Use this checklist to guide your planning and execution for a smooth Teams Phone migration.

Connectivity approach

☐ Determine how your organization will connect to the Public Switched Telephone Network (PSTN): Microsoft Calling Plan, Operator Connect, Direct Routing, Hybrid Setup

☐ Decide whether to retain existing carrier contracts and/or phone numbers

Device & system compatibility

☐ Confirm compatibility with physical desk phones, softphones and other endpoints

☐ Identify key system integrations:

- CRM systems (Salesforce, Dynamics 365, etc.)
- Productivity tools (Outlook, SharePoint, etc.)
- Third-party services or niche platforms

User experience & change management

☐ Identify change champions to advocate for Teams Phone adoption

☐ Communicate the benefits of Teams Phone to support adoption

☐ Establish or update your change management process

Security & compliance

☐ Verify that Teams Phone meets all relevant industry-specific regulations

☐ Develop a plan for ongoing monitoring and maintenance

Cost considerations

☐ Establish your budget and identify cost-optimization opportunities

☐ Determine how many users require Teams Phone licenses

☐ Assess where physical phones are truly necessary (eliminate unnecessary hardware)

Develop a detailed migration plan

☐ Create a migration timeline with key milestones for planning, testing and deployment

☐ Plan for a pilot rollout with a small group to gather feedback

☐ Maintain a 30-day parallel run with your legacy system to avoid service disruptions

☐ Allocate buffer time for unforeseen delays (number porting, network adjustments. etc.)

Assemble the right team

- ☐ Identify key stakeholders and form a cross-functional migration team:
  - IT team
  - Migration partner
  - Operations leaders
  - Change champions
  - Project lead
- ☐ Engage stakeholders early to set measurable goals and ensure alignment

Optimize network performance

- ☐ Conduct a network assessment to identify and resolve bandwidth bottlenecks
- ☐ Ensure a backup internet connection is in place for continuity
- ☐ Test call quality under peak usage conditions

Prioritize user training & adoption

- ☐ Develop training plans for different user groups (administrators, managers, end-users)
- ☐ Highlight key features (AI transcription, call routing, meeting integrations, etc.)
- ☐ Provide ongoing resources (FAQs, video tutorials, support, etc.)
- ☐ Conduct hands-on practice sessions before the go-live date

Post-rollout monitoring & optimization

- ☐ Track key metrics (call quality, user adoption rates, cost savings, etc.)
- ☐ Collect feedback from employees and customers
- ☐ Schedule regular system audits to maintain security and compliance
- ☐ Use analytics and reporting tools to drive ongoing improvements

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Need additional support?

Our experts at Threadfin are ready to guide you through every step of your Teams Phone migration—from planning and integration to post-rollout optimization. Contact us today to ensure your transition is seamless and successful!

Threadfin Business Solutions

We're an IT services-only company that creates incredible value through solutions that transform, modernize, optimize and secure organizations.

We're vendor-independent.
Our solutions are built for your specific needs and unique goals. We're focused on scalability, flexibility and cohesive integration with your environment

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We know digital transformation.
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We've perfected partner support.
Our unique partner support model empowers our partners with our advanced skills and expertise.

We're approachable experts.
Our team prides themselves on deep digital transformation skills and their willingness to collaborate and share their knowledge with our customers.

### We serve mid-tier and enterprise.
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Citrix • Dell • Duo Security
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Microsoft • NetApp • Okta
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analyze | assess | buildout | data center consolidation | deploy | design | diagnose
health check | implement | migrate | remediate | refresh | support | transform | upgrade

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- Collaboration Tools
- Data & Databases
- Development & DevOps
- Enterprise mobility

- Network Infrastructure
- Security & Compliance
- Server Infrastructure
- Storage & Backup
- Unified Communications
- Virtualization
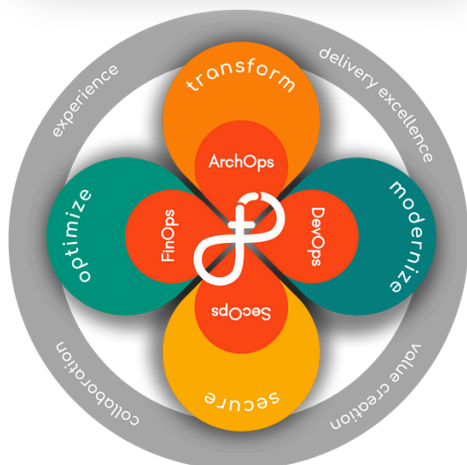
Our *Experience Threading Framework* illustrates the way we continuously improve digital experience for employees and customers.

The *Experience Threading* icon in the center represents the lifecycle of human-centered digital transformation. It's perpetual because technology continues to shift. It's pervasive, connecting through all the pillars, because they work in harmony.

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TENS OF MILLIONS
of users to the cloud.