

Project Plan for: Hosted Voice Over Internet Protocol (VOIP) Phone System

Project description

This project is to assess your organization’s needs for phone-based communication and how well your current phone system meets those needs. It will help you evaluate, purchase, and install a new Voice Over Internet Protocol (VOIP) phone system. You may currently have an on-premises (PBX) or cloud-based phone system. You will review options and features that best match your needs. *NOTE: This project is about your organization’s phone system, not individual mobile phones or mobile phone plans.*

Why take this on / what impact to expect:

If you complete this project, you can expect some or all of the following benefits to your staff and organization:

- A phone system with features necessary to meet the current needs of your organization
- A phone system flexible enough to adapt to your evolving needs, which could include a move to a new location or a change in physical office structure
- Increased staff morale and productivity
- Increased satisfaction of external stakeholders who experience improved communication with your agency

Estimated project timeframe: 3 - 12 weeks

Project deliverables

At the end of this project, you will have:

- A newly configured VOIP phone system and the phone hardware needed for staff
- Training for staff on efficient use of the new phone system and its features
- Documentation on features, maintenance, and support

Project milestones & who leads:

The major steps involved in executing this project and who leads them are below. Keep in mind there may be more sub-tasks than what’s noted here, but these are the major steps:

Milestone	Who leads?
1) Assess current state <ol style="list-style-type: none"> a. Ask key stakeholders what works well and what does not with your current phone system. Include both internal and external stakeholders. b. Do clients or supporters have a hard time reaching your staff? c. Are staff working remotely? Do they frequently need to use their personal mobile phone for work purposes? d. Are you able to easily transfer calls from one staff member to another? e. Do you have an efficient way to receive and manage voice messages whether you are in the office or not? 	Your org
2) Create requirements/define your needs <ol style="list-style-type: none"> a. Based on above, create a list of “must-haves” & “nice-to-haves” of what you need in a new phone system. i.e., <i>What must the phone system do, from where, for whom?</i> b. In addition to having the necessary features, do you have a need to report the number of calls received, length of calls, where calls are coming from, etc.? c. Understand what resources you have to help with this project, including to configure, train staff on, and maintain the phone system. 	Your org
3) Explore options <ol style="list-style-type: none"> a. Using the requirements above, evaluate potential phone systems and vendors that offer what you need – use the list below as a starting place b. If possible, demo/trial different phone systems to understand how they work 	Your org

<ul style="list-style-type: none"> c. Consider what training/documentation/support is available d. <i>TIP! If you already use Microsoft 365 or Google for Nonprofits, start by evaluating their corresponding phone solution to ease adoption and integration into existing systems.</i> 	
<p>4) Choose your phone system, install it, and train users</p> <ul style="list-style-type: none"> a. Purchase phone system & required hardware (phones, switches, headsets) b. Ensure all elements of the phone system you need are configured and tested c. Ensure all physical phones (if applicable) are setup and working d. Set up a training plan to ensure staff can successfully use the phone system e. Communicate and implement your ongoing support plan for the phone system to ease adoption and ensure success 	Your org and/or solution vendor

Estimated project budget:

If you follow the approach outlined in this project plan template, we estimate the project budget to be as shown below. Please keep in mind this is only an estimate and final cost will vary based on your choice of solutions/vendors, hardware, etc.

Description	Cost per user/month	# of users/units	Est. annual budget
Hosted VOIP phone system	\$10-\$30		
One time IP phone costs	\$100/each		
Configuration, training, support			\$3,000
TOTAL			

Potential solution providers/vendors for this project:

While the Nonprofit Support Program does not endorse the vendors/providers below, our work in the community indicates that many of your peers have used the vendors below for similar projects. It's essential that you research and fully evaluate solutions and vendors against your specific project requirements to ensure a good fit. We've recommended additional resources to help with that under "Learn more before you decide."

- [Microsoft Teams](#)
- [Google Voice](#)
- [Comcast](#)
- [Zoom](#)
- [Ring Central](#)
- [OOMA](#)

Learn more before you decide:

To learn more about how to evaluate these solutions/vendors before you proceed, consider the following resources:

- [More detailed guide to phone systems](#)
- [Free, 30-minute webinar on Teams as your phone solution](#)
- [FAQs about Microsoft Teams' phone solution](#)

Related considerations:

While you're working on this project, it is a good time to also consider the following:

- If you're already using Microsoft 365 or Google for Nonprofits, you may want to consider adding their corresponding phone solution to your existing accounts for smoother integration and to reduce the number of different solutions you're using.
- While you may want to replace your phone system as soon as possible, take the time to think about how your organization is changing or may be changing in the future, and how phone system features could play a role in supporting those changes. For example, might you hire new staff that will only work remotely? Are you adding a new office location or planning to move?
- Do you also want to conduct video calls/conferences internally and externally, including the ability to offer virtual programming? Some of that functionality may be included or could be added to the phone solutions above. See also the project plan for *Video Conferencing*.