



TELEPHONE SYSTEM SELECTION: Unified Messaging, VoIP and Other Considerations

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It's been almost five years since I've written about selection of telephone systems. [*Selecting A New Telephone System? Get Big-System Performance for Small-System Dollars*"; originally published in the 9/4/00 issue of the Pennsylvania Bar News.] In terms of telephone technology years, that's a lifetime. Much has happened since then. Based on the number of telephone calls I've received on the hot line lately regarding telephone system purchases, I think it's time to put some related issues on your radar screen.

First the good news. Telephone systems have improved in feature sets while decreasing in price. That should come as no surprise, as it follows the trend in other areas of technology, where hardware costs have dropped dramatically, and software functionality has improved significantly. Nonetheless, your new telephone system is likely to set you back some significant dollars, likely proportionate to firm size, although certainly there are exceptions to this general rule.

More good news. Unlike your PCs and other software, the expected life cycle of your telephone system should be somewhere around ten years or more. That means that you can afford to spend the money to do it right. And if you do indeed do it right, without being penny-wise and dollar-foolish, you should achieve the life expectancy. There are of course events which can prematurely obsolete your system. A significant change at your firm, such as a merger or opening of a branch office, may result in different or greater needs than the selected system can provide.

The telephone is your *most* important piece of equipment. I have seen attorneys operate without computers, without email, without fax, and even survive for a day or two without a copier. But I've never seen a firm survive more than a few hours without telephone service before the need becomes critical. Fortunately, with a cell phone in virtually every attorney's hand, there is always an emergency back-up available. Nonetheless, your new telephone system is not the place to scrimp. I'm not suggesting you overpay. Competitive bids will ensure your firm is getting value for price. What I am saying is that you should be forward-thinking in

your approach, and buy both the features you want now, and anticipate future needs as well.

The first concept I want to put on your radar screen is that of unified messaging. This is, simply, the integration between your email and vmail. Think now about some of the shortcomings of vmail. Ok, aside from the fact that you probably hate it, let's address *real* shortcomings. In no particular order they include

- § An inability to forward vmail messages outside your telephone system. In order to share a message with someone outside your system you must either transcribe—subject to dispute over accuracy later—or have the person come listen to the message in person, or connect special recording equipment to the telephone to transfer it to tape.
- § An inability to capture the emotional context of a message by transcribing it.
- § An inability to organize saved vmail messages. Typically, they are saved in sequential order. I've visited offices where attorneys and/or administrators have literally hundreds of saved messages because they contain "important" information they may need later.

If you're one of those, let's be honest. If you need to go back and find a particular message for desired information, and it happens to be message #198, are you really going to play the first few seconds of the preceding 197 messages before finding #198? No, of course not. You're going to give up after about 5 or 10 messages. So all those saved messages are doing you no good, and just eating up resources. Delete them.

- § On many systems, an inability to back up the saved messages. Typically on the older systems, the only items which back up automatically are the voice recordings and programming; *not* the actual messages. Many firms are unhappily surprised to discover this fact only after the hard drive fails on their vmail system. Are you sure about yours?
- § A need, when on the road, to access vmail and email separately. This is of course more time consuming and costly.



A telephone system providing unified messaging will automatically place a copy of each vmail message in your inbox, as a .wav (“wave”) file attached to an email from the vmail system. It’s just a sound file. The subject line shows the date and time of the message. If you double click on the attachment, it will play the message through your computer speakers. So now you only have to access one system when on the road in order to check both email and vmail. Now for the *really* neat part. You can forward that file to anyone in the world with an email address. You can append it with anything you want to place in the transmitting email. You can slide it into a client folder within your inbox for safekeeping and easy retrieval and replay later. You can link it to the client in your case management system, just like any other email. Because it is on your network hard drive, it will be backed up along with all your other data.

Because the systems are unified you only have to deal with the message once. If you listen to it while in vmail and delete it, it will be automatically deleted from your email inbox. If you listen to it while in your email inbox and move it to a subfolder or delete it, it will be removed from your vmail box. You can have this function otherwise, but this is the typical way most firms set it up, in order to eliminate redundant handling of the same message in two systems.

Unified messaging is also an important step toward the goal of achieving a paper-independent office. An office where you have virtual access to everything important about the file 24x7, whether it’s by internet connection to the office, or taking it with you on a laptop, portable hard drive, flash-ROM drive, or CD. An office where every important piece of information about the file is safely backed up automatically every night and taken off site every day, so that you needn’t worry about skipping a beat in the event of a disaster.

Bottom line? When you are ready to purchase your next telephone system, be sure to purchase one which is capable of unified messaging.

The next concept I want to put onto your radar screen is that of VoIP, which stands for Voice over Internet Protocol. Simply put, it means using your high-speed internet connection, usually reserved for data transmission and internet access, plus your internal network cabling, to route and place your telephone calls. This technology has improved dramatically in recent years; as broadband access has expanded and become more reliable, vendors have been responding by developing more and better IP telephony products.



Using VoIP can save significant money on long distance access. It can allow you to move your office significant distances without having to change telephone numbers. It can enable you to securely tap into your telephone gateway from any telephone, even if not “yours”, to make a call using your network and discounted rate tariff. It can enable you to set up a “virtual office” telephone system which can include numerous physical locations which are widely separated geographically.

Those of you who have attended any of my seminars know that I am a strong proponent of the “virtual office” paradigm. I believe it is the only way to achieve any balance of life and work in today’s environment. I *know* it makes for more efficient lawyering, greater productivity, and reduced stress as well. VoIP is an important tool to consider using. It’s not for everyone. But for some of you it may well be just the answer you need to a question you’ve yet to ask.

Attorney Jennifer Stiller (www.healthregs.com), who is an active member of the Pennsylvania Bar Association Solo & Small Firm Section listserv, recently shared an article with me which was written by her brother, Jonathan Stiller, (JDSC@nextel.blackberry.net) a telecommunications consultant. I find this particular statement profound enough to warrant quoting, as I couldn’t say it better myself:

My advice to most solo practitioners is that it is likely their biggest challenge to incorporate systems that support their mobility, that provide the voice / data confluence that allows business and service to take place anytime anywhere rapidly and professionally. Clearly, the folks in any business who are accessible, and who have the information resources to respond quickly, are the folks with a serious advantage. IP can be a building block to helping you do that, so if that’s important to you, not having it might prove really to be more costly than having it.

An alternative to VoIP to achieve some of these benefits is to use a software-driven system such as Altigen, which was discussed in great length in my prior article. In either case, don’t spend your dollars on a new telephone system before taking a close look at this functionality and determining if it is a benefit or advantage you should have.



Space constraints prevent me from including as much information as I'd like. But I will add one last important consideration. When you look at telephone systems it can be very confusing. Each vendor will emphasize their strong points, and avoid discussing their weaknesses. It's hard to do an apples-to-apples comparison. But that is precisely what you need to do in order to ensure you know what you'll be getting from each vendor in exchange for your hard-earned dollars. If you are a Pennsylvania attorney and want assistance from me so you know how to effectively and easily do your apples-to-apples comparison, I am just an email or telephone call away.

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