



Business Phone System Questionnaire

Everything a provider needs in order to quote you accurately the first time - so you are comparing real numbers instead of teasers.

- The single biggest reason phone quotes come back wrong is that nobody asked about the analog lines. Section 7 exists for that reason. Fill it in even if you have to walk the building.
- Your contract end date and notice window matter more than anything else on this form. Miss the window and you auto-renew at list price for another term.
- There is no cost to you. We are paid by the provider you choose, at the same rate whichever one you choose, and we will put that in writing before you sign anything.

Two ways to use this

Fill it in on screen - every box below is a live form field in your browser or in Acrobat, then save and email it back. Or print it and write on it. Either way, the blue button at the bottom of every page books the review when you are ready.

1 Who you are

COMPANY

YOUR NAME

EMAIL

PHONE

YOUR ROLE

LOCATIONS

COMPUTER USERS

2 If you could fix one thing tomorrow

Say it however you would say it out loud. This is the most useful box on the page - it is usually the thing the rest of the form is quietly circling.

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IN YOUR OWN WORDS

3 Your current phone system

Why we ask: We need to know what you are replacing before we can say what should replace it.

CURRENT PROVIDER / CARRIER

SYSTEM OR MODEL

ROUGHLY HOW OLD

WHERE IT LIVES

WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Critical

1 2 3 4 5 6 7 8 9 10

4 Size and footprint

Why we ask: Seat count and site count drive the price bands more than any feature does.

NUMBER OF SITES

USERS WHO NEED A PHONE

PHONE NUMBERS / DIDS

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COMMON-AREA PHONES

REMOTE OR HYBRID STAFF

TOLL-FREE NUMBERS

WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Critical

1 2 3 4 5 6 7 8 9 10

5 Contract and billing

Why we ask: This is where the money hides. Auto-renewal is a pricing strategy - theirs, not yours.

CONTRACT END DATE

NOTICE WINDOW BEFORE RENEWAL

CURRENT MONTHLY SPEND, ALL IN

WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

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DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Critical

1 2 3 4 5 6 7 8 9 10

6 How your calls actually flow

Why we ask: Nine out of ten migrations go wrong here, not on the handsets.

WHO SET THE ROUTING UP

AUTO ATTENDANT / IVR

HUNT GROUPS OR RING GROUPS

AFTER-HOURS HANDLING

VOICEMAIL TO EMAIL

CALL QUEUES

PAGING / OVERHEAD

WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Critical

1 2 3 4 5 6 7 8 9 10

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7 Contact centre and recording

Why we ask: Recording and supervision requirements change which providers can even bid.

CURRENT CONTACT-CENTRE PLATFORM

AGENTS WHO TAKE QUEUED CALLS

CALL RECORDING REQUIRED

COMPLIANCE DRIVER

WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Critical

1 2 3 4 5 6 7 8 9 10

8 Integrations

Why we ask: A phone system that does not talk to the system your team lives in gets worked around within a month.

WHAT IT NEEDS TO CONNECT TO

MICROSOFT TEAMS

CRM

INDUSTRY SYSTEM

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WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 Critical

9 Analog lines and anything still on copper

Why we ask: Fax, alarms, elevators, gates, lifts and paging often still ride copper - and those lines have been climbing in price for years. Some can move, some cannot. We need the list before anyone quotes.

WHO BILLS THESE LINES

FAX LINES

ALARM / FIRE LINES

ELEVATOR LINES

GATE, LIFT OR INTERCOM

CREDIT CARD / POS LINES

ANYTHING ELSE ON COPPER

WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

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DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Critical

1 2 3 4 5 6 7 8 9 10

10 Handsets and hardware

Why we ask: Hardware is usually the biggest one-time number in a quote, and the one most often left out of it.

CURRENT HANDSET MAKE

DESK PHONES IN USE

CONFERENCE UNITS

PREFERENCE

WHAT DO YOU LIKE ABOUT IT?

WHAT DO YOU DISLIKE ABOUT IT?

DESIRED IMPROVEMENTS - optional

PAIN SCORE - HOW MUCH DOES THIS HURT TODAY?

No pain ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Critical

1 2 3 4 5 6 7 8 9 10

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Add up your score

Write each section's pain score in the box beside it, then total them at the bottom. The total is not a grade. It is a running order - the highest number is where we start, and if the highest number turns out to be something we do not sell, we will tell you that instead of selling you something else.

01	Your current phone system	
02	Size and footprint	
03	Contract and billing	
04	How your calls actually flow	
05	Contact centre and recording	
06	Integrations	
07	Analog lines and anything still on copper	
08	Handsets and hardware	

YOUR TOTAL PAIN INDEX

out of 80 possible

Where the total lands

Healthy 0 - 19	Chronic 20 - 39	Acute 40 - 59	Critical 60 - 80
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What happens when you send this back

- **We read it before we call you**

Nobody is going to ring you up and ask questions you have already answered here. We come to the call with the market pricing for a business your size already pulled.

- **Thirty minutes, no pitch**

We go through what you have, what it costs and where the opportunities are. You get a straight read even when the answer is to change nothing.

- **You keep the work**

Whatever we produce is yours, whether or not you ever engage us. There is no cost, nothing to sign, and no obligation attached to any part of it.

- **How we get paid, plainly**

The providers pay us when you choose one. The rate does not change based on which one you pick, which is the only reason a recommendation from us is worth anything. We will show you the number before you decide.

Ready when you are.

Email this back to consulting@netit.net, or use the button to put a time on the calendar.

Houston based. American owned and operated. No cost to your business, ever.

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