

# UCaaS Buyers' Checklist

The best unified communications as a service (UCaaS) tools offer a range of transformative capabilities, from personalized meeting rooms to built-in security and encryption. Use this checklist to benchmark the most important features against your organization's UCaaS requirements.

Features	Description	8x8	Vendor 2	Vendor 3
<b>Voice &amp; telephony</b>				
Unlimited international calling for UC phone	Calling plan includes free calling to standard-tariff numbers in 13 key country destinations (see below), without additional long-distance charges. Excludes mobile, special and premium rate numbers in certain countries.	●	–	–
Tier 1 phone number and extension	Phone Number: Utilize a dedicated DID (direct inward dialing) number for each extension; DIDs or toll-free numbers available for over over 100 countries	●	–	–
HD quality voice	Ensure crisp connectivity leveraging a guaranteed voice quality score	●	–	–
Unlimited internet fax	Send and receive online faxes	●	–	–
Secure voice calls (TLS and SRTP)	Protect calls from eavesdropping with TLS/SRTP secure voice encryption	●	–	–
IP agnostic access	Connect to us over any IP network connection through patented access technology	●	–	–
PSTN access	The UCaaS provider works with 25+ PSTN carriers to provide global coverage and redundancy	●	–	–
Geo routing	Patented automatic localized signaling and voice to reduce latency and improve end-user experience	●	–	–
Voicemail with transcription	View and listen to recordings on your desk phone, computer or mobile device; transcribes voicemail to text and sends an email with it included	●	–	–
UC call recording	Record incoming and outgoing calls, play them back, download or delete them	●	–	–
Web browser click-to-dial	Click any phone number in a web page to instantly make calls from your UCaaS app	●	–	–
Power keys—for Polycom phones only (Busy Lamp Field – BLF)	Handle multiple calls at the same time and monitor other users' availability by taking advantage of spare line keys	●	–	–

Features	Description	8x8	Vendor 2	Vendor 3
<b>Voice &amp; telephony (continued)</b>				
UCaaS Mobile app	Connect with instant chat, high-quality phone calls, and secure video meetings, all from the mobile app on your mobile phone	●	–	–
Desktop app	Connect with instant chat, high-quality phone calls, and secure video meetings, all from the desktop app on your computer	●	–	–
UCaaS Web app	Connect with instant chat, high-quality phone calls, and secure video meetings, all from the Web app on your browser	●	–	–
Citrix certification for desktop app	The UCaaS desktop app is tested and optimized to ensure the best voice quality in a Citrix environment	●	–	–
Chrome Enterprise Recommended	Completed web verification with Google to ensure it is secure and optimized for ChromeOS	●	–	–
Highlight to dial phone numbers (Windows Only)	Highlight a phone number outside of the desktop app with your cursor, and enter the key combination Ctrl+Shift+8 to call the number without dialing it manually	●	–	–
Built-in receptionist console	Tailored experience for users assigned to receptionist or operator roles handling high call volumes. Features organization-wide contact list with live presence, full-screen interface, and drag-and-drop interface for fast call resolution.	●	–	–
Mobile Admin	Tailored experience for system admins to complete everyday operational tasks and maintain oversight of system status, from within the UCaaS app, while on the move	●	–	–
Barge, monitor, whisper	Enable managers and supervisors to monitor phone conversations of other employees, privately speak (whisper) to the employee without the customer hearing or join (barge) the call and talk with the customer	●	–	–
Hot desking	Enable any end user to log into a shared desk phone as if it were his or her own	●	–	–
Caller ID	Identify who's calling before you pick up the phone; customize your external caller ID	●	–	–
Number porting – self service or managed	Port existing phone numbers to the UCaaS provider through a self-service method or have UCaaS provider manage the porting	●	–	–
Call waiting	Allow callers to reach you even when you are on another call	●	–	–
Call transfers	Transfer calls to others through a warm transfer or a cold (blind) transfer or straight to voicemail	●	–	–
Extension to extension calling	Call others in your business by dialing the extension only	●	–	–
Call park	“Park” a call in the cloud while you use your phone to make another internal or external call, or ask a colleague to pick up the call	●	–	–
Multi Party Calls	Add up to three lines in the same call	●	–	–
Block callers at user level	Users can block numbers. Go to the Calls tab and click on the ellipsis to block or unblock callers.	●	–	–

Features	Description	8x8	Vendor 2	Vendor 3
<b>Voice &amp; telephony (continued)</b>				
Create new contact from active call	Create new contact from an active call by clicking on the in-call 'More' menu	●	–	–
Flip calls	Move an active call to another device instantly without interrupting or dropping the ongoing call	●	–	–
Country and local time displayed on dial-pad (for international calls)	Country and local time are displayed in the header while calling international numbers in the expanded view mode	●	–	–
Record Voicemail Greetings	Record voicemail greetings through the desktop app	●	–	–
Call Quality Indicator	Call quality indicator icon during an ongoing call provides status of the connectivity quality	●	–	–
Filter calls recordings and voicemails	Ability to filter call recordings by number and voicemails by name, number, call queue, and ring groups	●	–	–
Notifications disabled when 'DND' status is on	Desktop notifications disabled temporarily when the 'Do not disturb' status is ON	●	–	–
Transfer calls directly from the chat roster	Transfer calls directly from the chat roster in the expanded chat window mode	●	–	–
Phone paging (supported HP/Poly and Yealink devices)	Send one-way audio announcements to users who are members of a specific paging group or to everyone in an emergency	●	–	–
Hold music	Play recorded music or marketing messages while your callers are on hold	●	–	–
Emergency services	User updatable E112/999 location information that verifies address information with the servicing PSAP provider. Compliant with Kari's Law and the RAY BAUM's Act (US and CA customers).	●	–	–
Global cloud regions	A combination of private and public geo-redundant data center resources, strategically located across five continents for optimum global reach	●	–	–
Disaster recovery	Support business continuity with <30 second failover between POPs	●	–	–
UC media 'hot' storage	Instant access retrieval and playback during hot-storage retention period for audio call and video meeting recordings	●	–	–
UC media 'cold' storage	Optional cold-storage archive and retrieval services for long-term storage up to ten years	●	–	–
Auto attendant	A service that acts as an automated receptionist. Through profiles and rules, select which phone menu options and recordings are used at specific times for callers to route themselves to the appropriate destination.	●	–	–
Ring groups / Hunt groups	Distribute calls within specific departments by having all the phones in a group ring at once or set up a "round robin" approach where the extensions in the group ring in a specific order until the call is answered	●	–	–
Call queues	Place callers in a queue in the order received until the next agent becomes available, allowing you to serve your customers promptly, courteously, and efficiently	●	–	–

Features	Description	8x8	Vendor 2	Vendor 3
<b>Universal team messaging</b>				
1 on 1 instant messaging	Ability to message any individual user within a company's global directory	●	–	–
Team messaging	Provide group chat functionality to send messages to public or private Rooms	●	–	–
Set availability status	Users can set status to available, busy, do not disturb or custom message. Status is synced across meetings, phone, and team messaging.	●	–	–
Threaded messages	Ability to reply to specific messages in a conversation	●	–	–
Ability to open multiple chat windows	Open multiple chat panels in the desktop app when you switch to Expanded Mode or enlarge the app window (you can open up to nine chat windows)	●	–	–
Business SMS/MMS and texting	Send/receive text messages and multimedia attachments from your UCaaS phone number to any other phone number (available in US and Canada only)	●	–	–
Block SMS spam	Users can block inbound SMS from any external number not saved as a contact	●	–	–
Presence detection	See who is available, busy, away, in do-not-disturb mode, on a call or in a meeting. You can also set your status to show as offline using invisible mode.	●	–	–
Snooze conversations	Mute notifications for a specific time period	●	–	–
Room avatars	Customize private and public rooms by adding a picture or choosing a predefined color	●	–	–
End calls with predefined text messages (mobile app)	Respond easily by selecting a predefined text message when you are unable to take a call	●	–	–
Search past conversations with former users	Ability to search for former users (ex-colleagues) and view chat history	●	–	–
<b>Video and audio conference</b>				
HD video and audio conferencing	Share high definition (HD) quality video to see others in a meeting, supports up to 500 participants on all devices	●	–	–
Join from desktop web browser	Join meetings from any desktop web browser without downloading an app	●	–	–
Join from mobile devices	Join from iOS, Android, and tablets after installing mobile app	●	–	–
Join from mobile browser	Join meetings from any mobile browser to access a meeting experience that is optimized for the user's browser	●	–	–
Virtual backgrounds	Participants can select an image from a library, upload their own image or use the blur feature to replace their physical background with a virtual background	●	–	–
Emoji and GIF reactions	Meeting participants have the ability to use emoji and GIF reactions to respond to meeting content in real time	●	–	–
Polls	Pose a question to the audience with multiple-choice answers to gather feedback and drive participant engagement in real-time	●	–	–
Raise your hand	Participants can discreetly indicate they have something to say without interrupting the current speaker	●	–	–

For more information, call +44 (0)333 043 8888 or visit [8x8.com](https://8x8.com).

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<b>Video and audio conference (continued)</b>				
Meeting lobby	Screen meeting participants before letting them join the meeting by enabling the lobby feature	●	–	–
Secure passcodes	Option to set a passcode for extra security	●	–	–
Calendar integration	Click one button to add video meeting details into the video meetings user interface. See upcoming and past meeting details.	●	–	–
Participant controls	Participants can mute/unmute audio and video, share content, and check bandwidth and audio/video quality	●	–	–
Personalized virtual spaces	Individual employees get their own dedicated meeting web link	●	–	–
Controller mode	Control what viewers see and what users can share in meetings	●	–	–
Remote desktop control	Control the mouse and keyboard movements of another user remotely	●	–	–
Screen sharing	Share your desktop screen and choose which desktop applications or monitors to display; share content from screen on mobile device	●	–	–
Breakout Rooms	Hosts can split meeting participants into separate sessions for smaller, focused discussions	●	–	–
Meeting Whiteboards	Integrated visual collaboration for up to 25 participants per meeting, Draw freehand, arrange shapes, connect images, annotate text. Recorded and saved as part of a meeting transcript	●	–	–
Meeting Summary	Hosts can review participant engagement and easily access meeting details and in-meeting actions like recording, chat, and polls after a meeting has ended	●	–	–
Meeting live streaming	Stream a conference to an unlimited number of participants over YouTube	●	–	–
Meeting asset sharing	Single-click sharing of post-meeting assets, such as: participant list, recording, screenshots, chat, transcripts, summaries, action items, and links to shared files.	●	–	–
Tile view	Display meeting participants in a tiled layout to see all participants at once and to see who's talking	●	–	–
Large meetings	Extended capacity for wide-scale events with up to 10,000 view-only users and 500 interactive participants	●	–	–
Group chat	Send messages to every video meeting participant	●	–	–
Private Chat	Send private messages to individuals in a video meeting	●	–	–
Push-to-talk mode	Mode where all speakers stay muted unless they press a key to speak	●	–	–
Bandwidth controls	Users can adjust their video bandwidth and also monitor their connectivity quality	●	–	–
Conference Call-in	80+ dial in number options (11 toll-free) for 59 countries	●	–	–
End-to-end encryption	End-to-end encryption of a meeting using insertable streams	●	–	–
Audio sharing	Share audio in a meeting from your device or browser tab	●	–	–

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<b>Video and audio conference (continued)</b>				
Conference Call-out	Dial-in meeting participants from within a meeting	●	–	–
Live translation and subtitles	Speech-to-text transcription and display of what's being said in real time	●	–	–
Transcriptions	Detailed transcription of meeting dialog with time stamps	●	–	–
Branding	Customized Meetings experience with configurable background, logo, and URL	●	–	–
Moderation controls	Single moderation of meetings, moderation controls, moderation delegation, and participant lobby	●	–	–
Advanced moderation	Moderators can control audio and video of all participants at once – stop and start audio and video with bulk actions	●	–	–
Meet now	Elevate a call or chat to a video conference	●	–	–
Flip meeting	Move meetings between devices with the click of one button	●	–	–
Video segments and highlights	Meeting summary includes snapshots of shared content and video snippets of important moments from recorded meetings	●	–	–
Dynamic face centering	The video layout is dynamically adjusted, and the participant's face is centered for optimal meeting experience, based on screen resolution and size	●	–	–
Driving mode	Enable driving mode for an enhanced mobile app interface built to ensure a safer meeting experience while on the road	●	–	–
In-app meeting integration with Salesforce	Link meetings and centralize recordings, chat, and transcripts to Salesforce objects for easy access and broader visibility	●	–	–
<b>UCaaS analytics</b>				
UCaaS Speech Analytics and Quality Management	Enable conversation insights and professionalism from the front desk to the back office with this powerful add-on for UC users that combines speech analytics and quality management capabilities	●	–	–
Company summary	See a consolidated view of numerical and graphical details about call activities and metrics for any dates selected	●	–	–
Extension summary	View more than 20 selectable columns of detailed information on call activity on any and all extensions	●	–	–
Call detail records	Get historical information about all calls processed in the selected time frame, including real-time missed and abandoned call details for quick call-back – to avoid missing leads or customer service opportunities. You'll also see the caller's entire customer journey throughout the organization, including call transfers – to help increase customer satisfaction.	●	–	–
Active calls	See real-time information about all calls currently being processed within the organization. Details include the caller's journey throughout the organization up to that point.	●	–	–
Unreturned calls	Match inbound calls to outbound calls to find unreturned calls within the selected date range	●	–	–

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<b>UCaaS analytics (continued)</b>				
Calls by DID	Select and view detailed information for all direct inbound numbers (DIDs)	●	–	–
Business hours report	Customizable report based on company business hours, showing number of calls in and outside of defined business hours	●	–	–
Call quality	Reporting on system-wide and individual user voice quality	●	–	–
Call Queue	Reporting on call queues	●	–	–
Device Status Report	Track the real-time status and location of all registered endpoint devices	●	–	–
Ring Group Summary	Monitor performance of users assigned to Ring Group(s)	●	–	–
<b>Integrating communications into your ecosystem</b>				
Active Directory – authentication	Integrate with Active Directory to manage user access to UCaaS services	●	–	–
Single sign on	Use Single Sign-on for easy authentication	●	–	–
Okta integration	Create, update, deactivate, and reactivate users. Automatically synchronize Okta Active Directory users and groups into UCaaS Configuration System.	●	–	–
Web dialer for web browser (Chrome)	Click any phone number on a website to instantly initiate a call	●	–	–
Calendar integration (Google and Office 365 plugins)	Calendar integrations to start, join, and edit meetings	●	–	–
Google Workspace integration	Plug-n-play integration with 8x8 UCaaS capabilities right within the Google Workspace experience. Features include: click to call from within Gmail and Google Docs, call pop up, integrated search, and extend connectivity to Salesforce.	●	–	–
Outlook integration	Outlook plugin offers click to call from within the Outlook directory and emails	●	–	–
Office 365 integration	Schedule, start or join meetings with our Office 365 plugin	●	–	–
Microsoft Teams Integration	Direct routing integration with Microsoft Teams Phone	●	–	–
Slack Integration	Use commands to add voice and video conferencing to Slack	●	–	–
Salesforce integration	Access call-control and screen pop with caller information, auto-logging of calls, notes, call recording, and integrated search	●	–	–
Microsoft Dynamics 365 integration	Integration features include click-to-call, window pop-up, auto logging of call, chat, voicemail, call recording	●	–	–
ServiceNow integration	Access window pop up with caller information, auto logging for calls, chats, notes, call recording, and integrated search	●	–	–
Zendesk integration	Integration offers window pop up with caller information, auto logging for calls, chats, notes, call recording, and integrated search	●	–	–

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<b>Integrating communications into your ecosystem (continued)</b>				
Netsuite integration	Combining communications and ERP to provide one experience. Integration offers window pop up with caller information, auto logging for calls and integrated search.	●	–	–
Bullhorn integration	Improve productivity and boost placements with Bullhorn	●	–	–
Single integration framework	Integration framework allows quick integration with different 3rd party user apps to provide a seamless experience	●	–	–
<b>Security, compliance, and certifications</b>				
Enterprise grade security	Trusted by some of the largest enterprises globally	●	–	–
High industry SLA	End-to-end 99.999% uptime SLA with financial commitment	●	–	–
Cloud Security Alliance (CSA) STAR	Compliance with international Cloud Security Alliance (CSA) requirements through the CSA's Cloud Controls Matrix (CCM)	●	–	–
FCC Customer Proprietary Network Information (CPNI)	Compliance with the Federal Communications Commission's CPNI regulations for protecting customer proprietary network information	●	–	–
Health Information Trust Alliance (HITRUST)	UCaaS services are HITRUST–RAR certified, in accordance with the HITRUST Common Security Framework (CSF)	●	–	–
Health Insurance Portability and Accountability Act (HIPAA)	UCaaS Provider is third-party certified as a HIPAA-compliant business associate	●	–	–
STIR/SHAKEN	UCaaS provider signs all calls originating on its service using STIR/SHAKEN, in compliance with the FCC Robocall Mitigation program	●	–	–
Accessibility	WCAG 2.1 Level AA compliance for key interfaces	●	–	–
National Institute of Standards and Technology (NIST SP 800–53 R5) and Federal Information Security Management Act (FISMA)	UCaaS provider meets the NIST–NIST SP 800–53 R5 standards, and complies with the Federal Information Security Management Act (FISMA), which is confirmed by third-party auditors	●	–	–
Standard Contractual Clauses (SCC) apply for data transfers between EU and non-EU countries	This ensures appropriate safeguards for international data transfers involving personal data by the European Commission, including the United States	●	–	–
ISO 27001:2013 and ISO 9001	UCaaS provider is ISO 27001:2013 and ISO 9001 certified. ISO 27001 is an internationally recognized best practice framework for an information security management system. ISO 9001 sets out the criteria for a quality management system.	●	–	–
Certified PCI-DSS 3.2.1 SAQ-D solution provider	UCaaS provider encrypts all voice + data in transit and storage to help customers achieve their PCI compliance; UCaaS Provider meets PCI mandates to redact private cardholder data from recordings	●	–	–



Features	Description	8x8	Vendor 2	Vendor 3
<b>Security, compliance, and certifications (continued)</b>				
Data-in-motion encryption with SIP over TLS and SRTP	Data-in-motion encryption with Session Initiation Protocol (SIP) over Transport Layer Security (TLS) and Secure Real-time Transport Protocol (SRTP), enables full end-to-end encryption of UCaaS voice signaling and media streams to, and through, the cloud	●	–	–
EU GDPR compliance	Demonstrates compliance with EU General Data Protection Regulation	●	–	–
UK Government G-Cloud supplier	UCaaS provider is on G-Cloud, the UK government's online digital marketplace for the public sector. That makes it easy for public sector procurement of cloud technology.	●	–	–
UK Government Cyber Essentials Plus accreditation	UCaaS provider holds the UK Cyber Essentials Plus accreditation and appears on the UK Network Services framework agreement for unified communications	●	–	–
Australian Prudential Regulation Authority (APRA) compliance	UCaaS provider has a comprehensive approach to risk assurance for cloud communications services compatible with APRA mandates	●	–	–
Data Residency	UCaaS provider has data centers distributed across five continents, with a presence in the US, Canada, UK, Germany, Australia, and Hong Kong for region-specific jurisdiction	●	–	–
<b>Support and training</b>				
24/7 Support	24/7 global follow-the-sun support	●	–	–
Multiple global support centers	Multiple support centers around the globe, co-location with Network Operations center	●	–	–
Self-service support portal	Access the global support team via our portal, chat or phone	●	–	–
Extensive knowledge base	Access to the UCaaS provider's Knowledge Base for 24/7/365 access to the latest product capabilities and best practices	●	–	–
Network diagnostic tools	Tools that give specific measurements indicating network performance that affect VoIP call quality, including DNS service, network path characteristics, NAT/ firewall/ router characteristics, packet loss rates, jitter levels (changes in network traffic delivery times), round trip network delay (latency) between your network and the UCaaS servers, and more	●	–	–
Basic online training	Free online training for end users and IT administrators	●	–	–
Advanced online or on-site training	Customized training and advanced topics for end users and IT administrators	●	–	–
Elite touch implementation services	Variety of implementation services based on deep best practices and flexible deployment methodology	●	–	–
Professional services	Build custom solutions and capabilities through the professional services team	●	–	–

Features	Description	8x8	Vendor 2	Vendor 3
<b>Telephony calling zones</b>				
Metered or unlimited calling	Metered or unlimited outbound calling options to the following countries are based on the selected service plan	United States	–	–
		Canada	–	–
		United Kingdom	–	–
		Ireland	–	–
		France	–	–
		Germany	–	–
		Spain	–	–
		Netherlands	–	–
		Italy (excl mobile numbers)	–	–
		Sweden	–	–
		Switzerland (excl mobile & Special Services numbers)	–	–
		Australia	–	–
		New Zealand	–	–



8x8, Inc. (NASDAQ: EGHT) connects people and organizations through seamless communication on the industry’s most integrated platform for Customer Experience—combining Contact Center, Unified Communication, and CPaaS APIs. The 8x8® Platform for CX integrates AI at every level to enable personalized customer journeys, drive operational excellence and insights, and facilitate team collaboration. We help customer experience and IT leaders become the heartbeat of their organizations, empowering them to unlock the potential of every interaction. For additional information, visit [www.8x8.com](http://www.8x8.com), or follow 8x8 on LinkedIn, X, and Facebook.