



The Ultimate Small Business VoIP Checklist

Your step-by-step guide to choosing a phone system that grows with you.

Introduction

Stop Overpaying. Start Communicating.

As a small business owner, every decision counts—especially the tools you use to connect with customers. A modern VoIP (Voice over Internet Protocol) system can save you money, boost your professionalism, and free you from your desk.

But where do you start? This checklist is for you. It cuts through the complexity and gives you a clear path to find the **right** phone system for your budget and needs.

How to use this guide:

1. **Work through each section** and check the boxes that apply to your business.
 2. **Use your answers** to compare providers and ask the right questions.
 3. **Choose confidently** knowing you haven't missed a critical detail.
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The Basics – What Do You Really Need?

Part 1: Figure Out Your Foundation

First, let's get clear on your basic needs. This will prevent you from buying too much or too little.

Your Team & Growth

- **How many people need a phone?** (Count everyone *now*)
- **Will you hire soon?** (Estimate how many new users in the next year)
- **Who answers the main line?** (Receptionist? Everyone? A ring group?)

Your Hardware

- **Keep old phones?** (We'll check if they're compatible)
- **Go fully digital?** (Use apps on computers & smartphones instead)
- **Need new hardware?** (Headsets for a call center? A conference phone?)

Your Call Habits

- **High call volume?** (Do phones ring all day?)
- **Make international calls?** (To which countries?)
- **Use text messaging with customers?** (SMS/MMS)

Features – The Small Business Essentials

Part 2: Choose Your Features Wisely

You don't need every feature. Here's what actually matters for small businesses.

"Must-Have" Features (The Non-Negotiables)

- **Mobile & Desktop App:** Answer calls from your business number anywhere.
- **Auto Attendant:** That professional "Press 1 for Sales" menu for when you can't answer.
- **Voicemail to Email:** Get voicemails sent to your inbox so you never miss one.
- **Call Forwarding:** Ring your desk phone, then your mobile if you don't answer.

- **Business SMS:** Text customers from your business number.

"Power-Up" Features (Nice-to-Haves)

- **Video Meetings:** Built-in video conferencing for remote teams.
 - **Call Recording:** Record important calls for training or compliance.
 - **CRM Connections:** e.g., Integrates with Salesforce, HubSpot, etc.
 - **Call Queues:** Gently hold customers with music until an agent is free.
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Budget & Hidden Costs

✅ Part 3: Understand The Real Price

The lowest per-user price can be deceiving. Ask these questions to avoid bill shock.

Pricing Questions

- **What's the *true* monthly cost per user?** (After any intro discounts)
- **Is there an annual contract** or can I go month-to-month?
- **Is there a FREE trial?** (Never buy without trying first!)

Beware of Hidden Fees!

- **Number Porting Fee:** (To keep your existing business number)
 - **Setup/Activation Fee:** (Many providers waive this)
 - **International Calling Rates:** (Ask for their rates to your key countries)
 - **Toll-Free Number Cost:** (Monthly fee + per-minute charges)
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Tech & Support

✅ Part 4: Don't Forget Tech & Help!

The easiest system to set up and get help with is the best system.

Internet Check

- **Is your internet reliable?** VoIP needs a stable connection.
- **Run a speed test:** (Aim for at least 1 Mbps upload/download per active call)

Support & Setup

- **How do I get help?** Phone? Chat? Email?
- **Are they available when I need them?** 24/7 or just 9-5?
- **Is setup included?** Or am I on my own?

The "What If" Question

- **What if the internet goes down?** Good answers: "Calls failover to mobile phones" or "You can use the mobile app on cellular data."

Final Comparison & Decision

Part 5: Make Your Final Choice

*You've done the homework. Now, let's compare your top 2-3 choices. *

Provider Comparison Chart

Feature	Provider A	Provider B	Provider C
Price /User/Mo			
Contract Length			
Key Features			
Support Rating			
Free Trial?			

3 Final Questions to Ask:

1. **"Can you show me how a business like mine would use this?"** (Ask for a demo)
 2. **"How long does it take to port my current number?"**
 3. **"What is your process for onboarding new customers?"**
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You're Ready to Choose!

You've armed yourself with the right questions and a clear view of what your business needs. Your new, modern phone system is within reach.

Need a hand or have questions?

We help small businesses like yours every day.



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