IMPLEMENTATION RUNBOOK · 2026

How to Set Up a Business Phone System

The whole sequence on two pages: what to decide before you order, when to lodge the port, what to test, and how to run cutover day. Australian businesses, 2026.

Most disappointing phone systems are competently built and badly **cut over**. The failure is almost always sequencing: ordering before deciding, porting late, going live untested, training afterwards. Do it in this order and very little goes wrong.

Six decisions to settle before anything is ordered

Decision	What to settle	If you skip it
1. Numbers	Who holds rights of use over every number you publish: main line, 1300/1800, direct lines, the van.	A number registered to a former provider or agency. The most common nasty surprise.
2. Seat types	Not headcount. Full desk seats vs app-only seats for field staff vs shared/common-area devices.	You buy full seats for everyone. Usually the biggest single line on the bill.
3. Routing	Receptionist, menu, or ring a group. Under ~30 people a group beats a menu almost every time.	It gets assembled by whoever built it fastest, from a description in a meeting.
4. After hours	What happens at 7pm, on a Saturday, and on Boxing Day. Message, mailbox, mobile, AI answer, or on-call roster.	A default greeting governs the state your business is in two-thirds of the week.
5. Integrations	Name the systems where work actually happens: CRM, calendar, job management, ticketing.	Discovered in month three, when it changes which platform you should have bought.
6. An owner	One named person who can approve greetings, hours and routing without calling a meeting.	The project does not fail. It drifts, and drift turns six weeks into five months.

Porting is the critical path, so lodge it on day one

The only item with elapsed time you cannot compress, so schedule everything around its **confirmed** date, never a hopeful one. Copy the entity name, account number and service address character for character from a current bill. Requests are matched strictly, and "Pty Ltd" against "P/L" costs a week. Inventory every number first, including the fax line a supplier still uses and the alarm dialler. **Never cancel the old service before the port completes**: that is the one action that can permanently lose a number.

The order that works

1. **Week 0.** Six decisions settled. Number inventory built, rights of use confirmed in writing. Owner named.
2. **Week 1.** Port lodged. Call flow drawn on paper. Network and power checked.
3. **Week 2.** Configuration built, greetings recorded properly, integrations connected, hardware ordered.
4. **Week 3.** Devices provisioned, apps installed and signed in, test script run end to end, staff briefed.
5. **Week 4.** Cutover mid-week, mid-morning. Two hours watching live calls. Re-train on day three.
6. **Week 8.** Thirty-day review against the baseline you captured before go-live.

Pre-go-live test script. Do not go live with an open line

- [ ] Inbound to the main number from an external mobile: right group, right greeting
- [ ] Every other number individually, including fax and alarm lines
- [ ] Overflow engages on time, and a waiting caller hears something meaningful
- [ ] Outbound from a desk phone *and* the mobile app. Check the presented number on the receiving handset
- [ ] Blind transfer, consultative transfer, and a refused transfer returning to you
- [ ] Hold, park, and 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 actually writes a record into your CRM, against the right contact
- [ ] Call quality both directions, on wired and on mobile
- [ ] Unplug the internet. Calls divert as designed
- [ ] Every single person makes and receives one call

Cutover day: do

- Go **mid-week, mid-morning**. A full working day with support available, and two more days before the weekend.
- Agree a **rollback point** and who can call it, before you start. It is almost never used; its value is that everyone stays calm.
- First external test call within a minute of the port completing.
- Watch **live calls**, not reports, for two hours. Most faults appear in the first hour and are ten-second fixes.
- One issues list, one owner, all day.

Cutover day: don't

- Not the **first Monday of the month**, the day before a public holiday, the last week of the financial year, or the day a campaign lands.
- Do not announce a go-live date before the port date is confirmed.
- No configuration changes by anyone but the owner in week one. Parallel fixes mean chasing ghosts.
- Do not redesign the call flow on three anecdotes. Collect, then change once at thirty days.
- Do not train only once. The second session, on day three, is worth more than the first.

The step almost everyone skips

Take a **baseline before you cut over**: two weeks of answer rate, average speed to answer, abandoned calls and after-hours volume. It costs almost nothing, and without it every later claim about whether the new system improved anything is an argument rather than a measurement. It is also what makes the thirty-day review worth holding.

Get the call flow on paper first

One hour with a pen prevents most of what surfaces in week one. Answer eight questions before anybody opens a console: who rings first and for how long; who overflows; what a waiting caller hears; when waiting stops; the real opening hours plus twelve months of public holidays; what happens outside them; how a caller reaches a person from any automated path; and which number each team presents on outbound.