

# How to Switch TEM Providers: 5 Steps to Guarantee Success



# INTRODUCTION

Effective communication is a critical piece to success in any arena – including telecom expense management and vendor relationships. In our experience, we have seen communication barriers cause the most headaches and disconnects in services.

There are three main reasons organizations choose to move their services elsewhere:

1. The current TEM vendor lacks quality customer support.
2. The current TEM vendor lacks customization option and tailored solutions.
3. The current TEM vendor's software does not update features or is not included in the service.

The biggest fear preventing organizations from switching TEM vendors is that it will be an ineffective and painful process. Remember what it took to initially deploy the solution? The good news is that the transfer of responsibilities from one provider to another can be a seamless process, especially when you are supported through the course of action by a vendor who has assisted customers in your position many times before.

Valicom has decades of experience transitioning dissatisfied organizations from legacy providers over to the Valicom solution. To guarantee success in the transition process, we have outlined five critical steps to follow.

*“Gartner is witnessing a huge wave of large companies that are dissatisfied with their TEM providers and the migration of these big logo brands is just the beginning. Gartner believes that the market is willing to pay a premium for execution and stability.”*

- Gartner Research, 2014



# STEP 1.

## FIND THE PERFECT FIT

Gartner estimates that there are over 200 TEM vendors working across the globe. Each provider will offer different strengths and weaknesses. You will need to uncover provider characteristics to find your perfect fit, including:

**Benchmarking** – benchmarking pricing data will set you aside from your competition, does the TEM provider offer pricing evaluations and RFP support?

**Independence** – some TEM vendors work with preferred telecom vendors which could hinder the biggest savings, does the TEM provider work independently?

**Mobile Environment Expertise** – mobile devices carry a massive weight in some telecom environments, does the TEM provider have a history of success in mobile environments?

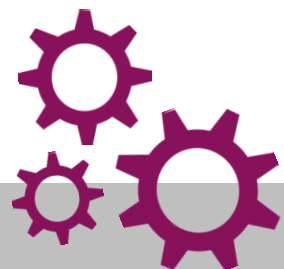
**Service Options** – TEM solutions offer a variety of services, some can even customize options per request, does the TEM provider offer the services you need?

**Cost Allocation** – cost allocation is a very important service for the organizational process of telecom expense management, does the TEM provider offer cost allocation expertise?

**Inventory Management** – inventory management is the foundation of telecom expense management and the software administered to manage inventory is the most critical piece of the puzzle, does the TEM provider offer state-of-the-art technology, feature updates and support?

**Bill Payment** – this solution is a saving grace for busy departments to save time, eliminate late fees and promote further savings, does the TEM provider offer bill payment services?

Make sure to review your contract with the current TEM provider to uncover agreement details and term length, including automatic renewals or notice requirements. The best time frame to search for a new TEM provider is when you have approximately six months left in the contract term.



# STEP 2.

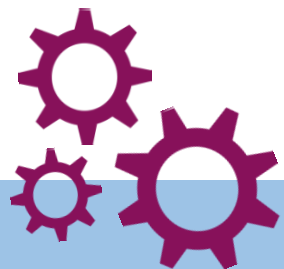
## BUILD YOUR TEAM

To streamline processes, communication will be the foundation of success. It is important to begin the TEM team building process by picking a few representatives to manage the project, communications, and ongoing tasks.

Whether you intend to manage TEM internally with a software-only model or you wish to outsource TEM completely, there should always be 2-5 point of contacts depending on company size. We suggest pulling personnel to represent your finance, IT, and procurement departments. Start with an internal meeting to debrief the status of your current TEM relationship and the upcoming switch in vendors.

Build your team by getting to know the new project managers and analysts at your new TEM company. These representatives will assist you with questions, TEM expertise, and ongoing support. Schedule a discovery call to exchange contact info – these experts are extensions of your team, use them as your support.

You should never need a 1-800 number if your supporting team has a solid foundation of open communication and a willingness to help.



# STEP 3.

## PULL INFORMATION

Data collection is going to save time down the road. Making sure you have all the information ready for the new TEM provider will guarantee success. Be sure to pull the following information:



**Active IT / Telecom Vendors & Contracts** – Pulling this information will allow you and your new TEM provider to see directly into your ongoing services. Also, this will speed up the process of reviewing contract details for cost savings opportunities and invoice comparison by your new TEM provider.



**Active IT Assets** – Some software options allow you to pull inventory reports while others may require you to track it all in a spreadsheet. Create a complete inventory database to share with your new TEM provider to transfer the inventory over in a seamless, time-savings fashion.

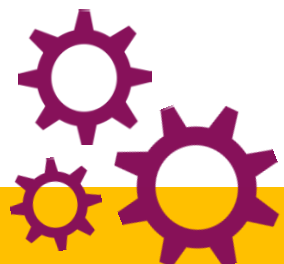


**Recent Invoices** – Pulling this information will allow you and your new TEM provider to review account numbers and set up billing services while comparing invoices to contracts for cost savings analysis.



**Current Process Outlines** – To streamline workflows, your new TEM provider will need to review and analyze current procedures by accessing accounting and chargeback processes as well as other existing workflows.

If you do not have access to this information, you can request the information from your vendor who will be able to assist you.



# STEP 4.

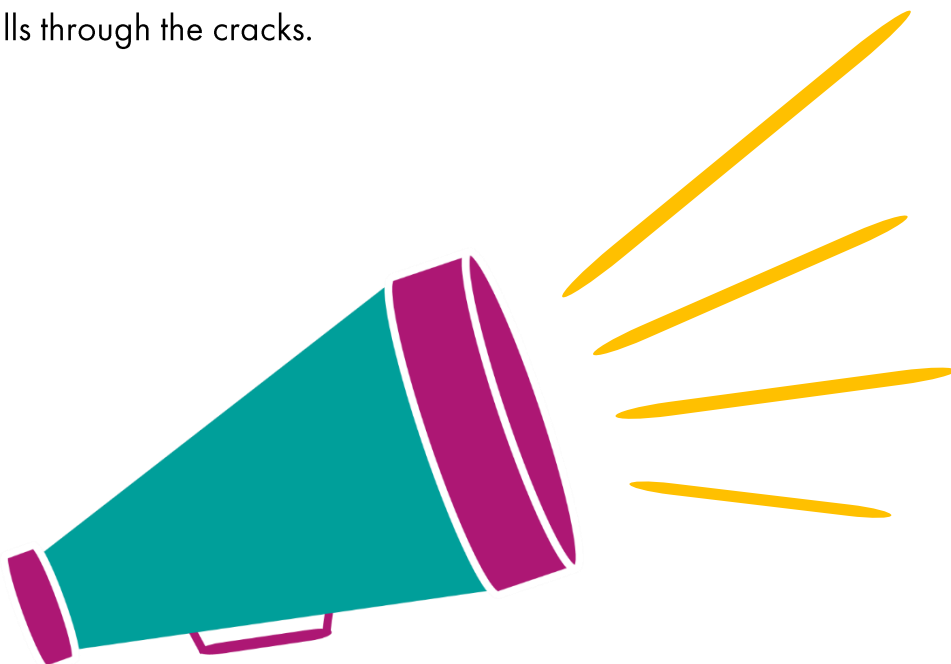
## NOTIFY VENDORS AND TEM PROVIDER

The first question we are asked when we agree to transition a company from a previous TEM agreement is, “when should I notify my vendors and current TEM provider of the switch?”

*Timing is everything.*

To prevent service disruptions, it is important to notify your telecom and IT vendors before the transition process begins. Carriers are generally supportive of the transfer and can assist with advance notification.

After you have notified your carriers and reviewed contract terms it is time to deliver your decision to your current TEM vendor; however, it is important to launch the relationship your new TEM provider first. Although service cutoffs are rare and unprofessional, they do occasionally occur. Make sure you have professional support to deliver next steps and transition expertise so nothing falls through the cracks.



# STEP 5.

## TRAIN & DEPLOY

The training process on a new software solution should be fairly simple now that the team has utilized a similar tool. Regardless, training should be held with the internal and provider's teams to ensure proper steps are being taken to manage the project.

Deployment of the solution should include a project management outline so all task owners are held accountable and fully understand the process. Understanding what steps are required in the launch of the new solution and managing the ongoing relationship will ensure a smooth end to the transition process.

Now you are ready to live in the new solution – congratulations!



# CONCLUSION

Limited knowledge on the transition process can obstruct the success of a new TEM relationship. Following these steps should streamline the transition process and make the experience as effortless as possible to avoid complications. Don't let concerns about switching vendors prevent you from making the strategic move.

Get started today by researching TEM solutions that will fit your unique needs.

Request a risk-free consultation from Valicom to discover what unique services we can offer you in order to meet your needs. Jump on a call to discuss your concerns and let's go through a demo of our TEM software, Clearview.





# ABOUT VALICOM

Most organizations pay too much for voice, wireless, and data services. Since 1991, we have deployed our TEM software, Clearview, and telecom auditing services to increase visibility over your telecom environment while reducing costs.

## What makes us different?

Our values are behind everything we do, providing tailored solutions for your unique needs. We promote supplier diversity programs as a woman-owned business and have received perfect scores in our quarterly client satisfaction survey. We are SSAE16 compliant and follow the Service Organization Control framework.

Contact us today to learn more!

**Telephone:** 608.274.3515

**Toll Free:** 800.467.7226

**Fax:** 608.227.0118

[info@valicomcorp.com](mailto:info@valicomcorp.com)

