



# Dial Plan Best Practices

3 Examples From Our Knowledgebase



# Table of Contents

|                                 |    |
|---------------------------------|----|
| Instructions .....              | 3  |
| Prerequisites .....             | 4  |
| <b>Dial Plans</b>               |    |
| Simple and Easy .....           | 6  |
| Business Basics .....           | 7  |
| Enterprise .....                | 8  |
| IVR Tips .....                  | 10 |
| Submitting Your Dial Plan ..... | 11 |

# Instructions

If the time has come for you to change your phone provider, consider how a well-designed dial plan early on in the process can save you time.

**Dial Plan** consists of the steps an inbound call takes when received by the phone server; many times, before the phone even rings.

***Regardless of provider, the phone implementation process can take time. Letting your phone provider know what you are looking for early on in the process can help you speed things up.***

***Follow these steps.***

1. Download this PDF file to your computer, rather than viewing it in a browser.
2. Review the provided dial plan templates and diagrams to find one that fits your company best.
3. Use the provided fields to gather and organize your information in one place.
4. Once complete, save the file and email it to us for feedback from a specialist.

*Once you submit your file, our implementation specialists will review your submission and will reach back out to schedule a time to discuss your options and to give you a no-pressure price quote.*

*Submit Your Dial Plan*  
[demos@ringplan.com](mailto:demos@ringplan.com)

# Dial Plan Prerequisites

Regardless of what dial plan you are designing, you will need this information handy. Use the fields below to organize your information in one place. This comes in handy when setting up your Interactive Voice Response (IVR).

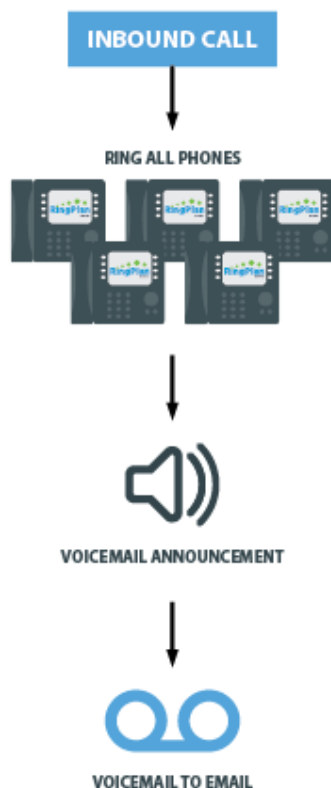
**Interactive Voice Response** is an Auto Attendant that assists in routing callers to the correct person.

- 1. What phone number do you want to display in your Outbound Caller ID?**
- 2. What name do you want to display in your Outbound Caller ID?**
- 3. What Company Name do you want in the greetings?**
- 4. Do you have call forwarding capabilities on your existing phone system?  
Please consult your current provider for instructions on how to forward calls**
- 5. How many users need phones?**
- 6. How many dedicated phone numbers do you need (DID)?**



# Simple and Easy

To hear a sample of this option, call 619-393-7001



**Yes, I want this option.**

Company Name for use in phone scripts



**What do you want the voicemail greeting to say?**

Our standard greeting is below. Feel free to replace it.

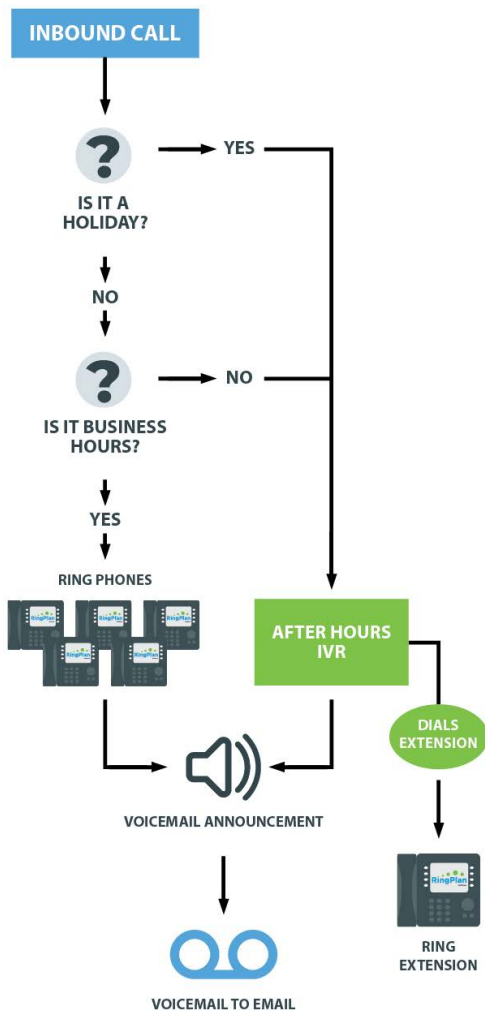


**Tell us the email address to send voicemail to.**

*\*\* Please note that IVR scripts and voicemail announcements will be created with a Text -To-Speech simulated voice. This can be easily changed by you if you wish to record the prompts yourself, or if you choose to have a professional voice company state your greetings.*

# Business Basics

To hear a sample of this option, call 619-393-7002



**Yes, I want this option.**

**Company Name for use in phone scripts**

**? What holidays are you closed?**

- |                |              |
|----------------|--------------|
| New Years      | Labor Day    |
| Chavez Day     | Columbus Day |
| Presidents Day | Veterans Day |
| Good Friday    | Thanksgiving |
| Easter         | Black Friday |
| Memorial Day   | Christmas    |
| July 4th       | Other        |

**? What hours do you want the phones to ring?**

ex: Mon- Friday 8-5

**☎ What phones do you want to ring?**

ex: 101, 102, 103

**IVR What should the after hours greeting say?**

Our standard greeting is below. Feel free to replace it.

**🔊 What should the voicemail greeting say?**

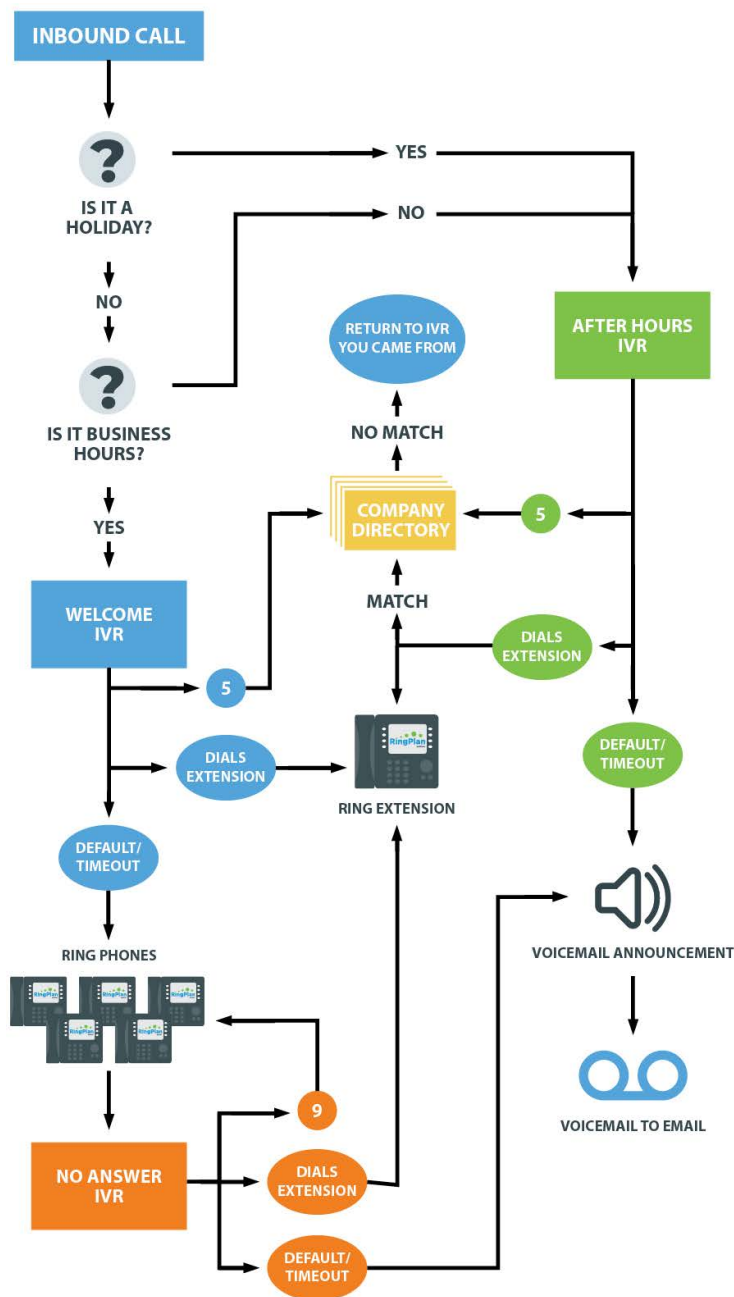
**Tell us the email address to send voicemail to.**



*\*\* Please note that IVR scripts and voicemail announcements will be created with a Text -To-Speech simulated voice. This can be easily changed by you if you wish to record the prompts yourself, or if you choose to have a professional voice company state your greetings.*

# Enterprise

To hear a sample of this option, call 619-393-7003



*\*\* Please note that IVR scripts and voicemail announcements will be created with a Text -To-Speech simulated voice. This can be easily changed by you if you wish to record the prompts yourself, or if you choose to have a professional voice company state your greetings.*



# Enterprise

**Yes, I want this option.**

**I want something else.**

Please schedule a DialPlan call with a RingPlan Implementation Specialist.

**? Company Name for use in phone scripts**

**What holidays are you closed?**

- |                |              |
|----------------|--------------|
| New Years      | Labor Day    |
| Chavez Day     | Columbus Day |
| Presidents Day | Veterans Day |
| Good Friday    | Thanksgiving |
| Easter         | Black Friday |
| Memorial Day   | Christmas    |
| July 4th       | Other        |

**? What hours do you want the phones to ring?**

ex: Mon- Friday 8-5

**IVR What should the Welcome IVR greeting say?**

Our standard greeting is below. Feel free to replace it.

**IVR What should the after hours greeting say?**

**☎ What phones do you want to ring?**

ex: 101, 102, 103

**IVR What should the No Answer IVR greeting say? 🗣️ What should the voicemail announcement say?**

**📧 Tell us the email address to send voicemail to.**

**\*\* Please note that IVR scripts and voicemail announcements will be created with a Text -To-Speech simulated voice. This can be easily changed by you if you wish to record the prompts yourself, or if you choose to have a professional voice company state your greetings.**

# Interactive Voice Response

## Tips to Remember When Setting Up Your IVR

### 1. Keep it Simple

Don't overdo it with menu items and levels. It's a proven fact that most people can't remember more than 4 options when listening to an IVR. Each menu should have a lean selection of options - four or less if possible - and you should limit menu levels to two or three.

### 2. Provide Intelligent Call Direction

You can set up call sequences using tools like Find Me/Follow Me, ring groups and mobile apps that effectively funnel customers to the person they need, even if that person is away from his or her desk or out of the office altogether.

### 3. Limit Waiting and Hold Times

Limit the number of times the phone rings during a Find Me/Follow Me sequence. For example, have the system ring your office phone three times (usually fifteen seconds), and then your mobile device three times, and then your home phone for the same amount of time, and so on.

### 4. Give Callers a Default Option

If they dial an invalid option, or they don't press any option, what will you do with the caller? The worst thing you can do is hang up on them, so figure out a default place to send the caller in these situations.

### 5. Give Them a Chance to Dial an Extension

If the customer already knows the extension of the person they want to reach, then give them an option in your primary menu to dial that extension.

### 6. Establish Time-based Routing

Create alternate schedules that kick in during off-hours or holidays. That way, instead of having a customer sit on a line and listen to the phone ring over and over, only to eventually wind up a voicemail, the off-hours schedule can automatically forward the customer to voicemail, or to the number of whoever is taking after-hours calls.

### 7. Call Your Own Number

Do some occasional undercover work. Call your business number and imagine how a customer would feel about his or her treatment on the phone. See if the menus are overwhelming, or if the hold music is off-putting. Check how long the queue waits times last, and how many steps it takes to reach your objective. Then use that information to determine what updates your dial plan needs to be more customer-friendly.

# Submit Your Dial Plan

**Project Manager** **Ranoo Saeed**

**Email** pm@ringplan.com

**Direct** (858) 431-4436

**\*Note** - Depending on your specific needs, your project manager may require you to complete the following items:

**Read: What to Expect**

**Company Extensions Worksheet**

**Company Speed Dial Keys Worksheet**

**Porting Documentation**

**Tip:** Download the files above to your computer to complete.