

DISCOVERY WORKSHEET

Business voice readiness checklist

Capture the information that makes PBX, SIP trunk and migration planning faster and more accurate.



P-Series Phone System

Connect your teams and customers with easy-first unified communications

[Learn more](#)

- ✓ PBX
- ✓ Call Center
- ✓ Omnichannel Messaging
- ✓ Video Conferencing
- ✓ 100+ Integrations



P-Series
Phone System

DESIGNED, DELIVERED AND SUPPORTED BY LIBERTY-I

Yeastar P-Series, SIP services, resilient connectivity and security in one managed solution.

PEOPLE, PLACES AND NUMBERS

Define what the new service must support

Users and locations

- ☐ List every office, remote team and operational location in scope.
- ☐ Count named users, shared phones, meeting spaces and common-area devices.
- ☐ Identify users who need desk phone, desktop, web or mobile access.
- ☐ Record expected growth over the next 24 to 36 months.

Numbers and SIP service

- ☐ Export the existing number ranges, DDIs and presented outbound numbers.
- ☐ Record the current provider, contract dates and porting authority details.
- ☐ Estimate normal and peak concurrent external calls.
- ☐ Identify special numbers, fax, alarms, lifts, door entry or analogue devices.

Call flows and customer experience

- ☐ Document main numbers, IVRs, ring groups, queues and receptionist routes.
- ☐ Define open, closed, holiday, busy and no-answer behaviour.
- ☐ Identify recording, announcement and voicemail requirements.
- ☐ Agree escalation, overflow and continuity destinations.

CAPABILITY, RISK AND MIGRATION

Confirm what must work on day one

Teams, contact centre and integrations

- ☐ List queues, agent groups, supervisors, wallboards and service-level reporting.
- ☐ Confirm whether SMS, WhatsApp or other messaging workflows are required.
- ☐ Identify CRM, helpdesk, Microsoft, directory or hospitality integrations.
- ☐ Separate must-have capabilities from useful future enhancements.

Connectivity, security and continuity

- ☐ Record access circuits, bandwidth, quality issues and planned resilience.
- ☐ Confirm VLAN, firewall, remote-access, TLS/SRTP and permission requirements.
- ☐ Agree recovery objectives, divert destinations and loss-of-site behaviour.
- ☐ Define recording retention, backup, monitoring and administrator access.

Migration and adoption

- ☐ Choose a preferred cutover window and any blackout periods.
- ☐ Identify pilot users, floor walkers, administrators and decision owners.
- ☐ Plan handset deployment, user training and quick-reference guidance.
- ☐ Define acceptance checks for inbound, outbound, emergency and failure calls.

TURN THE WORKSHEET INTO A SERVICE DESIGN

What Liberty-i will confirm with you



Solution route

Retain an existing PBX with SIP trunks, move to Yeastar P-Series, or build a fully managed voice service.



Platform and plan

Select the P-Series deployment edition, appliance sizing and feature plan that match the verified requirement.



Network design

Confirm connectivity, quality of service, segmentation, firewall policy and resilience.



Migration plan

Coordinate number porting, configuration, testing, cutover, user adoption and rollback.

READY TO SCOPE THE SERVICE?

Send the completed checklist to Liberty-i or use it during a voice discovery call.

liberty-i.com/contact/