Nextiva Onboarding

What is Onboarding?
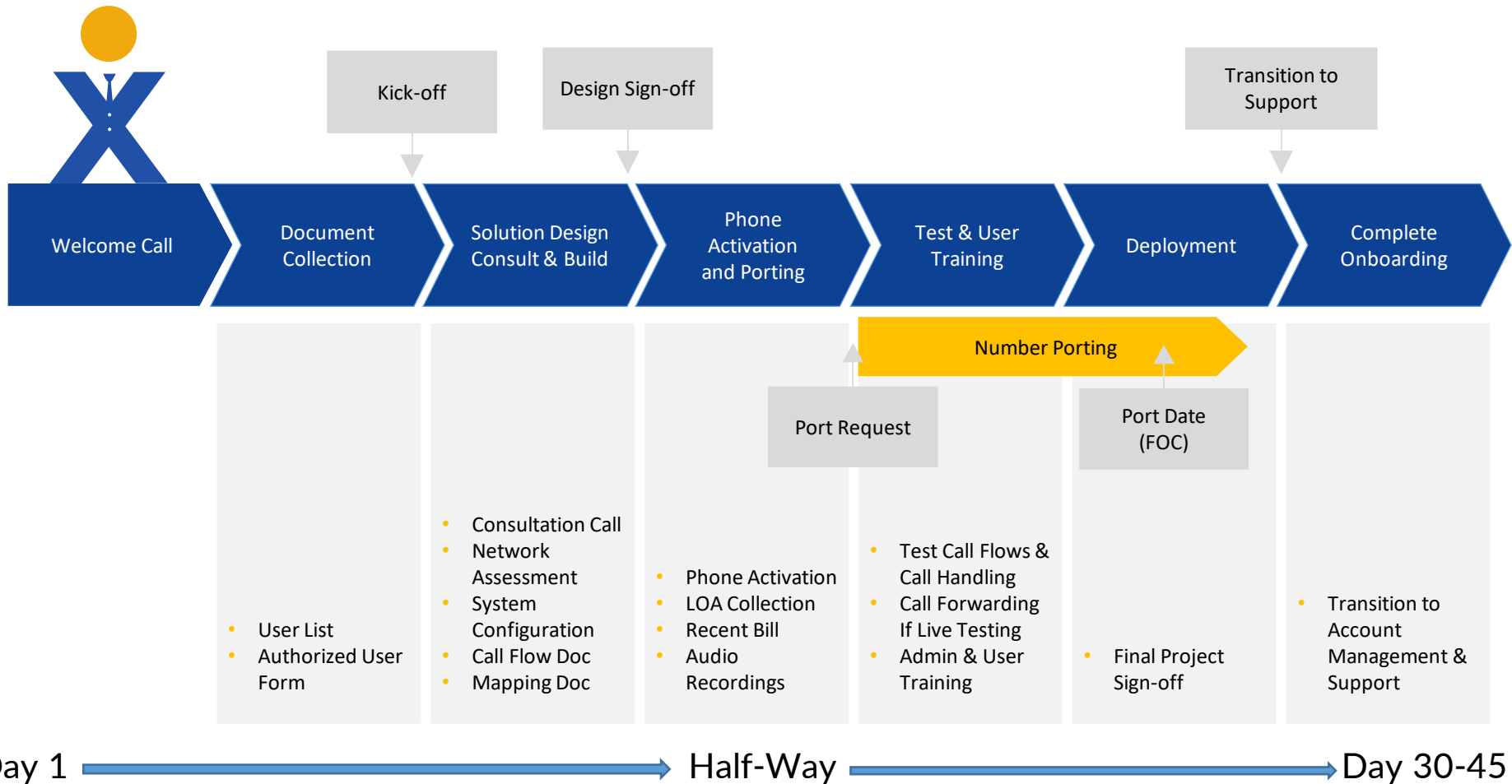
Onboarding is the process in which Nextiva gathers important information regarding you, your company, and your communication needs.

The Onboarding Team acts as a primary point of contact during the entire process.

During the Onboarding process, we will:

- Set expectations

- Establish timelines

- Check network

- Set up call flow

- Install phones

- Provide training

- Port numbers

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Onboarding Timeline

Kick-off

Design Sign-off

Transition to Support

| Welcome Call | Document Collection | Solution Design Consult & Build | Phone Activation and Porting | Test & User Training | Deployment | Complete Onboarding |

Number Porting

Port Request

Port Date (FOC)

- User List
- Authorized User Form

- Consultation Call
- Network Assessment
- System Configuration
- Call Flow Doc
- Mapping Doc

- Phone Activation
- LOA Collection
- Recent Bill
- Audio Recordings

- Test Call Flows & Call Handling
- Call Forwarding If Live Testing
- Admin & User Training

- Final Project Sign-off

- Transition to Account Management & Support

Day 1 ——→ Half-Way —————→ Day 30-45

Meet the Nextiva Team

Implementation Coordinator

- Overviews the process with you
- Document collection
- Initial appointment setting

Implementation Manager

- Consults with you on your phone system specifications
- Reviews and manages milestones and timelines
- Main point of contact throughout the Onboarding process

Onboarding Technician

- Performs network checks
- Builds your phone system to the required specifications
- Leads deployment

Customer Trainer

- Provides administrator and end-user training for your company

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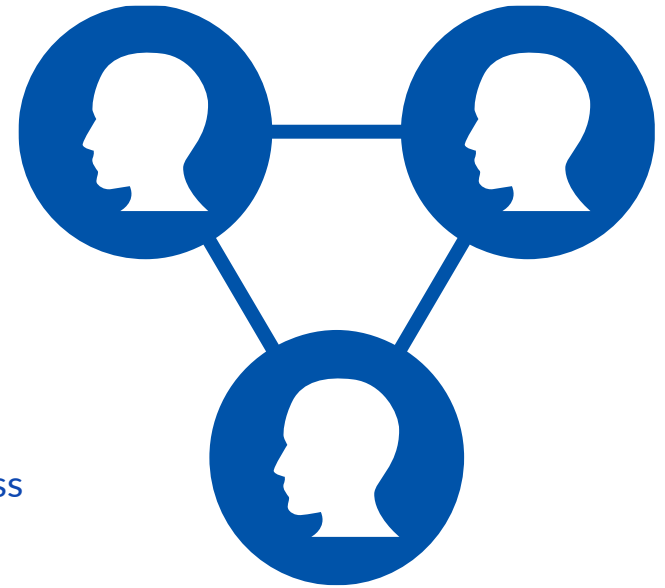
Welcome Call

Initial Call

- Your account will be assigned to an Implementation Coordinator.

- Within about 48 hours, the Welcome Call is made to you to discuss initial requirements and introduce you to your unique success team.

We will discuss:

- How to contact Nextiva

- Documents we need

- Network requirements (*Schedule technical appointment)

- CPNI/Authorized users

- Porting expectations

- Smartsheets and tracking your setup

Document Collection and Appointment Scheduling

You'll need to have:

- Authorized User Form

- Completed User List

Document Collection and Appointment Scheduling

Appointment Scheduling

- An Implementation Coordinator will schedule two appointments.

- Once your appointments are booked, you'll no longer work with Implementation Coordinator.

- An Implementation Manager will manage project moving forward.

Appointment #1	Appointment #2
Consultation call with your new Implementation Manager	Network evaluation with a Nextiva Onboarding Technician

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Customer Consultation

Your Implementation Manager will consult with you about your future phone setup.

This appointment aims to review how calls are routed to your business, including how your main phone number will ring with Nextiva.

To prepare for the call ask yourself the questions below, and involve anyone who will be included in your phone system setup.

1. What Call Groups do I need?

2. What Auto Attendants do I need?

3. What schedules do I need?

4. Do I want to setup any advanced features, such as Group Paging, Conferencing, Voicemail to Text or Mobility?

5. Do my phones need unique configuration?

Adjustments may be required down the road, but we're always here to help you!
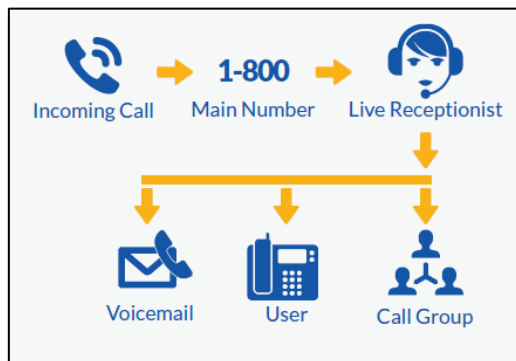
Customer Consultation

Configuring Call Flows

We will gather your input during this stage and schedule a technician to build out the account, per your specifications.
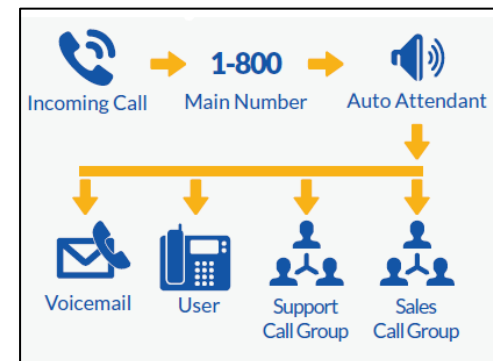
Here are some examples to consider:

Example #1
When callers dial your main number, it rings a live receptionist who disperses calls manually.

Example #2
When callers dial your main number, a recorded Auto Attendant greeting plays with selections the caller can choose from to be routed automatically.

Customer Consultation

Network Review

A Network evaluation is crucial to a smooth installation. Nextiva takes extra measures to ensure a smooth move to our service, and we will always check your network before plugging in phones or going live. For the most part, audio degradations happen because of local network configuration, for example, firewalls not properly setup or two routers on the same network. Nextiva will always check your network during Onboarding, setting you up for success!

Make sure you have access to your network!

We'll be checking the following:

- ISP and Type of Internet

- Modem and Router details

- Firewall Settings

- Bandwidth and Latency

If we discover any issues during this appointment,
Nextiva will help you work with your ISP to correct them!

Installation and Porting

We'll be testing your call flows during this time slot, inspecting your initial setup requirements and making adjustments as needed. We will need your phones to be installed before this appointment so that we can make sure they're working properly.

We'll also make sure:

- Your phones are online and working

- Your audio quality is clear

- Voicemails route to correct boxes

- Caller ID is reporting properly

- Call continuity is in place

- Auto Attendants route properly

Prior to your setup appointment, plug in your new phones!!

This will streamline the installation appointment and allow our team to make test calls and check the call flow more efficiently.

Installation and Porting

After your installation appointment you'll be ready to start using your new Nextiva communication system. We're also ready to start the porting process for you, and your Implementation Manager will be collecting the E-LOA and recent bill (required documents) and start your porting submission.

Next Action Items:

- Forward calls from your last provider to your Nextiva temporary numbers if possible

- Turn in E-LOA and recent bill

- Schedule training appointments for Users and Administrators

Installation and Porting

Porting Submission

After the phones are up and running we'll start the port request. Here are some things to keep in mind during porting:

- All E-LOA forms are filled out online using Docusign.com.

- Make sure only the authorized user/owner of the phone numbers fills out the E-LOA.

- E-LOAs <u>CANNOT</u> be printed and submitted via email; you should always use Docusign.com.

Porting requires a minimum of:

- **10-14 business days** for 49 or fewer numbers

- **21 business days** for 50 or more numbers

Installation and Porting

Port Rejections

The losing provider may deny the port request. Port rejections slow down the Onboarding process.

Possible reasons for rejection:

- Mismatched information on the E-LOA

- No active service with the losing provider

- Outstanding balance with the losing provider

- Un-authorized signer on the E-LOA

If everything is correct, your losing end provider has about 10 business days to respond and allow for the FOC and transfer of the numbers to Nextiva.

For help or more information regarding porting, please contact our team to attend an informational Porting webinar!

Training

After your installation day, you'll be offered an additional appointment dedicated solely to training administrators and/or end users.

- Free training sessions for administrators or end users

- Additional sessions may be booked as needed

- Over-the-phone, remote training

- One-on-one or group training

Bring your questions!

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Deployment and Final Sign-Off

Before we complete your onboarding experience, we let you use the system in real-life. We won't finish your setup until you sign-off!

- Use your Nextiva phones daily, just like you would any other system

- Work with your Implementation Manager if you need to make changes

- Learn the ropes! Attend a training session with your whole team

- Live-environment test while your port completes

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Onboarding Timeline
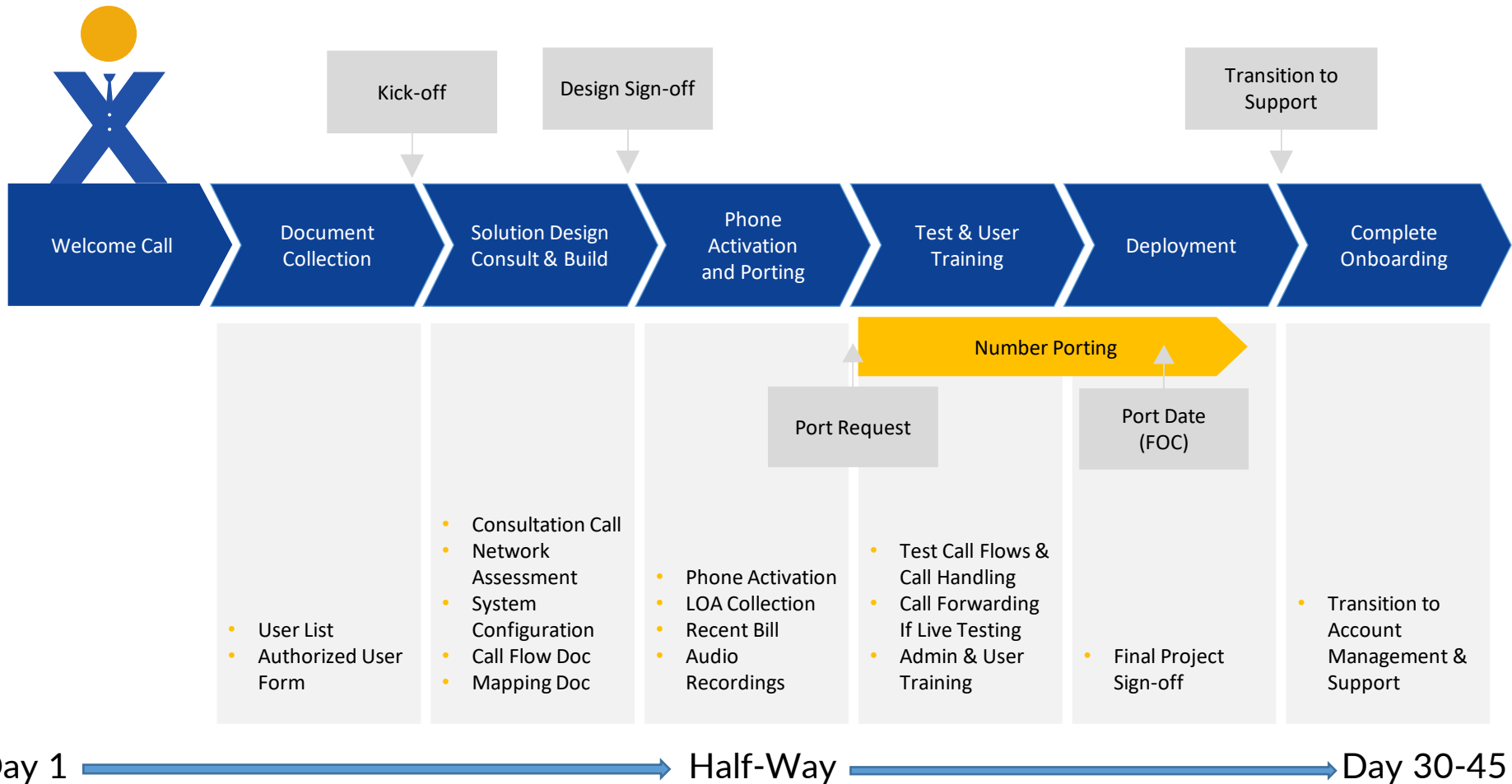
Onboarding Slow-Downs

Possible Slow-downs:

- Internet not up to required speeds or not installed*
- Location not ready (not wired properly, customer not moved in, etc.)*
- No access to your network*
- Missed appointments
- Unsupported router
- User list incomplete
- Missing call flow data
- Porting problems and rejections
- Call flow changes after design sign-off

Please make sure your Onboarding contact is aware of these issues ASAP!

Your communication needs and setup are 100% unique.

We want you to have fun building your new communication system.

After your setup is complete, we can evaluate the call flow and make adjustments as needed.

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Welcome to Nextiva!

Welcome Call | Document Collection | Solution Design Consult & Build | Phone Activation and Porting | Test & User Training | Deployment | Complete Onboarding

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