nextiva

Welcome to Nextiva Service Delivery!

Choice Experience



Released Winter 2024

Welcome to Nextiva. Let's get started!

On behalf of Nextiva, I'd like to personally thank you for trusting us with your business communication needs. We understand that partnering with us to support your company's growth is a huge decision.

Our team is committed to giving you our best—and proving Nextiva's Amazing Service.

Getting started is an important time in your Nextiva journey. We partner with you to make this transition as simple as possible. You'll be joined by a team of professionals to guide you through the service delivery process.

In the following pages, you'll learn how Nextiva recommends deploying services, what we do to help, and what part you play.

We tailor our process to give you options ranging from do-it-yourself with the help of online tutorials to on-site help from our Service Delivery team. Welcome to Nextiva!

Kind Regards,

Ken McMahon



Ken McMahon
Chief Customer Officer



What's already in the works?

Receiving shipped equipment

Devices purchased or rented from Nextiva will ship once payment is processed (if you ordered Extension Validation, your devices will ship after Configuration).

Your order may ship via FedEx prior to your first contact with the Service Delivery team. Please securely store your shipment until you are ready to unbox and install the equipment.

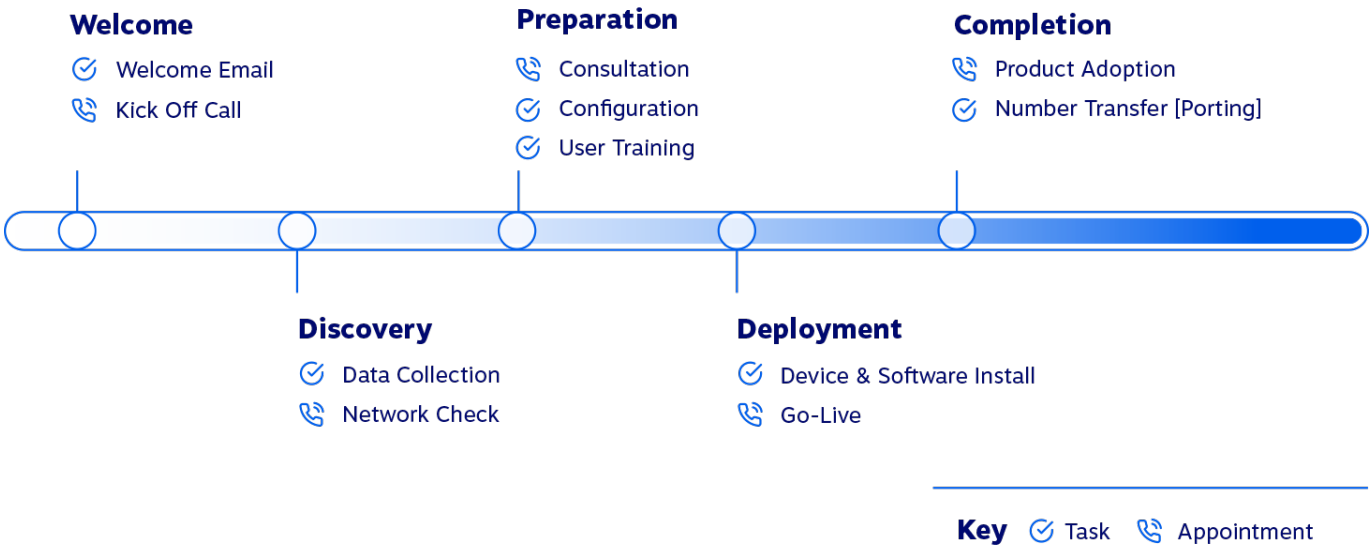
Providing roles and contacts

Your Sales team has provided Nextiva's Service Delivery team with your list of contacts and their roles.

We can add or remove contacts as needed throughout the project.

Service Delivery in five stages:

Check out the following pages for more detail on the process. While this is a general process, your experience may differ depending upon your unique needs.



The Choice Experience includes one Kick-off Call, Consultation, and Product Adoption appointment. Your first 3 Network Checks and Go-Live appointments are included. You may purchase setup for additional locations as needed. These appointments are completed within the first 30 days.

Introducing the Nextiva Service Delivery Team



Your Nextiva Service Delivery Manager

Your main point of contact assigned at your first scheduled meeting. They will coordinate resources and specialists throughout the setup process.

Admissions Agent

Sends the welcome email and helps you schedule your Kick Off Call.

Technicians

Technicians meet you on scheduled conference calls to help with technical work.

On-site Support

Nextiva can arrange for on-site support to travel to you for an additional fee.

Specialists

Your Service Delivery Manager will coordinate with subject matter experts when needed.

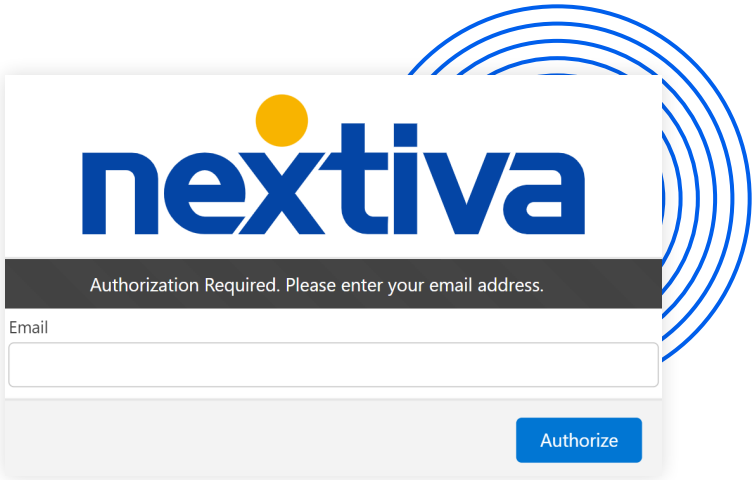
Nextiva Project Insights

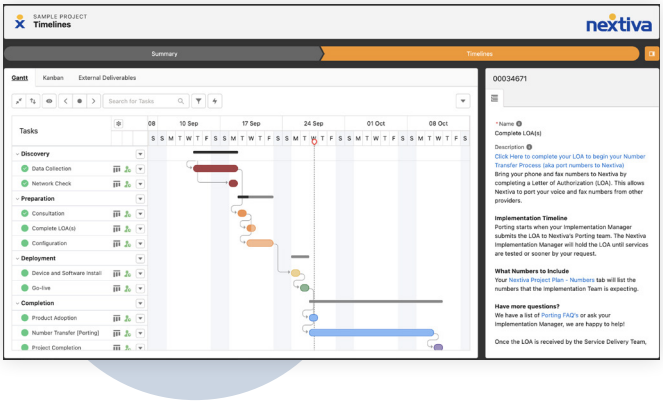
The Service Delivery Team uses Nextiva Project Insights software to keep a close eye on your setup progress. It's all about ensuring that your transition to Nextiva is as smooth as possible.

As you embark on your service delivery journey, here are three essential things to know about Nextiva Project Insights:

Exclusive Access

Only individuals added as stakeholders can access Nextiva Project Insights. This ensures a secure and collaborative environment for your project. Your Service Delivery team will provide a unique URL for you to access your project records.



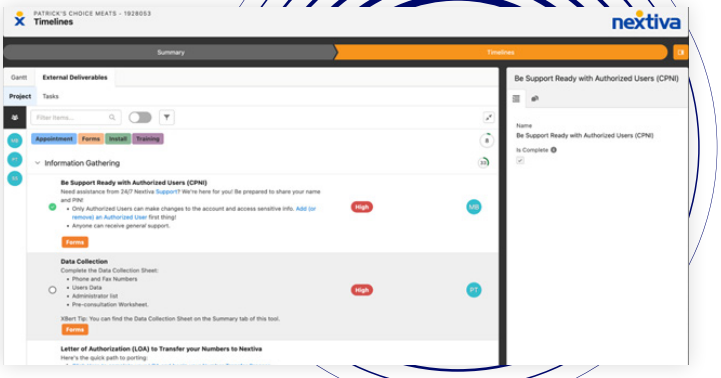


Project Timeline

Keep track of the project's progress with our intuitive timeline. It outlines the order of tasks and their expected duration, so you always know what's happening next.

External Deliverables

The External Deliverables screen empowers you by offering a comprehensive view of tasks assigned by our Nextiva team.



Setting expectations: When we need your help



The Paperwork

Data Collection

The first step is to gather information about your company and business. You can start now by completing the **Data Collection Template**. The Service Delivery team can answer any questions you have.

Number Transfer (Porting)

We need a completed **Letter of Authorization (LOA)** to move your voice and fax numbers to Nextiva.

For the best experience, please provide the most recent copy of your bill from your current provider (include all pages).

Authorized Users

To protect the security of your account, Nextiva asks that you determine who is authorized to access the account. You can do this online or complete a form. Learn more **here**.

The Preparation

Key roles in your organization for stakeholder alignment:

- **Main Point of Contact**: Charged with communications and decision-making.
- **Network Admin**: Can access your network equipment and make changes, if necessary.
- **Operations Manager**: Expert in your business operations who can provide call flow and feature use cases.

Implement Network Guidelines

We will help review your office network during the Network Check appointment to ensure you are set up for success according to Nextiva's Networking Guidelines.

We highly recommend implementing **Nextiva's Network Guidelines** as your local network configuration directly impacts the quality of service.

We rely on you to account for all network equipment.

On-Demand and Live Training

Nextiva offers on-demand training and resources to cover the basics. Get started by going to **Nextiva's Video Hub** for tutorial videos.

As part of the Choice Experience, the Service Delivery Manager will schedule an hour of live admin training after your account has been configured.

In person training is available with Nextiva's On-site Team at an additional cost.

Choose a custom greeting method:

- **Record greetings yourself.** This can be done using the online portal, through a Nextiva device, or a combination of the two.
- **Provide audio files.** You can provide audio files to the Nextiva Implementation Manager for Nextiva to upload for you.
- **Contract professional voice talent** to record your custom branded messages. Nextiva has partnered with **SnapRecordings** to provide you with a variety of options with industry leading talent.

The Go-live

Download NextivaONE

Provide your teams with a single application to communicate confidently, delight customers, and work smarter. **Click Here** to get started.

Install your devices

Connect your devices to internet and power. You can purchase On-site Services for help.

If you're bringing your own devices, contact the previous provider to ensure the equipment is unlocked and able to be reprogrammed to a new service provider.

Participate in testing

Your Nextiva Service Delivery Manager will help coordinate live virtual calls with technicians and your Operations Manager to test and deploy the Nextiva services.

If you purchased On-site services your Operations Manager will still participate in testing.

Contact your previous provider to forward calls

If transferring numbers (porting), you can forward calls as an option to get started with Nextiva service prior to your number transfer being complete. An authorized representative on the previous service provider's account must request the call forwarding (multi-path call forwarding to be exact). Or, you may be able to enable forwarding in an online portal. This will start routing calls to your Nextiva service and devices.

Your Nextiva Service Delivery Manager will provide the information needed to complete the task.

Product Adoption

The Product Adoption appointment is a live, one-on- one training with a Nextiva expert during which you will learn how to effectively manage your Nextiva service. This is a guided, personalized form of Administrator training and will take place near the end of your Service Delivery experience.

We are here to help and we will always provide our best effort. We ask that you attend scheduled appointments and communicate openly with us to keep progressing forward.

Any questions or concerns? No problem. The Nextiva Service Delivery team can help. We can talk in real-time on your Kick-Off Call. For urgent matters, simply reply to your welcome email or contact servicedelivery@nextiva.com.

Additional services provided by Nextiva

Solutions Specialists

The following services require subject matter experts outside the scope of standard service delivery. Contracting with Nextiva's Solutions Delivery Consultants is necessary for these custom configurations and incurs an additional cost.

- **Five9**: The Nextiva and Five9 integration helps connect your contact center to the rest of the business, ensuring that your agents can access the right resources in a timely manner. Nextiva connects seamlessly with the Five9 platform via a SIP connection.
- **Advanced IVR**: This is a highly configurable call routing system with advanced features available through Nextiva. This system is not part of Nextiva's NextOS Platform, meaning you will not see it in your Nextiva portal.
- **Azure Active Directory**: This helps clients sync their employee list with Nextiva's system.
- **Single Sign-On (SSO)**: This allows our customers to sign into NextOS and to the Nextiva App by signing into their own 3rd-party identity provider.
- **Additional services** requiring Professional Service help, such as Unity CC Media Streams and Akixi reporting.

On-Site Services

Standard service delivery is conducted remotely using online conferences. For someone to come on-site to help with the deployment, see the **On-site Service PDF.** Additional costs will apply (the PDF reviews the pricing structure).

We require lead time to coordinate an on-site visit: 5 business days (1 week) for Standard & 10 business days (2 weeks) for Advanced.

We're here to help!

For ongoing assistance, Nextiva offers multiple resources. Please keep in mind that while anyone may receive general information and assistance, requests requiring account information or changes must be done by an **authorized user**.

Self-Serve support: **nextiva.com/support**

- Online chat support
- Submit a support ticket
- Password reset

Phone support: **(800) 285-7995**

