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Teams Phone *Readiness* Checklist

A working checklist for the decisions you can't easily undo — work through it before you commit to a cutover date.

How to use this checklist

This is a working document, not a brochure. Work through it before you commit to a cutover date — the gaps it surfaces are far cheaper to close now than after go-live, when fixing them means carrier contracts, re-reporting projects, and users who have lost confidence in the platform.

Work through it in order:

1. Decide — use the PSTN connectivity decision table to choose your connectivity model per site, by usage pattern, not by default.
2. Verify — run the seven phase checklists. Every unchecked box is a decision the cutover date will otherwise make for you.
3. Tally — score each phase and the overall total, then use the read-out to judge whether you're ready to schedule the port.
4. Sign off — record the decisions and owners so the rationale survives the project.

Print it, share it with whoever owns the phone budget, and keep it with the deployment plan so every “small setup choice” is made on purpose.

Step 1 — PSTN connectivity decision table

This is the biggest hard-to-undo decision in the deployment. Compare the three models against your actual calling patterns — and remember that mixing models across sites is legitimate (e.g., Calling Plans for a small satellite office, Direct Routing for the high-volume headquarters).

Criterion	Calling Plans	Operator Connect	Direct Routing
Who carries the calls	Microsoft is your carrier	Partner carrier, integrated into Teams admin	Your chosen carrier, via Session Border Controllers
Setup complexity	Lowest — buy licenses, assign numbers	Low — carrier handles the integration	Highest — SBC design and ongoing management
Cost fit	Simple per-user bundles; rarely cheapest at scale	Carrier rates with carrier flexibility	Most negotiable; best for high or international volume
Carrier flexibility	None — Microsoft only	Switch among participating operators	Any carrier; existing contracts can carry over
Analog / legacy support	None	Limited, carrier-dependent	Yes — SBCs can bridge analog devices
Exit friction	Port-out project to leave	Moderate — numbers live with the operator	Lowest — you own the carrier relationship

Your decision (per site or region):

Site / region	Model chosen	Deciding factor

Step 2 — Phase checklists

Mark each item complete only when it's documented, not just discussed.

Phase 1 — PSTN connectivity decisions

- ☐ 12 months of call data reviewed: outbound volume, international destinations, toll-free usage
- ☐ Existing carrier contracts inventoried (end dates, early-termination terms, numbers held)
- ☐ Connectivity model chosen per site using the Step 1 table — by usage pattern, not by default
- ☐ If Direct Routing: SBC ownership decided (self-managed vs. partner-hosted)
- ☐ Exit path documented: what changing this model later would actually require

Phase 1 tally

/ 5

Phase 2 — Number porting & cutover

- ☐ Complete number inventory: direct dials, main lines, toll-free, and every number billed by every carrier
- ☐ Porting paperwork validated against carrier records (billing address, authorized signer, account numbers)

- ☐ Port sequence planned: pilot group first, departments in waves, revenue-critical numbers last
- ☐ Cutover fallback documented and tested (forwarding rules if a port is rejected or delayed)
- ☐ A named owner for carrier paperwork and port-date coordination

Phase 2 tally

/ 5

Phase 3 – Network readiness

- ☐ QoS verified end to end – voice traffic tagged and prioritized on every switch and router in the path
- ☐ Bandwidth headroom measured at every site under peak load, not average load
- ☐ Local internet breakout confirmed for branch sites (no voice hairpinning through a data-center VPN)
- ☐ Wi-Fi calling experience tested where users actually sit, not just near the access point
- ☐ Remote/home-worker experience assessed (consumer broadband, VPN interaction)
- ☐ Pre-deployment voice quality baseline captured, so post-launch complaints can be compared to facts

Phase 3 tally

/ 6

Phase 4 – Licensing path

- ☐ Current Microsoft 365 plans mapped: what already includes Teams Phone, what needs an add-on
- ☐ Calling minutes / plans licensed separately from the phone system – modeled at real usage
- ☐ Bundle math checked at actual headcount (step-up plan vs. add-on stacking)
- ☐ License assignment plan matches the porting waves (no user cut over without a working license)

Phase 4 tally

/ 4

Phase 5 – Devices & analog edge cases

- ☐ Full building walk completed – every device that touches a phone line inventoried
- ☐ Alarm panels, elevator phones, door buzzers, and gate intercoms identified with their monitoring contracts
- ☐ Fax requirements confirmed with the departments that still use them (legal, accounting, healthcare)
- ☐ Every analog device dispositioned: migrate via ATA/SBC, replace with IP alternative, or deliberately retain copper/cellular
- ☐ Conference room hardware audited for Teams compatibility
- ☐ Desk phone / headset needs decided per persona (who actually needs a handset)

Phase 5 tally

/ 6

Phase 6 – Resilience & E911

- ☐ Site-outage calling story decided: SBC survivability, cellular failover, or documented forwarding

- ☐ Emergency locations built: network sites, subnets, and wireless access points mapped to real physical locations
- ☐ Dispatchable location detail included (floor / suite — not just the street address)
- ☐ On-site notification configured for 911 calls (Kari's Law) and tested
- ☐ Remote-worker location confirmation behavior verified

Phase 6 tally

/ 5

Phase 7 — AI & Copilot readiness

- ☐ Copilot licensing prerequisites confirmed for every user expected to use AI calling features (it is not included with Teams Phone)
- ☐ Transcription & recording storage location identified — where transcripts and recordings actually live
- ☐ Retention policy for voice recordings and transcripts set with legal/compliance sign-off (not left on defaults)
- ☐ Access controls decided: who can search or read transcripts of calls they weren't on

Phase 7 tally

/ 4

Step 3 — Overall readiness tally

Phase	Score	Max
1 — PSTN connectivity decisions		5
2 — Number porting & cutover		5
3 — Network readiness		6
4 — Licensing path		4
5 — Devices & analog edge cases		6
6 — Resilience & E911		5
7 — AI & Copilot readiness		4
Total		35

Read-out:

- 30–35 — Ready. Schedule the pilot port and set the cutover date.
- 22–29 — Close, with named gaps. Close them before any revenue-critical number moves; most of these gaps are cheap now and expensive after go-live.
- Below 22 — Not ready. The unchecked items above are decisions the cutover date will make for you — and Phases 1, 2, and 5 in particular are the ones that are hardest to undo.

Reality check: A low score on Phase 3 deserves special attention: skipping network verification doesn't save the money, it defers it into the post-launch period as a help-desk queue full of "Teams is dropping my calls" tickets — and the platform takes the blame for a network decision.

Step 4 — Decision sign-off

Field	Entry
PSTN model(s) chosen & deciding factor	
Pilot group & port date	
Revenue-critical numbers & final wave date	
Analog devices retained on copper/cellular (and why)	
E911 design owner	
Recording/transcript retention policy owner	
Deployment owner & sign-off date	

One-paragraph go/no-go rationale (write it so it survives the project):

Checklist companion to "Rolling Out Teams Phone? The Decisions You Can't Easily Undo." Prepared by Plow Networks — Microsoft Cloud & Voice.

Rolling Out Teams Phone?

Plow helps IT leaders get the PSTN model, porting plan, network, and E911 design right before cutover — so the platform launches on facts, not hope.

[Talk to a Teams Phone Expert →](#)