

# 7 Steps to Unified Messaging Success

As workers become more mobile and clients expect an immediate response, unified messaging (UM) has become an increasingly valuable tool in empowering employees and improving customer engagement. With the right solution, organizations can increase productivity, strengthen customer support and support regulatory compliance. This article provides a basic guide to UM and describes the critical capabilities you need to consider when evaluating the best solution for your organization.

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## 7 Steps to Determining the Right UM Solution

### Step 1

**Interoperability:** Is the system compatible with all telephony systems, supporting both time division multiplexer (TDM) and IP environments simultaneously? What about email? Does it support all email systems and multiple systems simultaneously, including those on premises and in the cloud? The system you select should work with your existing investments as well as any solution you choose now or acquire in the future.

### Step 2

**Architecture:** Does the system support voicemail and UM users on a single system? Does it support all four types of UM architectures and enable you to mix these architectures on a single system? Most organizations choose to deploy UM for a subset of users.



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### Step 3

**Capabilities:** Can users access UM via the desktop, web, phone and any mobile device? Does the system offer a speech recognition interface, voicemail-to-text transcription, and text to speech?

### Step 4

**Enterprise Impact:** Does the system support a message buffer to reduce the impact on the LAN and email server? Does it offer web access using a variety of web servers and clients? Does it support the compliance requirements of your company and industry?

### Step 5

**Secure Message Access:** Can an administrator restrict certain users from saving copies of the message locally? Can an administrator restrict users from forwarding messages? Can the messages be delivered using a secure streaming technology, accessible from any device?

### Step 6

**Availability:** Will the system function during a network failure, which means supporting all call processing applications, taking new messages, and allowing users to manage their inbox, including options to delete, forward and save new messages?

### Step 7

**Cost:** Is the total cost of ownership in line with your company's objectives in terms of the licensing, annual maintenance and the additional hardware or software required to deploy UM?



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1 "State of the American Workplace," Gallup, February 2017  
2 "The ultimate mobile email stats review," EmailMonday, updated July 2017

## The Four Types of Unified Messaging

There are four types of architectures for UM systems. To properly leverage the value of each UM architecture, it is important to understand which features and functions are most valuable in meeting both corporate initiatives, such as compliance, as well as the demands of your users.

**Server Unified Messaging:** This is the easiest type of UM system to access from mobile devices. All messages—voice, fax and email—are placed into a single server, which is the email server. This allows users to access their voice messages from any of their email clients, whether desktop, web-based, smartphone or other mobile device.

Voice and fax messages can be treated as email messages, which means they can be forwarded, moved into folders or deleted using the same commands as email messages. This simplifies backups and enables users to access voice and fax messages through the web email clients. Users can also listen to their voice messages and take action using their mobile devices.

**Client Unified Messaging:** Voice and fax messages remain on their separate servers, and emails remain on the email server. Users can access all of their messages through a common email client.

This architecture puts less of a load on the LAN and the email server. It also functions regardless of the type of email system used by the organization. Most Client UM systems can be used to give users access to their voice messages even if they don't have an email system. Client UM systems typically make the most sense for local desktop users.

**Secure Unified Messaging:** This is the most secure architecture for UM. Voice and fax messages remain on the voicemail server, and email remains on the email server. Users can receive notifications via email but access voice and fax messages through a separate web browser or mobile client.

For secure access, administrators can enable specific security features for specific users. For example, certain users can be restricted from saving a copy of their

voice messages on their local systems. They can also be restricted from forwarding messages outside of the system.

**Simplified Unified Messaging:** Copies of voice and fax messages are sent to the user at a specified email address as email messages with attachments.

This offers the smallest feature set of any of the architectures, but it also provides advantages that are valuable to certain users. For example, users can use any email system to access their voice and fax messages and use standard tools such as Microsoft Media Player or Microsoft Image Viewer to hear or read their messages.

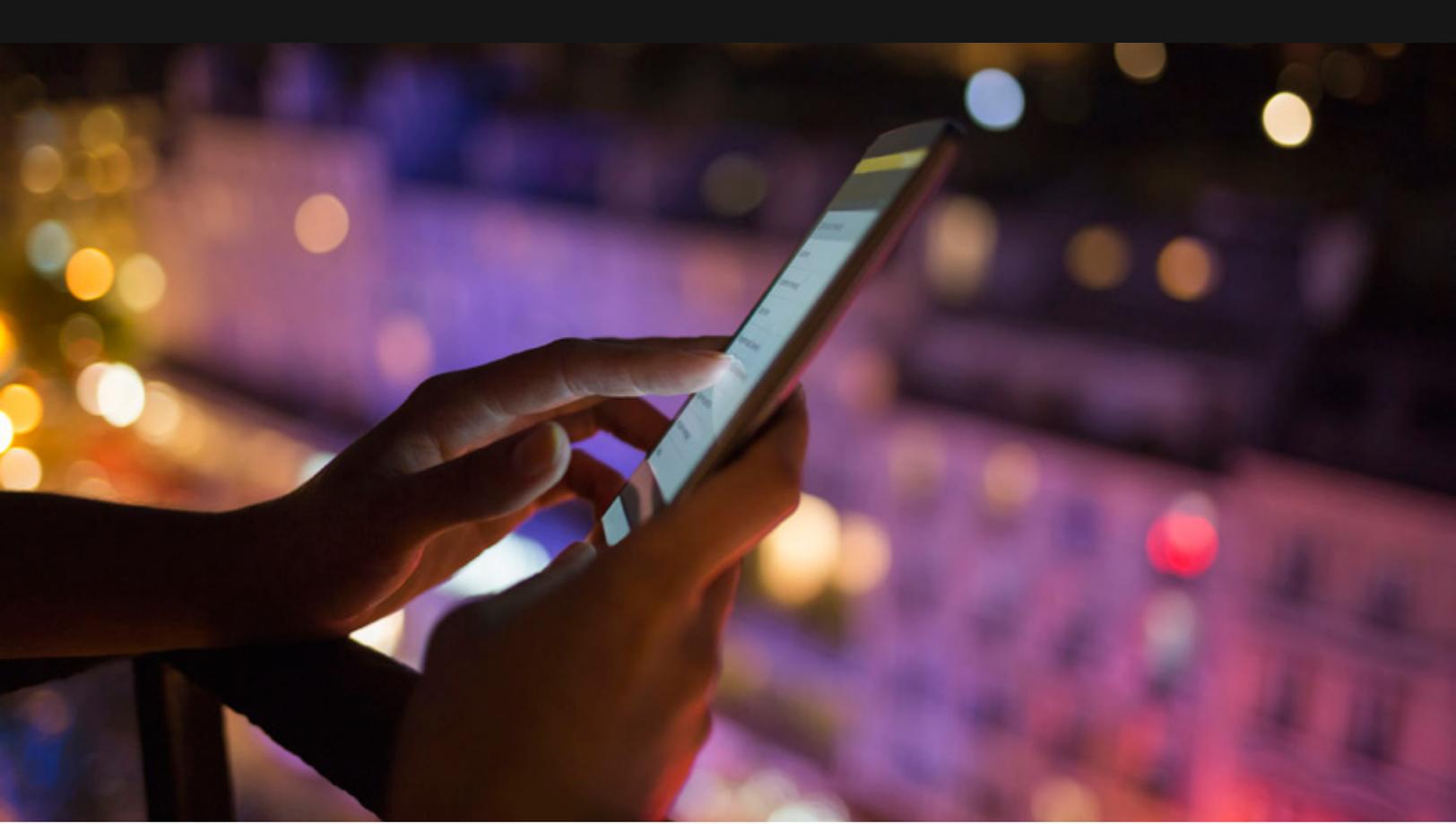
The Simplified UM system is also easy to manage, requiring no ongoing maintenance. It can work well for some small businesses because it is easy to deploy and relatively inexpensive, and it can be a way for larger organizations to try UM or enable key workgroups or lines of business.

## Targeting UM for Your Environment

You should ask your UM provider about the ability to mix and match different UM architectures for different users on the same system. Whatever mix of UM architectures you deploy, keep in mind the primary goal when deploying UM is to empower your employees—no matter where they are located, what device they are using, or whenever or however they are accessing their messages.

To accomplish these goals—any device, any location, any time—it's important to evaluate how the system fits into your existing IT environment. Not every UM system is designed to work with every possible customer enterprise IT system. Some systems are designed for a single telephone system and some for a single email system, typically Microsoft Exchange, Office 365 or Google Gmail. You may be able to buy modified versions of these systems, but you will get less functionality and flexibility.

So, one of the first things to evaluate is how well the system works with your current email systems and how well it integrates with your current phone systems. Due



to acquisitions and expansions, many companies have several different types of phone systems. You don't want a UM system that works for only some users. That model is not only impractical, but also expensive. With multiple systems, you spend more on maintenance, personnel, equipment and training.

Instead, you should standardize the UM system across the organization—a single system with the flexibility to accommodate different UM architectures for different groups of users—and protect your investment in the future by choosing a system that is completely independent of either the telephone system or the email type.

Another important consideration is the impact of the UM system on your existing enterprise data system. Depending upon the type of architecture you use, it could affect your LANs, email servers and enterprise storage. You can mitigate these potential problems by using a solution that supports every type of UM architecture and every type of user: voicemail only, Server UM, Client UM, Secure UM and Simplified UM.

Finally, you want to make sure that the system you are using enables you to meet the regulatory compliancy and data protection requirements of your industry.

For example, companies in certain industries, such as financial services, are required to save voicemails for a certain period of time. Failure to do so can result in heavy fines and brand damage. For firms regulated by the Securities and Exchange Commission or FINRA, the Securities Exchange Act requires the retention of emails for at least three years. In these highly regulated industries, demand for separate storage options for voice messages and email is critical to meeting different retention policies. The best way to address compliance challenges is to consult with your corporate compliance officer or legal counsel when considering the various UM solution architectures.

## Choosing the Right Vendor

AVST has been the leader in UM for more than 20 years. It is regarded as a best-of-breed vendor because it has been innovative in modernizing its solutions to meet the changing needs of customers—particularly in supporting mobile users and complex enterprise IT environments that comprise on-premises and cloud UC solutions.



AVST's CX-E is the most flexible UM system on the market, offering customers all four types of UM architectures and support for all the major PBX and email systems, on premises or in the cloud. With the CX-E, customers can:

- Support multiple email servers simultaneously
- Integrate email, voicemail and fax into a single view
- Enable access via mobile device, email client, web interface, speech or dual-tone multi-frequency (DTMF) telephone
- Flexibly support corporate requirements for security, compliance and confidentiality
- Incorporate new capabilities such as speech recognition, voicemail-to-text and text-to-speech

Because of the flexibility and functionality of AVST's solutions, customers are able to achieve significant business value. Business benefits include more productive workers, engaged customers, support for mobile users, cost management, a secure and compliant environment, reduced complexity, and a future-proofed solution that easily supports corporate growth, new acquisitions and workplace transformation.

## Conclusion

Unified messaging is a technology that has been around for more than two decades, yet it is perhaps more current and valuable today than ever. As the workplace continues to be transformed, with more mobile users, UM is a vital tool for improving collaboration, productivity and customer engagement.

To maximize the benefits of UM, it is important to choose a solution that meets the challenges of today's environment, particularly in supporting mobile users and complex IT environments that include on-premises and cloud solutions. Among the leading UM providers, AVST has been at the forefront of modernizing its solutions to support workplace transformation.

For more information about how unified messaging can help your organization empower your workplace and improve customer engagement, please visit **AVST**.