Centerline
COMMUNICATIONS ADVISORY

PLANNING CHECKLIST

Building a Technology Stack

Use this before you request a single quote. Most of the cost and most of the regret in a technology stack are decided at the requirements stage, not at the negotiating table. Work top to bottom and write down an answer for every line.

1. REQUIREMENTS AND SCOPE

- ☐ **Business outcomes, in plain terms**
  What has to be true a year from now. Write it before any vendor shapes the conversation.
- ☐ **Every location and how it is used**
  Headcount, hours, on-site versus remote, and which sites cannot tolerate downtime.
- ☐ **Who the users actually are**
  Office staff, field teams, call handlers and contractors rarely need the same tools.
- ☐ **Growth and contraction**
  Sites you may open or close inside the contract term.

2. CONNECTIVITY AND NETWORK

- ☐ **Bandwidth per site, with headroom**
  Measure current peak, not the average, then plan above it.
- ☐ **Diversity and failover**
  Second path, second provider, wireless backup, and what degrades when the primary drops.
- ☐ **Serviceability at each address**
  Confirm what can actually be delivered to the building before designing around it.
- ☐ **Install intervals**
  Fiber builds can take months. Sequence the project around the slowest site.

3. COMMUNICATIONS AND COLLABORATION

- ☐ **Voice, video, messaging and meetings**
  Decide what must be one platform and what can stay separate.
- ☐ **License tiers by role**
  Most organizations overbuy. Match the tier to the job, not to the org chart.
- ☐ **Number porting and inventory**
  Every DID, main line, fax and alarm number, and who owns each one.
- ☐ **Integrations that matter**
  CRM, ticketing, directory and single sign-on. Confirm these before signing, not after.

4. CONTACT CENTER AND CUSTOMER EXPERIENCE

- ☐ **Channels you will support**
  Voice, email, chat and SMS each carry their own licensing and staffing cost.
- ☐ **Routing and reporting needs**
  What supervisors must see live, and what the business reviews monthly.
- ☐ **Recording and retention rules**
  Any industry requirement changes the platform shortlist immediately.

5. SECURITY AND CONTINUITY

- ☐ **Access, identity and offboarding**
  How an account is created and, more importantly, how it is fully removed.
- ☐ **Data location and retention**
  Where recordings, messages and files live, and how long they are kept.
- ☐ **Documented failure plan**
  What happens to calls and connectivity during an outage, written down and tested.

6. COMMERCIAL TERMS

- ☐ **Term length and renewal language**
  Note the notice window required to cancel or renegotiate, not just the end date.
- ☐ **Pricing that survives the term**
  Rate holds, uplift caps, and what happens to promotional pricing at renewal.
- ☐ **Termination liability**
  The real cost of closing a site or leaving early, modeled at several points in the term.
- ☐ **Service levels and remedies**
  What is measured, how a credit is claimed, and whether it is applied automatically.

7. OWNERSHIP AND OPERATIONS

- ☐ **A named owner per service**
  If nobody can name the owner, nobody will catch the problem.
- ☐ **Support path and escalation**
  Who your people call, and what they own before escalating to the provider.
- ☐ **Change and disconnect process**
  Confirm that a cancellation stops both the service and the billing.
- ☐ **A living inventory**
  Keep one record of what you have. Everything on this page gets easier once it exists.

BEFORE YOU SIGN

If you cannot answer the ownership, renewal and termination lines for every service, the stack is not ready to buy. Those three lines account for most of the avoidable cost we find in established environments.

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