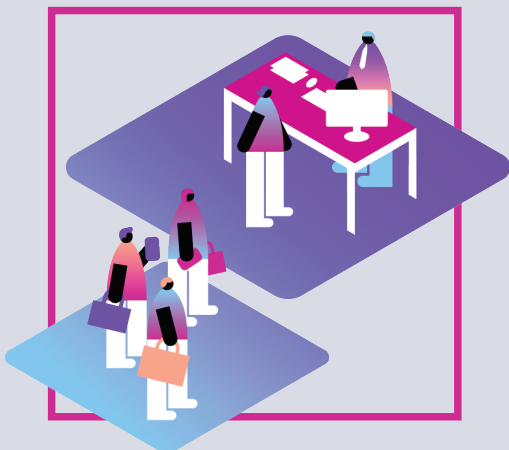
Got particular security, privacy, and compliance needs? Need to see results on independent tests and audits? Or details on security tools, processes, and talent?

☐ SCALABILITY REQUIREMENTS

Expect you'll need more lines, capacity, resources, and bandwidth? Or LESS after a while? Figure that out. You won't want to revisit this process in another year or two.

☐ UPTIME RELIABILITY MUST-HAVES

Demand 99.999% uptime reliability, proof from third-party uptime-monitoring services, multi-level fail-safes, distributed architecture, and 24/7 network ops.



4. Demonstration

☐ STRESS TEST

Be challenging. Throw curveball use cases finalists might not be expecting. Watch for them to volunteer their own challenging use cases, too.

☐ WATCH OUT FOR

Not being encouraged to participate. Snafus with basic features. Software glitches, operator errors, bandwidth issues — those should already be ironed out.

☐ QUESTION WHAT YOU SEE

Ask about the downstream costs customers report. Scenarios that show UCaaS's value. Features ADJACENT to what you're pre-sold on.

☐ QUESTION COSTS

Check specific costs like phone hardware, professional services, and carrier fees. Can they show identity-redacted copies of a few customers' bills?

☐ RED FLAGS, GREEN FLAGS

Think twice if technical content is lacking, but give props to the vendor who cites weaknesses they're working on AND strengths they've perfected.

5. Identification

☐ **RESOURCES COMMITMENT**

Be clear about what YOU'LL be expected to provide, but also THEIR timetable for implementation, onboarding, and spinning up new offices.

☐ **VALUE-ADDED SERVICES**

Expect lots IN ADDITION to UCaaS. Training. Ongoing support. Exciting upgrades. Details about new releases and innovations. Winners seize the chance to enhance.

☐ **CHECK REFERENCES**

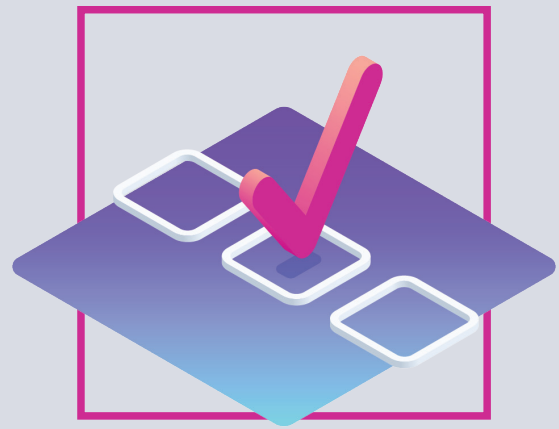
Talk to at least two. Three, if possible. Stick to process questions. Gather facts. Weigh opinions. Compare answers. Do they align? Contradict?

☐ **ROLLOUT APPROACH**

Get the risk-cost trade-offs of big bang versus phased. Demand to see clear objectives and measurable outcomes for the rollout's life-cycle plan.

☐ **VENDOR FINANCIALS**

Get a full report from a business credit bureau. Have your CPA review it. Ask for the latest report to shareholders, too.



6. Selection

☒ **CHOOSE VONAGE!**

Vonage nails all of the above. Unified communications integrated right into a CRM. Easy to use. Omnichannel. That's Vonage Business Communications.

Get started now