

VOIP and AI BUYERS GUIDE



A Comprehensive Guide on how to leverage the latest technologies to make your business as effective and profitable as possible.

Technology is pretty cool. It can make our lives easier, make our business more profitable and more. But let's be honest, shopping for technology can be confusing and frustrating; especially when your tech savvy is more Grandpa Carl and less Elon Musk.

So. if the idea of shopping for a new communications platform gives you heartburn, then I hope this guide helps you feel confident in your technology research journey.

David Petree

Founder



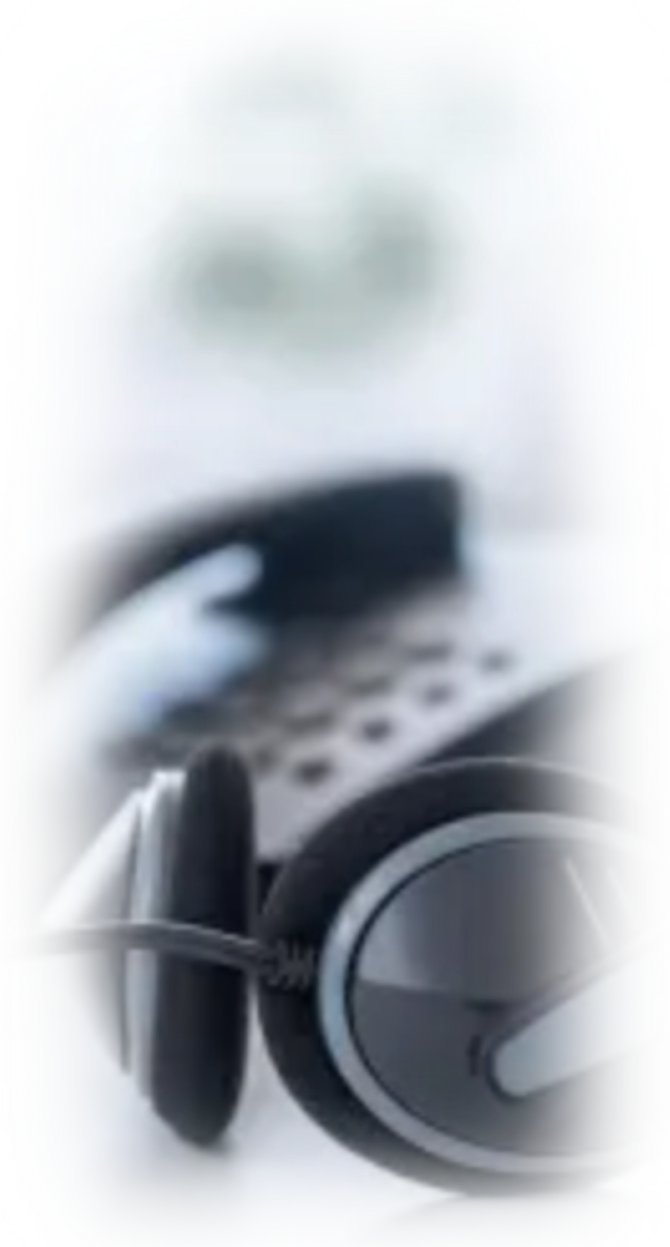
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A Guide to VOIP, UCaaS and AI

What follows is a guide on VoIP technology, written in laymen's terms that will:

- Educate you on VOIP, Unified Communications and AI
- Demystify the underlining technologies that run these systems
- What are the most popular features to look for when shopping for a new system
- How these technologies integrate with other tools like your CRM
- How AI works and how it's been adopted into VoIP
- What to look for when shopping for VoIP
- How to get the best deal on licensing, hardware and installation



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First, why work with us?

Proprietary Database

We take all your requirements and run them through a database of over 20 of the most popular VoIP companies. Based on your criteria, we will find you 4 or 5 ideal matches.

Vendors Competing

By having vendors “blind bid” for your business, we see an average of 20% or more savings over doing it yourself.

Project Managing the install

We will coordinate with you and the vendor to ensure a seamless and hassle-free transition.

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Traditional Phone Service (PSTN)

If you still have a phone system, you make calls like our ancestors; which is kind of cool 😊 Here's how it works.

Here's how your calls are routed:

(XXX) XXX- -XXXX x-XXX

Area Code	Prefix	Number	Extension
General Area	Neighborhood	Building/ Suite	Desk

Physical and Mechanical

This process requires infrastructure that is hard-wired so if any changes need to be made, it requires a technician to physically reroute copper. It's a hassle. This is why traditional telecom support is expensive and why traditional phone systems are very limited in what they can do.



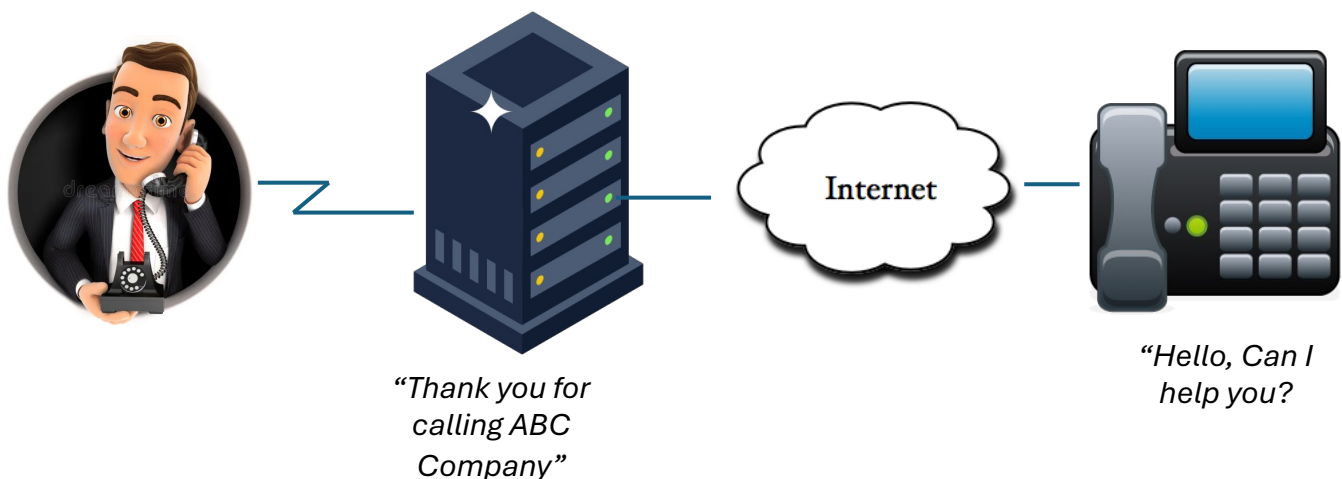
What is VOIP



VoIP stands for **Voice over Internet Protocol**. It is also referred to as IP telephony, internet telephony, or internet calling. It's an alternative to a public switched telephone network (PSTN). While it may sound it, a VoIP phone system is not complicated.

No Phone System

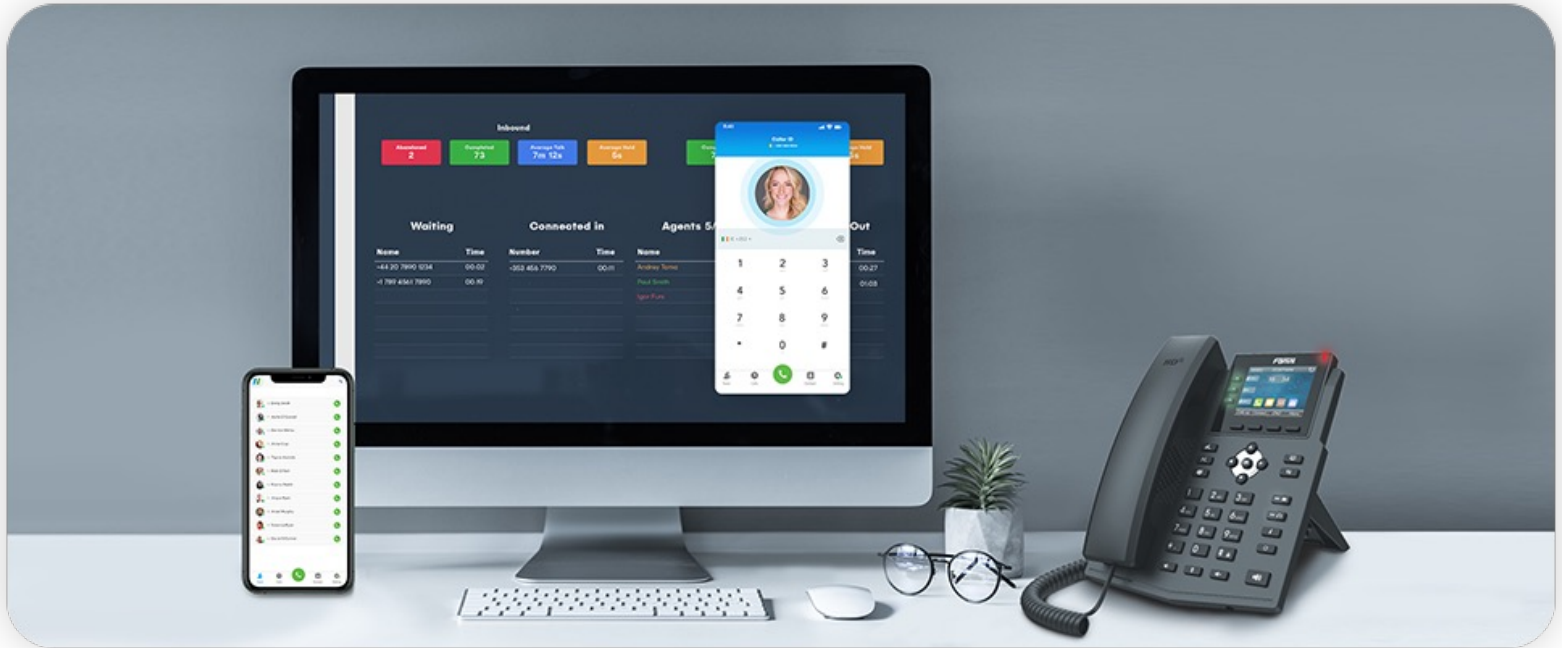
With hosted VoIP, there is no phone system on site. Instead, what you consider your “phone system” is simply software housed in a data center supported by your VoIP provider. When someone calls you, the phone call is routed to that data center and only the last piece of routing to your extension is the “over internet” part; otherwise, it’s like any other phone call.



Your analog voice is broken up into tiny packets of data and pieced together on the other side using software called “codecs”.

So why is any of this helpful?

With VoIP comes several benefits that are both cost effective and make your life easier



Cost

Typically, you'll see a 30-40% decrease in cost over traditional phone service due to its low cost to operate.

Flexibility

Since basically its software over the internet, you can get calls anywhere on any device such as a desk phone, smartphone app, desktop or tablet. And since the internet is everywhere, you can do this pretty much anywhere in the world.

Features

Again, its software. You can do things you never considered before. I'll cover the most common features next.

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VoIP Features

Here are the most common features to look out for when shopping for a new VoIP system. These should be pretty standard offers.



Auto Attendant

Direct Inward Dialing (DID)

Caller ID, Call Transfers, Call Waiting, Call Forwarding, Three-way calling

Call Park, Call Pick-up

Call Monitoring & Call Recording

Call Queues and Call Routing

In Queue Music & Messaging

Interactive Voice Response

Integrated Messaging

Notifications & Screenpops

Mobile Applications

Voicemail & voicemail to email

Conference Calling

Remote or Virtual Extensions

Analytics & monitoring tools

Call reporting

Ability to utilize VoIP & PSTN calling methods

Web based management

Application integration

Depending on the provider, different features require different licenses although some VoIP companies are “all inclusive”. Some features here are self-explanatory and some I’ll define below.

• Call Monitoring & Recording	Supervisors can listen, whisper to their employees or barge into conversations
• Call Queues and Routing	Inbound calls can be custom routed into a stand-by mode until employees are ready to talk
• Call Analytics	Custom reports outlining behavior such as average duration, hold time and results of call
• Application Integration	Your VoIP platform will integrate with other software apps you use. More on this later.

Unified Communications

Many of the VoIP companies you have heard of offer services called “Unified Communications as a Service”. It’s pretty much exactly what it sounds like. All your channels of communication, from phone calls, texts, instant messages, video and more are all consolidated into one platform; making everything more efficient and to help your business run smoothly.

THE EVOLUTION OF UNIFIED COMMUNICATIONS



Desk phones and telephony-centric tools formed the foundation of UC.



Over time, more advanced phone systems emerged, as did PCs and email.



The internet helped spawn other communication modes, including IM and video chat.



Mobile phones greatly expanded the communications landscape.



The rise of messaging and mobility presents new ways of working.



Communications platform as a service, or CPaaS, embeds communications into business apps.



Artificial intelligence and voice assistants could improve meeting workflows.

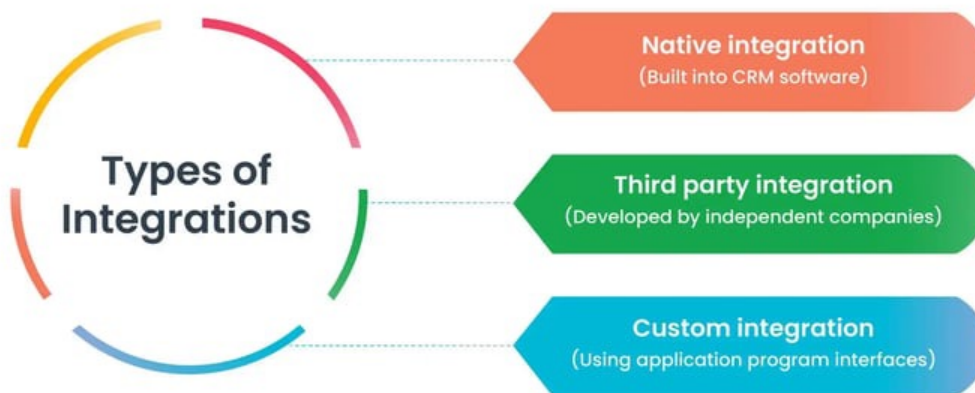
This is all much simpler than it sounds, and they are easy to learn. All your communication is in one place. We recommend seeing a few demos to see which platform is easiest and most intuitive for you and your employees



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Software Integrations

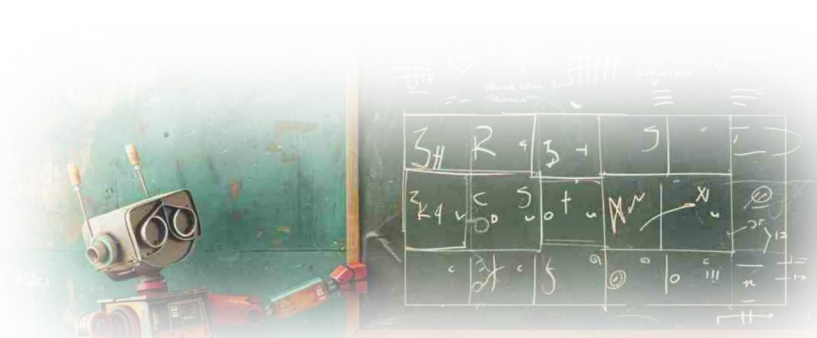
Now that your phone system is software based. You can have it integrate with other software systems you use to run your business. Things like sales calls automatically logged into your CRM, having your Point-of-Sale system “screen pop” when a customer calls in or phone calls made through Microsoft Teams are all very popular options worth exploring.



Be sure to consider, when shopping for a VOIP platform, what applications they integrate with natively. These “off the shelf” integrations are easy to set up; usually just a few clicks from within the VOIP user portal.

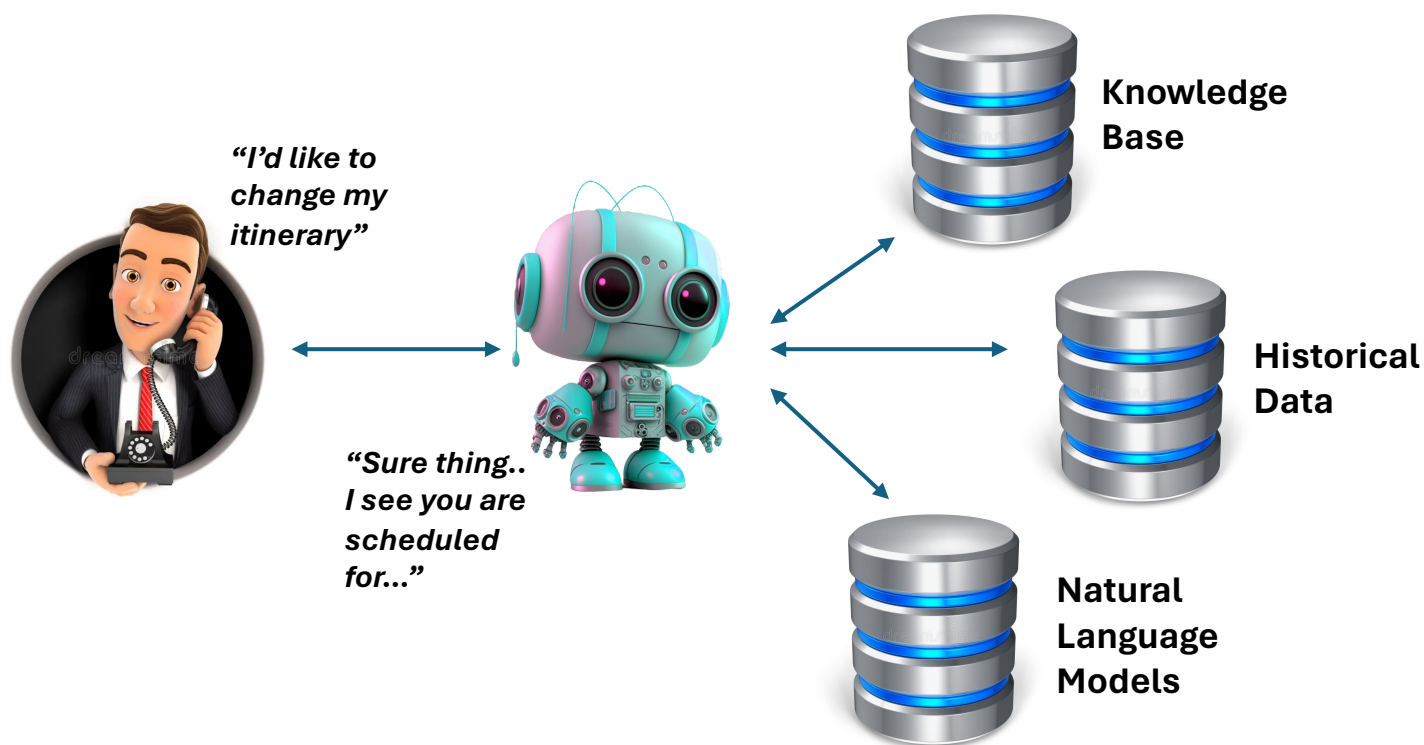
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AI Explained...



All these VoIP companies are integrating various levels of Artificial Intelligence into their platforms so let's unpack what AI is and how it helps.

AI is just software that accesses a knowledge base (such as all the user manuals for a set of products) as well as analyzes past experience to predict future outcomes and tries to communicate that as a human would; using familiar tone and phrases. That's really it.



These AI chat bots are set up for you. You just supply the data source; such as user manuals or access to your scheduling software. It's quite easy.

VoIP Companies adopt AI

With business calls like customer service and sales, there's three parties invested in that communication. The client or prospect, the employee and the manager who's interested in how these conversations go. These are the three components where VoIP companies are investing in new AI features. It's worth looking into to see if it's right for your organization.

For Customers



- Support questions such as “how do I change a fuse in my microwave”
- Scheduling requests like “I’d like to schedule an oil change for tomorrow”
- Billing inquiries like “I’d like to pay my bill”

For Employees



- Real time knowledge base “changing a fuse instructions are on page 41; would you like to send a link to the customer?”
- Internal systems “I need to call in sick today” “Ok, it's been noted, and 8 hours have been deducted from your PTO”
- Coaching “Your caller is showing signs of frustration, would you like me to send them this 20% coupon for their next purchase”

For Management



- Key word reports “There were 41 conversations this week where your competition was mentioned”
- Tonality “At 1 minute and 8 seconds this caller showed signs of being frustrated, here is a link to the recording”
- Coaching “There were 14 sales calls this week where your salesperson never asked for an appointment, here is the report”

These AI solutions can save up to \$30 per customer interaction and 78% of customers prefer this type of self service for simple tasks. If you are interested in AI, look for VoIP companies that offer both web chat and voice response AI options.



IT SUPPORT

Proper Admin User Portal

Most VOIP providers offer an online portal for making moves, adds and changes. Some are better than others, be sure to ask us which are easiest to navigate. Some providers are “cloud native” meaning they built the whole system with a web portal in mind, and some just added a portal later to a much more complicated provisioning process. Those aren’t as easy to bring on and support.

Installation

When it comes to installation and support, these VOIP companies vary greatly. Some offer little to no support outside of some online videos. They typically sell these systems through IT companies as you need to be in IT in order to install and provision them.

Others are more user friendly, offer installation on-site and lifetime support. These installations can run anywhere from 10’s of thousands of dollars for on-site, \$500 to have someone remotely to guide you, or some will do the whole thing for you including your own project manager for little to no cost. Depending on what you are comfortable with will determine what vendors we recommend.

Meet Dave Petree

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David has been a speaker and advisor for over 25 years. He was a keynote speaker at the Federal Bar Association's summit on international cyber crime as well as testified before California Congress on small business automation. He was also a panelist at the United Nations Summit on Cyberspace in The Hague, Netherlands.

David holds patents on encryption and computing where they redesigned a personal PC to be immune to malware and ransomware.

His formal education is an Advanced Degree in Data and Systems Analysis from Oxford University where, for project planning, his team would often sit at the same table that CS Lewis and JR Tolkien would read each other's stories as members of a club called the "Inklings"

Ask him how a crime organization stole 50 Million Euro using a pair of shoes. It's a crazy story.