Unified Communications Requirements for Fritz Industries, Inc.

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# Abstract

In this study, I will outline what Unified Communications is and how it can enable companies to be more efficient. I will also discuss how a Dallas based chemical manufacturer (Fritz Industries) attempted two different implementations of unified communications platforms, with different results. Fritz Industries recently purchased an Alcatel-Lucent IP PBX (private branch exchange) and several different pieces of software that accompany the system. Many of these applications were built to be part of a unified communications platform around the PBX. After months of implementation of a specific part of the system, called My Instant Communicator, Fritz Industries decided to reconsider their approach to integrating services such as instant messaging, screen sharing, and video collaboration with the PBX. In the second portion of the paper, I will discuss how Fritz selected the My Instant Communicator product and how they are re-approaching unified communications in the implementation of the Microsoft Lync product coupled with an Audiocodes media gateway. In closing the paper, I will give an update on the current status of the Lync implementation at Fritz Industries.

# Storyboard

Imagine a workforce, so linked with vendors and customers that making a sale or getting a quote takes only the click of a button and a quick instant message to the third party you’re doing business with. Imagine a workforce, one which secure audio conferences can be placed from anywhere in the world with an internet connection. Imagine a workforce that uses every available tool to be mobile, productive, and effective. Imagine a workforce that can solve issues with desktop sharing and virtual whiteboards while never having to leave their desk. Lastly, imagine a workforce that meets collaboratively with counterparts from around the world, in real time, via video conferencing. This is a workforce that embraces unified communications.

# What is Unified Communications?

Unified Communications is defined by Wikipedia as the integration of real-time communication services such as instant messaging (chat), presence information (displaying meeting information and if a user is on the phone or not), telephony, video conferencing, data sharing, call control, and speech recognition with non-real-time communication services such as unified messaging (integrated voicemail, e-mail, and fax). Unified communications can encompass all aspects of communication via TCP/IP and could be more broadly defined as communication that optimizes the processes and output of a business or unit.

# History and Evolution of Unified Communications

In the late 1980’s, voicemail systems with the capability of interacting with users and emailing voicemails were considered to be unified communications, though the term unified communications wasn’t broadly used until the mid-1990’s, when the first product that displayed presence of employees was released by New Zealand based IPFX.

IP networks have greatly changed the landscape of unified communications, as phones became just another device with Ethernet capabilities. With the onset of the cloud, new laws around communication, enhanced networking protocols, and mobile device integration, unified communications is constantly evolving.

# History of Fritz Industries

Founded in 1956 by Frederick “Fritz” Weisend, Fritz Industries, Inc. is an independent, employee owned company with integrated manufacturing and on-site research and development. Corporate headquarters and manufacturing facilities are located in Mesquite, Texas, with additional manufacturing facilities in Greenville, Texas.

Fritz Industries operates several divisions including both liquid and dry oilfield chemicals, an aquatic chemical division, and a pet chemical division.



# Selecting My Instant Communicator

When Fritz was performing the search for a replacement for their antiquated phone system, the company considered most of the top end systems on the market. The vendors they reviewed included Alcatel-Lucent, ShoreTel, and Cisco. Alcatel Lucent eventually won the bid with competitive pricing, a full suite of unified communications products, and a great demonstration experience at their local Plano, TX facility. The first part of the implementation was to upgrade all of the data network equipment to support the power over Ethernet function of the IP phones that would soon be rolled out. This portion of the project went very well, but soon the project would become tiresome and suffer from frequent delays and miscommunications.



The My Instant Communicator product was a piece of the unified communications solution offered by Alcatel-Lucent. It is a web based application that also has a client installed on each PC. The client was deployed in small groups to individual departments without a real plan for implementation. There were several problems as the population of users continued to grow.

## Problems with My Instant Communicator

The major problem with the My Instant Communicator product was that Fritz had no functional or non-functional requirements for what the unified communications system needed to perform for the company. Fritz had several different use cases and saw demonstrations in lab environments of what all these systems were capable of. This gave Fritz many good ideas about how to implement the system, but the lack of requirements was a problem for several reasons. The largest problem this created was the lack traceability between what was promised as part of the system and what was being delivered as part of the project. Another problem that the lack of requirements caused was no clear end date for the project. New ideas would be thought of and added in to what Fritz was currently doing without documenting a plan for how to implement the idea. There was no list of conditions to satisfy for the project to successfully close, so the project remained open much longer than anticipated. Enterprise requirements alone are not sufficient for most organizations to successfully implement large software packages.

There are also several other unique problems that Fritz Industries faced when implementing the My Instant Communicator product. The first is that the product was plagued with several different bugs and caveats that forced Fritz to halt the roll out to end users on multiple occasions. The bugs in the software included problems with SSL certificates, problems with different versions of .NET on different computers and operating systems, and problems with mass deployment of the client application. There were also issues with how the desktop sharing portion of the My Instant Communicator application worked.

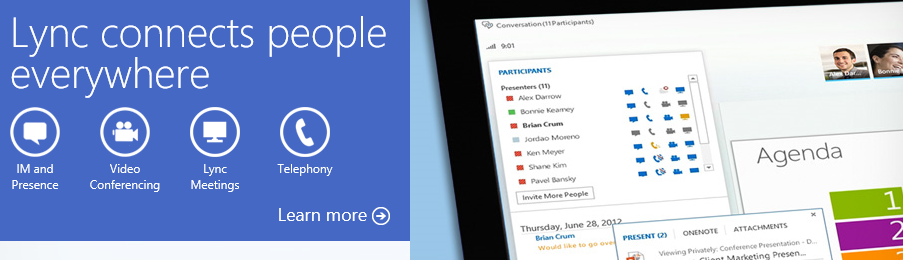
The second unique issue was that Fritz is a medium sized company, with around 500 employees. Many of the large providers of phone and unified communication systems operate under the value added reseller (VAR) model use the VAR as the implementation specialists on the ground for companies the size of Fritz. While this model makes great business sense for the provider, it can sometimes be a hindrance to the customer who, however small, may have big business needs from their communication platform. It can be a challenge for the VAR to find the same quality of talent that the provider is capable of recruiting.

An equally challenging issue for any software implementation is user adoption. Fritz was transitioning from a very old system which had no unified communications features. Implementing a system which enabled the users to communicate quickly sounds great on paper, but encouraging user adoption would be a challenge. The traditional way of communicating may be more appealing to some users, and they must be shown the value of instant communication across multiple platforms. Fritz didn’t necessarily consider this to be a huge problem, and perhaps it would not have been if the My Instant Communicator product would have performed as promised, but the end users eventually gave up on using the product due to reliability issues.

# The Turnaround

Given the frequent nature of these issues, Fritz Industries was frustrated with the product and their end users had all but given up adoption of the My Instant Communicator product. This posed an opportunity for Fritz to rethink their approach to implementing what the employees need to be most efficient at their jobs. The first thing that Fritz knew they needed to do was to establish clear goals for what the unified communications system needed to do for it to truly help the business. This knowledge led them to establish a set of requirements and objectives that they would be able to track and help give partners clear guidance in what Fritz wanted to accomplish. The first thing Fritz did was establish a service catalog of what would be provided to users as part of the end suite of unified communications. This service catalog was comprised of: instant messaging, screen sharing, delivery of voicemails to email, audio and video conferencing, and call control via mobile devices. This catalog helped define more technical requirements, including what hardware would be needed to control the systems and it also helped drive the decision for the future product that would be used for unified communications. The in depth set of requirements included other things such as: fitting unified communications into the strategic goal of becoming a more effective and mobile workforce, ensuring that user input was a large driver in the selection of a package, utilizing more applicable use cases, and the need for technical integration with existing systems.

Using the plan above, Fritz decided to implement the Microsoft Lync package. As mentioned, in a previous phase of the project Fritz had implemented a new PBX and data network equipment. They were also largely satisfied with these parts of the Alcatel-Lucent product. They knew from this point that they must focus on the integration of this package with their existing systems. It became apparent that an additional product was needed that would facilitate communication between the Lync server and the PBX. This device is called a media gateway, and handles interactions via SIP (session initiation protocol) between both systems. This product, manufactured by Audiocodes, enabled many of the features of unified communications, including presence, click-to-call, and reservationless conferencing to work seamlessly between the existing systems and the new Microsoft Lync platform.





# Implementation Status and Future Direction

Fritz Industries is currently running a pilot of the Lync product to 20-30 users, all of them are part of a joint effort to validate the system and perform more in depth testing to ensure maximum user adoption. These users are a mix of technical and non-technical, and will become the Lync subject matter experts for each of their departments. The term that Fritz uses to describe these users is “Lync Champions.” The Lync Champions will enable Fritz to more effectively support all of their users in the most efficient manner. Fritz has also developed a formal implementation plan, designed tailored training sessions for individual departments, and now has requirements that will ensure the project will end in a timely manner.

## The Culture change initiated at Fritz Industries

Fritz Industries learned the importance of formal project management, and more importantly formal requirements gathering. Prior to beginning the Lync implementation, the lack of formality around projects had led to many half implemented solutions that didn’t capture or deliver what the users needed to be most productive. The company has now implemented several different procedures and policies, including the formation of a new department, the “Project Management Office” or PMO. The PMO will be the driver for requirements elicitation, implementation, and validation for the entire company going forward. The project management office has already established formal project intake processes and documentation standards for project information, including requirements. The company is now comfortable going forward that they will have a higher success rate for project completion.

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