



# SOLUTIONS DESIGN QUESTIONNAIRE

## COMPANY INFORMATION

Legal Company Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_ Website URL: \_\_\_\_\_

Number of Locations (USA & Canada): \_\_\_\_\_ Number of Location (International): \_\_\_\_\_

Company Notes (Please list office locations): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## PRIMARY CONTACT FOR COMPANY

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Title: \_\_\_\_\_ Email: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_ Office Phone: \_\_\_\_\_

## BUSINESS INFORMATION (AS KNOWN)

Existing Phone System Type

\_\_\_\_\_

Phone System Brand

\_\_\_\_\_

Desk Phone/Handset Brand

\_\_\_\_\_

Desk Phone/Handset Model Number

\_\_\_\_\_

Conference Room Handset Brand (if any)

\_\_\_\_\_

Conference Room Handset Model Number

\_\_\_\_\_

Existing Maintenance/Support Plan

\_\_\_\_\_

Number of Office Extensions/Users

\_\_\_\_\_

Existing Phone Features in Use

Auto Attendant

Shared Lines

Answering Svc

Busy Lamp

Call Forwarding

Conferencing

Caller ID

Unknown

VM to Email

Number of Remote Extensions/Users

\_\_\_\_\_

Conference Phones Brand

\_\_\_\_\_

Number of Conference Phones

\_\_\_\_\_

Model and or Version

\_\_\_\_\_

Additional Phone System Features

\_\_\_\_\_

Existing Phone System Notes

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## EXISTING TELECOM INFORMATION (AS KNOWN)

POTS Lines Used for Voice	Provider

Quantity

POTS Lines Used for Fax	Provider

Quantity	Estimated Monthly Cost (per unit)

DID (phone) Number (quantity)	Service Provider Name

T1/PRI Channels Dedicated to PSTN Voice	Provider

Quantity	Estimated Monthly Cost (per unit)

PSTN VOIP/SIP Trunks / Call Channels	Provider

Quantity	Monthly Fee

## EXISTING INTERNET INFORMATION (AS KNOWN)

Internet Connection 1	Monthly Fee

Access Type	Provider

Speed	Static IP Addresses

Internet Connection 2 (Backup/Secondary - if applicable)	Monthly Fee

Access Type	Provider

Speed	Static IP Addresses

Notes

## EXISTING OFFICE NETWORK INFORMATION (AS KNOWN)

Firewall	Quantity
Firewall Model	Firewall Brand
Firewall Type	
Switch	Quantity
Switch Brand	Switch Model
Switch Type	Switch Type Power over Ethernet (PoE)
Router	Quantity
Router Brand	Router Model
Router Type	
Wireless Access Unit	Quantity
Wireless Access Unit Brand	Wireless Access Unit Model
Internet Access Failover	Device Type
IT Room/Closet	Telco/Server Rack Type
Shelf Space Availability	Power Source
Network Cable Type	# of Ethernet Connections at Each Computer/Phone Area

## PRIMARY TECHNICAL CONTACT FOR NETWORK INFORMATION (

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Title: \_\_\_\_\_ Email: \_\_\_\_\_  
Mobile Phone: \_\_\_\_\_ Office Phone: \_\_\_\_\_

## REQUESTED NEW PHONE SYSTEM INFORMATION Please provide quantity of each IP Phone requested

Economy IP Phones (breakout/kitchen rooms)

Standard IP Phones (general staff)

Premium IP Phones (executive staff)

Receptionist or Executive IP Phones

Extension Preference

Conference IP Phone Brand Preference

Headset Preference (if applicable)

Headset Brand Preference (if applicable)

Phone Feature Preference

Office Production Tool Integration

Bullhorn	MS Dynamics
Chime	Mocros Opera
Connectwise	Office 365
Google GSuite	Netsuite
Google Mail	Salesforce
Jabber	Zoom
Microsoft Outlook	Other

Auto Attendant	Call Recording
Paging	Conferencing
Presence	Custom Ring
Call Forwarding	Desktop Sharing
Caller ID	Mobile App

Call Center Features Required

Term of Service Preference

Transaction Preference

Training Preference

Onsite    Online    Admin Training Only

Professional Installation Preference

New Phone System Notes