

Are you ready to go beyond Telecom Expense Management?

Take a few minutes to take stock of your systems and processes

Checklist



1 Inventory Control	No	Somewhat	Yes
a Do you have a clear picture of your current technology inventory?			
b Do you know where your assets are located?			
c Can you tell who owns which assets, in real-time?			
d Can you track an asset's lifecycle?			
e Is your inventory information easily accessible?			
f Is it easy to manage disputes and discrepancies with your telecom carrier?			
g Can you manage both wireless and wireline in one solution?			
h Do you have a clear process in place to cancel or transfer all IT and telecom services when off-boarding employees?			
i Do you have a process in place to validate if all services are actually canceled once an employee has left the company?			

2 Cost Optimization	No	Somewhat	Yes
a Are employees using devices to their full potential?			
b Can you access a service last login date?			
c Do you know exactly which lines or assets are up for renewal or upgrades?			
d Can you compare trends, contracts, expenses with previous months and report on this information?			
e Are all invoices loaded electronically?			
f Have you reviewed current invoices and compared them to actual usage?			
g Are employees aware of their technology usage? Can they manage it themselves?			
h Do you know if employees are using the right services for their needs?			
i Do you know which employees need to travel for work? Are plans and services is adapted for their needs?			

3 Processes

	No	Somewhat	Yes
a Do employees have access to a self-serve portal to place IT orders?			
b Are approval processes automated?			
c Is your TEM solution the system of record?			
d Have you transitioned from using Excel as your reporting solution?			
e Do you have a centralized portal for communicating with your providers?			
f Are your AP files generated automatically every month?			

4 Managed Services

	No	Somewhat	Yes
a Do you have telecom expertise on staff?			
b Does this expert have the required experience to manage your telecom expenses?			
c Are you ready to spend time in finding someone with specific TEM qualifications?			
d Have you outsourced the task of managing your telecom expenses?			

TOTAL

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Where do you stand?

Now that you have finished answering all of the questions, tally how many times you answered **NO**, how many **SOMEWHAT** and how many **YES**.

TOP SCORE

NO

So you answered NO to most questions. You need to get started with Telecom Expense Management.

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TOP SCORE

SOMEWHAT

Your SOMEWHAT column has the highest score. You are on the right path. Start planning about going Beyond TEM.

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TOP SCORE

YES

The YES Column is your top score. You understand what it means to go beyond TEM. See how we do it.

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Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100% customer success commitment and the UplandOne platform, which puts customers at the center of everything we do. To learn more, visit uplandsoftware.com.



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