

## CLOUD MIGRATION GUIDE

### Moving to the cloud, explained.

The steps, the timeline, and what to expect.

*We ship them, you plug them in. It can actually be that easy.*

#### THREE STEPS THAT NEVER CHANGE

Ship	Plug in	Activate
Phones arrive pre-associated with your account. Nothing to configure in advance.	Wall to phone to PC. One cable each direction. Standard cabling, no new runs.	Phone calls the cloud, grabs its config, reboots. 5-6 minutes later, it's live and ready.

And if you need continuity from day one: we forward your existing number to a cloud number and have a basic auto-attendant running immediately, while the full build happens alongside your live business. Your callers never know a thing.

#### THE HONEST TRUTH

#### It's like buying a new car.

*"When you buy a new car, all the dials are in different spots, even though they're the same type of dials, doing the same things. And more. That's why you bought the new car."*

Cloud phones do everything your old system does. They answer calls, transfer calls, go to voicemail. They just do it better, from anywhere, with a lot more on top. The adjustment is real, and we're not going to pretend otherwise. What we will do is walk your team through every new feature at a pace that makes sense, so nobody gets overwhelmed and nobody gets left behind.

### PATH A: SMALL OFFICE, NO IT TEAM

#### Self-install. Done in minutes.

For a small office or anyone without a managed network. No technician. No truck roll.

##### 1 Phones arrive pre-configured

Your cloud phones are pre-associated with your account. A power adapter ships in the box if your switch does not support PoE.

##### 2 One cable each direction

Take the cable off the back of your PC, plug it into the phone. Use the included cable to connect the phone back to your computer. Wall to phone to PC.

##### 3 Power up

PoE switch: phone draws power through the ethernet cable, nothing extra needed. No PoE: plug the included adapter into any wall outlet.

##### 4 The phone self-provisions

Once online: reaches out to the cloud, identifies itself, downloads its full configuration, reboots. 5 to 6 minutes start to finish.

#### Wi-Fi option

- ✓ Some cloud phone models support Wi-Fi, no ethernet required.
- ✓ Enter your Wi-Fi credentials on the phone screen.
- ✓ The same self-provisioning process runs automatically once connected.

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### PATH B: IT TEAM OR MANAGED NETWORK

#### **We call your IT team first. Always.**

If your business has an IT department, an MSP on a maintenance agreement, or a network with VLANs: we coordinate with them before anything ships. We don't show up and start touching things without asking. Your IT team knows your network. We know the phones. Together, the install goes right the first time.

##### **What we coordinate with IT before shipping**

- ✓ Pre-install call with your IT staff or MSP
- ✓ VLAN tagging for voice traffic
- ✓ QoS policy to prioritize voice packets
- ✓ Firewall rules for SIP and RTP traffic to Intermedia's servers
- ✓ PoE budget confirmation (if powering phones through the switch)
- ✓ Phones ship only after everyone is aligned

*We work alongside your IT team, not around them. They stay in the loop at every step.*

### PATH C: FULL COMPANY MIGRATION

#### **Moving everyone, and adding the AI layer.**

For businesses moving all users and layering in an AI auto-attendant, voiceover, or CRM integration. Typically 4-6 weeks from kickoff to live.

##### **1 Call flow mapping**

A manager or whoever owns call routing today walks us through it. We document everything: who answers, how calls move, ring groups, after-hours behavior, voicemail routing.

##### **2 Onboarding package sent**

Before phones ship, your team receives everything they need: app install guides, user setup instructions, what to expect on day one, and who to contact if anything comes up.

##### **3 Build in parallel**

We provision the cloud system, produce voiceovers, configure routing, and connect your CRM, while your existing phones stay fully live throughout.

##### **4 Cutover and go live**

We forward your numbers, flip the switch, and stay on-call through the transition. We watch the first week closely and adjust anything that needs tuning.

##### **What the call flow sheet covers**

- ✓ Main number behavior: who or what answers first
- ✓ Menu options ("press 1 for sales") or no menu at all
- ✓ Ring groups: which phones ring together
- ✓ Individual extensions and direct numbers
- ✓ After-hours and holiday routing
- ✓ Voicemail-to-email addresses per user

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- ✓ Emergency escalation (who gets called if nobody answers)

### What's in the onboarding package

- ✓ App install guides: iPhone, Android, Mac, Windows, iPad
- ✓ User setup checklist, what each person needs to do before day one
- ✓ Phone hardware setup guide (the self-provisioning process)
- ✓ Who to call and what to expect on cutover day
- ✓ 30-day support contact information

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## PATH D: CALL CENTER & AI RECEPTIONIST

### The most sophisticated installs. Communication is everything.

Call center deployments, custom AI receptionists, and deep CRM integrations don't have a fixed timeline. Every business is different. What stays constant is the process: we scope it together, document every decision, and nobody moves forward without sign-off. Features layer in at your team's pace, tested at each stage.

### What makes these installs different

- ✓ No fixed timeline, scoped individually per business
- ✓ Written plan: agents, queues, reporting scope, and AI layer
- ✓ AI voice cloned or professionally produced in your brand
- ✓ CRM integration configured and tested before go-live
- ✓ Features added in stages, no day-one information dump
- ✓ 30-day post-launch tune-up included