webex by CISCO

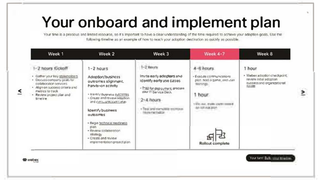
Webex Calling

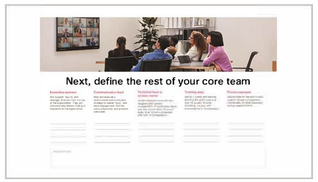
Your Webex Calling adoption journey starts here: Let's get started!

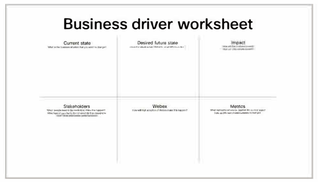
Download the guidebook for optimal interactivity.

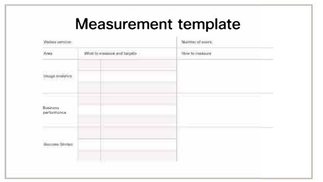
The plan guidebook

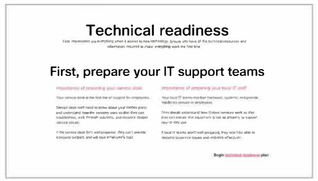
Click on a slide to jump to that part of the guidebook.

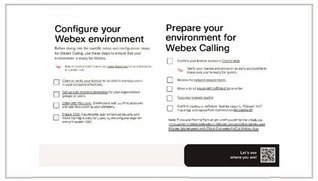


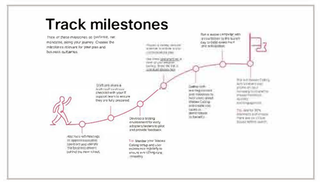


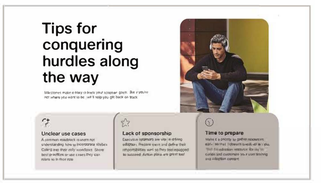


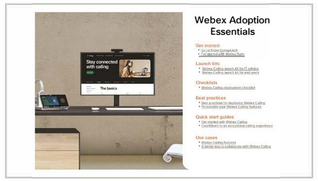


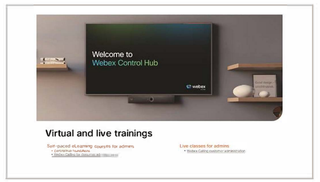


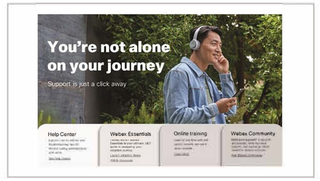












About this guidebook

Welcome to Webex Calling! We are thrilled you have chosen Webex. Our solution is designed to provide you with a comprehensive collaboration experience for a variety of use cases.

Introducing a new solution for your organization can seem daunting for any organization. We recognize this challenge, which is why we've developed an all-encompassing guidebook to assist you through this process. Our guide provides a comprehensive walkthrough of the following:

- Onboarding process
- Webex Calling installation
- Adoption progress monitoring
- And more.

Additionally, it offers valuable insights on integrating advanced technologies, stakeholder management, training, and more. This guide is based on the success stories of our satisfied customers who have maximized the benefits of Webex Calling.

It's worth noting that you're not alone in your Webex deployment journey. Before you begin planning, we recommend checking out Webex Essentials for helpful adoption information. Plus, several other organizations are already implementing and using Webex Calling. Our Community is an excellent resource for connecting with like-minded experts and exchanging insights and ideas.

Let’s get started >

Download this guidebook to fill in the blanks and keep track of your progress.

Elements of a successful deployment

At the core of a successful deployment are your **People**, **Process**, and **Platform**. Harness the full power of your Webex Calling investment by relying on these:

People

Assign a team to lead the charge in driving Webex Calling deployment and adoption through advocacy, change management, and buy-in.

Process

Communicate clear processes to your organization. Share the value of Webex Calling with use cases and adoption campaigns.

Platform

Use the right tools to support your people with seamless collaboration and integrated workflow apps—and track progress toward your goals.

webex by cisco

Our guided approach to adoption

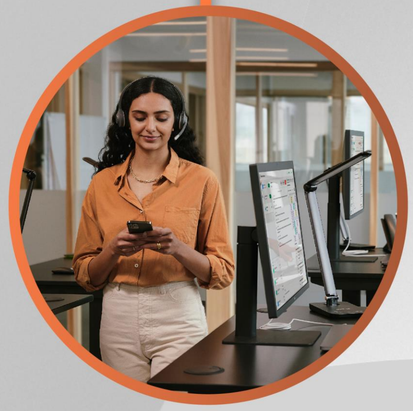
01

Your onboarding and technical readiness guidebook

02

Resources and more

03



01

Our guided approach to adoption

Your adoption journey, plan your next steps

Plan

Onboard and implement

In this stage we'll help you define your business outcomes and implement Webex Calling. There are four milestones in this stage:

- Determine your vision for Webex Calling
- Engage with executive sponsors
- Install & configure your Webex Calling services
- Prepare for launch

Launch

Use, engage, adopt

After implementation, it's time to onboard your users and then identify early adopters. These milestones help your users get the most out of Webex Calling services:

- Deploy Webex Calling to your organization
- Host adoption events and training
- Recognize and reward champions
- Success tracking and monitoring
- Help users meet their intended use cases

Grow

Maximize your investment

The third stage of adoption is where the refinement happens. New features and additional solutions help to optimize and expand Webex Calling. Only a few milestones left in this final stage:

- Roll out new features and services
- Explore and attach adjacent solutions
- Engage and become a subject matter expert

02

Your onboarding and technical readiness guidebook

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook

— Preview of what's ahead

Onboard and implement plan

Onboard

- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement

- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more

- Resources
- Support

Preview of what's ahead

Use this checklist to get a preview of the important steps we'll walk you through for planning of launch Webex Calling.

- [ ] Executive sponsors and leadership buy-in is vital in driving adoption. Prepare them and define their responsibilities so they feel equipped to succeed.
- [ ] Goal set early on and know your KPIs, metrics, and analytics. Keep track of usage and analytics in Control Hub.
- [ ] First impressions are everything when it comes to new technology. Ensure you have all the technical resources and information required to make everything work the first time. Jump to the implement section to begin with technical readiness.
- [ ] Effective implementation depends on proactive awareness and an intentional communication plan. Establish a feedback loop for continuous improvement.
- [ ] Consider change management needs. Prepare, support, and equip those who may be resistant to change.
- [ ] Know your timeline and milestones to stay on track with your adoption goals.

webex by CISCO

Your onboard and implement plan

Your time is a precious and limited resource, so it's important to have a clear understanding of the time required to achieve your adoption goals. Use the following timeline as an example of how to reach your adoption destination as quickly as possible.

Week 1	Week 2	Week 3	Week 4-7	Week 8
1-2 hours Kickoff • Gather your key stakeholders • Discuss company goals for collaboration services • Align on success criteria and metrics to track • Review project plan and timeline	1-2 hours **Adoption/business outcomes alignment, hands-on activity** • Identify business outcomes • Create and review adoption and communications plan **Identify business outcomes** • Begin technical readiness plan • Review collaboration strategy • Create and review implementation project plan	1-2 hours **Invite early adopters and identify early use cases** • Prep for deployment, prepare your IT Service Desk 2-4 hours • Test and complete technical implementation	4-6 hours • Execute communications plan, host a game, and user trainings 1 hour • Go live, invite users based on roll out plan **Rollout complete**	1 hour • Webex adoption checkpoint, review initial adoption success and organizational health

Your turn! Build your timeline.

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

Build your adoption team

It's essential to determine who will support the People, Process, and Platform aspects of your adoption journey from within your organization. Team size varies and depends on your company size and scope of deployment, but all core roles need to be covered, even if not full time.

Tip: Regular meetings are essential to keep everyone on track and working toward the same goals.

First, engage leadership

Engaging leadership gives you a great opportunity to really embed Webex across your company. Having the right people communicating the "why?" behind the investment and using Webex to the fullest does wonders for your adoption efforts.

Benefits of high adoption among your leadership team:

- Help drive and reinforce usage
- Understand business impact and value
- Shorter more, productive meetings
- A more engaged and connected workforce

In the next three pages you define your team, business goals, and use cases. If you've already done these things, skip ahead to implement to begin configuring Webex Calling.

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook

- Preview of what's ahead
- Onboard and implement plan

Onboard

- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

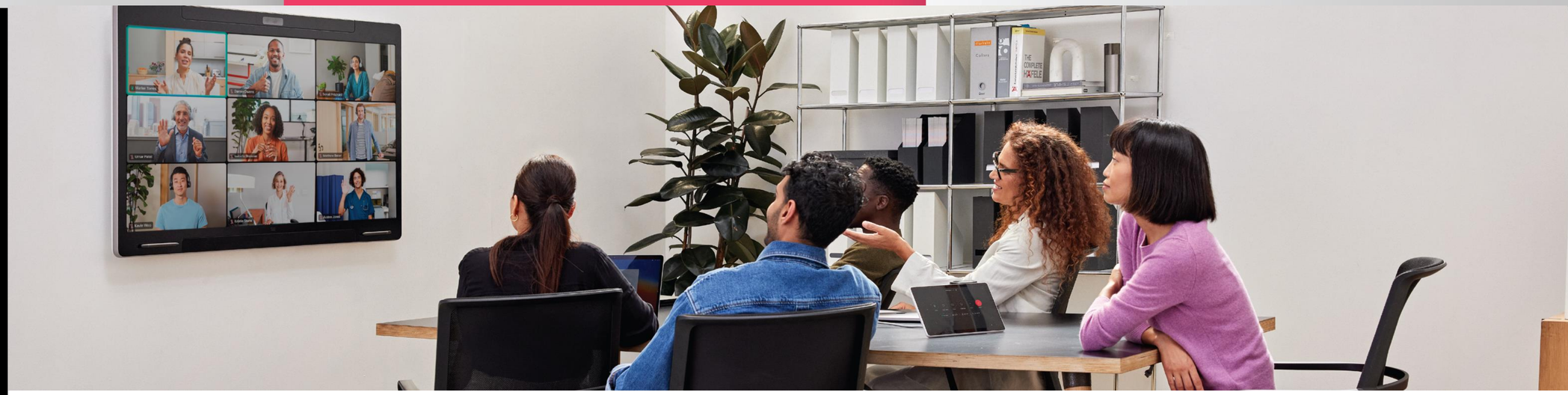
Implement

- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more

- Resources
- Support

webex by CISCO



Next, define the rest of your core team

Executive sponsor

Win support, buy-in, and strategic direction from the top of the organization. They will articulate why Webex Calling is important to the organization.

Communication lead

Plan and execute a multichannel communication strategy to create "buzz" and drive engagement. Sell the value proposition and promote use cases.

Technical lead or service owner

Create employee accounts and integrate with identity provider/SSO (if applicable). Make sure the service works first and every time. Simplify processes with bots and integrations.

Training lead

Gather / create self-service learning like quick start and how-to guides. Provide coaching, training, and encouragement to employees.

Project manager

Responsible for the end-to-end project change management. Coordinates all other resources during implementation.

Additional roles:

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by CISCO

Determine your business drivers

Identify your underlying business drivers for choosing Webex Calling and focus your efforts on achieving them.

First, why are you deploying Webex Calling?

- What challenges are you currently facing?
- What core business objectives will Webex Calling support?
- What are the different roles within your company that need to support this deployment?
- How does Webex Calling align with your work style (hybrid, in-office, or remote)?
- How will Webex Calling integrate with other collaboration tools?
- How are your other tools performing? How do you want performance to change?
- How can you establish performance benchmarks to enhance reporting?

Next, create your personalized objectives!

Common outcomes customers have identified before deploying Webex Calling:

- Create unified, consistent experiences for both employees and customers.
- Build a scalable suite of tools and solutions that can grow and evolve with my organization.
- Enable seamless experiences across devices.
- Support hybrid work securely in the cloud. Tip: Is hybrid work part of your business?

Tip: See the IT administrator guide to supporting a hybrid workplace.

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by CISCO

Business driver worksheet

Current state
What is the business situation that you want to change?

Desired future state
Once the situation has changed, what will it look like?

Impact
How will the business benefit?
How will your people benefit?

Stakeholders
Which people need to be involved to make this happen?
What type of communication channel do they respond to best? More awareness, better adoption!

Webex
How will high adoption of Webex make this happen?

Metrics
What numbers can you put against the current state?
How do you want those numbers to change?

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

Discover your use cases

Build use cases to demonstrate how Webex Calling can be used to achieve value based on the input of people who use it each day.

Use case elements

Describes the type of user, their type of work, and how/where they get work done with others

Persona
A persona describes the type of user, their type of work, and how/where they get work done with others.

Workflows
A workflow is the sequence or process workers follow throughout their day to get their job done.

Job function
A job function can include the type of work, their department, and their job description.

Vertical
An industry or sector in a marketplace. Examples include Healthcare, Financial, Manufacturing, Education.

Use case activity >

Exercise
Objective: Understand how different people work, so you'll know how to meet the needs of their role.
Participants: Identify 5-10 people/personas representing a mixture of key roles from a specific business area. (marketing, sales, HR, etc.).
Duration: 60-90 minutes

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

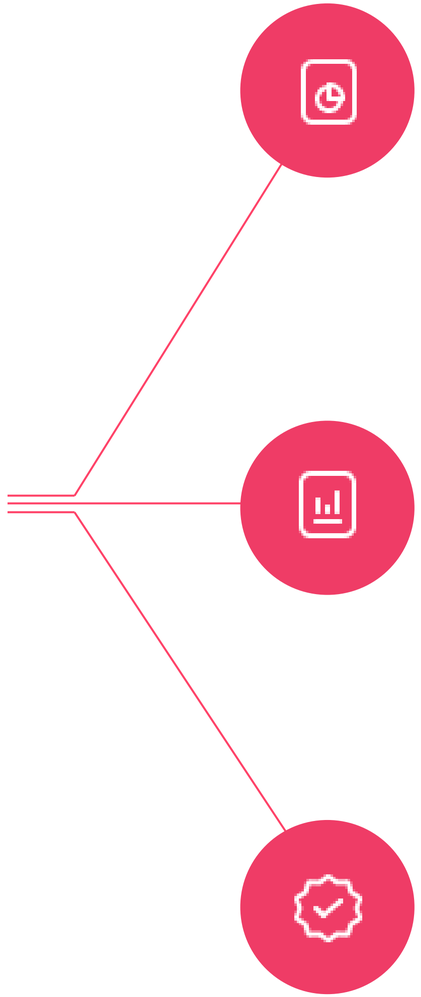
Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by CISCO

Establish how to measure your success

Before you roll out Webex Calling, it is important to establish targets and measurements. This helps make tactical changes to increase adoption and demonstrate ROI.



Usage analytics

How much services are being used, and by whom.

Set targets for the percentage of people using Webex Calling services on a monthly, weekly, and daily basis, and how quickly you'll achieve this. For example, how many calls are made and how many users have set up and accessed their voicemail.

Your targets depend on the size of your business plus the timescales and activities in your adoption plan.

Tip: Leverage Control Hub for your reporting needs.

Business performance

How Webex Calling is impacting productivity, quality, and cost.

Usage statistics tell you how many people are using your Webex Calling service, and how often, but say nothing about the benefits to your business. Benchmark the business outcomes you established so that they can be measured again regularly once usage of the Webex Calling service goes up.

Success stories

Compelling stories about how Webex is solving problems and creating value.

Compelling stories that bring successes to life. How exactly has Webex Calling adoption enabled remarkable things to happen? It's important to look out for these stories and capture them concisely in writing when they happen.

Use our success story template and remember to share your stories with your executive leaders and stakeholders.

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by CISCO

Measurement template

Webex service:			Number of users:
Area	What to measure and targets		How to measure
Usage analytics			
Business performance			
Success Stories			

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

Plan a kickoff meeting

Initiate sessions with key stakeholders to capture crucial operational, technical, and change process information and to equip the delivery team for a successful launch of Webex Calling.

What's on the agenda?

Things to consider:

- Identify business processes that will be impacted by the adoption of Webex Calling.
- Create your roadmap for implementation.
- Develop the organization communications plan.
- Build the user education plan.
- Make sure to consider both the legal and security aspects when deploying a new calling solution

Schedule your meeting on Webex. From closed captioning and live polls to built-in tools like Webex Assistant and Slido to seamlessly collaborate with your team in one place.

View meeting best practices >

Date:

Time:

Attendees

webex by CISCO

Let's see where you are!

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

Technical readiness

First impressions are everything when it comes to new technology. Ensure you have all the technical resources and information required to make everything work the first time.

First, prepare your IT support teams

Importance of preparing your service desk

Your service desk is the first line of support for employees.

Service desk staff need to know about your Webex plans and understand how the services work so that they can troubleshoot, walk through solutions, and escalate deeper service issues.

If the service desk isn't well prepared, they can't provide adequate support, and will lose employee's trust.

Importance of preparing your local IT staff

Your local IT teams maintain hardware, systems, and provide hands-on service to employees.

They should understand how Webex services work so that they can ensure that equipment is set up properly to support day-to-day use.

If local IT teams aren't well prepared, they won't be able to respond to service issues and requests effectively.

Begin technical readiness plan

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

Configure your Webex environment

Before diving into the specific setup and configuration steps for Webex Calling, use these steps to ensure that your environment is ready for Webex.

Tip: New to Control Hub? Check out these resources for an introduction to Control Hub.

- [ ] Claim or verify your domain to be able to manage users in your company effectively.
- [ ] Set up auto licensing templates for your organizations groups or users.
- [ ] Claim and add users. Claim users with existing accounts and add new users to your company.
- [ ] Enable SSO, if applicable. Add enhanced security and make signing in easy for users by enabling one login for everything with SSO.

Prepare your environment for Webex Calling

- [ ] Confirm your license access in Control Hub.

Tip: Verify your license and provision as early as possible to make sure you're ready for launch.

- [ ] Review the network requirements.
- [ ] Make a list of equipment and devices to order.
- [ ] Test your network quality.
- [ ] Confirm hardware, software, license security, Firewall, NAT Traversal, and Media Path Optimization requirements.

Note: If you are moving from an on-prem system to the cloud, you can skip these steps and refer to Migrate Unified CM to Webex and Migrate Jabber users with Cloud Connected UC to Webex App

webex by CISCO

Let's see where you are!

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

Set up Webex Calling

Make sure your organization is ready for the Launch phase and is set up to get the most out of Webex Calling. Familiarize yourself with the calling features and services to grasp how they can benefit your organization.

- [ ] Configure Webex Calling for your organization in Control Hub.
- [ ] Choose the right PSTN option for uninterrupted communication: Local Gateway, Cloud Connected PSTN, or Cisco Calling Plan. Learn more about Webex Calling global availability options.
- [ ] Refer to these use cases to enable features to match your business drivers.
- [ ] Utilize these launch kits and resources to set up our highly recommended features: auto attendant, call queues, voicemail, Webex Calling with Teams, Webex Attendant Console, call park, call pickup, hunt groups, call park extensions, virtual extensions, paging groups.

Tip: Use this list to see features available, by license type.

- [ ] Set up accounts for users who are entitled with Webex Calling. If you haven't added users or already entitled them, add your users in Control Hub.
- [ ] Configure calling for Webex App and Microsoft Teams.
- [ ] Assign and manage devices for users and workspaces in Control Hub and allow your teams to communicate through calling, messaging, and video meetings in Webex App.

Tip: What apps are your users already using? Easily integrate with existing solutions. Check out the integrations available in our App Hub.

- [ ] View your adoption trends and usage reports. Easily access reports to see how your Webex Calling services are being used.

Note: To activate Dedicated Instances, refer to these resources.

webex by CISCO

Let's see where you are!

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

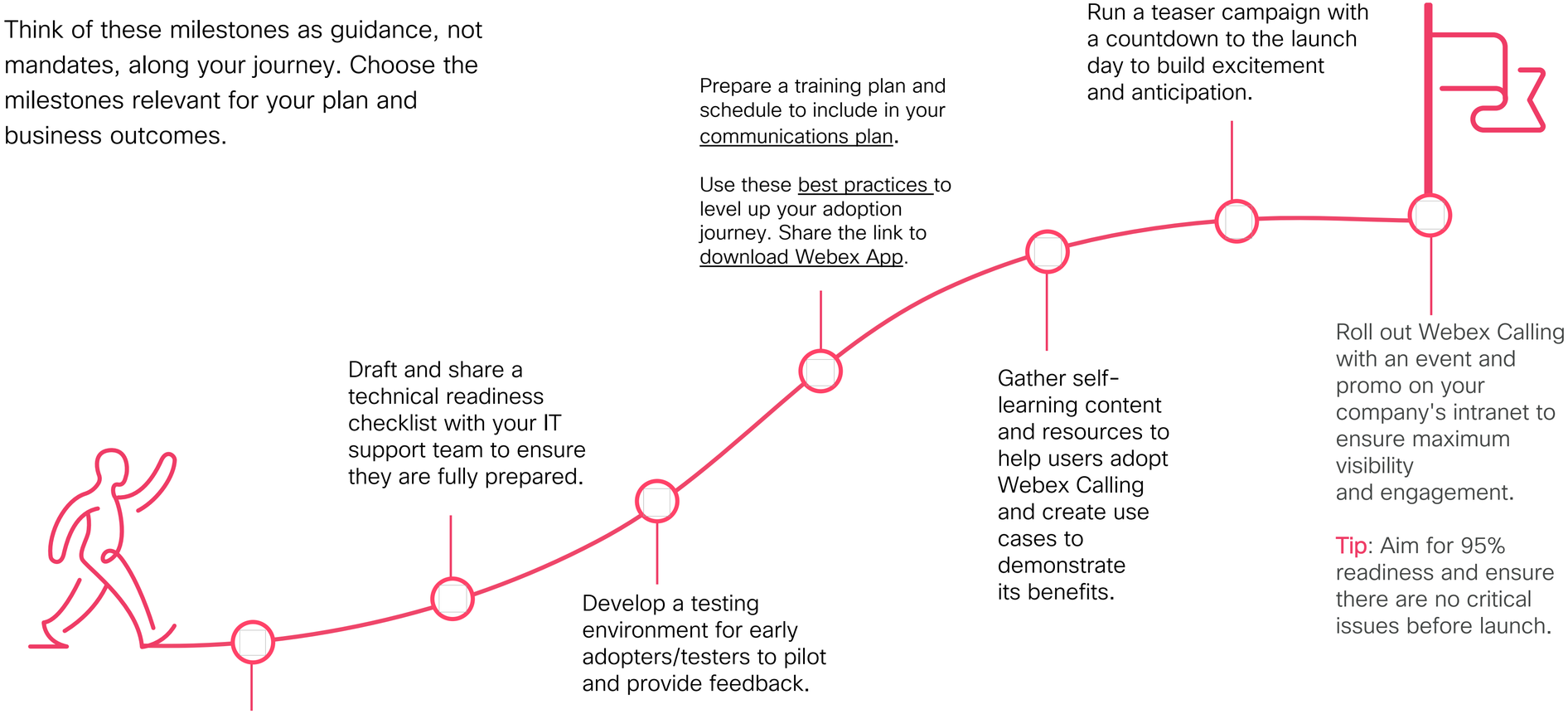
Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

Track milestones

Think of these milestones as guidance, not mandates, along your journey. Choose the milestones relevant for your plan and business outcomes.



Host kick-off meetings to appoint executive sponsors and identify the business drivers behind the new rollout.

Draft and share a technical readiness checklist with your IT support team to ensure they are fully prepared.

Develop a testing environment for early adopters/testers to pilot and provide feedback.

Tip: Monitor your Webex Calling setup and user experience regularly to ensure everything runs smoothly.

Prepare a training plan and schedule to include in your communications plan.

Use these best practices to level up your adoption journey. Share the link to download Webex App.

Gather self-learning content and resources to help users adopt Webex Calling and create use cases to demonstrate its benefits.

Run a teaser campaign with a countdown to the launch day to build excitement and anticipation.

Roll out Webex Calling with an event and promo on your company's intranet to ensure maximum visibility and engagement.

Tip: Aim for 95% readiness and ensure there are no critical issues before launch.

webex by CISCO

Plan

Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by cisco

Tips for conquering hurdles along the way

Milestones make it easy to track your adoption goals. But if you're not where you want to be, we'll help you get back on track.

Unclear use cases

A common roadblock is users not understanding how to incorporate Webex Calling into their daily workflows. Share best practices or use cases they can relate to in their role.

Lack of sponsorship

Executive sponsors are vital in driving adoption. Prepare them and define their responsibilities well so they feel equipped to succeed. Action plans are great too!

Time to prepare

Make it a priority to gather resources early, so that it doesn't sneak up on you. Visit the adoption resource library to curate and customize your user training and adoption content..

03

Resources and more

Plan

Our guided approach to adoption

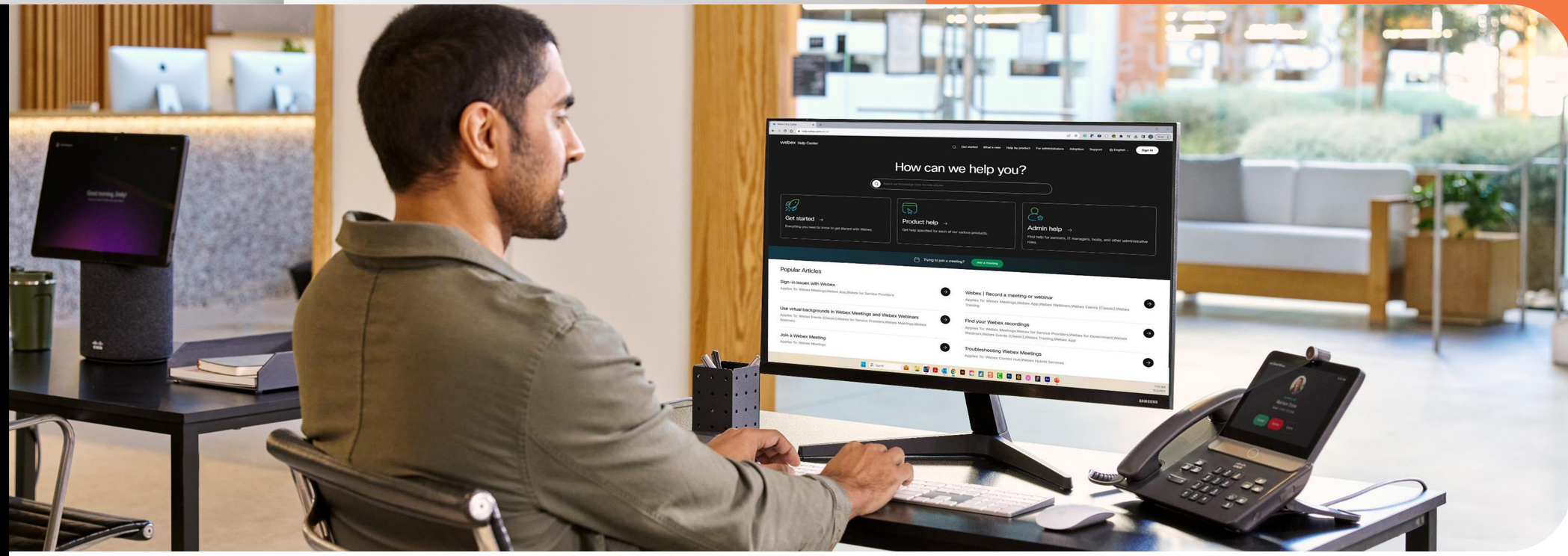
Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by CISCO



Help Center

Self help

- Webex Calling help
- What's new in Webex Calling
- Known issues for Webex Calling

Configuration

- Get Started with Control Hub
- Get started with Webex Calling
- Prepare your environment for Webex Calling
- Port reference for Webex Calling
- Configure Webex Calling for your organization
- Configure Local Gateway on Cisco IOS-XE for Webex Calling
- Configure Unified CM for Webex Calling

Webex Calling features

- Review Webex Calling features
- Review features available by license type
- Set up your Webex Calling features

Plan

Our guided approach to adoption

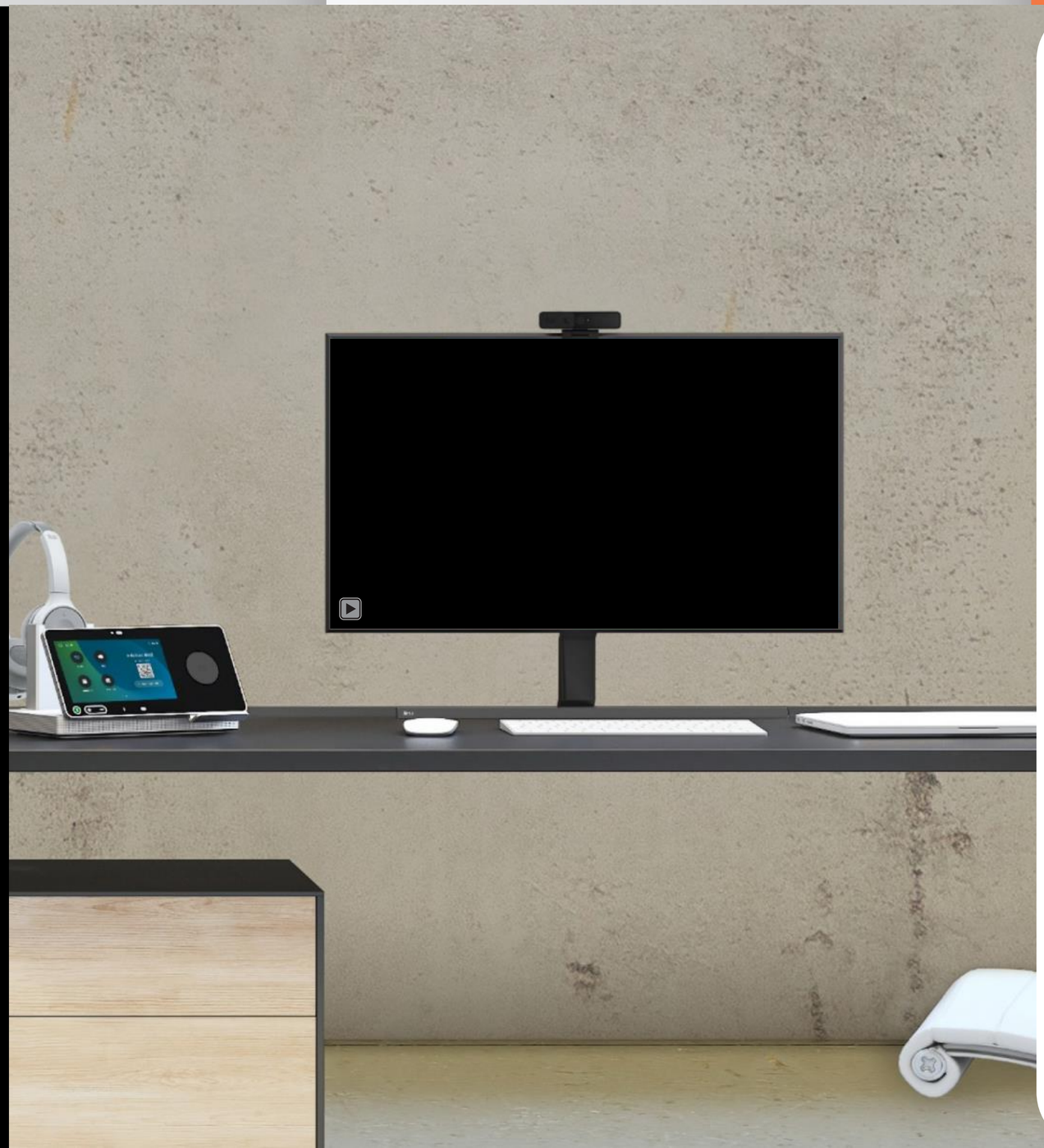
Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by CISCO



Webex Adoption Essentials

Get started
- Get to know Control Hub
- Get started with Webex Suite

Launch kits
- Webex Calling launch kit for IT admins
- Webex Calling launch kit for end users

Checklists
- Webex Calling deployment checklist

Best practices
- Best practices for deploying Webex Calling
- Personalize your Webex Calling features

Quick start guides
- Get started with Webex Calling
- Countdown to an exceptional calling experience

Use cases
- Webex Calling features
- A better way to collaborate with Webex Calling

Plan

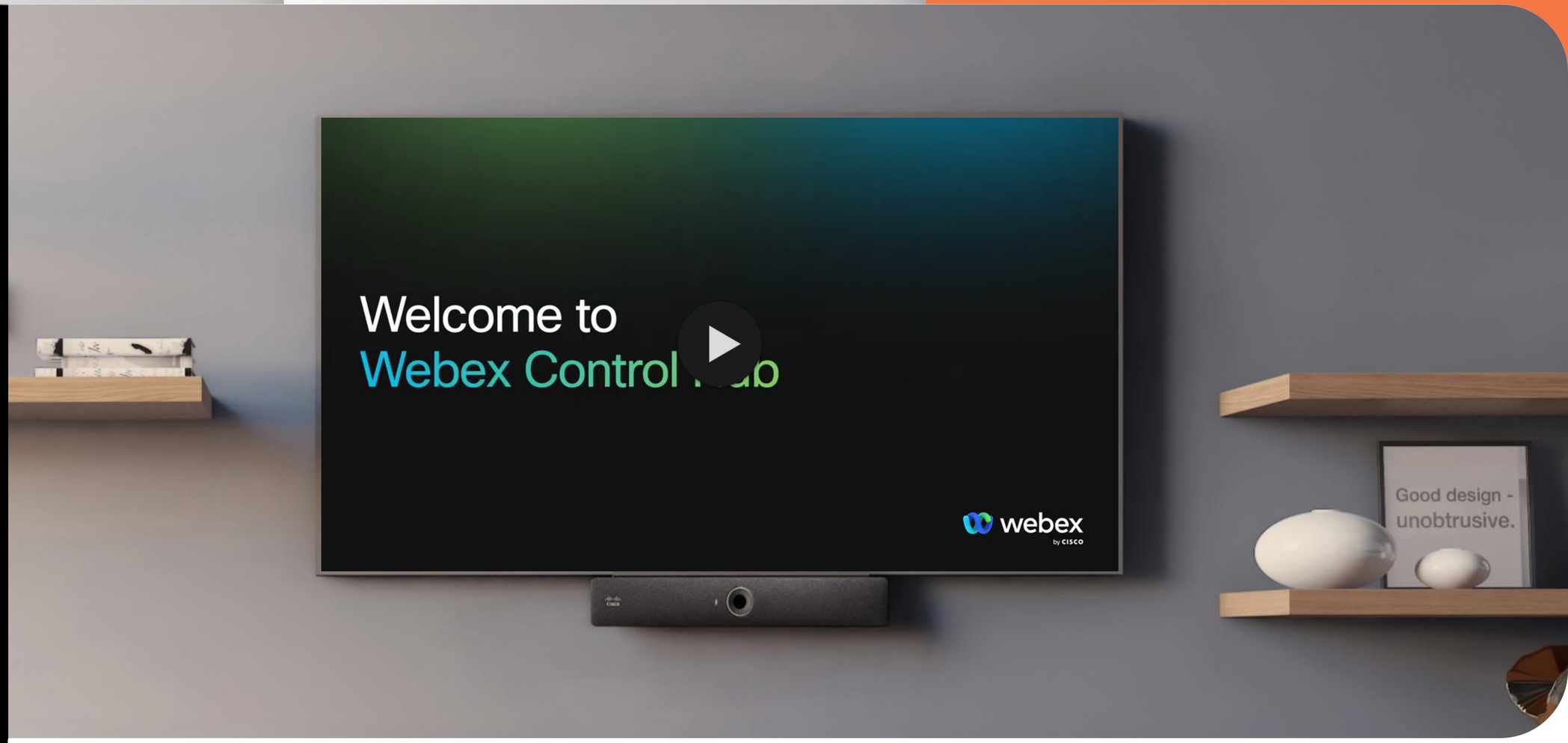
Our guided approach to adoption

Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support



Virtual and live trainings

Self-paced eLearning courses for admins
- Control Hub foundations
- Webex Calling for customer administrators

Live classes for admins
- Webex Calling customer administration

Plan

Our guided approach to adoption

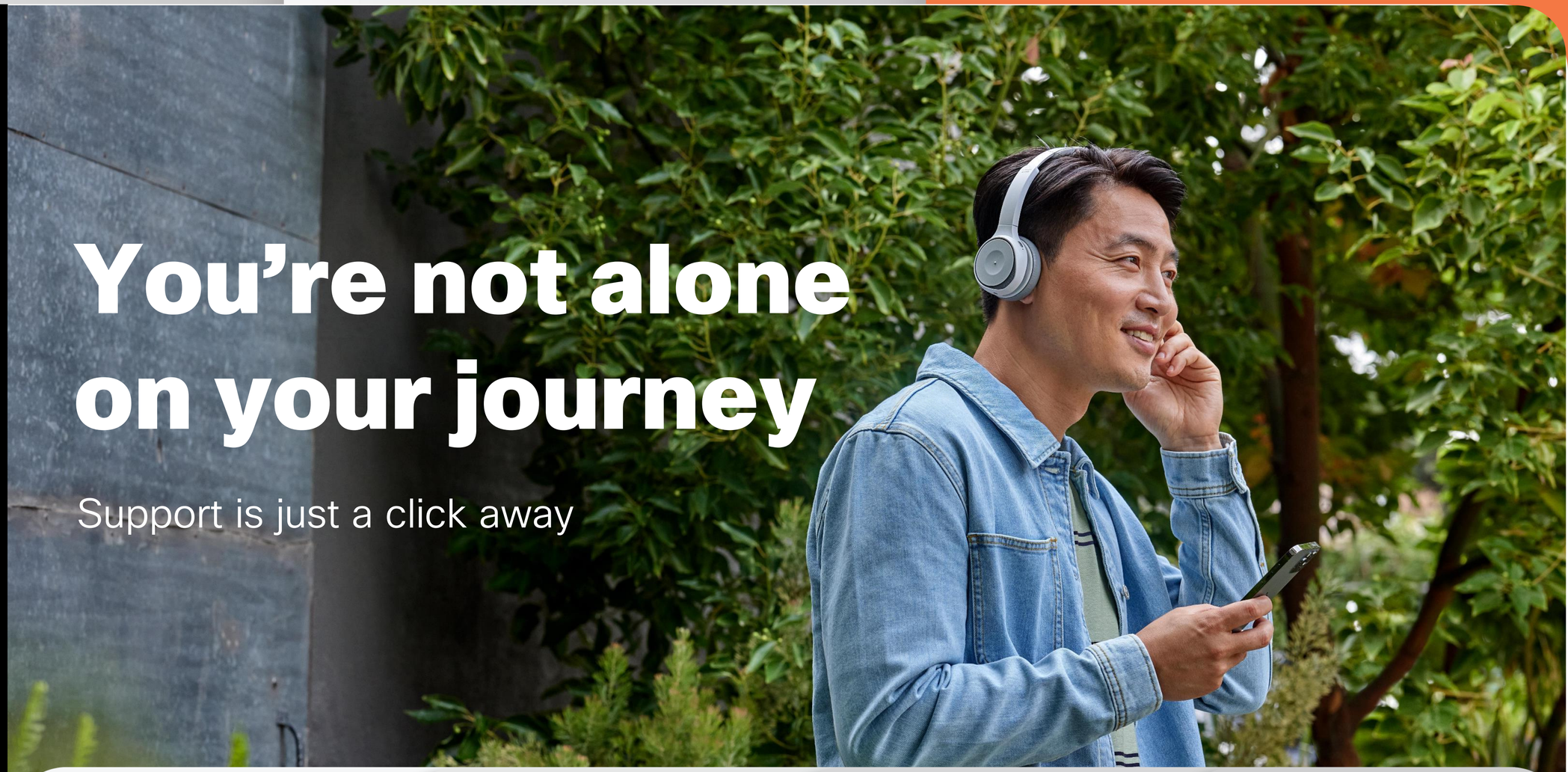
Your onboarding and technical readiness guidebook
- Preview of what's ahead
- Onboard and implement plan

Onboard
- Build adoption team
- Define business drivers
- Discover use cases
- Establish measurements
- Plan kickoff meeting

Implement
- Technical readiness
- Configure Webex Calling
- Track milestones

Resources and more
- Resources
- Support

webex by CISCO



You're not alone on your journey

Support is just a click away

Help Center

Explore how-to articles and troubleshooting tips for Webex Calling administrators and users.

Visit Help Center

Webex Essentials

Feeling stuck? Webex Essentials is your ultimate 24/7 guide to navigating your adoption journey.

Launch adoption library

Admin resources

Online training

Learn at any time with self-paced courses and quick video tutorials.

Learn more

Webex Community

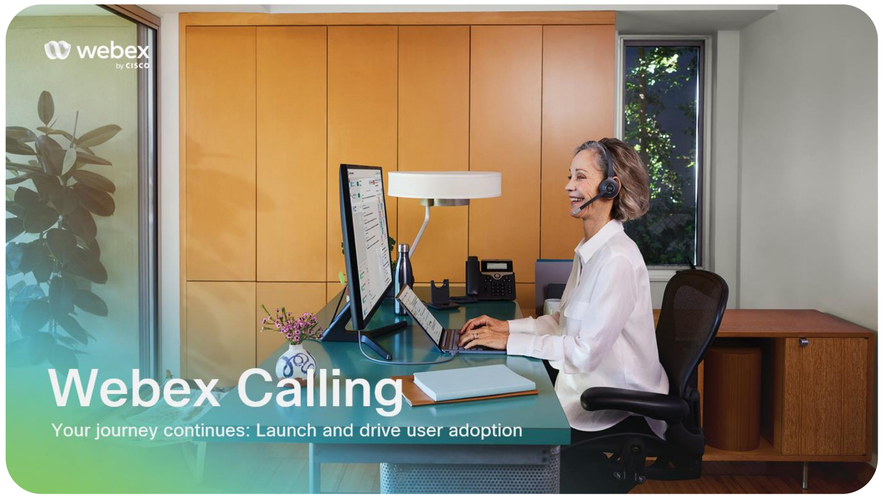
Need peer support? Engage in discussions, seek technical support, and exchange ideas related to Webex services.

Visit Webex Community

Congratulations! You did it!

You’ve engaged the right people, established achievable goals and outcomes, and successfully configured Webex Calling for your organization. Your intentional plan is underway.

Let's introduce the product across your organization and motivate users to adopt it to reach their goals!



Ready to launch?

webex by CISCO