

# New Hire VoIP Training Checklist

Use this checklist to make sure every new employee understands the basics of your business phone system before they start taking calls.

Section	Checklist Item
Basic Phone Skills	■ Answer an incoming call
	■ Place a caller on hold
	■ Transfer a call to another employee
	■ Transfer a call to voicemail
	■ Park and retrieve a call
Internal Communication	■ Dial another employee using extension dialing
	■ Use paging or intercom features (if applicable)
	■ Understand how to reach key departments
Call Handling	■ Use proper phone greetings
	■ Take a message for another employee
	■ Handle basic customer questions
	■ Escalate a call to a manager or supervisor
Voicemail	■ Check voicemail
	■ Listen to voicemail messages
	■ Delete or save messages
	■ Record a voicemail greeting
Mobility (if applicable)	■ Use the VoIP mobile app
	■ Make calls from a smartphone
	■ Transfer calls from mobile to desk phone (call flip)
	■ Log in or out of the phone system remotely
Advanced Features (if needed)	■ Use call queues
	■ Understand call forwarding
	■ Send or receive a virtual fax
	■ Use paging groups or overhead paging
Final Training Check	■ Answer and transfer a call correctly
	■ Place a call on hold and retrieve it
	■ Check and respond to voicemail
	■ Follow the company's phone greeting and etiquette