Small & Medium Businesses Evaluation Checklist

Compare business technology using the same practical tests with every provider. Check an item after you have evidence, a named owner and an agreed next step.

Business / locations: _____ **Date:** _____

Provider / reviewer: _____

☐ **1. Map business needs and priorities**

List locations, staff, remote workers and essential applications. Identify missed calls, slow connections and manual tasks. Set measurable goals before comparing providers.

☐ **2. Verify internet and Wi-Fi**

Confirm services available at your address, realistic capacity and installation dates. Test coverage where staff and customers work. Clarify equipment and cabling responsibilities.

☐ **3. Test phones and customer messaging**

Try transfers, voicemail, business texting, mobile use and after-hours routing. Confirm number portability, consent and opt-out handling, and who follows up on missed inquiries.

☐ **4. Review access and data protection**

List business accounts and devices. Confirm multi-factor authentication, access removal, backups and update ownership. Ask qualified support teams to review your requirements.

Evidence / open questions: _____

_____

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☐ 5. Check tools, integrations and AI

Test your actual email, CRM, scheduling and payment workflows. Verify licenses and connector costs. For AI, check data handling, accuracy review and a clear handoff to staff.

☐ 6. Plan for outages and recovery

Test backup connectivity, alternate call routes and file restoration. Record recovery expectations, vendor contacts and what staff should do when a critical service fails.

☐ 7. Compare complete costs and terms

Include users, equipment, setup, training, backup service and support. Compare introductory and renewal pricing, taxes, contract length, cancellation and number or data ownership.

☐ 8. Confirm rollout and ongoing support

Name the project owner, training plan and acceptance tests. Agree on cutover, rollback and escalation steps. Document who supports each service after launch.

Decision / next action: _____

Owner: _____ **Target date:** _____

Need help comparing your options?
Call or text USA Communications: **817-608-7319**
Schedule a free technology assessment

Consultation: www.usacommunications.us/schedule-a-meeting/

Planning worksheet. Each supplier's scope must be verified in writing. Use qualified teams to review applicable security, legal and operational requirements.