SETUP PLAN · 2026

Setting Up a Business Phone System in 14 Days

The same work as a dated plan with a name against every line. The interesting judgement all happens on days one and two, before anything is ordered. The rest is execution.

> "The new phone system is terrible" almost never describes a platform. Unpack it and you find four things: calls reach the wrong person, nobody is confident transferring, the after hours message is wrong, and a third of the team never finished setting up the mobile app. All four are **sequencing failures**, decided by what got done last rather than what got decided first.

What people actually mean, and the day that prevents it

The complaint	What went wrong	Prevented on
"Calls go to the wrong person"	The routing model was never decided. It was assembled from a description in a meeting.	Day 1, then drawn on paper day 4
"Nobody knows how to transfer"	Training happened once, before anyone had a real question.	Day 12, then again day 14
"The after hours message is wrong"	Nobody made the decision, so a default governs two thirds of your week.	Day 2, tested day 11
"It does not ring on my mobile"	Notifications never allowed, battery optimisation, or never signed in.	Days 9 and 10, verified by a real call

The fourteen days

1. **Days 1 to 2.** Decide, before ordering: seat types rather than headcount, the routing model, the after hours position, and what the system must write into. Build a complete number inventory and confirm rights of use in writing. Name one owner.
2. **Day 3.** Lodge the port. Details copied character for character from a current bill. Never cancel the old service.
3. **Days 4 to 5.** Draw the call flow on paper. Check the network, upstream headroom and power.
4. **Days 6 to 8.** Provider builds. You write the greeting scripts and supply integration credentials.
5. **Days 9 to 10.** Devices and the app rollout, verified with a real inbound call to each person.
6. **Day 11.** The written test script, including a public holiday rule.
7. **Day 12.** Brief the people. One page, six things, per group.
8. **Day 13.** Cutover, mid-week and mid-morning, with a rollback point agreed first.
9. **Day 14.** Re-train, because now people have real questions.
10. **Day 30.** Review against a baseline you captured before go live.

Day 11: the test script. Two people, two hours, no going live with an open line

- [ ] Main number from an external mobile: right group, right greeting, inside two seconds
- [ ] Every other number individually, fax and alarm lines included
- [ ] Overflow engages on time, and a waiting caller hears something meaningful
- [ ] Outbound from a desk phone and the mobile app, checked on the receiving handset
- [ ] Blind transfer, consultative transfer, and a refused transfer returning to you
- [ ] Hold, park, retrieve from a different device
- [ ] Voicemail: leave, notify, retrieve, transcribe. Right person, within a minute
- [ ] After hours path, tested by changing the hours
- [ ] **A public holiday rule.** The test nobody runs and everybody needs on 26 December
- [ ] Emergency calling address correct for every device and app
- [ ] An integration writes a real record into your CRM, against the right contact
- [ ] Call quality both directions, wired and mobile
- [ ] Unplug the internet. Calls divert as designed
- [ ] Every single person makes and receives one call

Four things that ruin a cutover

- **The old service gets cancelled.** Somebody tidies the supplier list mid project. This is the one action that can permanently lose a number.
- **A number nobody knew about.** The fax line a supplier still uses, or the alarm dialler.
- **The date was announced before it was confirmed.** Then moved twice. The system is unpopular before carrying a single call.
- **Everybody fixing things at once.** One owner, one list, no parallel changes.

Ask these so the dates are real

- "What do the first ninety days look like, week by week?" Named steps beat "our onboarding team will be in touch."
- "When is the port date confirmed, and what if it slips?" You want a written interim with calls diverting.
- "Who do I ring at 4pm on a Thursday, and what can they see?"
- "Is the thirty day review included?" With your numbers in front of both of you.

Take the baseline before day 13, not after

Two weeks of answer rate, average speed to answer, abandoned calls and after hours volume, captured before cutover, is the difference between a review that measures and a review that argues. It costs almost nothing and it is nearly always skipped. If the answer rate has not improved at day 30, **the routing model is wrong, not the platform.**