



WHITEPAPER

How Service Providers Can  
Rapidly Onboard Customers  
to Microsoft Teams Phone

# Introduction

Microsoft Teams has become the world's leading unified communications and enterprise voice calling platform, with over 320 million active users as of the third quarter of 2023<sup>1</sup>. As a result, service providers worldwide quite rightly regard the SMB/SME UCaaS market as a key revenue engine and are keen to expand their range of offerings to enable them to migrate these customers to Microsoft Teams Phone quickly and easily.

In this document, we will lay out guidelines to help service providers successfully onboard SMB customers to a hosted Teams Phone service.



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## Mapping Out the Customer Migration Journey

When transitioning to Microsoft Teams Phone, it is necessary to take a variety of considerations into account, which can generally be broken down into Day 1 and Day 2 categories.

### Day 1

Day 1 considerations revolve around migration and onboarding, and include:

- Choosing the most suitable PSTN connectivity method. **There are three ways to do this, each with its own advantages and disadvantages:**
  - **Microsoft Calling Plans** allows for making and receiving calls directly from Teams, but may not be the most cost-effective option. In addition, Calling Plans is not available in all geographic regions.
  - **Direct Routing** uses a Microsoft-certified session border controller to mediate between your current provider and Teams, offering more flexibility and cost savings. It also simplifies the integration of legacy voice and contact center platforms with Teams.
  - **Operator Connect** lets customers choose their preferred operator from a list of qualified providers, but has less flexibility in terms of interoperability and customization.

- Integrating with the customer's existing voice services and applications. **Providers should undertake a discovery and assessment process with the customer, which includes:**
  - A full appraisal of all locations in multi-region and multi-site organizations.
  - Taking an inventory of existing analog devices and SIP phones that the customer may wish to retain.
  - Examining how to integrate existing PBXs, contact centers and conversational IVR platforms with Microsoft Teams Phone.
  - Conducting a thorough survey of the customer's communications requirements, such as device needs for meeting rooms and individual use.
  - Ensuring site resiliency and security to minimize downtime and maximize productivity.
  - Carefully planning the entire implementation and migration process from start to finish.

## Day 2

Day 2 considerations are centered on operation and management, and include:

- User management (MACD) and voice quality monitoring.
- IT staff and user training.
- Periodical analytics and reporting.
- Providing customer support.



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# The Challenge for Service Providers

Service providers can help customers to streamline their deployment and simplify the migration process. However, many of them face Day 1 and Day 2 challenges around onboarding their small and medium-sized customers in a cost-effective way. As a service provider, it is vital for you to ensure a smooth and quick onboarding process, that can be scaled up rapidly, so that you can start generating revenues from as many customers as possible in the shortest amount of time.

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These challenges include defining go-to-market strategy and various technical aspects. **On the technical side, onboarding involves two main processes:**

- **Pre-onboarding and connecting to the customer's Teams tenant:**
  - Collecting the required information from the customer's current telephony infrastructure.
  - [Planning](#) how to configure the multi-tenant SBC and Microsoft Teams.
  - Connecting to the customer's Microsoft 365 tenant and setting up the connection between the tenant and the SIP trunk.
  - Onboarding the tenant, which requires the service provider to maintain a multi-tenant environment or a dedicated environment per customer.
- **Post-onboarding, including assigning user policies and phone numbers, managing global tenant policies and enabling add-on apps like conversational IVR and contact center:**
  - Setting up users and number assignment, which requires creating user accounts, assigning phone numbers and configuring policies and dial plans.
  - In many cases, service providers prefer to avoid handling the above steps, instead asking the customer to perform them themselves. This can significantly delay the time to revenue since SME and SMB customers do not usually have the necessary technical know-how.
  - Provisioning user devices, which requires deploying compatible devices for each user as seamlessly as possible.

These steps can be time-consuming, complex and costly, especially if you have to manage multiple customers with different needs and preferences. Moreover, some customers may need analog gateways, desk phones or Microsoft Teams Rooms devices, while others may have existing analog gateways or desk phones that they would like to continue to use with Teams. This can add another layer of complexity to the migration process

## Before You Start Onboarding

Before you begin the onboarding process, you need to discuss some important aspects with your customer, such as their business goals, communication needs and existing infrastructure. This will help you to adjust the solution to meet their requirements and expectations.


### **One of the key topics to cover is customer discovery. This involves:**

- Understanding the customer's current voice solution and network.
- Determining the required device capabilities for each user persona.
- Evaluating number portability options.

Number portability is the process of transferring existing phone numbers from one service provider to another. This is essential for customers who want to keep their current numbers when they switch to Teams, as it ensures continuity of service and minimizes disruption. Number portability also involves technical and (in many cases) regulatory aspects, such as verifying the eligibility of the numbers, submitting the required documentation, coordinating with the losing carrier and resolving any issues that may arise during the porting process.

You also need to determine how many devices and what types of devices your customer needs for their Teams deployment. Devices can include IP phones, headsets, meeting room devices like speakerphones and webcams, and other peripherals that enhance the user experience and enable different modes of communication. Depending on the customer's preferences and budget, you can offer them a range of device options. You also need to consider whether the customer wants to continue using their existing devices and, if so, whether they are compatible with Teams and how they can be integrated with the solution.

Another type of device that might be required is an analog gateway, which is deployed to support analog phones and other legacy communications equipment such as fax machines, intercoms or overhead paging systems. These analog gateways can be migrated to Teams using the Teams SIP Gateway. To do that, you need to define their location and, according to the number of devices to be supported, the number of analog gateway ports.



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# Introducing AudioCodes Live Platform for Microsoft Teams

## Live Platform

### The Perfect Solution for Swift Customer Onboarding

[AudioCodes Live Platform for Microsoft Teams](#), a white label, cloud-based service delivery platform, is the perfect solution for service providers who want to swiftly onboard their customers to Microsoft Teams Phone. Built in Azure, it offers a comprehensive and integrated solution that covers all aspects of the customer onboarding migration process, from tenant onboarding to user setup, device provisioning and device migration. AudioCodes Live Platform enables service providers to cut the customer service setup time from months to days or hours by leveraging the platform's advanced automation and provisioning tools. **It also enables service providers to:**

- Deliver a fast and easy migration experience to their end customers.
- Manage a community of resellers.
- Reduce the complexity and cost of the migration process.
- Increase their operational efficiency and scalability.
- Enhance customer loyalty and retention.
- Grow their revenue and profitability.

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AudioCodes Live Platform enables service providers to offer their customers end-to-end visibility and control over their voice and video network, as well as user and policy management, eliminating the need for PowerShell expertise or outsourcing. It also includes a selection of innovative AI-powered applications that power productivity and promote stickiness, including native Teams [contact centers](#), [conversational IVR](#), [call recording](#) and [meeting productivity](#). You can also further enhance your UC offering with our Microsoft-certified [business phones](#) and [meeting room solutions](#) and manage them as part of the platform.

## Tenant Onboarding – The Fast Way

AudioCodes Live Platform offers an ideal way to simplify and accelerate the tenant onboarding process by automating and streamlining the configuration and management of Teams tenants.

**It offers several benefits for service providers and their customers, such as:**

- Reducing the time and effort required to onboard a new tenant from hours to minutes.
- Eliminating the need for manual configuration and intervention.
- Providing a user-friendly web portal that allows service providers to easily monitor and manage multiple tenants from a single dashboard.
- Ensuring compliance with Microsoft's best practices and security standards.

With AudioCodes Live Platform, service providers can easily onboard new tenants, create Direct Routing policies and activate the customers' users in a few simple steps.

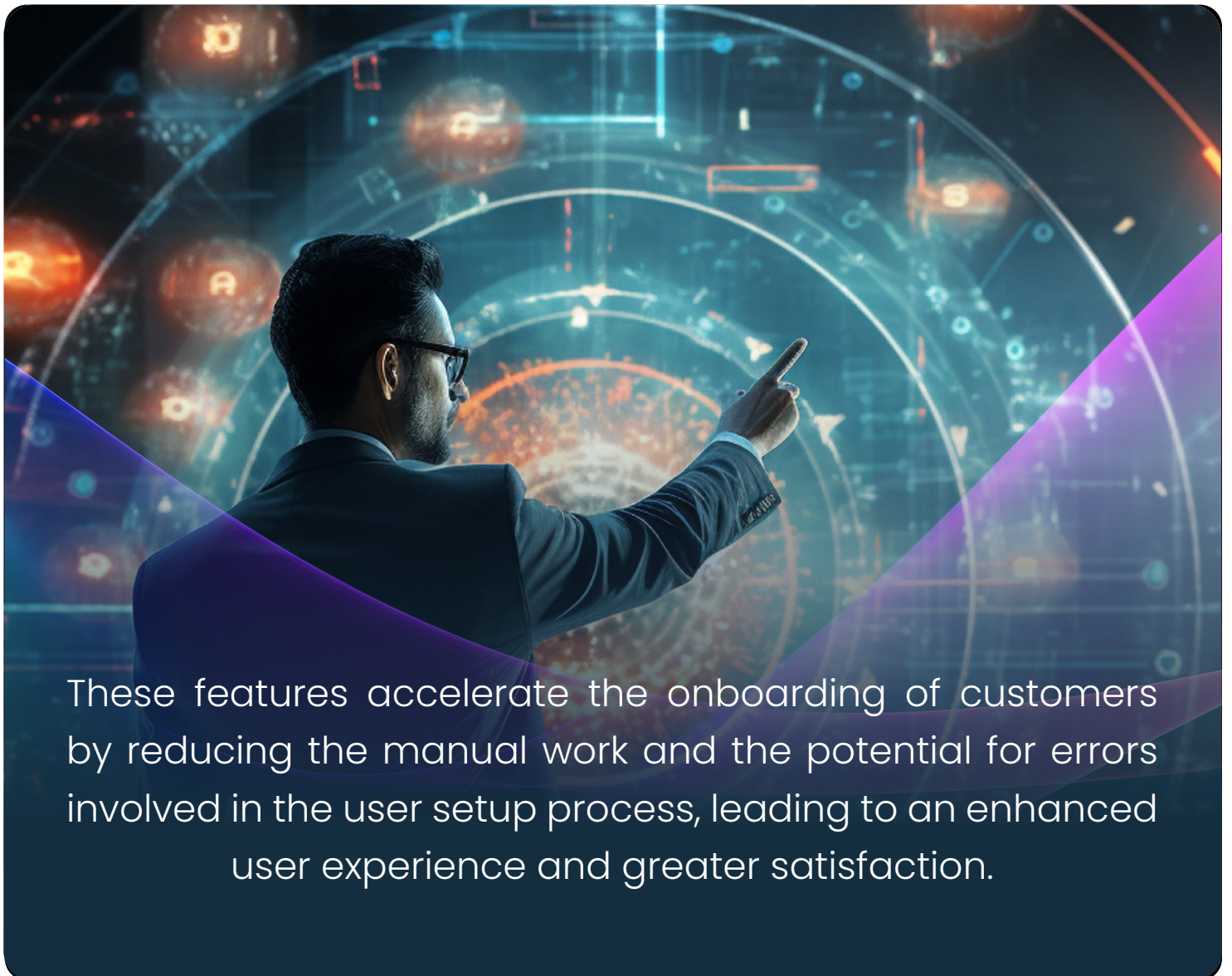


# Self-Service Tools for Customer Admins

Another way Live Platform simplifies and accelerates the user setup process is to go beyond self-provisioning features and give customers self-service tools to help them automate the migration process to Teams. **This enables customers to:**

- Automatically sync their user accounts between Microsoft 365 and AudioCodes Live Platform, eliminating the need for manual configuration and intervention.
- Automatically assign phone numbers and policies to users based on predefined rules and templates.
- Self-provision their users and their phone numbers.

These features accelerate the onboarding of customers by reducing the manual work and the potential for errors involved in the user setup process, leading to an enhanced user experience and greater satisfaction.



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# Automatic Provisioning of Meeting Space and End User Devices

An important part of simplifying and accelerating the onboarding process relates to UC device provisioning. The AudioCodes Live Platform Device Manager's automatic provisioning capabilities, available as an add-on to the standard Live Platform offering, automate the process so **that service providers can:**

- Automatically define initial end customer device templates and configuration, including branch, region and language settings.
- Apply automatic upgrades to devices and perform bulk configurations.
- Provision and update compatible devices for users based on their assigned policies and dial plans.
- Configure customer users with home office devices via a global redirect SaaS service, using zero-touch provisioning to enable devices to automatically connect to AudioCodes Live Platform and receive the required Teams configuration without any user intervention.
- Monitor health dashboards and alarms to avoid any service-impacting issues with meeting room devices or those belonging to key personas.

These capabilities make the physical installation and configuration of the devices much easier, as well as reducing the maintenance and support costs. They also allow customer admins to monitor the voice quality of their Teams users, devices and SIP trunks.

## Migrating Customers with Analog Gateways

Service providers can help customers with existing devices like analog gateways and business phones protect their previous investments by verifying that they are compatible with the Microsoft Teams SIP Gateway.

**With AudioCodes Live Platform, there are two recommended methods that depend on the size of the customer:**

- In a large enterprise, a DHCP server is used to tell devices where the software and configuration information is held. The enterprise should update the DHCP server with the AudioCodes Live Platform Device Manager's URL address. There is also the option for gradual migration by manually updating each device using the SIP Gateway Device Manager.
- In smaller organizations, it is recommended to change the provisioning URL manually in the analog gateways or replace these gateways with newer models that are preconfigured to work with the Microsoft SIP Gateway.

AudioCodes analog gateways make it possible for service providers to configure their customers' ports in bulk, enabling them to quickly provision each device to connect with Teams.

## Migrating Customers' SIP Phones

As part of migrating a customer to Microsoft Teams Phone, an important stage is identifying which users will use the Teams client, who will use an IP phone and who will keep their existing SIP phones.

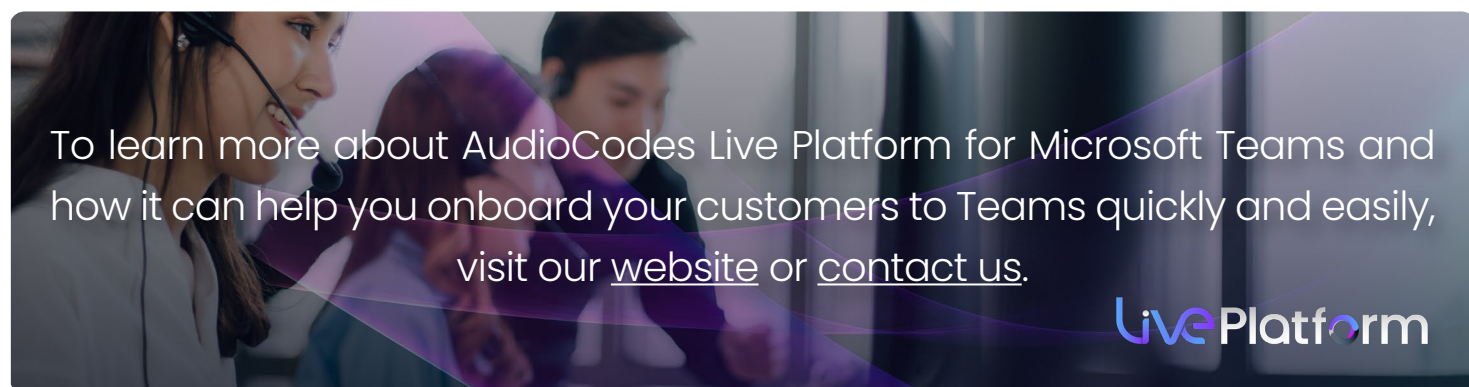
For customers with non-Teams native AudioCodes IP phones, AudioCodes Live Platform Device Manager offers an automated way to migrate to Teams by configuring them automatically to work with Microsoft Teams SIP Gateway.

For third-party phones, the service provider will have to set up the vendor's redirect server to provision these phones for the SIP Gateway. Once this is done and the phones are registered on the SIP Gateway, customers can use AudioCodes Live Platform's tenant management batch tools to reconfigure the phones for all their users.

In this way, AudioCodes Live Platform enables service providers to leverage their customers' existing investments and assets, as well as ensure a smooth and seamless transition to Teams.

## Get Started Today

AudioCodes Live Platform is a unique offering that combines certified solutions for Microsoft Teams Phone and contact centers, leveraging AI and Azure to enhance user, agent and customer experience. Complemented by advanced onboarding automation and management tools, this innovative, cloud-based solution delivers seamless PSTN connectivity along with a range of services to offer a complete calling and contact center experience for Microsoft Teams.



<sup>1</sup> [Microsoft Fiscal Year 2024 First Quarter Earnings Conference Call](#)

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