

# The Ultimate Business Phone Checklist

*Your essential roadmap to finding the right solution for  
your small-to-medium sized business.*



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# Introduction

## Importance of a Business Phone System

Since you are reading this checklist, we can already assume you either have a business phone system you are looking to upgrade or you're considering a brand new system.

With a properly integrated communications system, small-to-medium-sized businesses can increase efficiency, boost productivity, and effectively scale future growth.

## Purpose of This Checklist

Before you start browsing through phone system specifications or reading lengthy contracts, it is critical that you and your team have fully outlined and planned for your business' unique needs.

Whether you are just interested in seeing what expansion options exist for your current system or if you are brand new to the world of business phones, follow the guidelines in this checklist to create a cohesive roadmap to business phone success.



***Did You Know: Nearly 50% of SMB's plan to evaluate a new business phone system in the near future- with 86% planning to do so within the next three years\****

# Defining the Scope

One of the most important aspects of finding the right system or vendor is defining what specific conditions led you down this path.

We have outlined some common triggers below and provided a space to fill-in additional needs. Use the space below to define what triggered the decision to evaluate a business phone system:

Business Conditions	Circle One	Notes
<b>Operational Conditions</b>		
Add a new office?	Yes / No	
Moving to a new building?	Yes / No	
Gaining new employees?	Yes / No	
Other Operational Needs	Yes / No	
<b>Technological Conditions</b>		
Current system is unsupported?	Yes / No	
Need newer features?	Yes / No	
Other Technological Needs	Yes / No	
<b>Other Conditions</b>		



***Always check contractual terms on cancellation or returns, upgrade policies, ongoing support, and training opportunities before signing!***

# Defining the Scope

## Outlining Your Specific Business Requirements

As a small business ourselves, we understand that when you're busy running a busy, you want to find the best solution to your problem - without getting a bigger headache along the way.

Use the guide below to begin filling in some of the specific business requirements needed to properly outline your roadmap to untangled business communication:

What is your budget?	
How many phones will you need?	
Do you want to buy or rent?	
Do you have an IT team in place?	
Will you need mobile capabilities?	
Will you need remote office capabilities?	
Will your business require multi-site solutions?	
What does your current internet service look like?	
What hardware or software do you currently have in place?	
Do you have a CRM, ERP, or marketing automation software that will need to be integrated with your phone system?	



***A reputable business phone vendor will have a wealth of experience and should be more than happy to share a reference with you!***

# Customizing Your Solution

Allworx, a leading business phone system provider, conducted a study that reported nearly **75%** of all SMBs say that voice communication is ***extremely*** or ***very important*** to the success of their business.

As you might already know or will soon come to find, business phone features can vary widely between systems. Based on the most common business phone features used today, use the checklist on the next page to designate which are most important to your business.

Business Phone Features	Must Have	Tell Me More	Not Necessary
3-Way Calling			
Intercom			
Conference Call Bridges			
Music-On-Hold			
Calling Other Locations Using Extensions			
Vicemail Messages as Email Attachments			
Paging			
Call Park			
Auto-Call Attendant			
Customize Call Routing			
Individual Call Recordings			
Presence Management			
Shared Line Appearances			
Remote Desk Phones			
PC or Web-Based Interface			
Historical Call Reporting			
Automatic Call Distribution			
Hot Desking			
Real-Time Dashboard			
Third Party Integrations			
Call Supervision or Barging			
Mobile Client for Desk Phone			

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Shared Line Appearances			
Remote Desk Phones			
PC or Web-Based Interface			
Historical Call Reporting			
Automatic Call Distribution			
Hot Desking			
Real-Time Dashboard			
Third Party Integrations			
Call Supervision or Barging			
Mobile Client for Desk Phone			

# Vendor Considerations

While some business phone providers may only focus on one specific operation model (on-premise, VoIP, cloud offerings, etc.), many vendors offer a variety of solutions to fit your individual needs.

In order to ensure you find a vendor that will not only meet the specific system requirements you outlined previously, but also focus on your overall business phone solution, use the diagrams below to indicate the importance of each project factor:

## Cost



## Vendor Service & Management of System



## Installation Assistance



## Initial & Ongoing Training



## Equipment Inventory



## Vendor Monitoring & Troubleshooting



# Conclusion

While this checklist alone will not help you find the perfect business phone solution for your business, it will help you to gather and organize the most critical information needed when discussing your options internally, as well as with your chosen vendor.

Whether you have old or outdated equipment, want to reduce your communication cost, need a specific feature, or are growing your business, RI Telephone is your trusted advisor for Untangling Business Communications.

No matter how complex your requirements, we are confident that we can find a cost-effective communications solution to fit any budget or specifications. We consider ourselves to be the independent agents of business phone solutions, so you never need to worry that you are receiving an incentivized recommendation.

*For more information on Rhode Island Telephone, check out [www.ritelephone.com](http://www.ritelephone.com).*

