



The Ultimate VoIP Checklist

Business Phone Systems

Selecting the correct business phone system is a necessary process as communications are the foundation of most businesses' service delivery and ultimate success. Unfortunately, this task but can often be cumbersome and complicated. Unless you are in the telecom industry, this is not your primary area of expertise and you may need some assistance.

Below is a checklist to help you take an assessment of your needs and navigate through the many VoIP providers in the marketplace to find the best one to support your company's goals.

What are your phone needs?

- 1. VoIP Phones:
 - Digital IP Phones # Needed: _____
 - Soft Phones # Needed: _____
 - Wireless Phones # Needed: _____
- 2. Phones for mobile or remote workers # Needed: _____
Who: _____
- 3. Conference phones # Needed: _____
- 4. Do you want to purchase or rent? _____

What other equipment do you need?

- 1. Switch Yes _____ No _____
- 2. Router Yes _____ No _____
- 3. QoS Device Yes _____ No _____
- 4. Head Sets Yes _____ No _____
- 5. Bluetooth Dongle Yes _____ No _____

What VoIP features are critical to your business?

Business calling features: e.g. call park, call transfer, music on hold, do not disturb, call screening, etc.

Internal collaboration features: e.g. presence, busy lamp fields, chat, SMS, soft phone, etc.

Call center features: e.g. que reporting, average wait time, call recording, whisper, abandon rate, etc.

What other cloud platforms do you use every day?

1. CRM _____
2. Marketing: _____
3. Sales: _____
4. Help Desk: _____
5. Conferencing: _____
6. Other: _____

Is your office VoIP ready?

1. How much bandwidth do you have? _____
2. Is there internet and power at the workstations? _____
3. What kind of wiring do you have? e.g. CAT 3, CAT 5, CAT 6. _____

Analyze your phone bills and usage.

1. What is your average phone bill and usage?
 - Daily _____
 - Weekly _____
 - Monthly _____
2. What is your average monthly phone bill? _____
3. What is your average monthly long distance/ toll-free bill? _____
4. What is your average monthly internet bill? _____

List the VoIP providers you would like to research.

Provider:

Demo date:

Admin portal review date:

Confirm number portability.

1. Can you keep your current business phone numbers? _____
 2. Which numbers do you want to port? _____
-

Review provider quotes and proposals.

Ask questions:

1. What are the terms and conditions?
2. What is the cancellation policy?
3. What is the contract length?
4. What are taxes and fees?
5. What kind of support is provided - for installation, training, and customer support?

**To learn more about how to switch to VoIP, contact us at 804-412-7283
or by email: info@simplicityvoip.net**