

SMB/ICT Alignment: Company Internal Station User Needs Analysis

This worksheet is designed to solicit feedback from individual employees or station users to help identify the most cost-effective type of endpoint (station), set capabilities, feature access, restrictions, programming, personal settings and special applications for each phone user.

Station location: _____ Current extension: _____

User (employee) name: _____

- Executive user Front-office user Back-office user
 Plant Other: _____

Station location: _____ Existing cable: _____

Current type of phone (set): Analog (Retain) Digital (Retain) VOIP

- Basic set Display set Answering point Console/DSS: _____
 Executive set Hands Free Contact center agent Contact center supervisor
 Special application: _____
 Remote (branch) user: _____
 Mobile user: _____

Endpoint accessories: (Headsets, conference phone, etc.) _____

Inbound call responsibilities: _____

Call answering needs: _____

Outbound call responsibilities: _____

Call placement needs: _____

Call management responsibilities: _____

Call management needs: _____

Personal productivity needs: _____

Special application needs: _____

Access restrictions: _____

Computer integration needs: _____

Data, information, communications and cyber security prevention, management and response plan including policies, tools and strategies.

- Company has a plan I am trained on the plan I adhere to the plan

Additional Comments: _____

Company External Caller Needs Analysis

In addition to internal employee user feedback, it can be equally as important to get key customer, dealer, supplier or other external caller feedback (email or phone) on information and communications flow or responsive service challenges that they may have experienced with your business and their recommended solutions. Soliciting frequent caller feedback is key to uncovering unexpressed customer service problems, demonstrating your interest in their input, promoting customer loyalty and identifying special caller applications and external information and communications flow needs that you were not aware of.