

SITE SURVEY FOR:		DATE:		BY:	
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<b>Opening Questionnaire</b>			
<b>How many telephone users at your primary location?</b>			
<b>How many other locations do you have? (not including part-time telecommuters)</b>	<b>(City Name)</b>	<b>(# of phone users)</b>	
<b>How many part-time telecommuters do you have?</b>			
<b>What type of telephone system do you currently have?</b>			
<b>Are you seeking a full solution; Data and Voice or just Voice?</b>			
<b>How long have you had this telephone system?</b>			
<b>Do you own or lease your telephone equipment?</b>			
<b>When does your contract expire?</b>	<b>Internet</b>	<b>Phone Service</b>	<b>Leased Phones</b>
<b>What are your reasons for seeking a new service?</b>			
<b>What do you look for in a new telephone vendor?</b>			
<b>You may need to separate Data and Voice traffic, are you agreeable to upgrading your Internet service(s) if needed.</b>			

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<p>How does your Company use the Internet?</p>	<p style="text-align: center;">(Circle what applies)</p> <p>Email      Surfing      VPN      CAD</p> <p>Database up/downloads (file sharing)</p> <p>Streaming Video      Web Conferencing</p> <p>Surveillance Cameras      Faxing</p> <p>Elevator Phones      Security Systems</p>
<p>Do you have a disaster recovery plan for data and voice?</p>	
<p><i>(Set expectations on the Voice Product)</i></p>	
<p>What is your timeframe for delivery?</p>	
<p>Do you have a defined budget?</p>	
<p>Do you envision taking advantage of the collaborative tools WorldSmart offers</p>	<p style="text-align: center;">(Circle what applies)</p> <p>Instant Messaging for all staff</p> <p>Soft phone for the office and travelers</p> <p>Web/Telephone Conferencing      e-faxing</p>
<p><b>Conversion Participants:</b></p>	
<p>Monetary Decision Maker</p>	
<p>Technical Decision Maker</p>	
<p>Staff "Go To" Person</p>	

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### Account Information

#### Operating System:

What Operating System(s) will customer be using Worldsmart Client on:

No Computers

Vista SP1, Vista, Win XP, 98, 2000, 95, Mac, Others

#### SalesForce/SmartCast

Is SalesForce.com Integration Required?

Will customer be using Smartcast  In SalesForce

Will customer need any BLA (Bridge Line Appearance)

Will customer need help setting greetings? If yes, will those be recorded  In House/Var

In SalesForce Stand Alone  
No Smartcast  
3<sup>rd</sup> Party ACD

In House/VAR  
Prof. Greeting  
No Greeting Needed  
Recorded Via Phone

### Site Information

#### Site Details:

SITE(Location) Name:

Site Address:

Contact Name:

Work Phone:

Cell Phone:

Email:

Number of seats (per this site):

#### Connectivity:

Will customer be use existing ISP for voice Services?

ISP Name	Circuit Type	Speed	What was the QOS % on the MAT Test
AT&T	DS3	100Mbps	100% QOS
ATT, Verizon, PointOne, Level3, XO, Covad, Sprint, Paetec, Other	DS3, T1, MPLS, ADSL, SDLS, Cable, Business Cable, Fiber, Ethernet, Bonded T1, Partial T1	100Mbps, 10Mbps, 4.5Mbps, 3Mbps, 1.5Mbps, 750Kbps, 500Kbps, 256Kbps, Other	100% 95%, 90% 85%, 80% 75%, 70% 65%, 60% <50%



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**Phone Numbers(New)**

Will Panterra be assigning any new numbers to customer

NPA/NXX	Quantity

**Special Site Considerations**

Special Site Considerations/ Per Site Requirements:

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## Phone Features Questionnaire

<b>Answer Other Phones</b>	Do you answer other phones from YOUR phone?	If so, please list the phone # or Ext # >>>>	(Name Who)
<b>Monitor Other Phones</b>	Do you monitor other phones from your phone to see if that person is busy on their phone	If so, please list the phone # or Ext # >>>>	(Name who)
<b>Voice Mail (VM)</b>	<b>Options:</b> 1) Send VM to Email Only 2) Send VM to Email and call in to retrieve the VM 3) Only Call in to retrieve the VM	<b>Circle:</b> 1 2 3	
<b>Number of Active Lines</b>	Your Polycom Phone has either 2 or 6 Line Buttons. All Incoming calls will go to Line 1.  If you are on Line 1, how do you want other incoming calls handled?	<b>Circle:</b> 1 2 3 4	
<b>AND/OR</b> (see next question below)	1) Send other calls to VM 2) Forward other calls to another phone 3) Send 2 <sup>nd</sup> call to Line 2 4) Send 3 <sup>rd</sup> call to Line 3.... And 4 <sup>th</sup> to Line 4, etc.....	<b>WARNING:</b> The more lines you want active, the fewer lines you'll have for Speed Dialing	
<b>Number of Active Calls per Line</b>	Your Polycom Phone can HOLD up to 8 calls on a single Line.  How many calls would you like to Answer on Line 1?	<b>Recommend no more 3 or it will get confusing.</b>  <b>Circle: 1 2 3</b>	