

CHECKLIST: BUSINESS PHONE SYSTEM REQUIREMENTS



KEY POINTS TO CONSIDER WHEN SELECTING A NEW BUSINESS PHONE SYSTEM:

Integration with Existing Systems: Does the phone system integrate seamlessly with our current CRM, ERP, or other essential business software?	
AI and Automation Features: How does the phone system utilize AI and automation to improve customer service and operational efficiency?	
Mobile Capabilities: Can the phone system easily support mobile users, allowing seamless communication for a remote or hybrid workforce?	
Unified Communication Capabilities: Does the phone system offer comprehensive unified communication features, such as instant messaging, video conferencing, email integration, and file sharing, to facilitate seamless and efficient internal and external collaboration?	
Teams Integration: Teams Integration: How well does the phone system integrate with Microsoft Teams for a smooth workflow between our phone communications and Teams collaboration?	
Scalability: As the business grows, can the phone system scale accordingly without significant additional investments?	
Customization and Personalization: Can the system be customized to meet our specific business needs and preferences?	
Security and Compliance: Does the phone system offer robust security features and comply with relevant data protection and privacy regulations?	
User Experience: Is the system user-friendly and does it offer a streamlined experience for both employees and customers?	
Reliability and Uptime: What level of uptime does the service provider guarantee, and what are their protocols for handling outages or downtime?	

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Cost Structure: What is the total cost of ownership, including initial setup, maintenance, and any potential scaling costs?	
Quality of Service: How does the provider ensure high-quality voice and video calls, even under varying network conditions?	
Data Analytics and Reporting: Does the system provide comprehensive analytics and reporting tools to track performance and customer interactions?	
Customer Support: What level of customer support does the provider offer, and how quickly can they respond to issues?	
Remote Work Compatibility: How well does the system support a distributed team, ensuring effective communication regardless of location?	
Future-Proofing: Is the system designed to adapt easily to future technological advancements and changing business needs?	

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ESSENTIAL QUESTIONS FOR A SMOOTH TRANSITION TO A NEW PHONE SYSTEM:

Integration and Compatibility: "How will your system integrate with our existing CRM and other software tools?"	
Transition Support: "What support do you offer during the transition period to minimize downtime and ensure smooth implementation?"	
Cost Transparency: "Can you provide a detailed breakdown of the total cost of ownership, including any potential additional fees?"	
Ease of Use: "How user-friendly is your system, and what training resources do you provide?"	
Scalability: "How does your system scale for future growth and adapt to new technologies?"	
Security and Compliance: "How does your system comply with GDPR and ensure data security?"	
Customer Support: "What kind of customer support do you offer, and what are your response times in case of issues?"	
Vendor Credibility: "Can you provide references or case studies that demonstrate your reliability and long-term service commitment?"	
Feature Relevance: "How can we customize the features of your system to match our specific operational needs?"	
Remote Work Support: "How does your system cater to remote or hybrid work models?"	

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REVIEW AND CHECK THE FEATURES THAT BEST FIT YOUR NEEDS

Interactive Voice Response (IVR): Advanced system directing calls based on voice or keypad inputs, often enhanced with AI for natural language understanding.	
Intelligent Call Routing: Algorithms dynamically route calls based on caller data, behavior, and predictive analytics.	
Automatic Call Distribution: Distribution of calls to specific agents based on skillset and workload.	
CRM Integration: Connects the phone system with CRM software, with AI analyzing customer interactions for personalized service recommendations.	
Fixed Mobile Convergence: Integrates mobile devices with the office phone system for seamless communication.	
Call Recording: Records conversations, with potential AI enhancements for speech analytics and compliance monitoring.	
Call Transcription: AI-powered feature that transcribes calls into text for easy documentation and review.	
Voicemail-to-Email: Converts voicemail messages into emails.	
Voicemail-to-Text: Transcribes voicemail messages into text.	
Visual Voicemail: Allows users to view a list of messages and choose which ones to listen to or delete.	
Real-Time Dashboard: Displays live data with predictive insights and analytics.	
Call Monitoring: Supervises calls for quality, real-time sentiment analysis and performance feedback.	
Call Reporting: Generates reports on call activity, offering trend analysis and predictive insights.	
Audio and Video Conferencing: Enables multi-party meetings, potentially enhanced with AI for noise reduction and meeting transcription.	
Unified Messaging: Consolidates various communication services into a single interface.	
Multi-Device Support: Compatible across various devices, including phones, tablets, and computers.	
Mobile Client for Desk Phone: Extends desk phone functionalities to mobile devices.	

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Presence Management: Indicates team members' availability, potentially using AI to predict and display status based on past behavior.	
Encryption and Security: Protects communications with advanced security measures.	
HD Voice Quality: High-definition sound quality for clearer conversations.	
Call Logging: Keeps detailed records of all calls, with AI possibly aiding in data organization and anomaly detection.	
Conference Call Bridges: Platform for hosting large conference calls.	
Call Park: Places a call on hold at one set and continues from any other.	
On-Hold Music: Plays music for callers on hold.	
Auto-Call Attendant: Automated attendant to answer and direct calls, potentially enhanced with AI for improved caller interaction.	
Shared Line Appearances: Multiple phones share the same phone number.	
Hot Desking: Multiple workers use the same physical workstation.	
Call Groups, Group Pickup: Allows setting up groups for calls that any member can pick up.	
3-Way Calling: Facilitates simultaneous conversation among three parties.	
Intercom: Quick, direct communication between handsets within the office.	
Instant Messaging/Chat: In-built platform for text communication.	
Screen Sharing: Share screens during calls.	
File Sharing: Enables sharing files directly through the phone system.	
Call Supervision or Barging: Supervisors listen to and join calls, with AI aiding in identifying calls that require intervention.	
Toll-Free Numbers: Numbers that can be called at no cost to the caller.	
Premium Rate Numbers: Service numbers for specialized services, generating revenue for the business.	
Disaster Recovery and Redundancy: Ensures continuous operation during emergencies.	