



POLY + MICROSOFT

How to Build a Good Plan Incorporating Various Users and Devices

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Melissa Bisbo- *Experience and Demonstration Theater Lead, Americas*



AGENDA

- WORKSTYLE PERSONAS- *JENNIFER ADAMS*
- BUILDING BLOCKS OF A GOOD PLAN- *CECILIO RINCON*
- HARDWARE- *CHUCK APPLEGARTH*

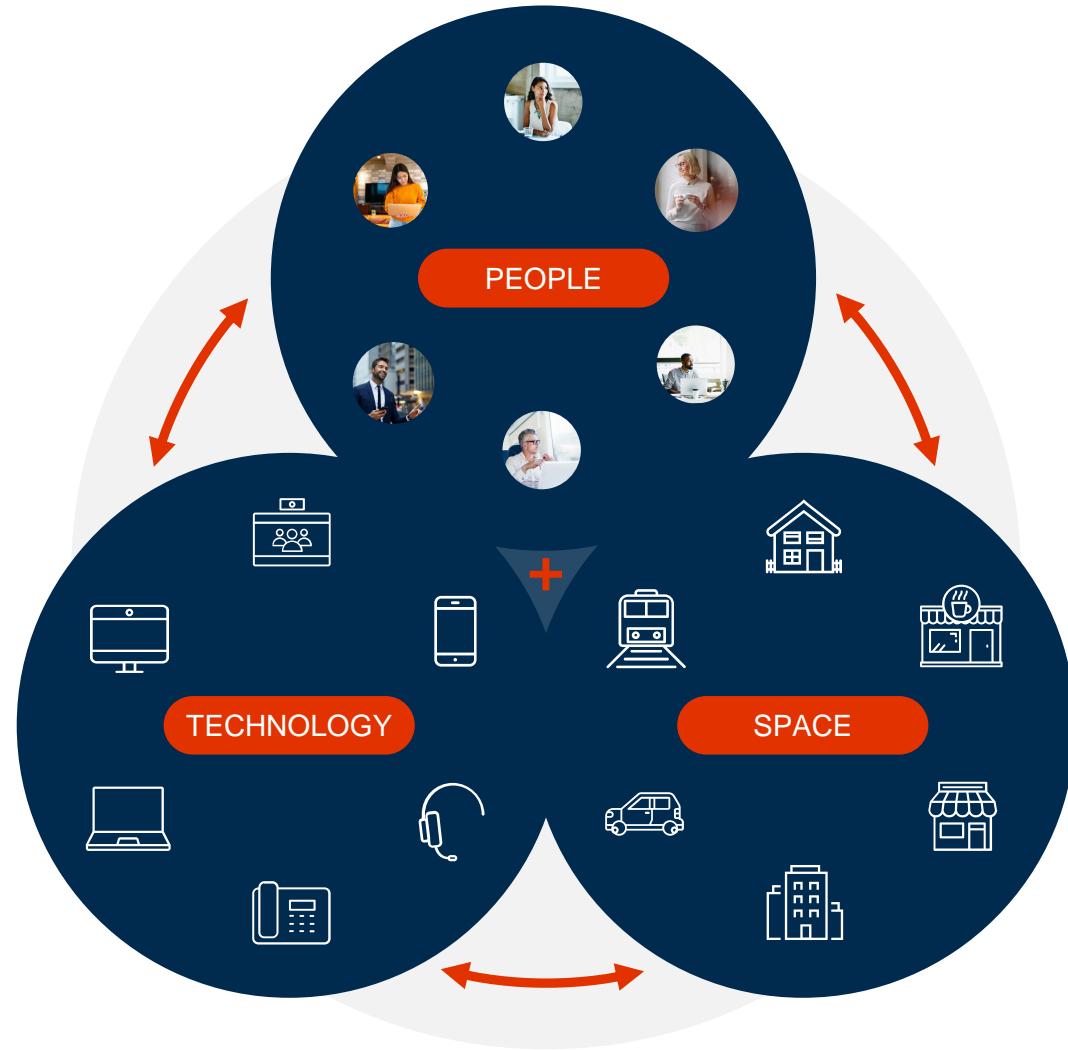


A WORKSTYLE FOCUSED APPROACH TO HYBRID WORK

Jennifer Adams
Poly



WORKPLACE NEEDS ARE CONSTANTLY EVOLVING



A circular inset on the left side of the slide features a smiling man with dark hair and a beard, wearing a dark blue suit, white shirt, and dark tie. He is holding a black smartphone in his right hand and pointing his index finger towards the text on the right. The background of the inset shows a blurred cityscape at night with lights from buildings and traffic.

OPPORTUNITY: FOCUS ON PEOPLE

2021 WORKSTYLE RESEARCH

METHODOLOGY

Research Completion: January 2021

Study Size: ~ 5000 respondents

Geography: US, DE, FR, AU, IN, CN, MX, BR

TARGET GROUP

Company Size: 4,300 (average)

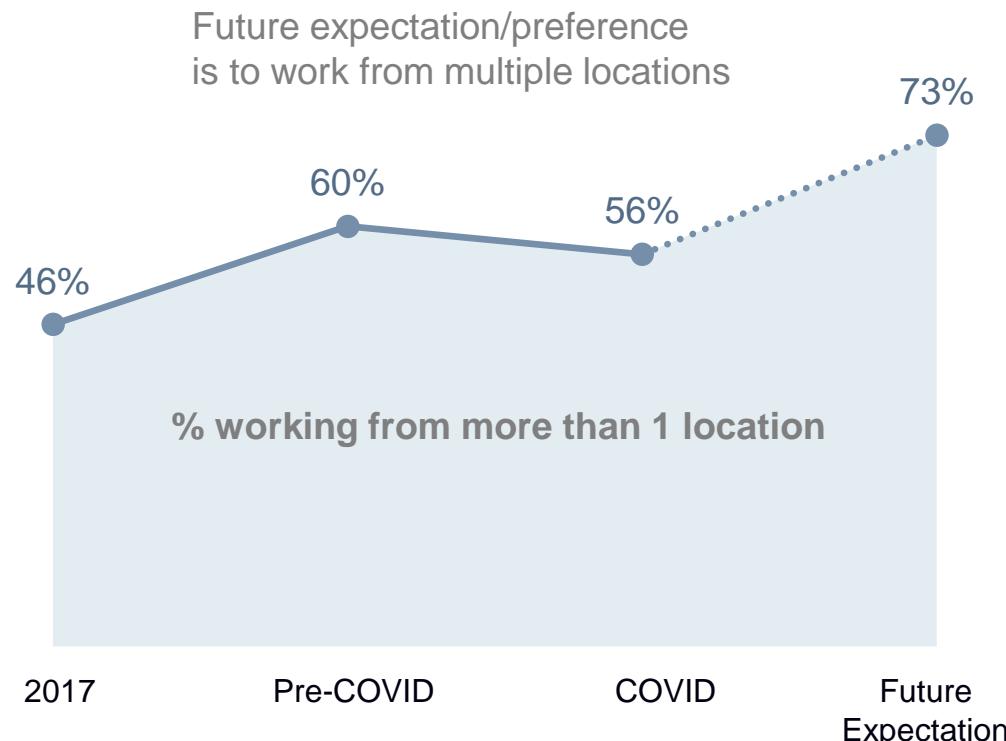
Group Surveyed: Knowledge Workers

TOPICS COVERED

Behavioral Considerations: Communication intensity, work locations, technology adoption and device usage

COVID impact & future (post-COVID) predictions
regarding the above behavioral considerations

WORK LOCATIONS ARE EXPECTED TO BE EVEN MORE FLEXIBLE IN A POST COVID WORLD



SOURCE: Factworks: [Poly Global Segmentation Research, 2021](#)



Even less time at office

Most expect to spend less time working at the office compared to pre-COVID 40% (68%)



Work from home is here to stay

Most expect to WFH to continue compared to pre-COVID (65% vs. 40%)
Expect 2x more share of time spent WFH post-COVID (27% vs. 13%)



Growth of telework centers/co-working spaces expected to continue

More people expect to work in these locations in future (33% vs. 28%)



Work travel expected to revert to pre-COVID levels

27% expect to travel (compared to 27% pre-COVID)
Expect to spend 6% of work time traveling (compared to 6% pre-COVID)

WHAT ARE PERSONAS? WHY ARE THEY IMPORTANT?

Personas represent critical & actionable information about 100% of workstyles in a typical enterprise.



Planning assistance for
WFH and/or Return to Work



Data Proves: One size does
not fit all



Matching workstyles to
devices and technologies
increases productivity, and
ease of transitions/mobility

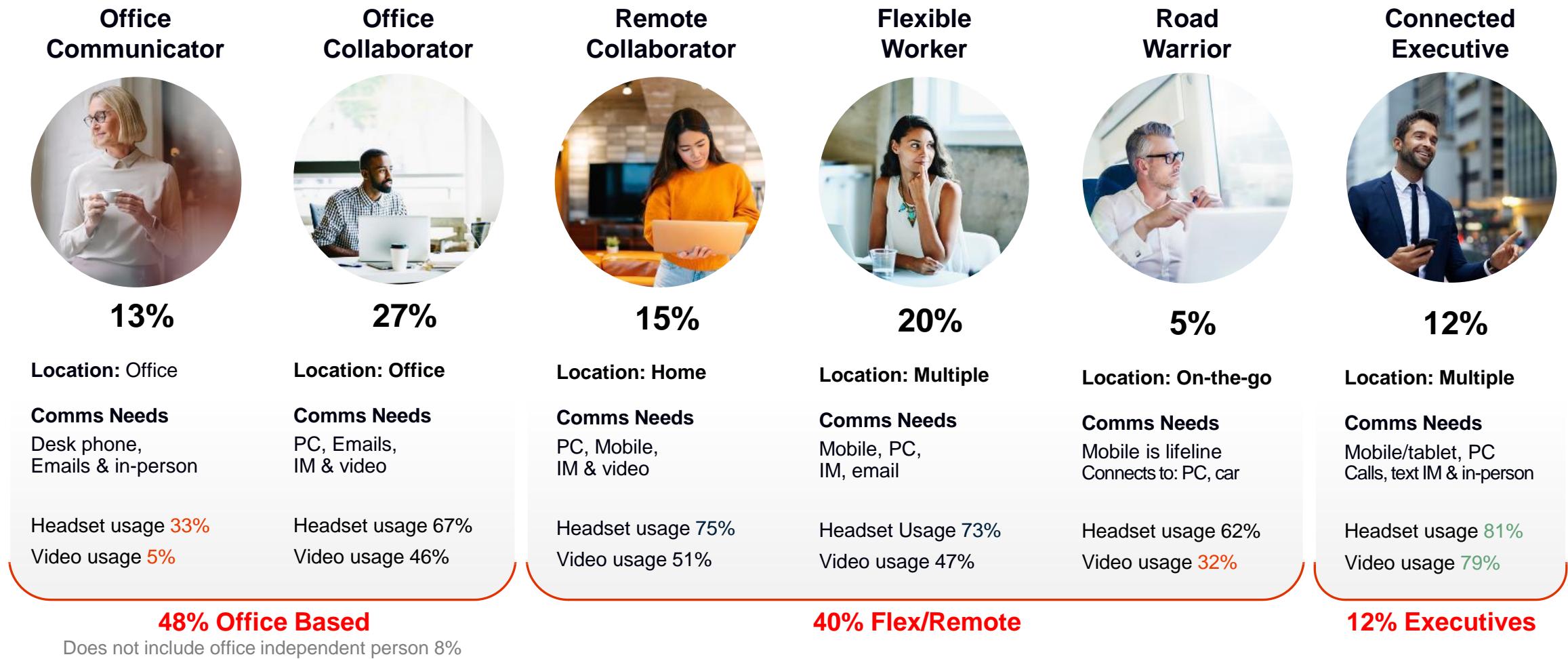


Personalization of application
settings, interfaces, and other
capabilities



Poly has been studying workstyle evolutions for nearly a decade

SIX COLLABORATIVE WORKSTYLES



These represent 92% of the workstyles in a typical enterprise

Higher or **lower** vs. other personas

WORKSTYLES ACROSS MARKETS



Office
Independent

Office
Communicator

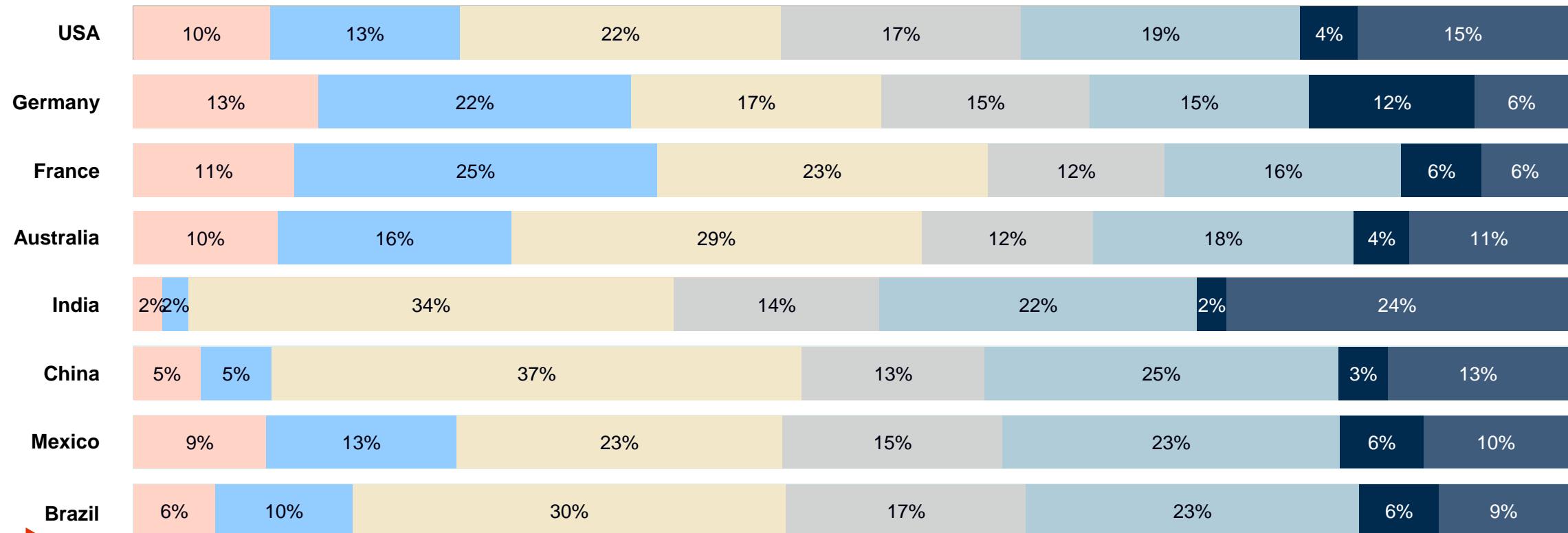
Office
Collaborator

Remote
Collaborator

Flexible
Worker

Road
Warrior

Connected
Executive



WORKSTYLES FRAME A SPECTRUM OF NEEDS



OFFICE
COMMUNICATOR

Average Devices: 2.8

Technical Savvy: ● ● ●

Main speaker: ● ● ●

OFFICE 97%



Mostly 1:1
Voice Calls

5% report daily
video usage



CONNECTED
EXECUTIVE

Average Devices: 7.3

Technical Savvy: ● ● ●

Main speaker: ● ● ●

OFFICE 38%



Mix of meeting
types & media

79% report daily
video usage

THIRD SPACE 32%



Uses average of 5
different spaces in the
office

HOME 19%



81% use
a webcam

96% report
experiencing noise
outside of home



SOURCE: Factworks: [Poly Global Segmentation Research, 2021](#)

WORKSTYLES CAN DRIVE A HYBRID WORK STRATEGY

OFFICE:

ASSIGNED / PRIVATE



ASSIGNED / OPEN



CONFERENCE ROOMS



HOME:

DEDICATED



SHARED



UNASSIGNED PRIVATE



UNASSIGNED OPEN



PUBLIC SPACES



THIRD SPACE:



TRAVEL / CLIENT:



2022 WORKSTYLE RESEARCH

METHODOLOGY

Research Completion: March 2022

Study Size: ~ 5200 respondents

Geography: US, DE, FR, UK, AU, IN, CN, MX, BR

TARGET GROUP

Company Size: 4,400 (average)

Group Surveyed: Knowledge Workers

TOPICS COVERED

Behavioral Considerations: Communication intensity, work locations, technology adoption and device usage

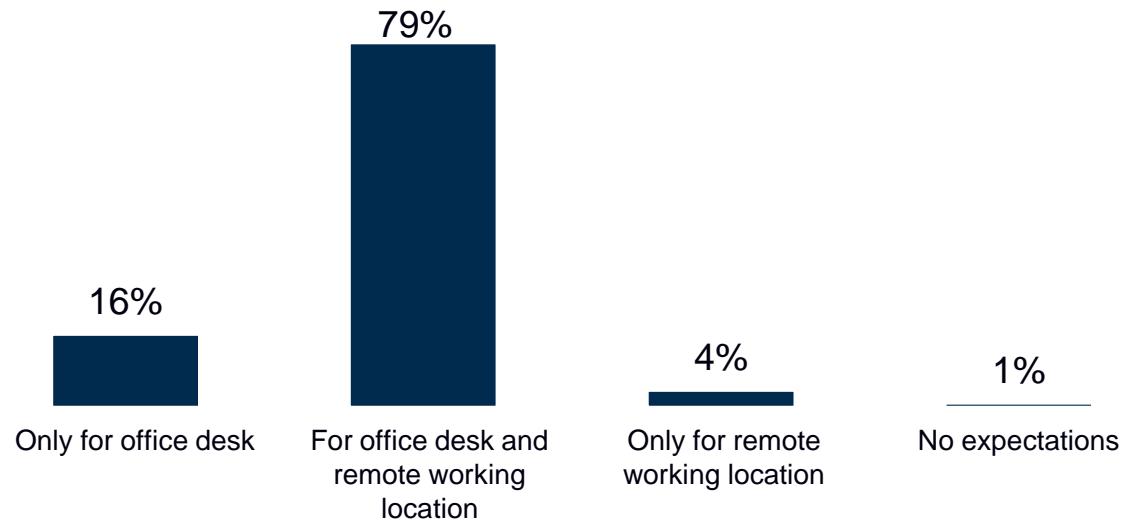
COVID impact on activities done in the office

What brings people into (and keeps people away from) the office and what spaces and technology are needed for productivity

KNOWLEDGE WORKERS EXPECT EMPLOYERS TO PROVIDE EQUIPMENT NOT ONLY AT THE OFFICE DESK BUT ALSO FOR THE USE AT OTHER WORKING LOCATIONS

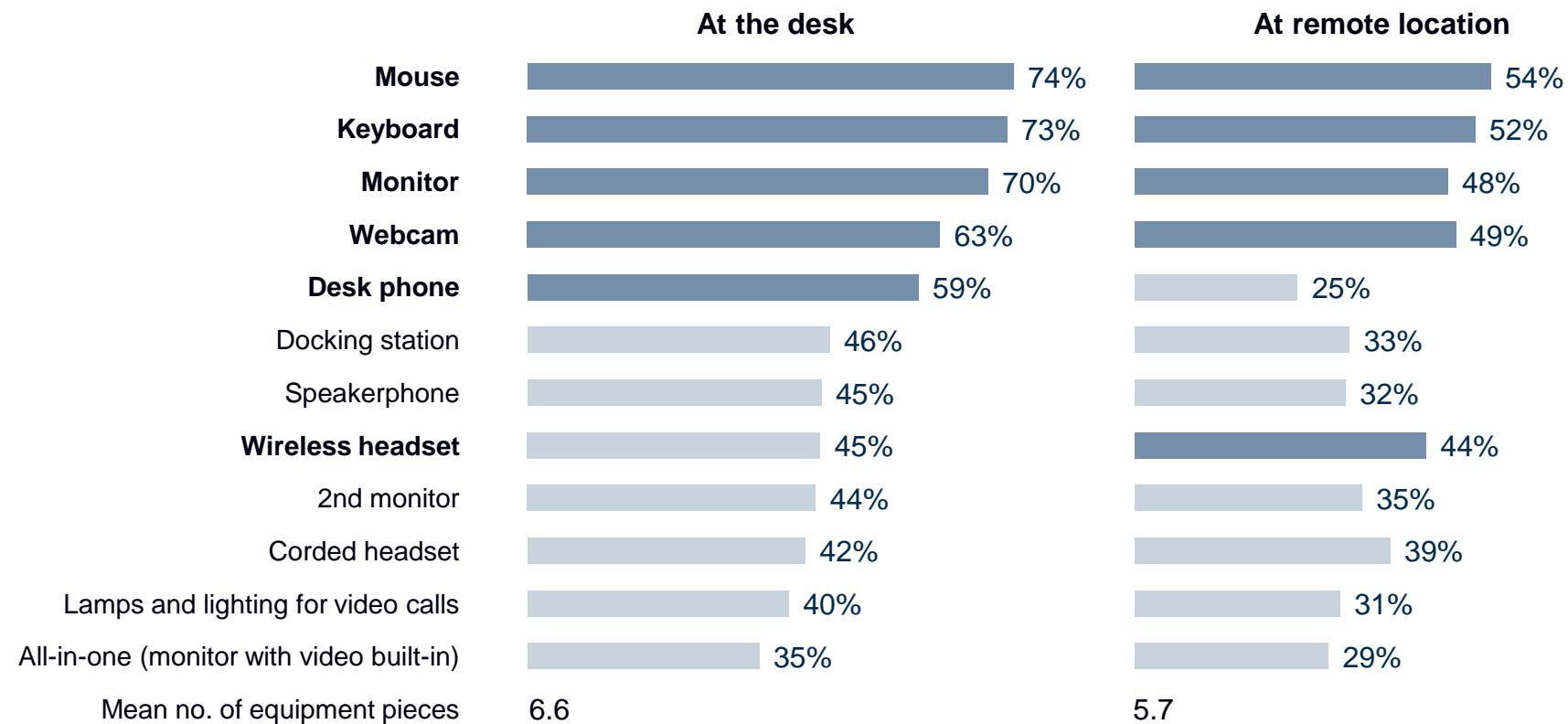


Expectations for employers to provide equipment



DESK PHONES STILL EXPECTED AT DESKS, MOST ALSO EXPECT KEY EQUIPMENT FOR HOME USE

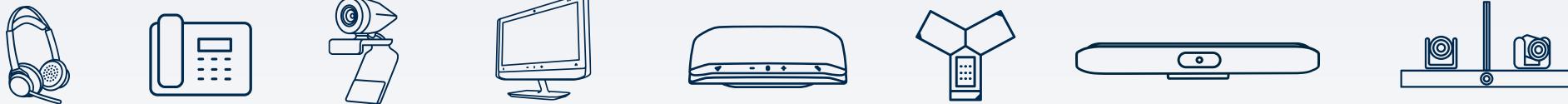
Expected equipment



"Provide additional equipment I can use at home (such as keyboards and mouse) to avoid bringing it back and forth (Office to home and vice versa)"
(Remote Collaborator, AU)

"Make equipment available in the office and at home. To take only a notebook when going to work in person"
(Remote Collaborator, BR)

LET US HELP YOU DELIVER THE BEST HYBRID WORK EXPERIENCE



Survey your organization to understand work styles & requirements
Deliver the right end-to-end solution for optimized and equal experiences

IDENTIFY YOUR EMPLOYEE'S WORKSTYLE

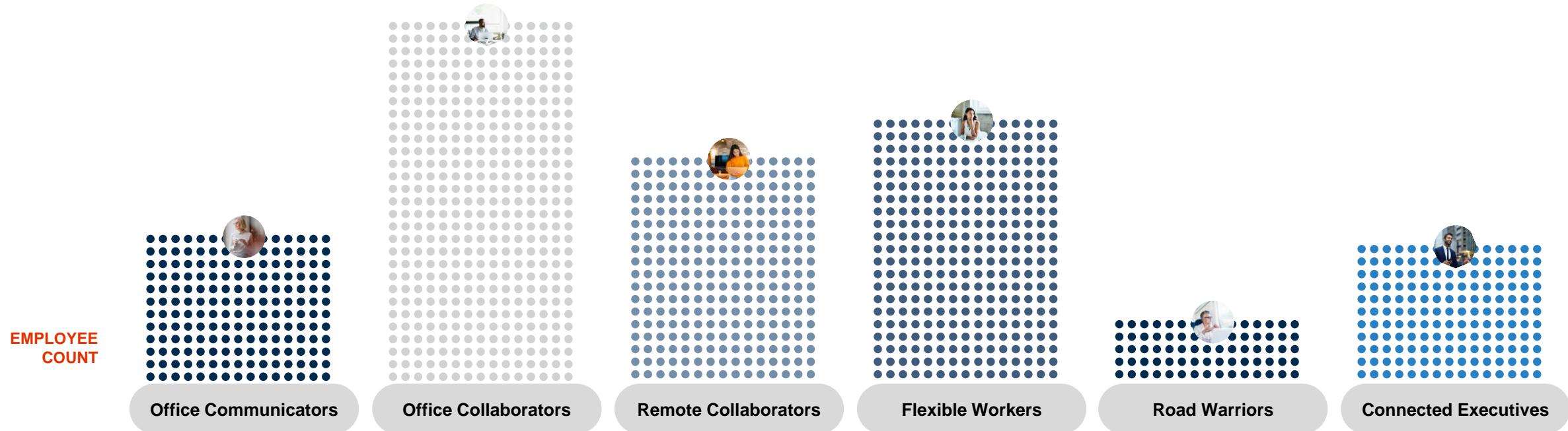


Workstyle Survey

You match the **FLEXIBLE WORKER** workstyle

A screenshot of a computer application window titled "Workstyle Survey". The window has a toolbar with standard icons like minimize, maximize, and refresh. Below the title bar is a grid of four columns, each containing three rows of gray rectangular boxes. In the first column, the second row from the bottom has a checked checkbox. In the second column, the first row from the bottom has a checked checkbox. In the third column, the second row from the bottom has a checked checkbox. In the fourth column, the fourth row from the bottom has a checked checkbox. At the bottom of the window, there is a blue rounded rectangle containing the text "You match the **FLEXIBLE WORKER** workstyle".

UNDERSTAND WORKSTYLES ACROSS YOUR COMPANY



DEFINE SOLUTIONS FOR WORKSTYLE NEEDS



Office Communicators



Office Collaborators



Remote Collaborators



Flexible Workers



Road Warriors



Connected Executives

PRIMARY
LOCATIONS

Corporate Office

Corporate Office

Home Office

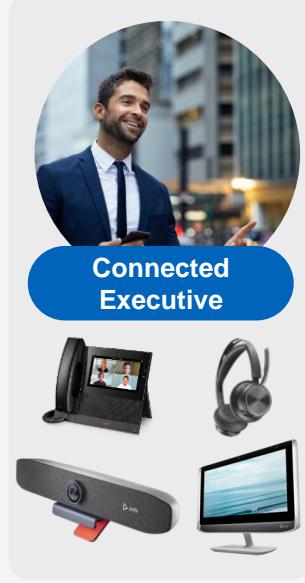
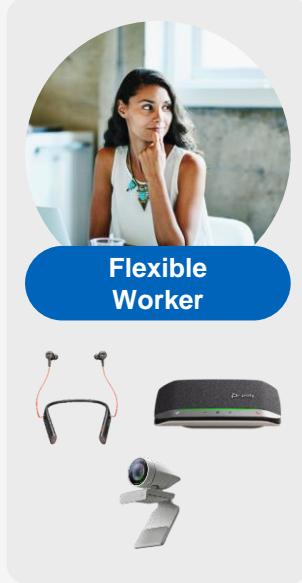
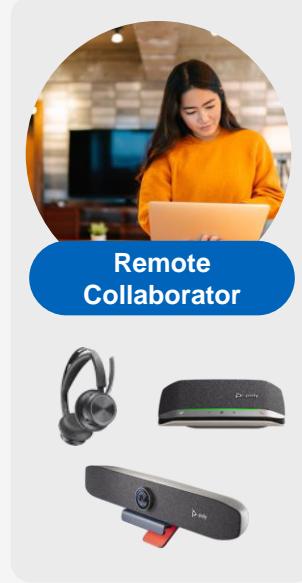
Home Office
Corporate Office

On the Go
Home Office

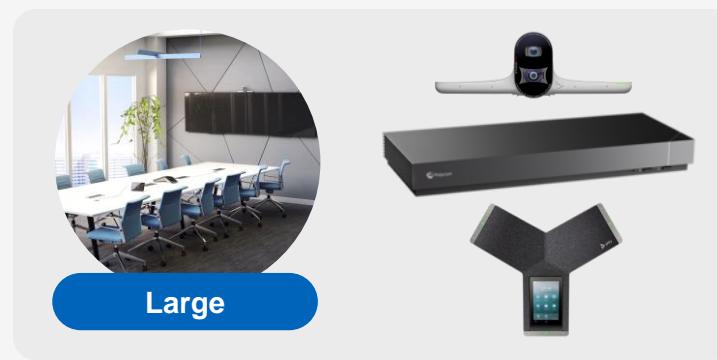
Corporate Office
Home Office
On the Go

DELIVER SOLUTIONS BY WORKSTYLE & SPACE

WORKSTYLES



SPACES



END TO END SOLUTIONS FOR EVERY WORKSTYLE



End-to-End Management & Insights

Supported by Poly Global Services & Poly global network of partners

NEXT STEPS

LEARN MORE ABOUT OUR WORKSTYLE SURVEY TOOL

Understand your workstyle distribution

Identify key needs & behaviors

Define technology solutions to support
needs across workstyles and spaces





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BUILDING BLOCKS FOR A GOOD PLAN

Cecilio Rincon- Sales Manager, Professional Services

THE CHALLENGES OF HYBRID WORK REQUIRE MODERN COMMUNICATIONS



Remote employees

Employees need to communicate from any worksite, on any device.



Evolving calling scenarios

Organizations require flexible phone capabilities—while keeping classic calling features.



Pressure on IT budget and resources

Modern solutions must be cost-effective and easy to manage.

TYPICAL CONCERNS WHEN ASKED - ARE YOU READY TO DEPLOY TEAMS PHONES?

- “I don’t know what would be involved, **blind spots** or **how long**.”
- “I don’t have a good understanding of the **risk to my operations**.”
- “I have **limited expertise** and internal staff.”
- “**It’s too big of a project to tackle right now**.”
- “**I don’t have enough in-depth understanding and experience** with Teams calling.”



WHERE DO I START?



PLANNING FOR DEPLOYMENT SUCCESS



Envision Assessment

Enlist IT staff & key stakeholders
Modernize Communications Workshop
Adoption and Change Management
Explore Teams Device Options

Environmental Readiness

Network Readiness & Security
Emergency Services (i.e., E911)
Calling Plans vs Direct Routing
Build the Plan (Users, PBX)
PBX Assessment (if needed)

Enablement Services

Setup Direct Routing/Calling Plans/Policies
Provision/Onboard/Manage Teams Phones
Execute & Support Migration
Adoption and Change Management

ENVISION
ASSESSMENT



ENVISION ASSESSMENT

Enlist IT staff & key stakeholders

Complete a Modernize Communications Workshop

Adoption and Change Management Planning



ENLIST IT STAFF & KEY STAKEHOLDERS

Who should be involved

Sponsorship coalitions

- **Executive Sponsor** – Drives overall messaging and accountability
- **Business Sponsor** – Facilitates new technology requests for their business unit
- **Department Managers** – Represents the teams most affected by this change
- **Project Managers/ Lead** – Oversees the transition project, ensures completion of all tasks

Project Team

- **Collaboration Lead/Architect/SMEs** – Creates and implements the solution architecture and knowledge of Teams, Phone System and Teams devices
- **Network Lead** – Provides insights into network design and execution
- **Telephony Lead** – Provides insights into telephony design and implementation
- **Security Lead** – Provides insights into security design, process and implementation
- **Training Leads** – Designs and implements training plans
- **Marketing Leads** – Designs and implements communication campaigns

MODERNIZE COMMUNICATIONS WORKSHOP

Partner-led engagement to help customers experience the vision for Microsoft Teams Phone and calling capabilities to meet customer needs and business priorities



Assess

Gather information on current environment and practices for calling scenarios.



Art of the Possible

Showcase modern calling capabilities powered by Microsoft Teams Phone.



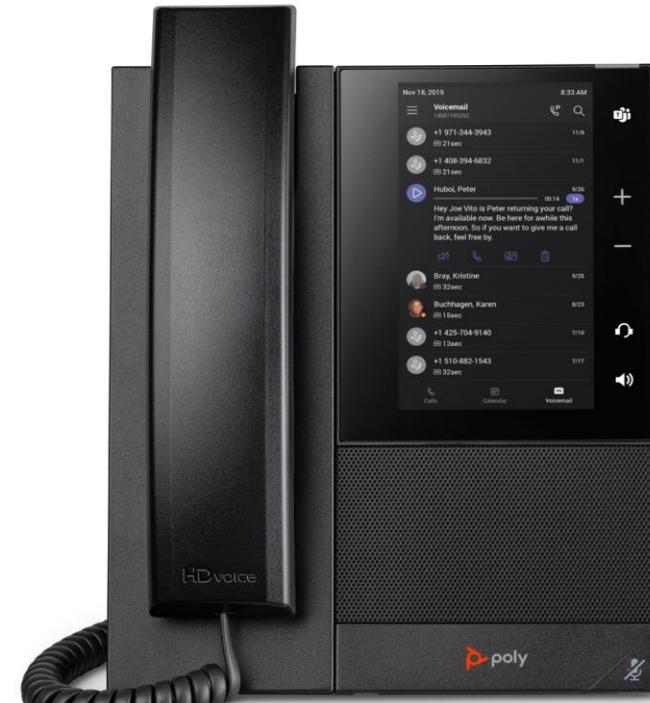
Build the Plan

Build the plan for how to deploy and adopt Microsoft Teams Phone.

OPTIONAL MODULES FOR THE ART OF THE POSSIBLE

Following the workshop, you can select optional modules that you would like to learn more about.

Combine the optional modules with the core modules to create your personalized Art of the Possible experience.



Optional



PSTN Connectivity

Optional Modules include:

- Microsoft Teams Calling Plans
- Microsoft Direct Routing
- Operator Connect
- Audio Conferencing



Management

Optional Modules include:

- Teams Phone Administration and Management
- Managing Call Quality and Reporting



Advanced

Optional Modules include:

- Call Queues and Auto Attendants
- Contact Center
- Call Recording
- Session Border Controllers
- Survivable Branch Appliance



Foundations

Optional Modules include:

- What is Microsoft Teams
- Security and Compliance
- Governance and Lifecycle
- Upgrade to Microsoft Teams from Skype for Business

TRAINING & ADOPTION PLANNING

Conduct an **Adoption and Change Management Workshop** with your business decision makers and key stakeholders.

The workshop will guide participants through the process of understanding the **steps needed to plan and successfully enable the people side** of the change.

Discussion topics include:

- Business outcomes
- Key roles for successful adoption (Champion Network)
- Communication and **awareness** (sparking excitement)
- Training strategy
- Success criteria
- [Leverage Microsoft Teams Customer Success Kit](#)



ENVIRONMENTAL **READINESS**



ENVIRONMENTAL READINESS

Network Readiness & Security Compliance

Calling Plans vs Direct Routing vs OC

Emergency Services (i.e., E911)

Build the Plan (Users, PBX, etc.)

PBX Assessment (as needed)



NETWORK READINESS

Prepare your organization's network

- Your quality of experience with Teams phones is contingent on how well your network optimized for Teams
- Use of Network Planner tool in Teams Admin Center
 - Help to determine, calculate, and organize your network requirements for deploying Teams and Cloud Voice
 - Create representations of your organization using sites and Microsoft recommended personas (office workers, remote workers, etc.)
- Generate reports and calculate bandwidth requirements for Teams usage.

Network planner

Network planner helps you to determine and organize network requirements for connecting people that use Teams across your organization in a few steps. By providing your networking details and Teams usage, you get calculations and the network requirements you need when deploying Teams and cloud voice across organizational physical locations. [Learn more](#)

The screenshot shows a 'NETWORK PLANS SUMMARY' section with two data points: '0 Network plans' and '3 Personas'. Below this, a button labeled 'Network plans' is highlighted in blue, while 'Personas' is in grey. A message below states 'There are no network plans yet.' followed by a blue 'Add network plan' button.

SECURITY & COMPLIANCE

How best to ensure security and compliance

- Teams enforces team-wide and organization-wide two-factor authentication, single sign-on through Active Directory, and encryption of data in transit and at rest.
- Further info:
 - [Microsoft Teams Essentials for IT: Security and Compliance](#) (12:42 min)
 - [Microsoft Teams Controls for Security and Compliance](#) (10:54 min)
 - [Microsoft Cloud Accelerator Workshops – Security and Transition to Cloud Workshops](#)



CUSTOMER CHOICE AT THE CENTER OF TEAMS PHONE ENABLEMENT

Microsoft meets your customers' diverse needs with flexible and simple options to bring calling to Teams. There are now three options for enabling Teams Phone.



Direct Routing

Highly customizable approach that allows customers to maintain existing service provider agreements and use on premises/hybrid hardware.

Available globally through partners.

Operator Connect

A quick and easy way to get started with calling while maintaining existing service provider agreements and leveraging the customization and flexibility of Direct Routing.

Public Preview available today through 11 partners covering over 50 markets.

GA in FY22 Q1

Microsoft Calling Plans

A fast and simple way to setup calling without additional technical configurations. It does not require a session border controller (SBC) or 'voice trunk'.

Available in 28 markets.



EMERGENCY SERVICES (I.E., E911)

Route emergency calls based on the known location of the Microsoft Teams client



Call routing service included for Microsoft Calling Plan users



Direct Routing users must obtain additional service [emergency routing service providers]



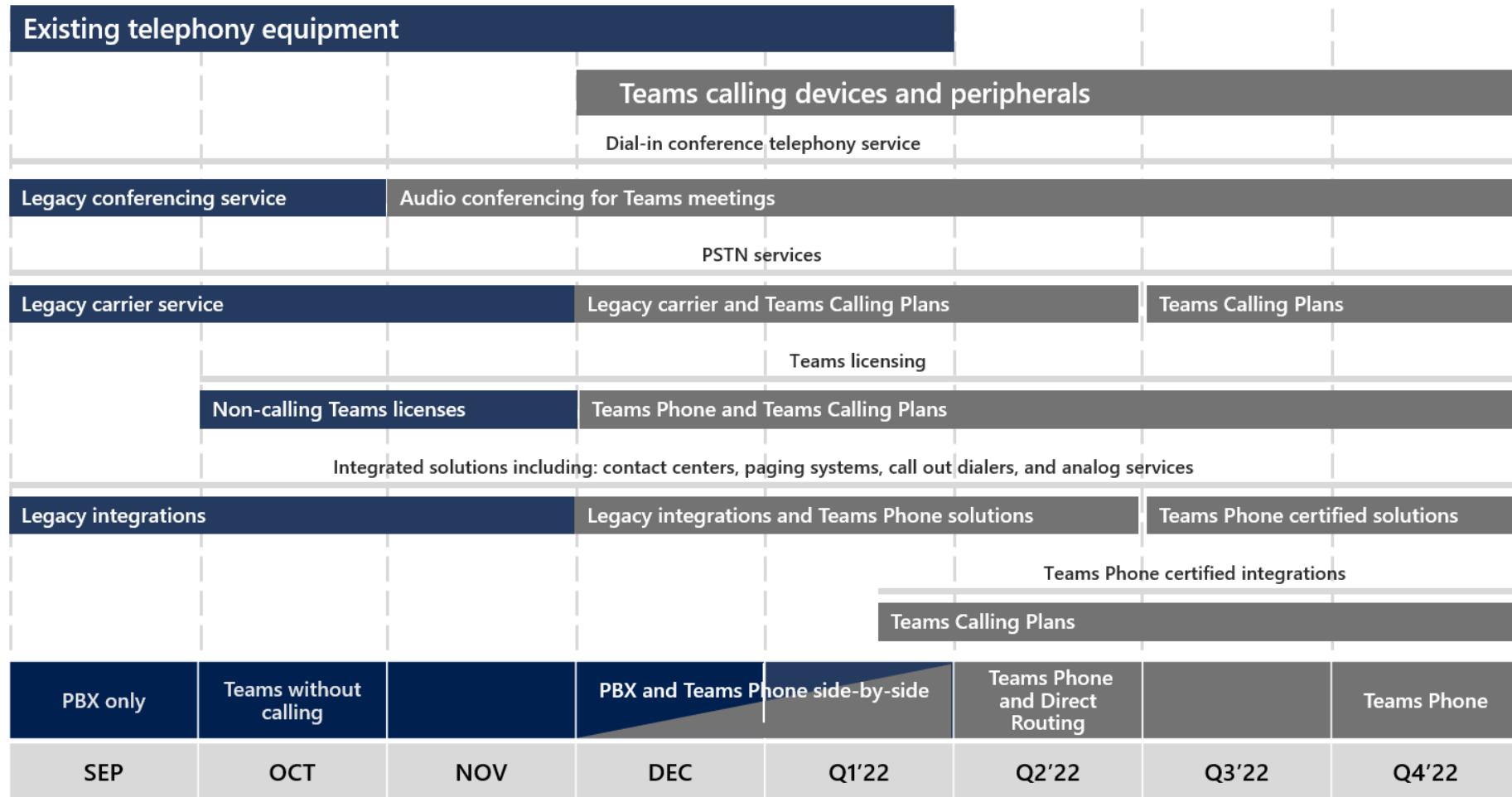
Direct Routing can also leverage Emergency Location Identification Number [ELIN] gateways



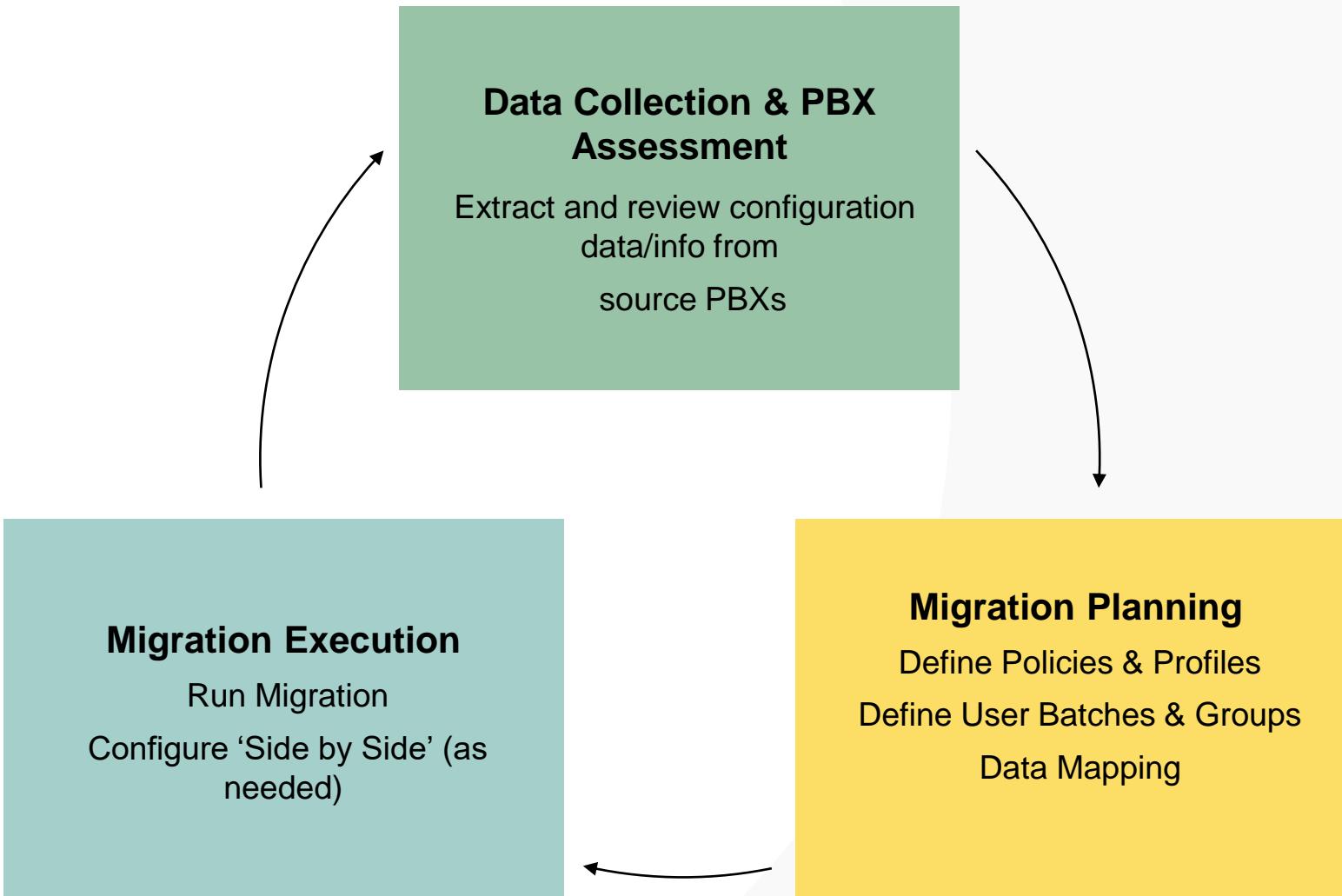
Optional:
Configure security desk notifications

BUILD THE PLAN

- Sample Microsoft Teams Phone migration plan for moving to Microsoft Phone.
- In addition, incorporate in the plan your Teams Phone devices rollout



PBX ASSESSMENT & KEY MILESTONES FOR SUCCESS



3 Legacy PBX Review

Following are key high-level numbers extracted from the analysis of the CUCM configuration data:

Category	Count	Comment
Extensions	23,449	Lines that are associated with an end user or a standalone device
Cisco End Users	17,746	
Orphan Cisco End Users	7,021	Cisco End User not associated with any device or associated with a device that has no lines; Subtotal of the Cisco End Users
Cisco Devices	30,880	A detailed breakdown is presented in section 6
Devices with Lines	30,026	Out of the total number of Cisco Devices
Devices without Lines	854	Out of the total number of Cisco Devices
Standalone Devices	14,228	Device that is not associated with an end user out of the total number of devices
Devices enabled for extension mobility	8,500	Out of the total number of Cisco Devices
Hunt Groups	360	Number of hunt pilots
Pickup Groups	421	

Table 1 - Overview

3.1 Statistics

Description	Count
Total number of Cisco End Users	17,746
Cisco End Users associated with a single physical device	69
Cisco End Users associated with multiple physical devices	4
Cisco End Users associated with a PC softphone	10,600
Cisco End Users associated with a mobile application	2,246
Cisco End Users that have extension mobility	10,843
Orphan Cisco End Users	7,021

Table 2 - End User Statistics

Description	Count
Total number of extensions	23,449
Extensions shared between multiple Cisco End Users and/or standalone devices	132
Cisco End Users associated with a single extension	10,205
Cisco End Users associated with multiple extensions	520
Standalone devices associated with a single extension	13,513
Standalone devices associated with multiple extensions	1

Table 3 - Extension Statistics

ENABLEMENT **SERVICES**



ENABLEMENT SERVICES

Execute & Support Migration

Provision & Onboard Teams Phones

Adoption and Change Management



EXECUTE & SUPPORT MIGRATION

- Migrate Users to Teams (Pilot/Production) in batches and enable licensing
- Enable Telephony (Calling Plans/Direct Routing/Operator Connect Service)
- Provision & Onboard Teams Phones
- Execute your Adoption and Change Management Plan

The screenshot shows the Microsoft Teams Admin Center dashboard for Contoso Electronics. The left sidebar lists various administrative sections: Dashboard, Teams, Devices, Locations, Users, Meetings, Messaging policies, Teams apps, Voice, Analytics & reports, Org-wide settings, Legacy portal, Call quality dashboard, and Firstline Worker configu... The main content area features a "MICROSOFT TEAMS UPGRADE" section with a heading "Planning your upgrade to Teams". It explains that Microsoft Teams is bringing Skype for Business Online capabilities into a single hub for teamwork. Below this is a "TEAMS USER ACTIVITY" chart showing communication trends over the last 7 and 28 days. The chart includes a legend for 1:1 calls, Channel messages, and Chat messages, with a "View details" link.



MICROSOFT TEAMS CUSTOMER SUCCESS KIT

The Teams Customer Success Kit includes

- End user communication
- End user guidance
- IT admin guidance

Welcome to Teams,
the hub for teamwork
in Office 365.

Teams is your one-stop for chatting, meetings, calls, and file sharing—a combination that gives everyone a place to get more done. In this guide, you'll find tips to make the most of Teams across your organization.

Get more from Teams! Find additional guidance, tutorials, and tips at aka.ms/successwithteams.

Marketing, Sales, Finance, Human Resources, Information Technology, Engineering, Project Management.

Meet Teams, the hub for teamwork in Office 365

Work remotely without feeling remote

Today we're rolling out Microsoft Teams, the collaboration app that helps your team stay connected and organized, even when working remotely! Wherever you are, Teams makes it easy to converse with coworkers, host meetings, share files, and collaborate on documents. We're confident you'll love working in Teams.

Discover Teams

Collaborate in one place no matter where you are

1. Sign in to Microsoft Teams

Go to teams.microsoft.com and sign in to your account.

Sign in

Microsoft Teams

Quick Start Guide

Move around Teams

View and organize teams

Find personal apps

Add apps

Start a new chat

Join or create a team

Manage your team

Add tabs

Use the command bar

Manage profile settings

Mark & Project items

Research and Development

Compose a message

Reply

File

Compose a message

Reply

File

Introducing Microsoft Teams

Your new hub for team files, conversations, and meetings. All in one place, wherever you go.

One place for conversations, meetings, and calls

Chat privately, one-on-one or have instant group conversations. Join meetings with HD audio and video, all in one place, instead of multiple apps.

Collaborate with integrated Office 365 apps

Office apps and services that you use every day—Word, Excel, PowerPoint, OneNote, SharePoint, Stream, and Power BI—are built-in, giving you access to files and tools in one place, so you stay in your workflow.

Security and compliance

Teams is integrated into Office 365, which means it features the enterprise-grade security and compliance you need.

Tailor your workspace

Get notifications and content from services you care about—Trello, GitHub, Adobe Creative Cloud, SurveyMonkey, and many more.

Start using Teams

Add your message here. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec mattis enim eu lorem malesuada hendrerit. Suspendisse eget quam et ipsum pretium ultrices. (200 character max)

Go to [www.aka.ms/TeamsCustomerSuccess](https://aka.ms/TeamsCustomerSuccess)

For additional guidance, tutorials and tips visit www.successwithteams.com

Your Logo Here



<https://aka.ms/TeamsCustomerSuccess>



POLY + MICROSOFT HARDWARE

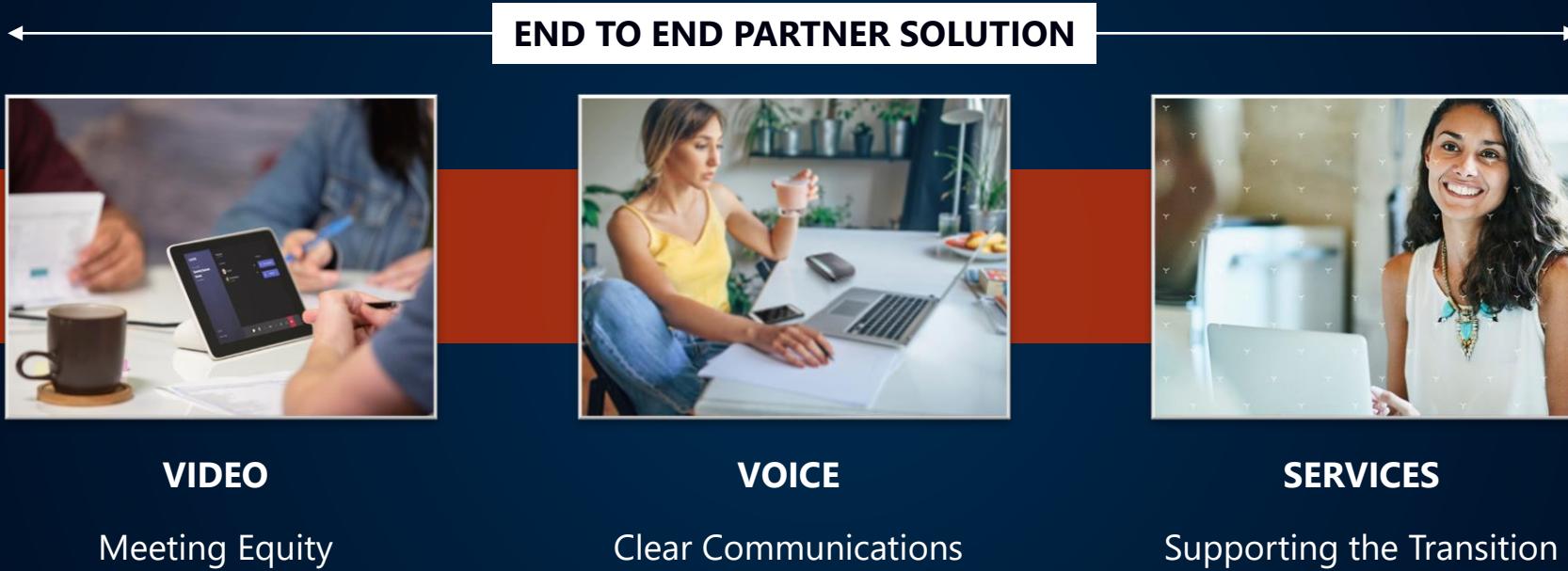
Chuck Applegarth- *Americas Head of Microsoft Alliance*

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DIFFERENTIATOR
WHY POLY?



POLY VALUE TO OUR CUSTOMERS



**GOOD
JUST ISN'T ENOUGH**



CREATING EQUALITY IN MEETINGS

AUDIO



Active Noise Cancelation & Noise Canceling Microphones



Acoustic Fence



Noiseblock AI



Next-generation Beamforming Microphone Array

VIDEO



Group Framing



Personal Field of View



Speaker Tracking



Conversation Mode

POLY VOICE PORTFOLIO

POLY HEADSETS (VOYAGER, SYNC, BLACKWIRE, SAVI)



POLY CCX PHONES, CCX PHONES WITH HEADSETS



SIP GATEWAY OPPORTUNITIES

Leveraging legacy & future....

SIP Gateway provides connectivity from compatible (VVX) SIP devices to Microsoft Teams, helping users migrate seamlessly to Teams telephony.

Available Poly Devices

- VVX Line (150/2xx/3xx/4xx/5xx/6xx)
- Trio 8500/8800
- Coming soon – **ROVE!**



Rove 40 Handset



Rove B2 Base



POLY CCX OVERVIEW

 **PROVISIONING**
Teams Admin Center
PDMS | Resource Manager
Lens

 **SINGLE SOFTWARE**
For Teams and SFB



PLATFORM FOR TODAY AND THE FUTURE
Faster Processors | Latest Android 11



RICH TEAMS EXPERIENCE

Sleek Design (Simple/Smaller/Less space)



POLY HEADSET

Best in class USB/UC headset integration



INNOVATION

Only solution in the market that offers with or without handset SKUs



POLY AUDIO

Acoustic Fence | NoiseBlockAI
USB Audio

POLY RENEW PROGRAM



<https://www.poly.com/Renew>

Key Benefits

- Outfit your organization with the devices you need
- Obtain best possible value for your end-of-life Poly equipment
- Use voucher to purchase new Poly equipment of your choice (phones, headsets, or video)
- Minimize environmental impact through our recycling and sustainability program
- Simple and fast process with all reverse logistics handled by Poly



Reach out to Renew@Poly.com with any questions.



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Intro to
PILOT

POLY AND MICROSOFT “PILOT” OFFER



Identify & Align
PERSONA RESEARCH

Envision & Assess
WORKSHOPS & NETWORK
ASSESSMENTS

Execute
GROW & EXPAND



Terms and Conditions Applicable

CALL TO ACTION

WORK WITH **POLY AND MICROSOFT** TO HELP YOUR COMPANY DEPLOY VOICE

CONNECT WITH POLY TO DETERMINE YOUR DEVICE STRATEGY

MAKE USE OF THE **PROGRAMS** TO REDUCE COSTS

