

CASE STUDY:

Teams Telephony - Legal

lindsays

Quorum recommended that Lindsays move away from the traditional on-premises telephony approach. Using Teams telephony was the obvious next step in their hybrid working strategy, giving their staff the right tools to connect and support them wherever they are.

They already used Teams for collaboration (allowing them to move all their internal meetings from in-person to virtual meetings), and they were already working from their laptops and mobile phones without difficulty.

Quorum and Lindsays have collaborated for a long time and were the ideal choice for this project because of our extensive Teams Telephony and hybrid working solutions experience.

Quorum are a Microsoft Modern Work solutions partner with a specialism in 'Calling for Microsoft Teams'.

Lindsays are a well-respected Scottish firm of Solicitors and Estate Agents. They are a full-service firm with 45 partners and over 270 users across multiple sites.

Like many others, the firm wanted to move towards a hybrid working model. This vision involved an infrastructure modernisation project to move many of their on-premises services to the Cloud.

Their former on-premises telephony system was cumbersome, had major bottlenecks that caused performance deterioration, and did not provide their workers with the greatest flexibility and portability to operate from anywhere.

The benefits of Teams Telephony for Lindsays include:

1

Improved
hybrid working

2

Cloud Infrastructure
Modernisation

3

Flexibility, productivity,
engagement,
& collaboration

THE SOLUTION

Adopting a unique mobile phone solution was not the answer due to Lindsays requirement of implementing calling groups and call flows as well as not all employees having access to a company device

Additionally, Lindsays also aimed to eliminate the need for Direct Dial In (DDI) calls to be forwarded, allowing employees to manage calls on multiple devices (laptops, iPads, and phones with the Teams application installed), allowing everyone to manage calls according to availability.

The team at Lindsays was happy with the proposed Teams solution and the project was split into 5 stages:



DISCOVERY AND DESIGN

Quorum mapped out Lindsays' telephony needs, including the call groups, during a thorough discovery and design phase. This included:

- Gathering information on all telephone numbers in scope and the corresponding users and compiling these ready for phased number porting;
- Confirming and classifying all users who need to make international calls to ensure they have the appropriate licences;
- Demonstrating Teams' telephony features to key business stakeholders.
- Gathering information on all handling requirements for calls;
- Using the above data to create a design and get customer sign-off.

IMPLEMENTATION

Key stages of the implementation included setting up:



Call Queues and Auto Attendants

These were created based on the current softphone configuration, allowing incoming calls to be automatically routed to the appropriate person or department.

We also automated the behaviour for company operating hours and holidays using customised messaging from Lindsays.



Call handling flow for required call groups

Each call queue was assigned a Microsoft 365 security group, making it easy for Lindsay's to manage these groups if users needed to be added or withdrawn.

In addition, we enabled the shared voicemail feature, which means that each group member will receive an email with a voicemail transcription, improving the user experience and enabling effective voicemail management for groups and individuals.



M365 Security Call Groups

All of Lindsay's call groups' service numbers were migrated, ensuring that each user was assigned to the correct call group and received the appropriate calls.

We also added a feature that allows users to turn off call queues when they are away from their workstation, in a meeting, etc.



Teams Telephony Licensing Groups

We assigned each user a Teams Telephony licence, which is required to enable the Teams Telephony function.



Call Porting

Lindsay's had multiple number ranges from various providers, which we had to combine under the Microsoft Teams Telephony provider. This was done in several steps, beginning with gathering all of the information from each provider and isolating expired numbers and analogue lines currently in use for business purposes.

Once Microsoft confirmed a porting date, we were able to reassign the users' DDI numbers. This allowed for a fluid transition for users to continue to receive and make calls using the Microsoft Teams Telephony function.

TESTING

Before the go-live date, the solution was tested to ensure that the required configuration and call flow behaviour were correct. Because of the nature of Lindsay's business model, losing telephony for a law firm will have a significant impact, so thorough testing was required.

TRAINING

Lindsay's employees received training sessions from Quorum via Teams video conferencing, allowing them to fully utilise the new solution. Over the course of three weeks, 25 training sessions were held, including instruction on the following Teams features:

- Teams chat;
- Teams telephony;
- Teams audio and video conferencing;
- Teams meeting scheduling.

Quorum held separate sessions for receptionists to ensure that they received extensive training on Teams telephony features so that they could fully utilise the technology.

OUTCOMES - Lindsays now has a strong cloud-based phone system that promotes flexibility, productivity, engagement, and collaboration, giving their staff the resources, they need to stay in touch and assist one another wherever they are, thanks to Microsoft Teams.

Partnering with our customers is essential in building a strong and successful relationship; we genuinely enjoy getting to know our customers so that we can provide the best service possible.

Our most successful engagements occur when we truly partner with our clients, assisting them in realising the benefits of technology while leveraging our diverse range of experience and skills. We intend to work with Lindsays in that capacity for the foreseeable future.

