



XMMedius



BUYER'S GUIDE

CLOUD FAX SOLUTIONS

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INTRODUCTION

Your organization needs a fax service to transmit and track sensitive and confidential documents. Sending these documents by email is not an option because of the disclosure risks inherent in plain text communications over the Internet. Conventional manual faxing is extremely cumbersome, as it involves printing a document from your PC, walking to the fax machine, filling out a cover sheet, dialing, sending and waiting to make sure your transmission was successful. On top of all this, conventional faxing methods incur costs for leasing fax machines and analog phone lines, as well as technician fees to wire new fax lines.

With an increasing number of mission-critical business applications moving to the cloud, using a hosted fax service has become a valuable option for businesses. Cloud-based solutions give you immediate access to technologies and resources without any up-front capital investment. And because these solutions are highly scalable, they can quickly adapt to changing business needs, giving you the freedom to operate as you see fit.

Now comes the challenging part: finding the cloud faxing solution that best meets your organization's strategic objectives. There are many solutions out there, but you need to ensure the faxing solution you choose will allow you to minimize your costs and man-hours, help you address compliance regulations, and be as user-friendly as possible.

The purpose of this Buyer's Guide is to help you find the right cloud faxing solution for your specific organization. We'll walk you through the steps to help you make the best-informed decision, and ensure that you maximize both the short and long-term benefits of your purchase.

LET'S GET STARTED!





DEFINE YOUR NEEDS

Carefully defining your needs is probably the most important step in the entire process, and will prevent major headaches down the road.

BUSINESS GOALS

Write out a list of the main reasons you need a cloud faxing solution and the corresponding end goals you have in mind.

TIP

Be specific! Your needs and goals should answer the “who, what, where, when and why” questions.

Example: Our organization is looking for a cloud faxing solution that will:

- › Allow our employees to send and receive faxes directly from their laptops, using their Microsoft Office applications, from onsite and remote offices
- › Reduce paper use by transmitting faxes digitally
- › Securely transmit sensitive tax and audit documents to internal and external stakeholders
- › Reduce the costs associated with faxing by eliminating analog phone lines, fax machines, supplies, and maintenance

TIP

Built an inventory of the fax machines and phone lines that are currently deployed in your organization, evaluate the number of faxes and pages per fax your organization send and receive every month.



REQUIREMENTS

You can determine and prioritize specific requirements by looking at the list of goals that you've already made. For instance, if one of your end business goals is to be able to send faxes even when you're away from your desk, then write down "mobile application" as one of your requirements.

TIPS

Include all stakeholders when discussing requirements—end users, executives and the appropriate finance and IT decision makers.

Below are some examples of questions that can help define your requirements:

- ☐ Learning curve: How quickly do you want your users up and running with the new solution?
- ☐ Growth potential: How well should the chosen fax solution adapt to your expansion?
- ☐ Integration: Do you need to integrate your fax system with your unified communication environment?
- ☐ Security: Is your organization subject to strict regulations with regards to security? Do you have constraints with respect to the control, access, security and traceability of your data?
- ☐ Availability and integrity: Is your organisation faxing high volumes of mission-critical document and therefore requires High Availability and Disaster Recovery implementations?





COMPARE SOLUTIONS

Once you have defined your goals and requirements, the challenge is to short-list the best providers. Here are the key criteria that will help you select your cloud fax service provider:

COMPANY BACKGROUND AND INDUSTRY EXPERTISE

A thorough understanding of the company behind the fax solution you are evaluating is a critical factor to consider in your decision process.

Checklist:

- ☐ When was the company founded? Is it growing? If so, what accounts for its growth?
- ☐ What is the company's expertise and experience? Who are its technology and business partners? Is it an innovator?
- ☐ What is the company's market presence and customer base?
- ☐ Does the company have a global approach? Does it support customers in a range of languages, does it have offices across the world, and does it consider local market realities?



FLEXIBLE PAYMENT MODELS

Cost optimization is a key factor when making a decision. When evaluating a fax solution, you should look at the various pricing models.

Checklist:

- ☐ Are the different subscription plans flexible and customizable?
- ☐ If your organization is a small enterprise, can you pay per use?
- ☐ Can you benefit from volume-based reductions?
- ☐ Can you benefit from a subscription that will accommodate fluctuations in fax volumes?



INFORMATION SECURITY AND INTEGRITY

If your organization operates in a highly regulated industry, the solutions you are considering should allow you to efficiently protect document privacy and facilitate compliance with regulations such as HIPAA, FERPA and the Sarbanes-Oxley Act.

Checklist:

- ☐ What is the SLA level? Top service providers offer carrier grade SLA of 99.9%.
- ☐ Does the cloud infrastructure allow for High-Availability and Disaster Recovery?
- ☐ Is the cloud infrastructure ISO/IEC 27001: 2013, CSA Star, SSAE Soc 2 and PCI-DSS certified?
- ☐ What are the user/admin control, management, and encryption features? Are the security features capable of keeping pace with changes to security threats and vulnerabilities?
- ☐ Does the solution provide advance routine features to ensure sensitive documents are routed only to approved recipients and designated secure printers/MFPs?
- ☐ Are the solution provider's employees HIPAA trained?
- ☐ Is there a "Zero Retention" option to ensure that data is deleted immediately after the fax delivery is completed?
- ☐ Are fax images and fax call detail records stored and encrypted?



USER EXPERIENCE

Another important aspect to take into account is how users will embrace their new fax solution. Does it guide users through their tasks intuitively? A fax service that requires less training can achieve measurable success more quickly.

Checklist:

- ☐ Can faxes be sent or received directly from within your everyday applications, such as your email service?
- ☐ Is a user-friendly mobile application part of the fax service?
- ☐ Are users able to fax using the same fax numbers they have always used?
- ☐ Can users send faxes to multiple e-mail recipients, route faxes to SharePoint and send faxes to workflow applications?
- ☐ Can faxes be delivered as TIFF, PDF, or fully searchable PDF files?
- ☐ Can faxes be printed on network or cloud printers?
- ☐ Can users send and receive faxes from back-office, vertical-industry and legacy applications?
- ☐ Can users track their fax activity?
- ☐ Is the solution available 24x7 to every user with Internet access?
- ☐ Is there a user-friendly knowledge base?

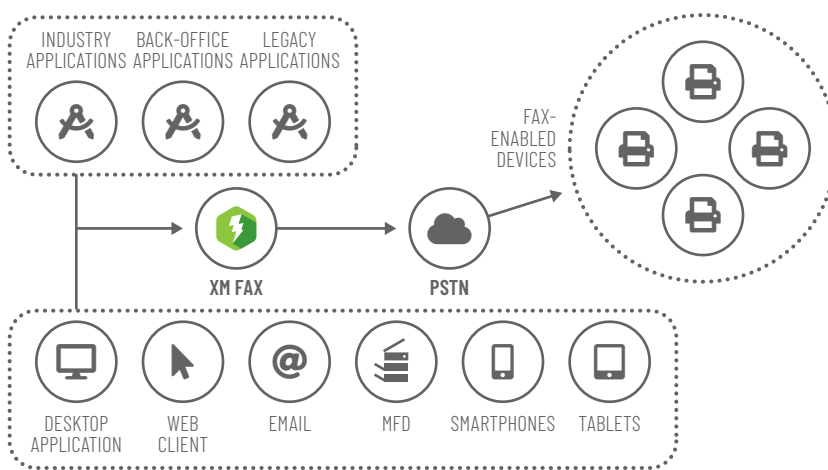


INTEGRATION WITH THIRD PARTY APPLICATIONS AND DEVICES

The cloud fax solution you choose must be able to integrate seamlessly with your current infrastructure and be compatible with a wide spectrum of ERP, workflow applications and Microsoft Office 365.

The fax solution should integrate printing, scanning and copying into one single solution. You should be able to send faxes to and from all major MFPs (Xerox, Ricoh, Sharp, Fuji-Xerox, Lexmark, etc.) through especially developed connectors. All fax activity transiting to an MFP should be captured by the cloud fax service with detailed tracking and audit reports.

The following diagram depicts a typical business infrastructure, integrating a cloud fax solution:



ENTERPRISE-GRADE FEATURES

Last but not least, as a business or public organization, you need to make sure the solutions you are evaluating meet the following enterprise-grade requirements:

Checklist:

FAST AND SCALABLE DEPLOYMENT

- ☐ Are user accounts automatically provisioned via real time Active Directory integration?
- ☐ How easy is the onboarding? How many days it takes to go live?
- ☐ Can the fax service scale easily to variations in fax volume and the number of users?
Can you deploy it in other segments of your business or new offices?



ROBUST FAX MANAGEMENT FEATURES

- ☐ Can you port your existing fax numbers?
- ☐ Can you fax using local numbers?
- ☐ What are the fax viewing and auditing capabilities?
- ☐ Is it simple to create and invite users? Assign inbound fax numbers to users?
- ☐ Can you manage user groups (for user classification & billing purposes)?
- ☐ Is the usage and billing information easy to access and understand (full monitoring, reporting, and audit trail capabilities)?
- ☐ Can you define how long you need to retain your faxes and fax transmission histories?

INBOUND FAX ROUTING AND OUTBOUND FAX SCHEDULING

- ☐ Can inbound faxes be routed via optical character recognition (OCR) or bar codes and delivered to multiple users or destinations (applications, remote file servers or printers) as searchable PDF files?
- ☐ Can you define different fax priorities, the number of retries and the wait time between retries for various groups of users?
- ☐ Can you schedule delay faxing?

CUSTOMER SERVICE

- ☐ Is there 24-hour technical support?
- ☐ Do you have direct access to an online help desk?
- ☐ Do you have access to auditing services (customer requirements analysis, help to set up the specifications)?
- ☐ Do you have support during the installation process (on site or remote)?
- ☐ Do you have access to training services (administrator and user training, certifications for resellers)?



SELECT TOP SOLUTIONS

Once you have matched your requirements with the key criteria listed above, narrow your choices to a short list of the best solutions.

Contact each of the selected vendors and ask to talk to customer references. Direct and genuine feedback gives a real picture of the pros and cons of a solution.

You should also ask for product demonstrations and trials. This will give you a concrete, hands-on appreciation of the solution's features and capabilities. You will also be able to assess the quality of customer service.

TIP

For each selected cloud fax solution, rate each criterion. The solutions with the highest scores should help further refine your short list of solutions. You might involve many stakeholders and consolidate all individual ratings in one weighted final score.



MAKE YOUR FINAL DECISION

Every organization has unique needs. Choosing the right fax service is not always easy as there are a lot of solutions on the market, with a wide array of features and complex business models.

Take the time to define your requirements and expectations, involve all your stakeholders, and match your requirements with the most relevant criteria.

**WE HOPE WE MADE YOUR LIFE EASIER
WITH THIS GUIDE!**