



Communications Onboarding Checklist

- Device Setup**
Desk phone, softphone, or mobile app or combination? Walk through the [options](#) to find the best fit—comfortable teams are productive teams.
- Team and Call Routing**
Don't wait for an event to add new hires to the correct [ring groups](#) or Contact Center [queues](#). Ensure calls are routed properly and they're included in team communications from day one.
- Emergency Location (e911)**
Confirm each remote employee's e911 location. This step is often overlooked but is critical for safety and compliance.
- Phone Number Assignment**
Determine if your new team member needs a full phone number (DID), an internal extension, or both. Setting this early prevents confusion and ensures flexibility.
- Voicemail Configuration**
Set up [voicemail-to-email](#) forwarding so important messages don't go unnoticed. This small step prevents missed communication.
- Texting Access**
Decide what kind of messaging access each new hire needs—1:1 texting, group threads, customer messaging, or marketing outreach. Enable access during setup.
- System Training**
Review essential [communication features](#): transferring and parking calls, using CRM integrations, and navigating core system tools.
- Integrations and Automations**
Explain how your communication system connects with other business tools. Show where automations like CRM updates or call logging occur to maximize efficiency.
- Support and Escalation**
Provide clear guidance on how to get help—who to contact, how to open a support ticket, and what to do if a technical issue arises.