



Data Sheet

# The Alianza Difference: Our Onboarding Discovery Process

It's Not Just Another Project, It's a Well-Oiled Machine

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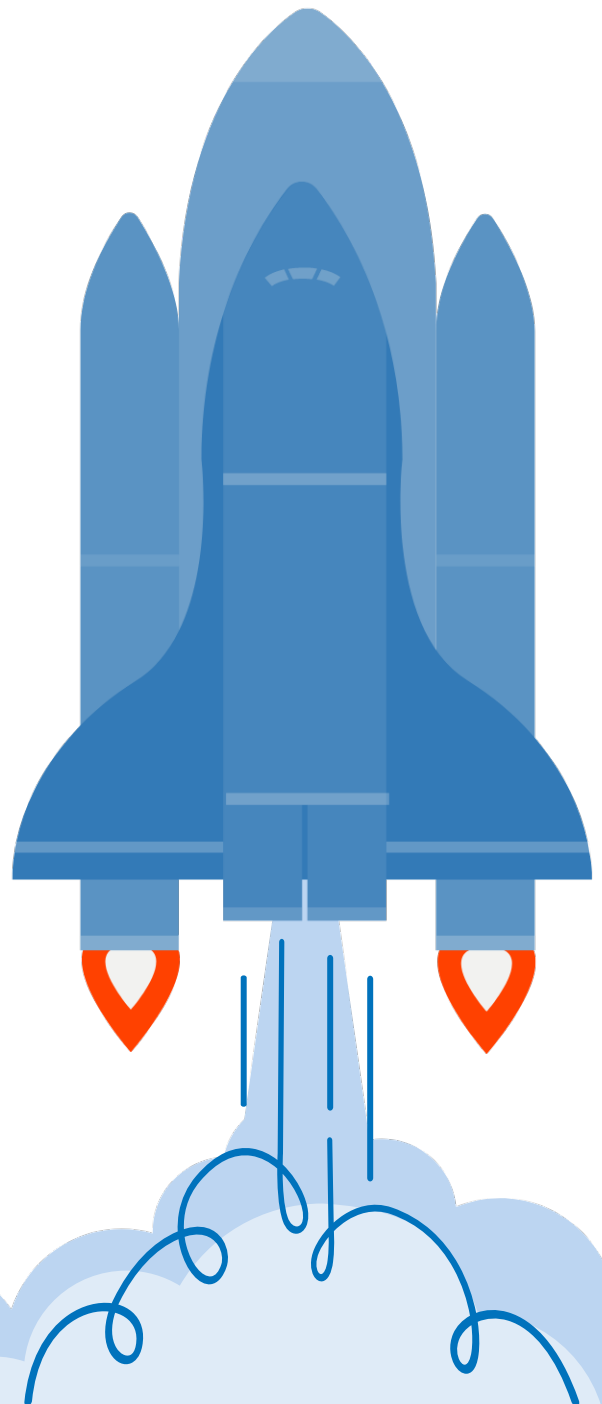
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# Onboarding Stages at a Glance

We've successfully migrated providers from virtually every switching platform on the planet and we know how to mitigate risk and move subscribers over safely. To show that your business and customers are in good hands, we'll walk you through the measured steps we take to get to know your business before we execute or implement a single thing.

## It's Not Just Another Project, It's a Well-Oiled Machine



Discover

Stage 1

Team Alignment &  
Prioritization



Prepare

Stage 2

Product, Team, &  
Platform Readiness



Execute

Stage 3

No-Impact End User  
Migration



Grow

Stage 4

Ongoing Support,  
Enablement & Growth

Successful migrations and cloud transformations require more effort, coordination, and subject matter excellence than most business leaders recognize, which is why Alianza's Onboarding, Migration, Professional Services team is there to help every step of the way. They'll work with you to understand your business model and use cases, set timelines, train your team, test devices, improve processes, and more. At each step, we will identify the owners, timelines for completion, and any impact that may occur if the timelines aren't met.

**Our onboarding process is a well-oiled machine, but we want you to be comfortable with everything we do before we get started. With that in mind, let's run through an overview of Stage 1: Discover.**

# Project Scope Overview

Before your first call with our Onboarding Project Manager, we'll do our due diligence to ensure we hit the ground running. Here's an example of what that looks like:

## Projected Launch:

- Phase 1 — Q1'23: Subscribers within ID
- Phase 2 — Early Q3'23: Subscribers within WA, OR, and MT

**Estimated Subscribers:** 1,500 licenses during Phase 1 and 6,200 during Phase 2

**Billing System:** Deep Packet Inspection (DPI)

**Integrations:** DPI (Q2'23)

**Connectivity:** Public connectivity for now, then GRE once the network is built

**Target Market:** Residential, SMB, and enterprise within states WA, OR, ID, and MT

**Devices:** PolyCom, Yealink, MediaTrix, and EdgeMarc

**Additional Feature Requests:** Interoperability certify the voice operator panel

**Rate Center Needs:** None

**Carrier Services:** Alianza (Bandwidth)

## Results after Our First Kick-off Call



Identified key project members and their roles



Provided access to the Alianza Admin Portal



Scheduled our first discovery call



Established weekly call cadence



Provided project tracking access



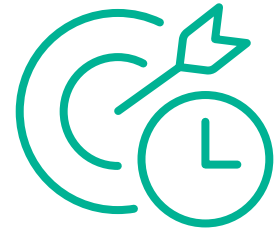
Reviewed initial onboarding documents

# Discover: Team Alignment & Prioritization

1



We'll begin with **sales and marketing** items, like reviewing the areas and customers you'll be selling to, and your plans to sell and support voice.



2



After that, we'll go over **technical items**, like your integrations, network, and the devices that will be used with Alianza, including scheduling setup and testing.

3



Next, we'll review the **Alianza platform**, **discuss** our products in comparison with what you currently offer, and identify any trainings that may be beneficial.



4



Finally, we'll discuss what is needed to **migrate** your existing voice customers over to the Alianza platform, including **project coordination**, and next steps.





# Sales & Marketing

We want to understand your business, customers, and plans to sell and support voice

Going to market, finding the perfect target audience, and generating inbound marketing opportunities takes time and effort — **and it will be *that much* harder if you're unfamiliar with the product.** To empower your teams to sell more confidently and enable more effective and consistent go-to-market success, you need engaging and easily digestible online training content.

Alianza has extensive enablement materials and resources to supercharge your go-to-market strategy and help you successfully launch your new voice product offering. Plus, we'll arrange a **sales enablement training session to help activate your team.**

## Business Overview

- Identify your billing or service segmentation needs, such as billing entities, user segments, phone number inventories, or other
- Understand how you currently sell voice services
- Understand your **commercial vs residential** targeting
- Understand your **inside** and **outside** sales team composition
- Identify the **available channels** to get the word out, such as your website, bill inserts, email campaigns, social media, or other
- Understand how Alianza can support your **growth plans**

## Rate Centers

- Review your **current service areas** and any expansion plans
- Confirm **coverage** needs and validate for your existing customers
- Identify **rate centers** and confirm authorized porting

## Regulations

- Confirm the stakeholder(s) who will manage **taxes, fees, and state communication requirements**



# Technical Items

Review integrations, the network, and devices that will be used with Alianza, scheduling setup, and testing

## Billing System

- Identify your team members(s) who will **utilize Alianza's APIs to build an integration** from your billing system to the Alianza platform
- Scope work from billing support system (BSS) vendors

## Call Detail Records (CDR)

- Set up a **secure file transfer protocol (SFTP) folder** for your **CDRs**, so you can bill customers for rated calls

## Rate Centers

- Confirm your choice of **public connectivity** or **generic routing encapsulation (GRE) tunnels**
- Your team member who will set up the network

## Devices

- Identify which **devices** you will sell and support
- Identify your team member who will **confirm device interoperability** with Alianza's platform

## Star Codes

- Map your current star codes to those offered on the Alianza platform
- Identify any star codes we don't support

### Granular Device Provisioning

Phonism is an intelligent, cloud-based device management solution with zero-touch provisioning that makes custom device configuration management so much easier. This added service can be enabled at the account and device levels for ultimate device control. Available on **Cisco, Poly, and Yealink devices**.

# Training & Admin Portal

We'll review the Alianza platform, your current offers and new solutions, and recommended trainings

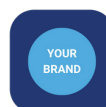
We'll help you identify the right people in your organization who will create new accounts, provide Tier 1 and Tier 2 support, install equipment, and more, so you can support your future voice customers.

To help your team members get up to speed, we've built the [Alianza Marketing Portal \(AMP\)](#), is full of white-label marketing materials with compelling storytelling, defined value props, and sales enablement content like marketing sheets and the ability to add your logo and sales contact information to certain assets. Enable your sales and support teams with pre-to-post-sales LMS courses, a video library of micro-trainings, and on-demand webinars. **And we're adding new courses all the time!**

In addition, our **easy-to-use, intuitive Admin Portal** provides simplified customer management and powerful analytics. Your staff will be able to create customer accounts, manage products and features, and more. To get you started, we will determine your calling plans and per-minute costs and create a Platform user with Admin permissions on your partition in the Alianza Admin Portal.

## Voice Portal Branding

**Our end user Voice Portal can be branded with your colors and logo — and even a custom domain (optional) — providing your customers an advanced, user-friendly, digital experience where they can manage and use their services online. We'll work with your designated team member to brand your portal the way you want it.**





## Application Branding

If custom branding is purchased, you can fully customize the **Alianza UC app** for macOS, Windows, iOS, and Android devices to match your company's brand. It's perfect for companies that want to offer a fully branded experience without ever having to explain what Alianza!

With your designated team member, we'll go through all the graphical and technical assets we need to brand our products and portals. And to make your new apps available to your customers, we can guide you through the steps to **publish the iOS and Android apps to the respective app stores** and how to create a landing page for your customers to download the application with appropriate file hosting for each application.

## Migration Planning

Your available reports and data — including customer accounts, phone numbers, and relevant features — will be compiled and used to automate the migration of your end-user customers to the Alianza platform.

**We'll start with a pilot group and continue through as many other groups as needed.**

Migration groups and timing will be determined by the losing carrier, rate center(s), hardware, device types, customer type, geographic region, account grouping, and more. **Rest assured, we'll be at your side the whole way.**

Knowing how, when, and what you communicate to your customers will help ensure a seamless experience for each migration group. **We'll discuss and make recommendations about how communicate the migration details to your customers, such as:**

- The changes or differences between your current platform and Alianza
- Voicemail PIN changes and resetting voicemail greetings
- The lead time needed to create the communications and notify customers before the migration
- Your communication channels to get the word out, such as your website, bill inserts, email campaigns, social media, or other
- Updated user guides





# Project Coordination & Next Steps

We'll discuss migrating your existing voice customers over to the Alianza platform, timelines for completion, milestones, and project coordination, and next steps

Over the years, Alianza has participated in, advised on, and supported countless digital transformations. In helping service providers navigate the entire migration process, we've fine-tuned the knowledge needed to deliver a safe migration. That means we **look ahead try to identify any risks we may encounter**, such as:

- Delays due to time off or **holidays**
- **Prioritizing** against other internal initiatives
- Internal speed of **adoption**

Successful migrations and cloud transformations require more effort, coordination, and subject matter excellence than most business leaders recognize, so we're here to help.

**Contact us today to see how Alianza can help transform and grow your network.**



## Let's start a conversation. Contact us today!

Alianza empowers service providers to rapidly create and deploy high-value communication offerings. With exceptional quality and always-on availability, service providers leverage our product suite to innovate and address the evolving demands of business and residential customers with an easy to manage, easy to consume, and highly profitable platform.