Before you shortlist a provider

Use this checklist when evaluating your options:

- [ ] Define whether your operation is primarily inbound, outbound or blended.
- [ ] Ask for the total cost at your expected user count, including numbers, telecom usage, AI and messaging charges.
- [ ] Test how calls, recordings and outcomes synchronise with your CRM.
- [ ] Run a trial or demo with real workflows and representative calls.
- [ ] Check security documentation and applicable compliance requirements.
- [ ] Confirm number portability, recording export, contract terms and exit requirements.