



aircall



**How To Break Up
With a Bad Phone System
Without Breaking Your Business**

You're right. You deserve better.

There's no reason you should be settling for a phone system that:

- Makes you look unprofessional
- Cuts your conversations short
- Limits your options (and/or)
- Refuses to adapt

But we also understand why you haven't made a move just yet.

Change is scary.

Even when you know it's the right decision.

And *especially* when it impacts something as critical as your business communications.

But when you have a support system behind you — people who know the path ahead, the process becomes less overwhelming.

Aircall has helped thousands of sales and customer support teams navigate this important transition, and in this guide, you'll find a reliable framework for making your best business decision.



Table of Contents

- Confirm Your Reasons Why.....3
- Take Inventory of Your Business.....7
- Request a Test Drive.....10
- Plan For Porting.....12
- Get It In Writing.....14
- Live Happily Ever After.....16

Confirm Your Reasons Why

So you've had it with your phone system. They promised they would change but they didn't. It's just not working out between you two, and now it's hurting your whole team.

It's time to move on. But before you do, try to define exactly why you're so disappointed.

What were the expectations your phone system could never quite live up to?

If you don't set your priorities now, you could end up with buyer's remorse. Taking one step forward only to find yourself taking two steps back.

To get the ideas flowing, here are the main answers we've heard over the years when asking clients why they first started looking for a new phone solution.

Reliability

Clear communication is the foundation of your relationship with your phone system. If call quality isn't stable, operations could come crashing down.

That being said, there's a tradeoff to be made. Landlines have historically provided the most consistent experience in terms of call quality. But, as we'll discuss later, they lack the majority of productivity-boosting features seen in software-based solutions.

If you want the flexibility of **VoIP** (Voice Over Internet Protocol) and the best call quality, you'll want to take a few additional precautions to make sure everything is crystal clear.

Will your new provider set up bandwidth preserving **QoS** (Quality of Service) parameters on your router? Will they perform network checks to make sure everything is running at top speed?

// Clear communication is the foundation of your relationship with your phone system. //

Additionally, you should check whether your provider is doing all they can to keep your lines active. Are they able to automatically switch carriers in case of outages?

Softphone reliability has dramatically increased in recent years, but you'll still want to conduct due diligence.

Simplicity

If the controls on your phone system feel as intuitive as those in an airplane cockpit, it's usually a sign that it's time to start the search for a more user-friendly solution. But if you're having trouble deciding where to draw the line between what's unacceptable and what's good enough, consider the following questions:

- What steps do you need to take to get new employees setup on the system?
- How long would it take to update your voicemail greeting?
- How easy is it for you to adjust call routing rules?

When these routine processes are complex or confusing, the end result becomes hours of busy work standing between you and what's really important.

Flexibility

A little space is a good thing. It presents an opportunity to express your own personality and pursue independent interests. It's also good to create some distance every once in a while... from your office.

Deskphones, it turns out, require a desk and a phone. Those are two things you might not want to pack on your business trip to San Francisco, or on that “working holiday” at your parents’ house. Cloud-based phone systems, on the other hand, function from anywhere with internet — or strong data — connectivity.

For extra flexibility (and peace of mind when OOO), you may also want a phone system with native mobile apps. This added capability could help you win more deals or provide superior service by responding exactly when a critical moment arrives.

// Every extra bit of information you know about your clients means you’ll be able to win more deals and provide a better customer experience. //

Integrations

If your phone system doesn’t get along with other critical parts of your workflows, what are the chances it’ll work out between you two in the long term?

Modern phone systems can now directly connect with a variety of CRM, Helpdesk, and administrative platforms. And when these integrations are up-and-running, essential information like complete call recordings, notes, and category tags are automatically shared between tools.

Every extra bit of information you know about your clients means you’ll be able to win more deals and provide a better customer experience. And as an added bonus, you can eliminate many manual tasks and direct more of your attention to the conversations themselves.

Analytics

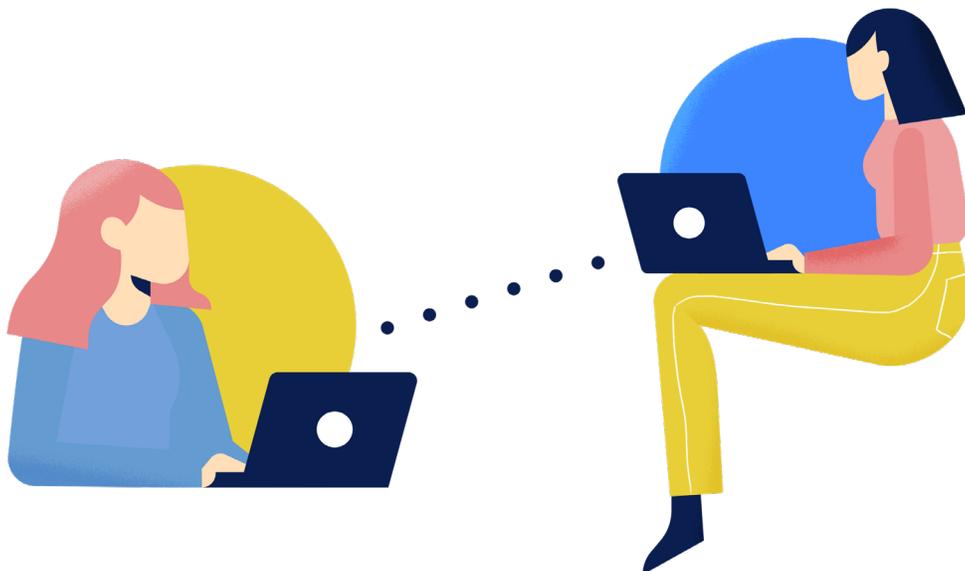
Some decisions are better left to intuition. Managing your business communications shouldn't be one of them.

Despite our ability to monitor and collect data on almost every aspect of our lives, a lot of support and sales teams are still "flying blind" on the phone. Critical insights like call efficiency and staffing optimization are left to gut instincts or overloaded spreadsheets.

Phone systems with modern reporting features can reveal precise statistics on results like call duration, missed call rate, time-to-resolution, and wait time. These can be broken down further according to individual employees, teams, or numbers.

When reviewed in a monthly or quarterly context, this data can alert you to important business trends. And when viewed in real-time dashboards, it can help you identify issues before they become crises and make critical adjustments in the moment.

From monitoring the performance of a new employee to determining the smartest way to set schedules, the more data your phone system provides the stronger your decisions will be.



Take Inventory of Your Business

Before you can love another, you need to know and love yourself. So after creating a wishlist of what's important, you now need to determine what's actually possible within the context of your company.

What does your infrastructure look like, who are the decision makers, and how will you be using this new phone system? These are just a few of the questions to consider.

Logistical

Where do you do business? Where will you be calling?

Make sure your new phone system can **provide local numbers** in locations where your company operates. First and foremost, local numbers **create a sense of trust** between customers and a brand. Second, local numbers eliminate per-minute charges for your customers and any additional expense on your end as well. Toll free numbers are good for customer convenience, but will still cost your company extra. #BuyLocal.

How big is your team?

The right phone system for a 1,000+ employee insurance company will look different than one for a fashion startup. Take a look at your needs and compare them next to available features and functionality. Some solutions will be better for small and mid-size teams, while others can support large-scale operations.

How active are your phone operations?

Does your business use the phone primarily for outbound calling or inbound? Sales demos or support requests? Depending on your situation, you may want to check pricing-per-minute, call routing features, and analytics capabilities.

Network architecture

VOIP systems need a reliable and strong internet connection. The best user experience will require a capable router and quality headsets. Furthermore, find out what any potential phone system's backup plan is **in case of network outages**. This is an answer you'll want to know before emergency strikes.

Other tools in your workflows

Any phone system worth its weight in plastic can make and receive calls, but software-based systems are capable of **connecting on a deeper level** with your other business tools. Imagine a world where notes don't need to be manually copied between multiple platforms (or sticky notes). Or if you could instantly see a caller's background and profile before ever picking up the phone. When shopping for new systems, it's a huge advantage if your phone complements and enhances your current tools.

Political

Who needs to be involved in the decision?

The company "purse-strings" will of course need to sign-off on any final decision. But more immediately, any managers of teams that regularly use the phone should have a strong say in the matter.

Who will you need to help you install?

If you've chosen to go the landline route, you'll need to find someone in your office who knows how to navigate the server room and can keep track of multiple wires. It's possible that your provider will send someone to install the system, but periodic maintenance is not always guaranteed.

The beauty of cloud-based phone systems is the ability to **install and set up workflows without the IT team**. However, cooperation from your colleagues will make for a swift and effective transition.

Who will be impacted?

Each team (sales, support, onboarding, HR, etc.) may require different features and configurations. Collect this information beforehand to ensure everyone is happy and productive.

? Financial

What are the commercial details of your current relationship?

You'll need to find out the terms of your current phone contract, whether it be cell phone provider, another VOIP system, or an old-school deskphone. If you're on a month-to-month payment system (or just winging it on Skype), go ahead and make the switch. However, annual contracts may require additional consideration.

What are your ongoing costs?

Consider the pricing of outbound vs. inbound calls. A cheaper per-minute phone provider (they *do* vary) could make switching a good financial decision in the short-term. For example, if your company makes a high volume of outbound calls, the **price-per-minute** is a significant expense.

Request a Test Drive



Even after getting a firm grip on your business structure and requirements, adopting a new phone system still comes with inherent worries.

Will things really be better than before? Can this new provider follow-through on their promises?

Luckily, you have a surefire way to see how green the grass is (or isn't) on the other side. You have the power to make an informed, reliable decision without fear of negative consequences.

First, **request a personalized demo**. During this meeting, an account executive can learn more about your needs and how you can maximally benefit from their system.

Next — unlike a few other notable long-term commitments — you can (and should) try out a new phone system before diving in head-first. These practice

// You have the power to make an informed, reliable decision without fear of negative consequences. //

runs can last anywhere from one to three weeks or be defined by a set duration of calls.

During that time, you'll want to make sure your setup is as similar to everyday operations as possible. Yes, that means setting up your call routes, IVR messages, voicemail inboxes, and team structures if you can.

And even after the trial period ends, you may want to ease into your new phone system. Many companies choose to migrate a single team first as a "pilot" program. Once everything is up-to-speed, onboarding all other operations is a breeze.

Finally, ask about the full menu of pricing options. Month-to-month plans are less economical than annual subscriptions, but they could prevent against buyer's remorse. Plus, these plans can always be upgraded to long-term commitments once you are feeling more confident.

Plan For Porting

You've made your decision and signed a new contract, but your ex-phone system is still holding onto your stuff. What do you do? There's some good stuff in there, some stuff you really need to run your business. Who does it belong to?

The stuff belongs to you. You paid for it, and they can't use it anyway.

In terms of phone systems, your numbers are your most prized possessions. They're posted everywhere; they're how your customers know to reach you. Changing them now could result in weeks of unnecessary headaches and potentially lost opportunities.

Luckily, you can keep your same numbers when transitioning to a new provider. Porting is a process involving four parties: you, your current provider, your new provider, and a network carrier. It isn't the most user-friendly process, but if you come prepared, it isn't nearly as painful as it seems.

For one, there is some paperwork that needs to be completed. The good news is, your new phone provider will do a vast majority of the heavy lifting.



All you need to provide is:

- The name of your current phone provider
- The name of each number's account owner
- A full address associated with each number
- A copy of the last bill for each number

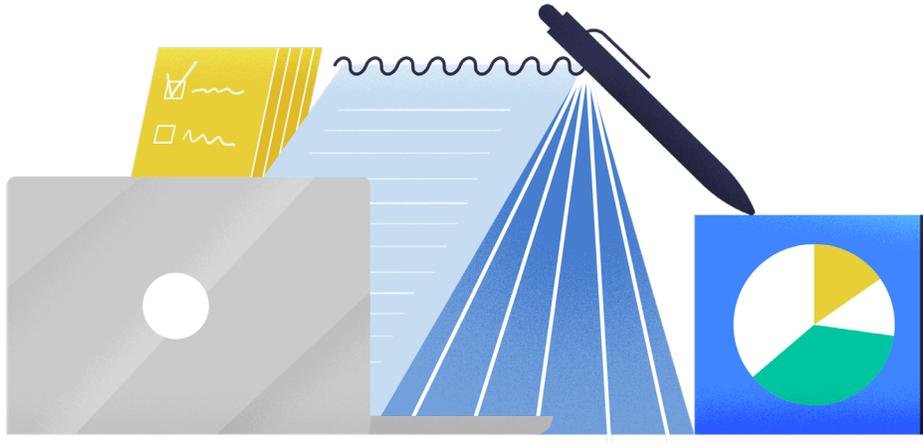
If you can provide each number's [CSR](#) (Customer Service Record), this document will contain most of the necessary information, thus expediting the process.

From there, all interactions with your current (soon to be former) solution will be handled by the new provider. An LOA (Letter of Authorization) will be submitted to your old system, and porting requests will be scheduled with a carrier (e.g. Voxbone or Twilio). This ensures your numbers are officially active and accessible.

Please note: This is not an instant process. Porting requests with carriers must be scheduled at least **8 days in advance**. This time frame — plus collecting the necessary information — means you should **plan on budgeting at least 2 weeks** for the full transition.

Get It In Writing

.....



You're about to enter a very intimate business relationship. You've done your homework, and everything seems to be ready for launch.

But don't let history repeat itself. Take precautions to make sure everything stays predictable. The best way to do this is to have all the details of your partnership acknowledged in writing.

If you are expecting onboarding assistance, for example, confirm exactly how long this support will last. Is it negotiable? Are there different levels of support available?

Additionally, you'll want to inquire about an [SLA](#) (Service Level Agreement). This document ensures the quality of your service will remain at an acceptable level throughout your relationship — and confirms consequences for when it fails to meet expectations.

Finally be sure to address industry specific requirements at this time. Is your new phone system compliant with GDPR? HIPAA? PCI? Those are answers you'll want before regulators ever ask a question.

// Take precautions to make sure everything stays predictable. //

Live Happily Ever After

You did the hard work despite your initial doubts and now you're in a healthier, more productive professional relationship. You're finally free to focus on what you do best and get back to building your business one conversation at a time.

We promised ourselves we wouldn't get emotional, but we'll just come out and say it.

We couldn't be more proud.



Is it a match?

Aircall helps Sales and Support teams have the kind of conversations that create lifelong customers. Our phone system easily integrates with your CRM, Helpdesk, and other critical business tools, giving employees all the insights they need to deliver exceptional experiences.

[See for yourself: www.aircall.io/signup](http://www.aircall.io/signup)

