

VOIP MIGRATION CHECKLIST

The VoIP Switching Checklist

Everything to settle before you port a number - so the cutover happens without a single missed call.

01	Bandwidth and network checks to run first
02	Number porting timelines and how to avoid downtime
03	The per-seat costs providers tend to leave out

Use this guide to assess where you are, identify the evidence you need, and turn the biggest gaps into a practical action plan.

Prepared by Brotherly Technology

Owner-led IT, security, and compliance support.

15-MINUTE ASSESSMENT

Start with the current state

Mark each item Yes, Partial, or No. A written policy only counts as Yes when the process is operating and you can show evidence.

☐ Every number, carrier, account, billing name, service address, and use is inventoried.	☐ Yes ☐ Partial ☐ No
☐ Critical numbers include main lines, fax, alarms, elevators, postage, gates, and failover paths.	☐ Yes ☐ Partial ☐ No
☐ Concurrent call demand and busy-hour patterns are estimated by site and team.	☐ Yes ☐ Partial ☐ No
☐ Internet circuits have measured latency, jitter, loss, upload capacity, and failover behavior.	☐ Yes ☐ Partial ☐ No
☐ Firewall, switches, VLANs, Wi-Fi, QoS, PoE, cabling, and UPS capacity are ready.	☐ Yes ☐ Partial ☐ No
☐ Emergency calling has correct addresses, locations, callbacks, and staff procedures.	☐ Yes ☐ Partial ☐ No
☐ Call flows, hours, queues, auto attendants, voicemail, recording, and retention are approved.	☐ Yes ☐ Partial ☐ No
☐ Devices, headsets, conference rooms, analog adapters, and mobile/desktop apps are assigned.	☐ Yes ☐ Partial ☐ No
☐ Porting documents match the carrier record exactly and no line is cancelled early.	☐ Yes ☐ Partial ☐ No
☐ A temporary routing and rollback plan covers delays or partial ports.	☐ Yes ☐ Partial ☐ No
☐ Users, reception, and supervisors complete role-based testing before cutover.	☐ Yes ☐ Partial ☐ No
☐ The quote includes taxes, fees, numbers, usage, devices, support, integrations, and changes.	☐ Yes ☐ Partial ☐ No

Quick score: Yes = 2, Partial = 1, No = 0. Start with any No that could stop work, expose sensitive data, or create an avoidable contract cost.

Test the path a real call will take

Bandwidth alone does not guarantee voice quality. Measure loss, latency, jitter, congestion, power, and failover at the same sites and times users will call.

Check	Record	Pass decision
Concurrent calls	Peak expected calls x codec bandwidth plus overhead	Capacity remains during normal data peaks
Latency	Round-trip to provider edge	Stable and within provider design target
Jitter / loss	Repeated tests during busy periods	Consistently within provider target
LAN	PoE, VLAN, QoS, duplex, cabling, Wi-Fi use	Voice path is documented and monitored
Power	UPS runtime for modem, firewall, switch, phones	Meets outage and shutdown plan
Failover	Secondary circuit or forwarding behavior	Live call survives or reroutes as designed

Run a call-quality pilot with representative users and sites. Test inbound, outbound, transfer, hold, queue, voicemail, mobile, conference, and emergency-calling procedures.

PORT AND PRICE

Control the timeline and the full recurring cost

A port is a coordinated carrier process. Keep the old service active and maintain temporary routing until every number and call flow is validated.

1	Collect a current bill and customer service record; make the authorization match the carrier's legal name, address, account, and number list.
2	Classify every number and dependency; decide which numbers port together and which need special handling.
3	Submit with realistic lead time, freeze unrelated account changes, and confirm the firm order commitment date.
4	Before cutover, build and test users, devices, call flows, emergency locations, failover, and temporary forwarding.
5	After port, test every number from multiple carriers, keep the old account open until validation, then obtain written cancellation confirmation.

What to watch for

WATCH: The current carrier account is cancelled before the port completes.

WATCH: The inventory misses fax, alarm, elevator, or published direct numbers.

WATCH: The quote omits taxes, regulatory fees, numbers, usage, devices, support, or integrations.

WATCH: Emergency locations are assigned only at the company level.

WATCH: The network has never been tested during the busiest hour.

MAKE IT ACTIONABLE

Turn the worksheet into a 30-day plan

Do not try to solve everything at once. Assign one owner, one next action, and one date for each priority.

NOW	Name the owner and confirm the current state.	_____
NEXT 7 DAYS	Fix the highest-risk gap or gather the missing evidence.	_____
NEXT 30 DAYS	Complete the remaining quick wins and set review dates.	_____
NEXT QUARTER	Test the process, document results, and assign improvements.	_____

Notes / decisions / questions for your provider

Want a second set of eyes? Book a free consultation at brotherlytechnology.com/contact/ or call 404-907-1005.

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