Cloud phone system (UCaaS) buyer checklist

Use this list to compare cloud phone providers on the things that matter after the contract is signed.

Requirements

- ☐ Number of users, locations and phone numbers to port
- ☐ Desk phones, softphones, mobile app, or a mix
- ☐ Microsoft Teams calling needed?
- ☐ Call center or queue features (recording, reporting, IVR)
- ☐ Fax, paging, door phones and overhead speakers
- ☐ Business hours, holiday and after-hours routing
- ☐ E911 locations for every site and remote worker

Reliability

- ☐ Published uptime commitment and service credits
- ☐ Geographically redundant data centers
- ☐ Automatic failover to mobile if a site's internet fails
- ☐ Does each site have a backup internet path?

Contract and cost

- ☐ Per-user price, and what it includes
- ☐ Taxes and regulatory fees estimated in writing
- ☐ Hardware purchase vs. rental
- ☐ Term length, auto-renewal and price increase caps
- ☐ Cost to add or remove users mid-term
- ☐ Number porting and installation fees

Implementation and support

- ☐ Named project manager and a written cutover plan
- ☐ Training for staff and administrators
- ☐ Porting schedule that avoids busy days
- ☐ Support hours, response times and escalation path
- ☐ Admin portal: can you make simple changes yourself?

Side-by-side scorecard

Item	Provider A	Provider B	Provider C
Monthly cost (all-in)			
Teams / mobile / desk phone fit			
Contact center features			
Uptime commitment			
Contract terms			

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