SCOPING YOUR CLOUD FAX SERVICE PROVIDER:
A CHECKLIST TO GETTING STARTED

Whether you're migrating off your own fax servers, replacing existing fax machines, or in need of a new digital fax provider, assessing how a potential solution fits into your organization's needs is the first step. Use this checklist to assess what's important to your organization in a fax solution.

YOUR FAX VOLUME

Knowing your volume is the first step in assessing your needs. Fax solutions priced on a "only pay for what you use" contract allow savings for organizations with variability in their fax volume.

☐ I know my organization's day-to-day inbound and outbound fax traffic.

☐ I know my organization's maximum peak volume for inbound and outbound fax transmissions.

☐ I know how often my organization has peak fax traffic days.

YOUR INTEGRATION NEEDS

If you currently have existing custom application integrations, it's vital to find a cloud fax provider that mitigates the need to unravel the web of integrations that your organization has built over the years.

☐ I've assessed my organization's existing folder-based fax integrations, if applicable.

☐ I've assessed my organization's custom application integrations, if applicable.

☐ I've assessed my organization's needs for API-based integrations that would enable fax from existing applications, if applicable.

YOUR SECURITY AND COMPLIANCE STANDARDS

For organizations that depend on the security of a digital fax solution, the service provider should serve as a trusted partner in keeping your sensitive data secure.

☐ I have an understanding of all of the compliance standards that my organization must adhere to.

☐ I need a digital fax provider who will sign a BAA, if applicable.

☐ I have an understanding of when data must be encrypted.

YOUR ORGANIZATION'S USER CAPABILITIES

Maintaining ease of use for everyone in your organization is crucial; understanding how fax is used within your organization today can make the transition to a new cloud fax service much smoother.

☐ I'm aware of how my users primarily send fax documents, i.e., email to fax, MFP, or other.

☐ I'm aware of how my users primarily receive fax documents, i.e., fax to email, MFP, folder delivery, or other.

HOW YOUR ORGANIZATION MANAGES INBOUND FAXES

Finally, understanding how your organization currently manages received documents will give you the right knowledge for process improvement.

☐ I know how teams route and manage different types of inbound documents.

☐ I know how much time my users typically spend hunting through received documents for information.

☐ I know how my users input received information into existing systems or applications.

The items outlined in this checklist are just a starting point as you begin your search for the right fax provider for your business. By covering the basics, we want to help make it easier for you to assess your fax needs and better understand which providers will work for your organization.

To see how we address each of these checklist items here at Concord, reach out to one of our Concord Cloud Fax specialists at sales@concord.net.

Ready to Learn More About Concord Cloud Fax?

Schedule A Demo Today.

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