



Phone System Evaluation Checklist

The process of purchasing a new phone system can be extremely overwhelming and time consuming. Your company communications are vital to the success of your business. The interests of many groups and individuals need to be considered when evaluating systems. On top of the needs of your company, there are dozens of products and services to consider as part of the evaluation process. Digium developed this **Phone System Evaluation Checklist** to help you collect and organize the information necessary to make a sound decision on a new phone system. Take the time to complete the following steps and you'll be set up for a successful new system deployment.

Understand Current Company Communications Status

In this section, you'll be collecting basic information on the current state of your communications. The information below will be important during the evaluation process.

Number of users: _____ Number of concurrent calls: _____

Current ongoing phone system costs: _____

Current monthly phone bill: _____

Circuit type/# (SIP/PRI/T1/Analog): _____

Any equipment being reused (SIP phones, paging equipment, etc.):

Remote sites: (Location/number of users):

Site 1: _____ Site 2: _____

Site 3: _____ Site 4: _____

Detail your pain points with current system:

To see the value in a new system, check out our ROI Calculator here: <http://bit.ly/1KfxMfh>

100 Renfrew Drive, Suite 100, Markham
ON L3R 9R6 Canada

Phone: +1 (256) 428-6000 or
1 (877) 344 4861 (toll free in N. America)

Sangoma.com © 2019 Sangoma Technologies
Proprietary - Every effort has been made to ensure accuracy of this document.
Due to ongoing improvements and revisions, Sangoma reserves the right to make changes without notice.

Determine Business Needs

Budget: _____

Timeframe: _____

For more detailed information about network requirements, read the Network Readiness Guide here:

<http://bit.ly/1o6faDU>

Desired Call Flow

Describe how you would like incoming calls to flow through your company. Do you want automation or a receptionist? Do you need call groups or queues, etc.?

Interactive Voice Response (IVR) Needs

Does your company need any call automation? What options do you need?

Example: *“Press 1 for Sales, Press 2 for Support...”*

Multiple Office Connectivity

What level of connectivity do you need between sites? 4-digit dial?

Instant Messaging? Shared Queues/Call Groups, etc.?

Integrations

Are there any systems that you would like to integrate with the new phone system? CRM, eMail, web browsers, etc.?

Redundancy

What level of redundancy is required? How long can you afford to be down in an emergency?



It is incredibly important to interview a member from each workgroup to ensure you understand the features they use today so that key functionality is not missed.

Determine End User Needs

Mobility

How many mobile employees do you have? Remote workers?
What communication tools do they need?

Collaboration

How would you like your teams to communicate? Audio conferencing, video, screen sharing?

Desktop Call Control

Would you like the ability to control calls, view their status, access stats, and see the directory all from the desktop? What other call control features are important to you?

Call Center/Queue Needs

Need call center functionality? Queues, wallboard, advanced reporting, etc.?

Reporting

What information do you need to extract from the system and why?

Device Needs

Specify the type and the number of phones you need, including desk phones and softphones.

Feature Needs

Use the following table to organize your needs by listing the features you *must* have, think would be nice to have, or only want if they are free.

Must Have	Nice to Have	Only if it's Free

For an easy-to-use tool that provides basic bandwidth information, use our Network Assessment Test: <http://bit.ly/1oa0nIW>

Evaluate Current Network Infrastructure

With modern phone systems, the most important factor influencing call quality and deployment success is the condition and setup of your internal network. Addressing the following issues ensures that your network is ready.

Register for a free demo of Switchvox
<http://bit.ly/1XnDWvE>

Perform Network Assessment and Report Findings

Have your IT department or an outside resource perform a full network assessment to make sure there are no issues.

Interested in a free trial of Switchvox Cloud?
<http://bit.ly/1Kfyol2>

Ensure Current Bandwidth is Sufficient

Here is a simple equation to see how much bandwidth is needed for your company's phone calls:

$$\text{Concurrent calls} \times 100 \text{ kb/sec} = \text{Bandwidth needed for voice}$$

_____ x 100 kb/sec = _____

Required or Recommended Equipment in Place

- Quality of Service (QoS) capable network equipment
- Power over Ethernet (POE) Switches
- Business Grade Router
- Cat 5 Cabling



For more detailed information
on hosted vs. on-premises
systems, click here:
<http://bit.ly/1Kfyqcw>

Consider Deployment Options

One of the major decisions you'll need to make is whether to choose an on-premises phone system or a hosted (Cloud-based) phone system. Below is a table that briefly explains the differences.

Cloud	On-Premises
Pros: Simple management Low up-front cost Provider handles system maintenance and updates Fast, simple and inexpensive installation Easy multi-site or remote worker connectivity Free your IT group to do other things Easy to add and remove users Redundancy included OpEx cost option	Pros: High level of customization Total control over the system Long-term Total Cost of Ownership is typically lower Keep your current provider Ability to add SIP trunks to lower costs Own equipment Control over network
Cons: Higher Total Cost of Ownership Highly reliant on internet connectivity Gets expensive as you scale up	Cons: Higher up-front equipment costs Need CapEx to purchase Redundancy options available, but can be expensive

Evaluate and Choose a Local Partner

For the best experience possible when evaluating a new phone system, it is best to involve a local technology reseller. Local resellers can provide valuable information from years of experience and oftentimes offer more attractive pricing than you would receive purchasing directly from a vendor. Here are some steps you need to take when selecting a local technology reseller:

- Check references
- Ask about various services offered
- Request necessary certifications

Evaluate Options

Now it's time to evaluate your options. The most important step in the evaluation process is to watch a detailed demo of the system to see it in action. **If you have the time or need to get more information, consider a free trial or access to a demo server.**

Use the following table to help organize the results of your evaluation and compare differences between each vendor.

	Vendor 1	Vendor 2	Vendor 3	Vendor 4
Demo feedback:				
Cost: (Upfront/yearly renewals/monthly service costs):				
Features: Pros/Cons				
Support:				
Training:				

Choose Solution

You've evaluated all your options and now it's time to make a decision! Oftentimes companies require multiple parties to approve the purchase decision. Track those approvals here:

Approvals Needed:

Approval 1: _____

Approval 2: _____

Congratulations, you are ready to select a new phone system!

Hopefully this checklist was a helpful tool during your evaluation process.