Plan a phone-system change

List the numbers, call routes, devices, and people that need a working handover.

Business / decision-maker

Current provider / planning date

Keep existing service active until transfers are complete and checked. Confirm specialist services and the cancellation sequence before disconnecting anything.

Number / type	Purpose / person / specialist service	Transfer / keep / check

Describe the route callers should follow

Normal hours: who answers / backup / menu or answering group

Busy, unanswered, lunch, holidays, or closed: where does the call go?

Voicemail owner / absence coverage / accessibility or language needs

Staff who need desk phones, computer calling, or mobile access

Keep account bills and authorization records in an appropriate private channel. Do not record account PINs or passwords on this worksheet.

Prepare, test, and close out

Assign an owner to each check. Record exceptions before completing the change.

- ☐ **Confirm account readiness.** Check the authorized account holder, number eligibility, renewal terms, and equipment obligations.
- ☐ **Confirm technical readiness.** Review internet, network, power, phone compatibility, headsets, and agreed outage arrangements.
- ☐ **Agree the handover.** Document the sequence, decision-maker, staff communication, contingency approach, and training.
- ☐ **Check specialist services.** Confirm fax, alarms, door entry, payment devices, and other dependencies with their responsible providers.

Verification item	Result / exception	Owner / checked date
Incoming / outgoing calls		
Caller ID and transfers		
Menus / busy or no-answer routes		
Voicemail and opening hours		
Mobile / computer apps in scope		
Specialist service arrangements		

Outstanding issue / owner / next check

Transfer confirmed by / date; old services to retain or cancel; cancellation approver

Provider processing times vary. Confirm completed transfers and remaining services before requesting cancellation.