RingCentral

Is your SMB's communications system meeting today's demands?

Table of contents
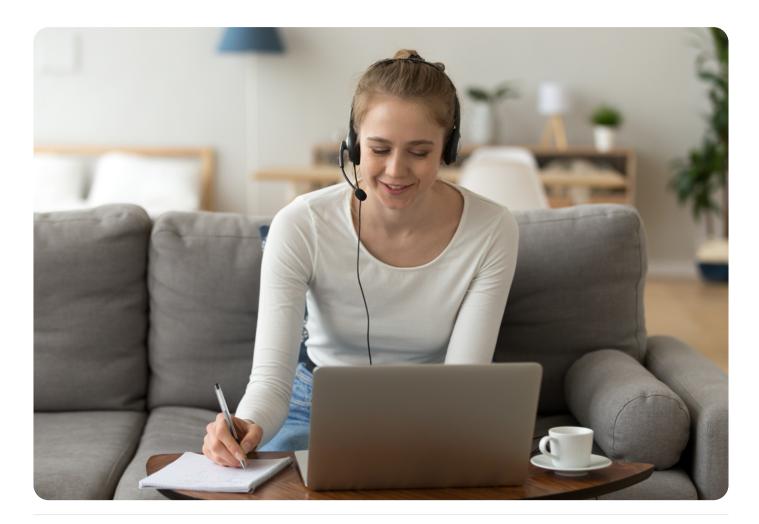
Introduction

In today's competitive landscape, a modern communications system for small businesses must do more than just handle phone calls and file sharing. It needs to equip your team with intuitive, easy-to-use tools that boost productivity, enhance flexibility, and reduce costs. When your employees are happy and efficient, they deliver exceptional service, leading to happier customers and ultimately giving your business a competitive edge.

This checklist helps you…

- Evaluate whether your current communications system supports these critical outcomes

- Identify areas for improvement to ensure your business thrives

Employee experience

Think about how you're providing your employees with the tools they need to stay productive from anywhere. Are there ways you could be offering more support, like more work/life balance, or provide tools that make their daily tasks easier? Use our employee experience checklist to see how else you can support your team.

Easy-to-use, intuitive tools

Make sure your communication system offers a range of capabilities, from basic to advanced, that are user-friendly to simplify setup and training.

☐ **User interface**

Does the system have a clean, easy-to-navigate interface that requires minimal training for new users, and allows for effortless switching between different communication channels like voice, video, SMS, and chat within the same platform?

☐ **Customizable templates**

Are there pre-built, customizable templates available to simplify the setup of advanced tasks like creating call queues, auto-receptionists, response automation, or analytics dashboards for non-technical users?

☐ **Call management**

Does the system allow you to easily set up call routing based on business hours or team availability, and quickly adjust call queues or forwarding settings for peak times on the fly?

☐ **User and role management:**

Does the communication system allow you to set up in minutes, quickly add, remove, and manage users and their roles without the need for a dedicated IT team?

Mobility

Assess whether your communication system is truly mobile-friendly and capable of supporting your team's need for flexibility and remote work.

☐ **Flexibility**

Can your team seamlessly access the communication system from any device—phones, laptops, desk phones, and tablets—and smoothly transition between them during calls or meetings to stay connected on the move?

☐ **Unified experience**

Does the communication system provide a unified business number and consistent user experience across all devices, ensuring that all features and functionalities are accessible no matter where or how it's used?

☐ **Advanced mobile features**

Can your team use advanced capabilities like SMS, fax, and adjust calling rules directly from their mobile devices, with real-time analytics available to monitor performance and make decisions on the go?

☐ **Mobile onboarding and management**

Is the system designed to allow administrators to set up new users and manage roles directly from their mobile devices, enabling quick and efficient onboarding and configuration entirely from mobile?

☐ **Remote productivity tools**

Are there features specifically designed to enhance productivity and collaboration for remote teams, such as virtual whiteboards or team huddle?

Work/life balance

Evaluate if your communication system supports a healthy work/life balance by offering professional handling of communications, and clear separation between work and personal lives.

☐ **Separate work conversations from personal messages**

Does the communication system provide a single unified business number for all communications—voice, fax, and text messages—allowing you to communicate with customers securely using your business identity, even from personal devices?

☐ **After-hours routing**

Can the system automatically route calls after business hours or greet customers with customized voicemail greetings to maintain a professional look even when the business is closed?

☐ **Out-of-office responses**

Can the communication system automatically send texts and act as an out-of-office responder to provide timely updates to customers?

☐ **Customizable ringtones**

Are there customizable alert and ringtone options that allow you to distinguish between work and personal calls, so you can choose which calls to answer and which to ignore?

☐ **Call muting**

Can the communication system provide the option to mute calls or notifications from specific numbers, while still allowing important calls to come through, helping you stay focused on urgent tasks?

Customer experience

Evaluate whether your communication system effectively supports and enhances the customer experience across all touchpoints. Use this checklist to determine if your tools are providing a professional, responsive, and unified customer experience that supports your business growth.

☐ **Unified view of all customer interactions**

Can your system manage all customer interactions—chats, calls, social media messages, and more—in one place to provide a personalized experience and keep track of the customer's journey across different channels?

☐ **Look professional**

Does your communication system allow you to extend your brand to the different ways customers reach out to you with features like custom caller ID, personalized ringback tones, or hold music, while providing high audio quality and removing background noise in noisy environments?

☐ **First call resolution rate**

Does your communication system allow you to set up a customizable phone menu (interactive voice response) and routing rules based on skills, customer data, or directing to the last staff member who served them, to quickly connect customers to the right person?

☐ **SMS marketing**

Does your communication system allow you to automate SMS texts, enabling you to efficiently connect with thousands of customers to answer support questions, confirm appointments, share promotions, and more?

☐ **Immediate response**

Can you quickly reply to incoming calls with typed voicemails or set up auto-replies to make customers feel heard, even when you're busy?

☐ **Call recording and analysis**

Can your solution automatically record and store calls for customer insights, future training, or compliance with industry regulations?

☐ **Real-time coaching**

Can you discreetly monitor customer calls and provide real-time coaching to your staff to improve their performance during interactions?

☐ **Customer satisfaction**

Does your system offer post-interaction surveys to gauge customer sentiment and collect direct feedback, helping you understand and enhance customer satisfaction?

Value/ROI

Evaluate whether your communication system provides cost-effective solutions that contribute to lower operational expenses and overall savings. Use this checklist to determine if your tools offer bundled services, flexible pricing, and efficient resource management, all contributing to greater value and a strong return on investment for your business.

Cost efficiency

Assess how effectively your communication system reduces operational costs and maximizes savings for your business.

☐ **Operational costs**

Does your communication system reduce the need for extra personnel to manage the system, operate with minimal hardware, support remote work to save on office space costs, and cut traditional telecom infrastructure expenses?

☐ **Maintenance costs**

Does the system minimize maintenance expenses by providing free, automatic updates and ensuring minimal downtime, so your business stays operational at all times?

☐ **Cost of ownership**

Does your solution offer a bundled service by integrating multiple communication services into a single platform, reducing the need for separate subscriptions and simplifying billing?

☐ **IT support**

Does your system simplify administration and support, allowing you to save on IT support costs by being user-friendly and easy to manage?

☐ **Cloud-based cost benefits**

Is your communication system cloud-based, offering cost benefits like reduced hardware investment, lower energy consumption, and flexible pay-as-you-go pricing models?

A unified platform

Evaluate whether your solution meets all your communication needs by unifying all channels into a single platform to boost ROI.

☐ **Video**

Does your communication system enable one-click video meetings with a full-featured, no-download experience for guests joining from any desktop or mobile browser?
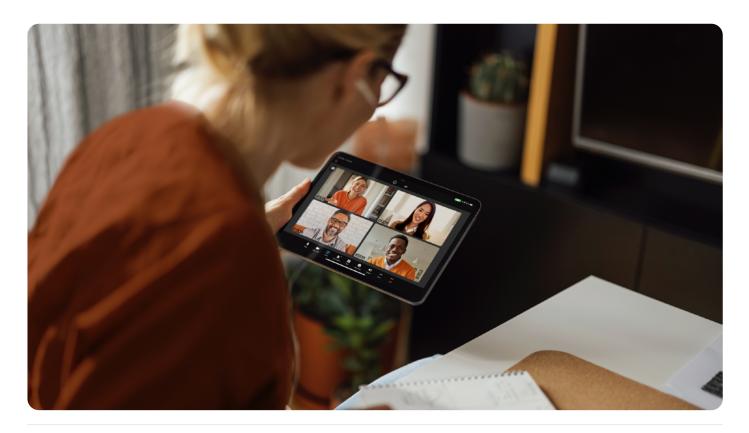
☐ **Team messaging**

Does your communication system provide a team messaging or chat platform that supports instant messaging, file sharing, and task management for individuals, customized groups, and project teams?

☐ **SMS/MMS**

Does your communication system allow employees, customers, and partners to send and receive text/SMS/MMS messages, while ensuring carrier compliance and optimized deliverability?

☐ **Internet fax**

Does your communications system allow you to send and receive secure, compliant, confidential faxes using your currently assigned phone number from any device?

Scalable and integrated

Assess whether your communication system can efficiently scale to meet growing and changing business demands while integrating smoothly with your essential apps, streamlining your workflow into one unified system.

☐ **Easy expansion**

Does the system allow you to easily scale up or down by adding or removing phone lines, users, or devices in just a few clicks, especially during busy seasons, without significant additional costs or complexity?

☐ **Global reach**

Can your business expand globally by using international phone numbers, giving customers the option to call a local number and creating the appearance of a local presence without the need for physical offices?

☐ **Integrated**

Does your communications system integrate with the core apps (e.g., CRM, email, productivity suites) that your teams use every day to sync contacts, track conversations, and more? For example, Salesforce, Google, and Microsoft?

☐ **Automation**

Does the system offer integrations and customizations to automate workflows like tracking your team's billable time or sending automated follow-up workflows to ensure you don't leave a lot of revenue on the table?

☐ **Open platform**

Can you quickly create custom apps for your communications system using your vendor's APIs?

Analytics and reporting

Evaluate how well your communication system's analytics and reporting capabilities support efficient operations, informed decision-making, and enhanced customer experiences.

☐ **Data-driven decision support**

Does your communication system provide real-time visibility and interactive reports on any device, allowing you to customize views, explore historical trends, and receive alerts and updates with intuitive, user-friendly interfaces and pre-defined templates?

☐ **Customer service**

Does your system track metrics like talk times, call volumes, and hold times to enhance customer interactions and optimize service operations by analyzing time spent on issues like billing and invoicing?

☐ **Marketing and campaign performance**

Does your system use call tracking to gather valuable insights about your customers and prospects, such as their interests, geographic locations, and preferred communication channels, to tailor services and marketing strategies effectively?

☐ **Staffing optimization**

Does your system provide real-time analytics that help you understand peak call times, enabling you to adjust team schedules for proper staffing to handle high call volumes efficiently and minimize labor costs during low call volumes?

☐ **Employee performance**

Does the system offer detailed insights into employee performance, helping you train new hires, reward top performers, and set clear performance goals?

AI-powered efficiency gains

Are you using AI to simplify your team's tasks? Implement easy-to-use AI features like automated note-taking, real-time transcription, and intelligent call summaries to minimize routine work and support efficient, data-driven decision-making for your business.

☐ **Enhanced meeting efficiency**

Can your communication system automatically generate real-time notes, summaries, and action items from video meetings and calls, capturing insights and decisions to free employees from manual note-taking and ensure everyone is aligned, even those who couldn't attend?

☐ **Automated CRM updates**

Can your communication system automatically digest and summarize conversations, and update sales CRMs like Salesforce, Hubspot, and Zendesk, ensuring all customer interactions are accurately logged?

☐ **Quick access to information**

Does your communication system provide direct, conversational responses and pull insights from both historical and real-time data during calls and meetings, making it easier to find relevant information quickly?

☐ **Automated coaching**

Does your communication system provide automated coaching tips based on past performance and current practices, while also analyzing and summarizing historical interactions to offer insights into communication trends, talk time, and sentiment to improve employee communication skills?

☐ **Customer insights**

Does your communication system have the capability to analyze conversations to identify the topics, competitors, and products that customers are most interested in, helping to refine marketing and sales tactics?

☐ **Content creation and management:**

Does your communication system help your team create clear and consistent messages by letting them input key ideas and automatically generate professional texts?

Security, privacy, and reliability

Evaluate if your communication system offers robust security and privacy protections, along with reliable performance, to ensure the safety of both your team and customer data.

☐ **Privacy for business calls:**

Can your team make business calls from their personal cell phones without disclosing their personal phone numbers, protecting their privacy while maintaining professional communication?

☐ **Access control and security:**

Does your communication system provide a single, central login point with multi-factor authentication and granular access control, allowing you to manage who can access specific features and information, ensuring the security of customer data and preventing unauthorized access?

☐ **Secure communications:**

Are all communication channels within your system, including voice, SMS, and data transfers, protected by advanced encryption and security protocols to safeguard against breaches and unauthorized access?

☐ **Spam filtering:**

Does your communication system use AI-based spam filtering to identify and mitigate unwanted calls, ensuring peace of mind during every conversation?

☐ **Compliance with industry regulations:**

Can you ensure that your communication system complies with industry regulations relevant to your business like HIPAA, GDPR, and CCPA?

☐ **Data privacy for mobile users:**

Does the system ensure that business communications made from personal devices are secure and private, keeping personal and business data separate and protected?

☐ **Reliability:**

Does the system have a proven track record of uptime and minimal service disruptions?

If you left any boxes unchecked, your business is missing out. Now is the perfect time to see how RingCentral can help small businesses like yours succeed. Contact RingCentral to learn more.

About RingCentral

RingCentral Inc. (NYSE: RNG) is a leading provider of AI-driven cloud business communications, contact center, video and hybrid event solutions. RingCentral empowers businesses with conversation intelligence, and unlocks rich customer and employee interactions to provide insights and improved business outcomes. With decades of expertise in reliable and secure cloud communications, RingCentral has earned the trust of millions of customers and thousands of partners worldwide. RingCentral is headquartered in Belmont, California, and has offices around the world.

For more information, please contact a sales representative. Visit ringcentral.com or call 855-774-2510.