SCORECARD FOR VOICE OVER INTERNET PHONE (VOIP) SYSTEM EVALUATION

YOUR NAME: _____   DATE: _____

PRODUCT: _____   SYSTEM: _____

INSTRUCTIONS:
1. Evaluate each system for each of the categories described below.
2. Provide a score for each category (or subcategory). Scoring will be based on a scale of 1-4 where the scores are categorized as:
    4 - Superior
    3 - Exceeds Requirements
    2 - Meets Requirements
    1 - Does Not Meet Requirements
3. Include comments and observations concerning each system. Add comments describing distinguishing features justifying any qualitative assessment falling in the "superior" or "does not meet requirements" range, although you may add comments to as many categories as you desire. Please try to use specific examples in your comments.

CATEGORY	SUBCATEGORY	SCORE (1-4)	COMMENTS
GENERAL VOIP	· does vendor offer a free trial?		
	· unlimited calls in U.S.		
	· unlimited calls internationally or what restrictions		
	· auto attendant (phone tree for callers)		
	· call blocking		
	· call forwarding		
	· call logs		
	· call recording ability		
	· call transfer		
	· caller id features (e.g., caller id with name vs just phone number)		
	· can block "unknown" or "private" numbers		
	· conference calling		
	· dial by extension (employee directory)		

	· DND (do not disturb) feature		
	· hold music customization		
	· intercom functionality		
	· international phone number (if desired)		
	· internet faxing		
	· Mac software client (if applicable)		
	· mobile app for iOS/Android		
	· ring group ability (e.g., ring 3 people when a call selects an option)		
	· sequential ring (A then B then C in order)		
	· text messaging ability		
	· time conditions (day/night or weekday/weekend, etc.)		
	· toll free number for client		
	· voicemail (customization, greeting customization, mobile access, text transcription of message)		
INTEGRATION WITH EXISTING PROGRAMS	· integrates with your practice management program (more likely if PM is web-based), particularly for incoming faxes or text messages · integrates with your lead tracking or lead generation tool (e.g., Clio Grow or Lawmatics) · integration with other existing tools (e.g., MS Outlook, MS Teams, Slack, Zoom, etc.)		
ADMIN TOOLS	· live technical support at hours that work for you · ease of editing the auto-attendant, phone tree, ring groups, and other customization features (e.g., can		

	you do it via a website or do you put in a support ticket or make a phone call		
OTHER	· Any known limitations or additional benefits

· what statistics does the vendor have on reliability, uptime, etc.?

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