Deploying Microsoft Teams with Phone Systems

A Microsoft Teams User Guide for Businesses Considering Integrating Microsoft Teams Direct Routing with Voice Services

Evolve IP's Guide to Microsoft Teams Direct Routing Solution

SECTION 1: RACI

Thanks for your interest in learning more about the Microsoft Teams Direct Routing solution. This overview dives into the major considerations you'll want to think through, as well as provides advice on implementing Microsoft Teams Direct Routing independently or with a 3rd party enterprise voice provider like Evolve IP.

To start, here's a suggested RACI that covers many of the major Microsoft Teams Direct Routing milestones:

Implementing Microsoft Teams Direct Routing Responsibility Matrix

This RACI assumes you will use a 3rd party provider for your enterprise voice solution. If you're planning on going at it alone you can simply implement in Excel and assign internally.

- o **R = Responsible** - The entity who performs the action/task
- o **A = Accountable** - The entity who is held accountable that the action/task is completed
- o **C = Consulted** - The entity who is consulted before performing the action/task
- o **I = Informed** - The entity who is informed after performing the action/task

Phase	Item	Vendor	Customer
Design	Complete an implementation workbook including all user information, auto-attendants, hunt groups, contact center, receptionists, call recording	C	RA
	Provide documentation on existing call center routing and messaging such as call flow diagrams (if applicable)	I	RA
	Identify business & technical requirements for network, desktop, smart phones, tablets and VoIP routing, gateways, firewalls	C	RA
	Document requirements in your vendor applications	RA	C
	Verify and purchase necessary Microsoft licensing in Office 365 Customer Tenant for: E1, E3, E5, Phone System, Audio Conferencing, and Conference Room licensing	**	**
	Approve design	I	RA
Build	Build Hosted PBX and contact center solution on the vendor voice platform	RA	C
	Build the sub-domain, gateways, trunking, voice routing policies in Office 365 Customer Tenant	**	**
	Build user roles, permissions and PSTN usages in the Office 365 Customer Tenant	**	**
	Identify use cases for testing and document formal User Acceptance Test criteria	C	R

Phase	Item	Vendor	Customer
	Order phones, headset, accessories, and video conference equipment for delivery (depends if phones are purchased through Evolve)	RA	RA
	Install applications, bookmark web-based applications, test logins	C	RA
	Build your identity an access management instance for users to access the vendor's application	RA	I
	Build web-based portal for service management	RA	I
	Ensure that all network and firewall requirements documented by the vendor have been met	I	RA
User Acceptance Testing (UAT)	Perform user acceptance testing including routing, messaging, phones and video endpoints	C	RA
	Document testing feedback	I	RA
	Update solution based upon testing feedback	A	R
	UAT approval	I	RA
	Implement change freeze three days prior to the go-live date	A	R
	Finalize go-live testing and end-user change management plans	C	RA
	Finalize cutover plans	RA	C
	Ensure that every user has logged into MS Teams and confirmed access	I	RA
	Train system administrator(s)	A	R
	Train users on vendor applications	A	R
	Provide access to vendor knowledge base of system documentation, how-to articles, user guides, quick-reference guides, etc.	RA	I
Deployment	Document deployment feedback	C	RA
	Update solution based upon testing feedback	A	R
	Provide any supplemental training	A	R
	Take ownership of all voice administration activities including call recording, receptionist, analog ports, auto-attendants, and hunt groups	C	RA

**Indicates that the vendor is Responsible & Accountable and the client is Consulted OR vice versa depending if you have selected Your vendor on your sales order to provide enterprise voice administration to implement and support your Office 365 voice solution.

SECTION 2: MICROSOFT TEAMS DIRECT ROUTING ESSENTIALS

When you decide to implement Microsoft Teams Direct Routing solution, Microsoft becomes your primary platform for both collaboration and communications. The solution requires users to be licensed for Microsoft Office 365 E1, E3, and E5 packages. These licenses contain the Teams application which is the primary application users will interact with daily.

You will then need to purchase the Microsoft Cloud Phone System licensing and optional services for desk phones, headsets, USB devices, audio conferencing, video conference rooms, and live events. All internal calling (sometimes referred to as "Teams to Teams") will take place on the Microsoft Phone System platform.

IMPORTANT: The Microsoft Teams Enterprise Voice solution drastically improves when an outside provider is selected as the Cloud Services Provider (CSP), but it is not required to deploy the solution.

- Why? As great as the Microsoft Teams Direct Routing solution is, **there are some significant gaps that make it less than ideal for many businesses**. Generally, Microsoft Teams Direct Routing is fantastic 'out-of-the-box' for small businesses but falls short for mid-sized and enterprise organizations. Here are just a few examples.
    - Quality of Service (QoS) – does not provide 99.999 reliability
    - It is missing major features (receptionist, multi-level auto-attendant, contact center, advanced hunt groups etc.)
    - Calling plan costs are very high, especially when adding any international business

There are more gaps which we will cover elsewhere in this document.

* When you choose Evolve IP's Cisco hosted PBX to implement your Microsoft Enterprise Voice solution you are selecting the two best platforms in the world for collaboration and voice applications. This ensures the voice quality, reliability and features required by today's growing businesses. In addition, Evolve IP develops and deploys advanced applications that significantly improve the user experience as well as the management experience for IT.

SECTION 3: MICROSOFT TEAMS PHONES AND HARDWARE

Microsoft teams desk phones vs. Softphones | Microsoft teams conference units and softphones

For the Microsoft Teams Direct Routing solution, clients are required to purchase supported MS Teams-enabled devices (desk phones, video room systems, headsets, and speaker phones). A list of these devices can be found here: Teams Devices.

The devices register to the Microsoft Phone System for firmware, dial tone and feature functionality. The authentication process, technology, and features vary drastically from one manufacturer to the next.

Should you choose to partner with a provider for enterprise voice some will sell you a selection of these devices. However, clients can also purchase their devices separately to use with the Microsoft Teams Direct Routing solution. Typically, your business will be responsible for authenticating the phones as they require the user's Microsoft AD Credentials (Windows login) to authenticate to Office 365.

Evolve IP Tip: based on our testing, Evolve IP recommends Yealink for desk phones used in a Microsoft Teams Direct Routing deployment.

Advantages of Microsoft Teams hardware

1. The Microsoft Teams softphone turns any device (work laptop, tablet, personal computer, Chromebook, etc.) into a fully-featured telephone that users can operate anywhere there's an Internet connection.

2. Physical Desk Phones – Essential telephony capabilities with new features such as launching 'push button' Microsoft Teams meetings.

3. Video systems – Users walk into a conference room last minute or only have a couple minutes to transition from the last meeting. As a result, they want the equipment to work with as few 'clicks' as possible. New video systems enabling Microsoft Teams Meetings accomplish this goal with meetings getting up and running in just seconds.

a. The solution natively integrates with Outlook scheduling and MS Teams so users can simply start their meeting upon entry to the room. A Conference Room license from Microsoft is required for this solution.

Evolve IP Tip: Evolve IP recommends you purchase Microsoft Teams enabled video room systems, such as the LogiTech Tap Room Bundles, that provide all the video, audio, and tablets needed to easily integrate Microsoft Team conference room meetings.

Evolve IP Tip: USB Devices and Accessories – Many users will need a compatible headset for the best experience with Microsoft Teams however many current headsets will not function correctly or fully. Evolve IP recommends that you test your existing headsets for compatibility and quality calling. Additional USB devices can provide speakerphones for users that work in a quiet area and do not wish to use a headset or feel more productive with a USB speakerphone.

Microsoft Teams Phones

Users are used to the legacy features on their phones and you're going to need to manage their transition to newer, modern tools. Here's what the communications experience will look like for your organization going forward.

Microsoft Teams Desktop Phones

Microsoft Teams enabled phones focus the user experience around meetings, calendars, call history, and searching a directory. In short, they are looking to mimic your mobile phone experience OR simply pair up a desk phone with a mobile phone application.

This MAY be a big change for users that want:

1. Buttons to "see when other people are on the phone"
2. Shared lines with their boss/assistant
3. Intercom / Push to talk

You have numerous choices for Microsoft Teams enabled devices. Microsoft [maintains a webpage](#) of certified devices which is updated as manufacturers complete the certification. The devices are desk phones, USB devices, headsets, and video room systems.

Each manufacturer determines the feature functionality based on the operating system they use on the phone, demand of features for phones versus application features, Microsoft supported functionality, and vision of user experience.

A best practice is to setup your devices in advance of the cutover date, prepare your users for a different experience, and train your users on the important feature functionality used for daily calling and interactions.

Users will likely raise questions and concerns to which you can address with how to handle on the Microsoft Teams platform going forward. It's important to remind them that you're not trying to replicate their existing phones and functionality.

Conference Room Equipment

Microsoft Teams Video Room Systems should make your user experience better as most of the legacy systems in the market require multiple steps to operate, are expensive and many are unreliable. You'll begin by purchasing the Conference Room licensing and Teams Room Systems. Once the systems are installed your rooms are easily scheduled through Outlook Calendar / Exchange.

Users will be excited to see conferences start with one-touch of the tablets running the Teams application. You will need to manage and communicate about the dangers of "squatting or stealing" conferencing rooms. Make sure your entire business knows how to run effective meetings and avoid the pitfalls of stealing conference rooms.

SECTION 4: MICROSOFT TEAMS DIRECT ROUTING CALL QUALITY & MICROSOFT TEAMS DIRECT ROUTING QOS

Call quality is the key consideration that needs to be understood with Microsoft Teams. Although mobile phones have become ubiquitous in today's society we all experience regular issues where calls are choppy, garbled, or seem like we are talking to a person that is submerged underwater -- THAT is the "call quality" we are talking about.

There are a few key technology fundamentals that you need to understand:

Microsoft Teams Direct Routing Quality of Service or QoS – QoS in a nutshell is about ensuring the priority of voice and video traffic over other traffic (web, email, file sharing) in a network. Think of QoS as providing a dedicated "Carpool Lane" for your voice traffic that never experiences congestion. Microsoft provides several methods for implementing and managing QoS for Microsoft Teams deployments. There are pros and cons to each especially how Windows and MAC operating systems handle traffic differently.

    a. QoS via port-based tagging, using ACLs on your routers and firewalls
    b. Implement a GPO to direct MS Teams devices to insert a DSCP value in the IP Packet headers to identify it as voice or video
    c. A combination of both port-based tagging and DSCP values

Once you have selected a method for implementing QoS, there are 5 high-level tasks to ensure you are ready for Teams Direct Routing:

- Verify your network is ready
- Select a QoS Implementation method
- Choose initial port ranges for each media type
- Implement QoS Settings
- Verify the settings and policies are correctly in place

* Evolve IP Tip: For remote users, often times MS Teams traffic will process properly over public Internet directly to Microsoft's cloud, but there are additional considerations. For example: proximity to wireless

router, plug an Ethernet cable directly into Internet router, device performance with CPU, RAM, and overall practices for open tabs, streaming music, and processes running in the background.

No matter where your users are located, Windows users should be configured to QoS policies to best effectuate call quality using Microsoft Teams. Follow the Microsoft Guide for <u>Setting QoS on Windows Machines</u>.

Once you've taken the proper steps to setup your network, workstations, and endpoints for QoS with Microsoft Teams, we recommend that you use the Microsoft tools available for monitoring and troubleshooting call quality. Please follow the Microsoft guide for <u>Call Analytics and Quality Dashboard</u>.

* Evolve IP Tip: to ensure enterprise-quality voice QoS businesses will be best served leveraging a dedicated 3ʳᵈ party voice platform – such as Cisco. This can also eliminate several feature gaps in Microsoft Teams direct routing solution.

SECTION 5: MICROSOFT TEAMS ENTERPRISE FEATURES AND IMPORTANT FEATURE GAPS

Microsoft Teams Call Recording

In today's world, the need for call recording increases every day and with Microsoft Teams you will need to consider whether call recording is a requirement for your business or a future opportunity. In the cases of contact centers, it's almost always a requirement for agents. A critical gap in Microsoft Teams recording solution is that **since** all internal calling remains on the Microsoft Teams platform, **the ability to record internal calls is not currently available**.

Microsoft Teams Meeting Recordings

Microsoft Teams meeting recording is offered natively in the Teams application. When users schedule a meeting using the Teams app it is ready to go. The user needs to manually turn on the recording functionality, then they can pause/resume or stop the recording. When the meeting is complete, the user gets a notification and the recording is available in the Teams Meeting channel and the Stream application for playback, interaction, notation, etc. When a meeting starts recording, the users, via the application or phone, are provided a notification that they are being recorded to assist with user notification regulations.

User-Level Call Recording

This functionality provides businesses with the ability to record calls for all users, or a subset of users, in your organization. Common features associated with User Call Recordings include:

- Record all calls automatically
- Initiate recording on-demand
- Pause and resume call recording
- Stop a recording early

* Evolve IP Tip: As compliance for Microsoft Teams direct routing is new there may be gaps in 3rd party supplier offering. Be sure to ask how a provider backs up their compliance claims and for any audits /

certifications they can provide. For example, Evolve IP offers solutions that meet certifications and has been audited. We also provide essentials like a Business Associate Agreement (BAA). See below for a detailed look at compliance.

Microsoft Teams Reports – Microsoft Cloud PBX or Call Detail Reports (CDR)

The Microsoft Cloud PBX is your primary user PBX. As a result, the Microsoft Teams Direct Routing platform is the primary location for your Call Detail Records and Phone System reporting on user activity. Administrators have access to the reports section in the Office 365 portal to view and configure and also have the ability to monitor calling, usage, devices even down to the operating systems that are used to generate the calling, and more.

Here is a link to see and learn more about <u>Microsoft Calling Reports</u>.

Microsoft Teams Contact Center Reports, Dashboards, Analytics:

Currently a Microsoft Teams Contact Center does not exist. However, vendors like Evolve IP, that provide a platform level integration between Teams and their solution can fully enable a Purpose-Built® solution that unifies your business. This includes rich reporting and analytics that drive key insights into your business.

Key elements to look for include:

- **Contact Center Reports** – Standard reports that are often utilized in contact centers across numerous industries that allow filters to provide the right information to supervisors. These reports are often configured and scheduled to be delivered via email to key stakeholders.
- **Wallboards & Dashboards** – A web-based application that provides numerous views across one or multiple queues, agents, and teams. Thresholds allows visualization to capture the attention of users and managers to act when metrics display exceptions. SLAs are configurable to show an easy display of performance.
- **Analytics** – A business intelligence application that takes contact center metrics into a format that allows analysts and managers to interact with the data. Vendors offers a solution designed to meet our contact center clients' needs for additional business intelligence for those businesses willing to dedicate time and resources toward business intelligence.

Gaps in Microsoft Teams Direct Routing: Key Considerations

It's likely that 80% of your business has standard needs for communication; phones (physical or soft clients), call handling, and call processing both domestic and international.

However, it's often the 20% of the communications and call processing that become the most critical; services like receptionist, auto-attendants, hunt groups, overhead paging systems, front door access, call recording, and more.

It's critical to consider all aspects of your communications platform and usage to ensure you are able to provide all of the services your users need to run the business. **We believe that for the majority of mid-market and enterprise businesses a tailored approach; integrating Microsoft Teams Direct Routing with enterprise telephony will be required.**

Here are some common scenarios where businesses will have to sort through gaps in Microsoft Teams Direct Routing.

Microsoft Teams Receptionist Application

This feature is unavailable in Microsoft Teams Direct Routing.

If you're unfamiliar with the term. The Receptionist Application handles main number calling providing the answering individual with the ability to process and route calls quickly by seeing if users are in the office or on the phone.

Evolve IP offers a web-based application that will work simultaneously with the MS Teams application and/or desk phones. The application affords them the opportunity to work from anywhere and process calls whether under normal business circumstances or during a snowstorm. They can see users' phone presence, make notes on availability, easily provide a warm-transfer or blind transfer for call handling, transfer to voicemail, set favorites and more.

Single-Level vs Multi-Level Auto-Attendants

An auto attendant is an automated receptionist, that provides callers with various greetings and options to transfer to another user, hunt group, call center, extension or voice mailbox. Microsoft offers a basic,

single-level auto-attendant that only offers calls to a single user, operator/receptionist or a call group. This is typically not a long-term solution & is not sufficient for most larger businesses where a **multi-level** auto-attendant is needed.

A multi-level auto attendant feature is not available.

A multi-level auto attendant is based on the existing single level auto attendant capabilities (the ability to transfer to the operator, dial by extension, dial by name, transfer with prompt, play an announcement, repeat the current menu, transfer to voice mail, and repeat menu) with the addition of the support for sub-menus and holiday schedules from the primary auto attendant level.

*In addition to offering the basic functionality from Microsoft, Evolve IP's multi-level auto-attendants provide the ability to send calls to hunt groups, off-net extensions, multiple hunt groups, messaging for directions, voicemail, warehouse analog extensions, and more.

Microsoft Teams Hunt Groups / Call Groups

Within Microsoft Teams Direct Routing, traditional hunt groups are now called "call groups" and they don't provide the same functionality of hunt groups with flexible options that IT / telecommunications professionals are accustomed to.

Microsoft Teams Call Group (single option)

- Microsoft Teams Call Groups are solely designed for call coverage so when a user's phone rings it can be answered by other users.

Multiple Teams Multiple Hunt Groups & Advanced Routing is not available

- Microsoft doesn't allow for separate phone numbers from users and only attaches them to hunt groups.
- No capabilities for routing for routine options such as longest idle, round robin, simultaneous ring, even distribution etc.
- Time schedule routing based on business hours, holidays etc. is unavailable
- Have no place to send calls such as an auto attendant, voicemail or another office if unanswered

In the end, it's an apples to oranges comparison if you're considering Microsoft call groups versus hunt group functionality.

* Evolve IP's Hunt groups allows users to handle incoming PSTN calls received by a hunt group from any of the following ring patterns: simultaneous, circular, regular or uniform. Users can also establish a no answer policy to redirect calls to another phone number or voicemail if unanswered.

Microsoft Team Call Recording

In the 21st century, the need for recording calls increases every day for a variety of reasons. You'll need to consider whether call recording is a requirement for your business or a future opportunity. In the cases of contact centers, it's almost always a requirement for agents.

As noted previously, currently Microsoft Teams only offers call recording for Microsoft Teams meetings and not at the individual user level. This is a critical concern for any business that has compliance concerns and / or monitors calls for quality control or customer experience.

This major gap in Microsoft Teams is a big reason that businesses are looking to leverage Microsoft Teams Direct Routing with Enterprise Voice from a service provider; one that can deliver call recording for some or all users with general mailboxes that may be associated with contact centers, auto-attendants, hunt groups, and department messages.

At Evolve IP, the majority of our clients take advantage of call recording capabilities for quality assurance or training purposes. In the Evolve IP platform, Call Recording is a "total recording" solution for designated users. In other words, all their PSTN calls are recorded – including inbound and outbound calls.

Given the benefits of the Evolve IP OneCloud™ architecture, calls that are often delivered to alternative locations (mobile phone, landline, etc.) are also seamlessly recorded. There are several call recording considerations that can be found in the Evolve IP Knowledgebase here: Call Recording, Notification and Legal Compliance. The biggest consideration is ensuring that your staff and their callers are notified that their calls (both inbound AND outbound) are being recorded.

For compliance, all call recordings and voicemail boxes are stored on encrypted disk.

Microsoft Teams Five Nines Reliability

Microsoft Teams is only promising 99.9% reliability vs. the traditional 99.99% reliability that enterprise businesses and their users expect. Leveraging a 3rd party provider like Evolve IP that integrates an enterprise voice solution at the platform level makes Microsoft Teams a viable solution for mid-market and enterprise level businesses, or any business that is not willing to accept lower voice quality.

SECTION 6: MICROSOFT TEAMS DIRECT ROUTING DESIGN CONSIDERATIONS

There are many decisions to be made on a Microsoft Teams Direct Routing project; some are strategic while others are more tactical in nature. Discussion topics you should consider are:

- o Do you need analog ports (with ATA devices or other analog interfaces) for traditional phones in warehouses, fax machines, overhead paging systems, or front-door controls?
- o Do you need account codes for tracking of calls, either verifiable or non-verifiable?
- o Are you recording calls? How will callers be notified for inbound calls? Outbound calls?
- o For interactions that are waiting in a call queue, what should their experience be like?
    - o Would you like to offer them relevant messaging? Marketing programs? Or music?
    - o Will this messaging be recorded internally by a member of your organization or will you be engaging 3rd party professional voice talent?
- o For non-voice interactions in a call center
    - o What standard "canned" responses do you want to make available to your agents to select from a dropdown list during an interaction? Does it vary by department or interaction type (chat vs. email)?
    - o What yellow warning or red alert metric thresholds do you want to establish globally that provides alerting across all client applications (Agent, Supervisor, and Wallboard)?

Microsoft Teams Direct Routing Change Management and Planning

At Evolve IP, we've had the privilege of working with thousands of clients as they migrate to our cloud-based solutions. One of the biggest pieces of advice we can give based upon those experiences is to never underestimate the impact of the technology change on **your entire organization!** Many organizations don't spend enough time and energy considering the impact associated with a major change in technology.

You have chosen to move from a calling 'first' experience to making collaboration and other forms of communication the top priority. As a result, it's no longer about blinking lights and putting a person on hold. It's about meetings, conference calling with video and providing "call coverage" for important users in your organization.

Here are a few critical recommendations:

Microsoft Teams Adoption

In working regularly with Microsoft clients, we find that most are in varying degrees of transition for widespread Teams adoption. *You need to carefully evaluate other collaboration and communications applications in your organization today and plan to transition away from most of them.*

- Replacing other web meeting platforms for most users and get them using Teams Meetings
- Replacing traditional audio-conferencing platforms with Teams conferencing
- Conference room audio/video equipment is often replaced with Teams-enabled units for a better one-touch user experience
- Filesharing (network drives) often migrates to OneDrive or similar online storage
- Unify around Microsoft Teams Outlook calendar meetings as they easily initiate Microsoft Teams meetings

REMEMBER: User adoption increases as communication and training increase. As a result, the project becomes more successful as your users become more productive and more communicative, plus they will enjoy the service more!

Improving Microsoft Teams User Adoption

COMMUNICATE! COMMUNICATE! COMMUNICATE!

Our advice is to over-communicate about the change and specifically WHY your business is making this change.

- What are the benefits?
- What challenges does it solve?
- Lay out some milestones and timelines, so your users know what and when to expect to invest their time in learning new technologies.

Communicate repeatedly using different platforms: conference calls, recorded video messages, and email. It's critical to talk about the project both formally and informally among your teams across ALL these mechanisms.

What's In It For Me (WIIFM)

Everybody perceives "changes" through their own internal lens and thinks … WIIIFM (WHAT'S IN IT FOR ME!?). Here are some key aspects to address WIIFM for your users:

- Audio and video conferencing
- Mobility apps with push notifications
- Persistent chat, channels, @mentions
- Integrated file sharing
- Recording of calls and meetings
- Upgraded contact center

As you begin to layer Microsoft Teams into your organization be sure to identify a tiger team of users and early adopters to start using the new features and become internal advocates.

In addition to known champions, all organizations have informal influencers who won't understand the goals or may perceive things in a negative way. They can quickly torpedo your team's morale and create a toxic climate around this change.

We recommend that you engage some of these associates directly in the project by asking them to be part of the tiger team, this will allow them to become an advocate for the new solution and may help smooth adoption when you roll out to the full organization.

Go-Live Support

A final step is to have on-site support the day Microsoft Teams Direct Routing goes live where knowledgeable staff is available to assist users. It brings comfort to have "experts" walking the floor to help them with the new technology. Focus on these key organizational areas:

- Contact Center
- Receptionists

- Executive assistants
- Sales

There are always little things that come up on every go-live so having a support system in place first is critical. We encourage our customers to bring their staff in a little early on these days so they can take a few extra minutes to get themselves mentally prepared for the new rollout.

It also helps to make the go-live day more festive where breakfast and lunch are served for everybody and there are plenty of "goodies" to keep everybody energized and smiling. The reality is the day of the big go-live can be a little stressful or chaotic and that it quickly settles down after a couple hours. Take the time and make sure that everybody is truly prepared and knows what to expect ahead of time.

Training, Training, Training

There are a few responsibilities you want to carefully segment and address with training:

- Use of Microsoft Teams application functionality
- 3rd party enterprise-voice applications
- Microsoft Teams Enabled Devices

Microsoft Teams Application Functionality

Typically, you will be responsible for training your users on the essentials of the Microsoft Teams application for desktop and mobile use. This includes all of the standard voice controls in the Teams application, such as Hold, Transfer, Mute, etc. as well as collaboration features.

A 3rd party provider should be able to provide you with end user documentation via a knowledge base to help with training efforts and save you time. Additionally, Microsoft has 'how to' videos and the Internet has thousands of tips.

* Evolve IP Tip - As you get users on the system be sure they are sharing their own best practices and advice to others in the organization. Set up a Teams Tips Chat!

Training on the standard use of Microsoft Teams functionality will never end! Users will constantly be learning about new features and changing their business processes as new features are introduced by Microsoft.

Evolve IP's Approach to Microsoft Teams Training

Evolve IP trains on the following applications that are critical to implementing and integrating Microsoft Teams into key parts of your organization:

- **OSSmosis Service Management** – Your administrators need training on opening and managing support tickets. They will be expected to make changes to common services, such as: user features, auto-attendants, hunt groups, contact center, call recording, IVR, and more.
- **Call Recording** – Supervisors and Quality Assurance groups need training on accessing recordings, as well as filtering, searching, and listening to call recordings for scoring and ensuring standards are met.
- **Receptionists** –Receptionists are typically the 1st point of contact when callers reach your organization and you want to make a good impression. We make sure they can login to the receptionist application and are fully trained 2 weeks before the cutover / port date.
- **Contact Center applications -** Ensure applications are available to your users, based on their ability to login to the applications, 2 weeks prior to the cutover (phone number port date). Begin training on the application 1 week prior to cutover date and focus on their key interactions to effectuate a smooth transition, then continue training.

We offer three flavors of training sessions:

- **Standard** – This is public, instructor-led training at scheduled times with numerous clients on a given application.
- **Premium** – This is an instructor-led web-based training scheduled with you at a coordinated time on one or more applications. This is the most common option for clients and billed hourly at the rate on your sales order by hours consumed.
- **On-site** – An Evolve IP associate will come to your facility for training. Travel and expenses are billed back to the client in arears. This is common for clients with contact centers.

Microsoft Teams Compliance Considerations

Most mid-market and enterprise businesses have regulatory requirements. When reviewing the Microsoft Teams Direct Routing Solution, as well as any 3rd party applications, you need to focus on 3 elements for security and compliance:

- Encryption of data in transit, such as an active voice call
- Encryption of data at rest, such as a recorded call or voicemail
- Providing tools to users and clients to help them prevent the improper storage of sensitive information

You are ultimately responsible for protecting data anywhere it is transmitted or stored including at a cloud provider. Therefore, it is critical that you select a direct routing and 3rd party application partner that will collaborate with you to ensure your regulatory obligations are met and compliance is assured.

The Microsoft Teams Cloud

The most important headline about the Microsoft Teams application is that it's classified as Tier-D compliant. That classification includes numerous standards both in the US and internationally. [The Microsoft security and compliance page](#) goes into further details around compliance framework, audit logs, eDiscovery, and more.

The Microsoft Teams application offers security for authentication when launching the app. Your organization can also setup multi-factor authentication in a variety of ways to increase security. After this point, your provider can address each of the elements that need to be addressed to meet compliance needs and provide detail on where information is stored.

Voice Encryption of Microsoft Teams Direct Routing With Enterprise Voice from Evolve IP:

For voice calling

Both the media and the signaling are encrypted by the Microsoft Teams application.

- First, when users make calls to and from Microsoft Teams, the entire call is encrypted.
- Second, when calls are placed between Microsoft Teams users and Evolve IP users, those calls are encrypted end to end.

- Third, when users place and receive calls with the PSTN (outside of your business), the calls are encrypted between the Evolve IP network and Microsoft network. *However, the PSTN itself is unsecure and no provider can encrypt calls out to landlines through the PSTN.*

For voicemail on users' direct numbers

Voicemail is stored in Microsoft's cloud and a transcription of the message is sent to the user with the audio file. The file itself is stored in the user's mailbox along with the transcription.

Microsoft's compliance, security, and BAA practices are in effect and are available on the Microsoft website [here.](here)

Microsoft Teams Compliance With Evolve IP

Evolve IP's solutions have been certified or authenticated for leading compliance initiatives including:

Payment Card Industry (PCI)

Every credit card transaction creates an opportunity for unscrupulous activities to occur and the damage can be significant; ranging from a simple one-time illegal purchase to a full-blown identity theft using people's stolen personal data.

As a Level 1 certified PCI Service Provider, the highest level of validation for payment card data security, Evolve IP demonstrates a strong security posture and dedication to information security for our clients. There are many credit card-related considerations that can be found in the Evolve IP Knowledgebase under "PCI DSS Compliance and Data Protection from Evolve IP"

Health Insurance Portability & Accountability Act (HIPAA)

The Privacy regulations of the U.S. Health Insurance Portability and Accountability Act (HIPAA) require health care providers, organizations, and their business associates, develop and follow procedures that ensure the confidentiality and security of protected health information (PHI) when it is transferred, received, handled, or shared. There are many HIPAA considerations that can be found in the Evolve IP Knowledgebase under "Achieving HIPAA Compliance with The Evolve IP Compliance Cloud".

HITRUST

The HITRUST Common Security Framework (CSF) was developed to address the multitude of security, privacy and regulatory challenges facing healthcare organizations. The HITRUST CSF was developed by healthcare and IT professionals to provide an efficient and prescriptive framework for managing the security requirements inherent in HIPAA. The vast majority of Payers and Providers have adopted this framework and this has quickly become a standard requirement for anybody in that supply chain.

In addition, we have been certified for SOC II, GDPR and numerous other compliance initiatives. Please reach out for more information at www.evolveip.net

ABOUT EVOLVE IP

At Evolve IP we Make Work Better™, ensuring employees are more productive, more mobile, more secure and less dependent on IT resources. We design Purpose-Built® solutions, tailored just for your business, that unify workspaces, collaboration and communications, and contact centers. Integrating blue-chip technology partners like Microsoft, Cisco, Citrix and VMware, with our intellectual property, Evolve IP's analyst-acclaimed solutions have been deployed globally to 500,000+ users and into the world's most well-known brands. All Evolve IP associates are focused on driving successful client outcomes and that has resulted in our scoring at the top of verified analyst and client satisfaction rankings.