

# Cloud Telephony Buyer's Checklist

27 questions to ask before you choose a platform — or stick with what you have

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Switching your phone infrastructure is a bigger decision than it looks. This checklist is designed to help IT heads, ops leaders, and business owners evaluate cloud telephony options without getting lost in vendor jargon. Work through each section before your first demo — or use it to audit your current setup.

## SECTION 1 — Understand Your Current Setup

- How many agents / users need access to the phone system?
- Are your agents office-based, remote, hybrid, or field-based?
- What is your average daily inbound call volume?  
*Include peak days — festive, month-end, etc.*
- What is your current missed call rate? Do you even track it?
- How old is your current PBX or telephony setup?  
*More than 5 years old = likely costing you more than you think*
- Do agents use personal numbers for business calls?  
*This is a compliance and privacy risk*
- Do you have any call recording or quality monitoring today?

## SECTION 2 — Non-Negotiable Features

- Multi-level IVR with easy self-service configuration  
*Can non-technical staff update IVR menus without IT?*
- App-based softphone — agents log in from any device  
*No desk phone hardware dependency*
- Number masking for outbound calls  
*Critical for privacy compliance and brand protection*
- Real-time call monitoring and supervisor dashboard
- Call recording with searchable CDR (call detail records)
- CRM integration — Zoho, Salesforce, Freshdesk, or custom API  
*One-click call logging saves 8–12 min per agent per day*
- Missed call alerts with auto-callback queue
- WhatsApp Business Platform integration  
*Indian customers increasingly prefer WhatsApp over voice*

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## SECTION 3 — Reliability & Compliance

- What uptime SLA does the vendor guarantee? Is it contractual?  
*99.5% minimum. Anything lower is a risk.*
- Is call data stored in India? (Critical for BFSI, Healthcare)  
*DPDP Act compliance requires data localisation*
- Is the vendor DoT/TRAI licensed?  
*Unlicensed VoIP providers carry regulatory risk*
- Does the platform support DND scrubbing for outbound campaigns?
- Is 128-bit encryption (or better) applied to all calls and data?
- Does the vendor offer 24x7 managed support — not just a ticket portal?
- Can the platform scale up in under 24 hours for demand spikes?  
*Test this claim before signing*

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## SECTION 4 — Pricing Sanity Check

- Is pricing per-user/month, or per-minute? Understand your exposure.  
*Per-minute billing creates unpredictable cost spikes*
- Does the plan include a calling minute pool, or is it truly unlimited?  
*Look for pooled fair-usage policy of 5,000+ min/user/month*
- What is included in the base plan vs. paid add-ons?  
*Analytics, recording, and WhatsApp are often gated*
- Is there a minimum contract length? What are exit terms?
- What does the migration / porting of existing numbers cost?
- Is there a free pilot or POC with real production data?  
*Any serious vendor should offer this*

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## SECTION 5 — Red Flags to Watch For

- Vendor can't provide reference customers in your industry
- Uptime SLA is not in the contract — only in marketing material
- No India-based support team (just email tickets)
- Data storage location is 'global' or unspecified
- Per-minute billing with no cap — especially for ISD calls
- No sandbox or demo environment to test before buying
- Can't integrate with your CRM without a paid professional services engagement

**One platform worth evaluating against this checklist:**

Smartflo by Tata Tele Business Services — carrier-grade, India-first, full-suite.

**Smartflo**