

Business Phone Systems Discovery Document

1. Why are you looking for a new phone system?
2. Are they looking for a new carrier with this quote?
3. What is your current phone system? (Premise, hosted, age, fully depreciated, etc)
4. Are you looking for a Hosted or Premise based phone solution?
 - ☐ Hosted
 - ☐ Premise
 - ☐ Don't Know
5. How many locations do you need a phone system at?
6. If the multi-location, how are they networked together?

7. Do you utilize a PRI?
8. How many DIDs do they currently have?
9. Do you have an 800 number and how many do you have?
10. How many outbound minutes do you have?
11. How many POTS (Phone Lines, Fax, alarm, credit card, etc) do you have?
12. Does the company have an external paging system which is integrated into the phone system? If yes, please provide make and model.
13. Does the phone system integrate with a door lock? If yes, please provide make and model.

14. Do you want a mobile app which ties to your phone system?
15. Do you want Outlook integration?
16. Do you want to integrate the phone system with a CRM or other application? If yes, please explain
17. Do you need Call Recording? If yes, how many users will you need?
18. Do you have a Call Center?
19. How many agent and call center supervisors do you have at this location?

20. How many total handsets do you need at this location?
21. Are Gig Sets required? If yes, how many at each location?
22. What type of handset preference do you have for this location? (2 button, 6 button, conference, etc.)
23. Do you need cordless handsets? How many?
24. Do you have Cat 5 or Category 6 wiring to each location where you would like a phone?
25. What type of data switch(es) do you have? (Manufacturer, Model number, total ports)
26. Does your current switch(es) provide PoE (power over Ethernet) and VLAN capabilities?
27. What type of firewall do you have? (Manufacturer and Model Number)

28. Does your company do faxing today with efax?
29. Does your company do voice, video, and web conferencing today?
30. Do you have a budget for your new phone system?
31. What financing options would your client like?
- ☐ Outright Buy
 - ☐ Rental
 - ☐ Lease
32. What additional insight can you provide in regard to this quote?
33. When would you like to see a quote regarding your needs? (Enter due date)
34. When would you like to install this phone system? (Date)