

FacetPhone Demonstration Guide

Before demonstrating, find a little about the prospective customer situation. This will help determine areas to focus on during the demonstration.

1. Will all the phones be in a single location?
2. How many extensions/stations & outside lines at each location?
3. Do they currently use an automated attendant or a live operator?
4. What is prompting their phone system search?

Also before demonstrating, get all your screens set the way you want them.

- Architecture drawing (Windows or Mac)
- Multi-office scenario drawing
- Teleworker drawing
- VoIP dial tone topology web page
- FacetCorp contact web page – Skype
- IP phone images
- In/out board at front desk image
- Call center screens and/or screen shots
- Net-TAPI info / screen shot
- FP Web Call Detail Report Generator
- FP VM/recording archive retrieval web interface
- Customer service positioning statement
- Competitive differentiators
- Price lists
- Prospect profile doc – for resellers
- Anything else you may need

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1. Overview
 - a. An IP-PBX for SMBs
 - b. Designed for people to use standard telephones
 - c. If phones have CID display, call waiting CID or VMWI, FP will use them
 - d. Users only need phone, not desktop GUI
 - e. But, GUI great tool if available ... and allows for this demo
2. Check that customer display settings are the same or higher than yours (e.g. 1024 X 768) – for Web demos only
3. As you prepare to start demo, explain that the system includes many features and we do not expect every company to use all the features. The idea of showing so many features is just so they will be able to determine which ones are useful for them.
4. Review architecture drawing and benefits:
 - a. Industry standard server & components
 - b. External media gateways
 - c. Standard analog telephone vs. IP phone and soft phone

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- d. Separate network path for GUI
- 5. Your FP GUI is pretty busy as it is set up more like an operator than a user for demonstration purposes.
- 6. User Watch Window – Also known as presence management.
 - a. Title bar description
 - i. Group concept
 - ii. Type of Window
 - b. User extension – roaming extensions
 - c. Enterprise Instant messaging – click on name, note the intuitive list of options for each user
 - i. Simple text messaging capability between users on the LAN/WAN (hence “enterprise”). Does not go out over public network (e.g. AOL IM)
 - ii. You can add multiple parties to the IM
 - iii. You can add groups to the IM
 - iv. Often used to quickly communicate information about active calls without interrupting the call participants’ conversation (e.g. “Joan, you have that call you’ve been waiting for on line 4.”)
 - d. Phone Status
 - i. Phone icon position = horizontal or vertical
 - ii. Color
 - 1. Green = phone will ring
 - 2. Yellow
 - a. GUI and/or audible phone notification on inbound call (call waiting)
 - b. From GUI can click on Pickup call and current call automatically put on hold, or can click on send to voice mail
 - c. If phone supports call waiting CID, FP will display it on the phone
 - 3. Red = calls go straight to voice mail
 - iii. Shape
 - 1. Round = normal user phones
 - 2. Square = operator phones – all ring at same time
 - 3. ACD Square = operator phones that ring available operators sequentially (one at a time) instead of all at once (i.e. at FC we xfer tech support calls to group rather than to an individual)
 - e. Work / Status – Presence management
 - i. Sort by column header (Java)
 - ii. Usage of this is totally optional by customer
 - 1. Some have the system automatically log people in at the beginning of the work day and out at the end.

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2. Some set it up so the user's not logged in profile just rings their phone & roll to voice mail after a set number of rings
 3. But many, like FC, take advantage of the presence management capability. If using it, all users can see the status of each individual, so no longer need to tell the front desk when leaving the building, going to lunch, etc.
 - iii. Status is changed on the Control Center window.
 - iv. See effect of changing the status on the other columns (e.g. Phone, IM & Work)
 - v. Call forwarding – with and without centrex (tying up 2 lines)
 - vi. Edit status definitions to show attributes of each status and ease of adding/modifying status [action, my configuration, configure, my status definitions]
7. Control Center – all users get this window
 - a. Current activity
 - b. Dial box – for typing in a number, pasting a number from web page, or using one from the recent history list drop down box.
 - c. Number of new voice mail messages (to be covered in detail later)
 - d. Status drop down list (already covered)
 - e. Six action buttons for current call
 - i. Hold (still owned by user. No limit on number of calls on hold)
 - ii. Hangup
 - iii. Park (global call available to all users)
 - iv. Transfer
 - v. Transfer to VM
 - vi. Conference
 1. Easy to setup concall – call first party, put on hold, call 2nd party, click on Conf button
 2. Multiparty conference calls
 3. Conference initiator may drop out of concall
8. Call Flow – now that we've talked about holding and parking, talk about the call flow options (keep in mind how customer handles call flow now)
 - a. Full time automated attendant (24X7)
 - i. If you know your party's extension, dial it now
 - ii. Press 2 for the company directory (which is first name OR last name with FP)
 - iii. Press 3 for department X, 4 for department Y, etc.
 - b. Live operator answers call and transfers call directly to the user
 - c. Live operator answers and parks call, announce the call to the user along with the park location, and the user picks up the appropriate parked call.
 - d. Part time automated attendant – In conjunction with b and c above, FP will pick up an inbound call if it goes for too many rings without

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- being answered. In addition, FP will automatically turn the night auto-attendant on at the end of the work day and off at the beginning of the work day.
- e. Direct Inward Dial (DID) for customers with T1s.
9. Active Calls Window – Very powerful window, especially for operators
- a. Call direction – You can see at a glance if the call is inbound or outbound
 - b. CID information on inbound calls
 - c. Which user is on which call
 - d. Which call is your call – My Active Call
 - e. How long the call has been active
 - f. How long the call has been on hold
 - g. Click on My Active Call
 - i. Hold
 - ii. Park
 - iii. Transfer
 - iv. Transfer to voice mail
 - v. Monitor call
10. Call Center Features (show live call center or screen shot of ACD monitoring)
- a. Record calls – continuous or on ad hoc basis
 - b. Monitor calls (supervisory)
 - c. Barge-in on calls
 - d. ACD (automatic call distribution) queue described earlier
11. Screen Layout / Group Watch
- a. Java-based graphical user interface allows you to layout, move, resize or delete windows with normal mouse movements
 - b. Can add/subtract windows under Window, Change Group Watch – Add a group watch to demonstrate simplicity
 - c. User's desktop layout can be saved as needed (Window, Save desktop layout) or each time they exit FP
12. Voice Mail
- a. TUI access very intuitive
 - i. Available for any phone anywhere
 - ii. Use to listen to VM, record prompts, etc.
 - iii. Intuitive commands for VM, e.g. 4 <left> replay or previous, 6 <right> skip to next, 5 <middle> switch direction
 - b. GUI access very powerful
 - i. Like Main screen, layout totally up to user
 - ii. New and saved message folders
 - iii. My and Group VM where you are member
 - iv. Sort by column header
 - v. Date/Time
 - vi. From – CID info
 - vii. Subject – Notes to self to help identify message (minimizes need to re-listen to messages)

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- viii. Duration
 - ix. Click on VM
 - 1. Play message on phone
 - 2. Play message on PC speakers
 - 3. Return call if CID info
 - 4. Forward Mail – ad hoc basis
 - a. User extension
 - b. Email address (goes as WAV attachment)
 - c. Record prefix note
 - d. Group
 - e. VM distribution list
 - i. Explain VM distribution lists often for companies with outside extension only employees. Or to communicate VM messages to departmental or geographic groups of employees.
 - ii. Email like implementation
 - 1. Reply - return VM message to initiator
 - 2. Group reply - return VM message to all on initial distribution list
 - 5. Forward Mail – all the time basis
 - a. Action, My configuration, Configure, My User Configuration, Voice Mail Handling
 - b. Voice mail delivery to:
 - i. Folder only
 - ii. Folder and email attachment
 - iii. Folder and email notify (note good cell phone usage)
 - c. While on this screen, point out the Idle rings and record all call areas
13. Computer Telephony Integration
- a. Dialing and CID-based screen pops from Outlook, Goldmine and ACT!
 - b. Outlook special feature for CID when no match found, auto fill new contact with business name and phone number from CID data.
 - c. Universal TAPI (UTAPI) for UNIX / Linux or Windows applications
 - d. Dial from FacetWin
 - i. Highlight number and dial
 - ii. Right click within a previously defined FacetPhone number field
 - e. Dial with UTAPI
 - f. Get CID with UTAPI – explain time savings
14. Interactive Voice Response (IVR) – FP has powerful and flexible IVR capability so callers can use the telephone to interact with the customer's computer (scripting required for this, could be fee based if FC does it)

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15. Call Detail Records
 - a. All transaction details go into simple flat text file
 - b. File can be opened / analyzed by any tool the customer chooses, including MS Excel
 - c. FP comes with a simple web interface for ad-hoc reporting (show this)
16. Price List – show their specific configuration
17. Return on Investment – as appropriate
18. Final questions
 - a. Customer Q&A on FacetPhone
 - b. What is their overall interest level?
 - c. What is their time line?
 - d. Is this project budgeted? If so for what time period?
 - e. What are their hot buttons and key areas of concern?