

# Discovery Questions



## Enabling Your Customers' Virtual Workforce

### **First thing's first:**

#### **General Conversation Starters**

- Is your business suffering any challenges related to COVID-19?
  - > Are your employees working from home right now?
- Were you already prepared for your users to work remotely?
- Are you running into any challenges with your users working remotely?
  - > What kinds of challenges? Security, connectivity, etc.?
- Did you have a work-from-home policy prior to the pandemic or have you put something in place recently?
- Do you have a disaster recovery playbook in place?
  - > When was the last time the playbook was reviewed?
  - > When was the last practice/test of the playbook and recovery process?
  - > If you do not, are you looking to implement one now?
- Are you working on any initiatives to accommodate newly remote employees/departments?
- Are there any specific regulations or guidelines you need to adhere to?
  - > GDPR, HIPPA, PCI-DDS, SOX, etc.
- How are your IT personnel handling the increased demand on their time?
  - > Have you considered implementing any solutions to ease their workload?
- What types of solutions are you looking at or have you already looked into to support a remote workforce?
- How many employees are in your organization that will or are working from home?
- What were your cloud and security strategies before the pandemic?
  - > Does the environment today effect your existing plans?
    - If no, have you identified what gaps need to be addressed?

#### **Conference Calling (Audio/Video)**

- What collaboration platform(s) does your organization use today? Do your employees interact virtually; if so, how? (on-prem vs remote, internal users vs external users, etc.)
- How are your employees scheduling meetings today? Are they experiencing any challenges?
- What is the average number of attendees on your conference calls? Do you have all company calls or events that would require a high-capacity solution?
- How many users would be or are using audio/video conferencing?
- Do you have a UC collaboration service you use in place today? (ie: Zoom, MS Teams, Webex)?
- Are all remote users domestic or international?
- Would you like to continue utilizing the same UC Collaboration service you have today and expand licenses?



## **Virtual Desktop/DaaS (Desktop as a Service)**

- Do you have a way to enhance your remote and mobile productivity? This can be achieved with a DaaS solution.
- Do you have a way to keep your employees on the latest hardware/software to support their application and compute needs?
  - > Are you having trouble keeping up with hardware/software refresh?
- Do your staff levels flex up and down and do you have trouble keeping up with laptop deployments? Eliminate the need with DaaS.
- Do you have HIPAA workloads that need to be safeguarded by eliminating the endpoint devices? Use DaaS to store the HIPAA or other sensitive data in a secure cloud environment, eliminating the possibility of a stolen laptop.
  - Office 365:
    - How are your employees accessing email today?
    - Is your email on a reliable platform?
    - Do you get the most out of your email and Office products?
    - How are you securing your Office365 infrastructure?
    - Do you know the who is accessing Office365 accounts, on what devices, and where from?

## **Security:**

- Have you had any issues with spam or suspicious links or attachments coming through email?
- Have any security issues, threats, or projects resulted from COVID-19?
- Are the company's remote desktops/laptops secured?
  - > If so, by what means?
- Does your IT team and/or systems administrator have visibility into all of the applications on your network?
- Can you identify legitimate traffic from your employees vs bad traffic from outside threats?
- Do you have any advanced solutions deployed? (ex: geo-fencing, intrusion prevention, content filtering, BOTNET, data loss protection, etc.)
- Are you familiar with identity access management? If so, have you considered implementing it?
- Do you have single sign-on (SSO) and/or multi-factor authentication (MFA) deployed and in use?
- Do you have a specific solution or process for device management? Do you utilize any type of mobile device management for users when remote or working from home?
- Do you offer a BYOD environment? If you do, how do you ensure your users have the tools and applications needed to do their job? Do you have a BYOD policy in place?

## **CCaaS:**

- How many employees (or agents) do you have working today in physical locations? Do you currently have any remote employees?
- Where are your agents located? What countries and how many per country?
- Is your network infrastructure 100% ready to handle 100% of your agents working remotely?
  - > (If no or unsure, a bandwidth assessment must be performed)
- Do your agents need to handsets, do they only use a softphone, or do they use both?
- Is seasonality a concern? Would you like the ability to "scale up and scale down" your seats based on seasonal demand?
- What level of support would you need from a CCaaS vendor during the pandemic? Is this different than during "normal" operations?
- What is the most important thing to you after implementation of a CCaaS solution for your remote workforce?
- Do you anticipate a significant percentage of agents remaining remote after the pandemic has dissipated, or do you only require a temporary solution?



## **UCaaS:**

- How many employees do you have working today in physical locations? Do you currently have any remote employees?
- How many of your employees are domestic? International?
- How many IT staff members do you have on-staff today? Will you need additional, outsourced staff for remote deployments?
- Is your network infrastructure 100% ready to handle 100% of your employees working remotely?
  - > (If no or unsure, a bandwidth assessment must be performed)
- Do you currently have a PBX on-prem, SIP trunking, or a hosted voice solution in place?
- Is 10-digit dial plan ok, or do you require a 3, 4 or 5-digit dialing plan?
- What does the majority of your calling look like? (i.e.: inbound, outbound, site-to-site)?
- Do you have a need to accommodate mobile and/or PC-based clients?
- Do you require hard phones at employees' homes or are softphones ok?
- How many and what type of phones (hard/soft) will need to be deployed remotely?
- Will you need to integrate any CRMs, UC Clients (i.e.: MS Teams, Zoom) into your voice system today?

## **Disaster Recovery (DRaaS) / Business Continuity (BC):**

- Do you have any type of disaster recovery or business continuity plans and/or solutions in place today?
- Do you have any challenges with your current disaster recovery solutions or business continuity plans?
  - > Are you happy with your providers? (level/quality of service, etc.)
- In the event of a disaster, are your users able to fully access email, applications, and data as they would during normal operations?
  - > If not, what is not accessible and is this being addressed?
- Are you testing your business continuity and DRaaS regularly (i.e. twice yearly)?
  - > If so, when was the last time they were tested?
  - > Were all the tests successful or were any issues remediated and re-tested?
  - > If not, what is preventing the testing?
- Do you have any compliance regulations (i.e. HIPPA, SOX, etc.) or internal processes that make disaster recovery and/or business continuity a challenge?
- What will the financial and/or reputational impact be if one or more of your mission-critical applications goes down?
  - > Will the company survive?
  - > Would the loss be less than the cost of the solution to mitigate that loss?