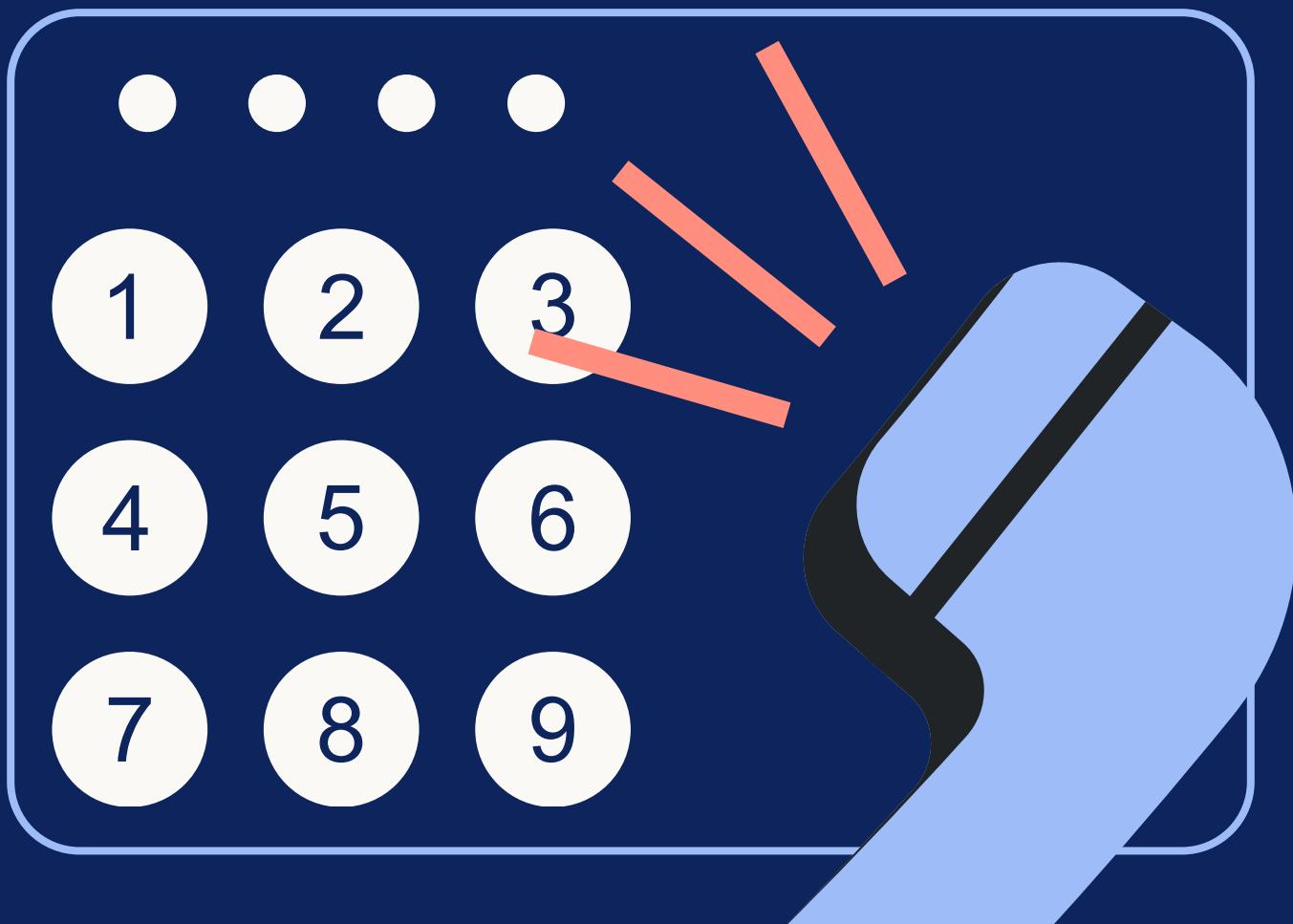


Ring and Repeat

What to Consider When Choosing your
Organization's Next Phone System



Phone System Basics

In the face of overwhelming demand and limited resources, any flaw in communications quickly becomes a critical liability for a legal aid organization. This guide offers key considerations for organizations adopting a modern Voice over Internet Protocol (VoIP) solution.

Why is picking the right phone system so important?

1. Client Communication

For many clients, the phone is the first contact point. A missed call, a frustrating phone tree, or poor audio quality can erode an applicant's confidence in the organization and create a more stressful experience.

2. Internal Communication

A fragmented, outdated phone system creates data silos and wastes valuable time that could be spent on casework or other tasks.

An integrated phone system allows staff to see who is available (presence indicators) and transfer calls seamlessly between extensions, even across different physical locations.



3. Data Insights

A modern phone system turns raw call volume into actionable data, which is essential for organizations that depend on data for grant reports or proposals.

When to Upgrade?

An ineffective phone system does not just run the risk of delivering a negative client experience, it can also cause workflow delays and frustration among staff. When is it time to start looking at an upgrade?



Client Feedback

Begin your search when you notice an increase in complaints about access failure, such as reports of consistent busy signals, being unable to leave a voicemail, or being unexpectedly disconnected.



Staff Feedback

Look for complaints that the system is forcing staff to waste time on manual call logging, that users are choosing incorrect phone tree options, or that the system is causing unnecessary work (like dealing with a flood of duplicate messages).



Workflow Delays

Key metrics to watch include rising abandoned call rates, consistently long hold times that exceed organizational expectations or limits, and an increasing backlog of intake calls.



Cost > Quality

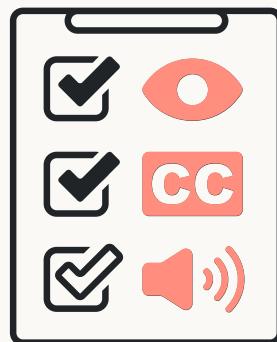
Assess your phone system when the financial model no longer makes sense. Like when your current system lacks modern features (like mobile apps or voicemail transcription), or when the per-user cost for an old system is higher than the VoIP alternatives.

Phone Must-Haves: *Foundational Features*

What are some base-level features that every good phone system must have?

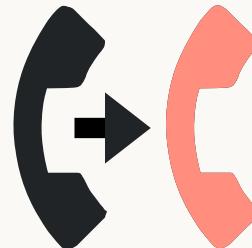
Accessibility

The system should be fully compliant with WCAG standards for clients or staff using screen reader software. Additionally, the system's navigation must feature short, simple phone trees and clear, unambiguous prompts, ensuring that clients with cognitive or visual impairments can quickly and reliably access assistance without encountering exclusionary barriers.



Call Management

By deploying intelligent systems that utilize callback functions and voicemail transcription, legal aid can effectively manage overwhelming call volume during peak hours, drastically reducing client frustration and the number of abandoned calls.

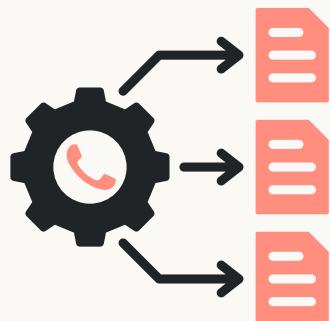


Reporting

The data captured by the phone system (ex: metrics on call volume, peak demand times, and abandoned call rates) is crucial for leadership seeking to justify grant applications, optimize staffing to eliminate intake bottlenecks, and prove the measurable impact of the organization's services to funders and stakeholders.



Phone Must-Haves: Legal Aid Add-Ons



Case Management System Integration

CMS integration is an absolute requirement for efficient legal aid service. Some vendors offer phone integrations with Clio, LegalServer, and other systems. These integrations allow you to open matters, share case notes, and track client calls without switching tabs.



AI Assistants

The strategic use of AI assistants can significantly ease the burden on human intake staff. Chatbots or voicebots can be deployed to handle simple, high-volume tasks such as answering frequently asked questions, confirming office hours, and pre-screening for basic eligibility criteria.



SMS Functionality

Text messaging provides a convenient, low-barrier channel for sending essential, time-sensitive updates, such as appointment reminders, document checklists, and court date alerts. Ensure your organization and vendor understand federal SMS registration requirements.



Live Queue Features

This feature allows you to control the flow of incoming calls, providing clients with automated updates on their position in the queue and estimated wait times. This helps manage client expectations and ensures that staff can handle calls efficiently.

Scalability and Pricing



TIG awards can help fund VoIP projects for your organization

Consider Cost

If you are a legal aid organization that relies on outside funding, where you decide to invest your money matters. Grant programs like LSC's Technology Initiative Grant can help offset the cost of implementing a VoIP solution into your organization. In 2025, LSC awarded over \$5.6 million in funding to 19 legal aid organizations to fund their tech improvements.

Organizations are always trying to figure out how to balance high efficiency and low overhead costs. Investing in the right tech solutions can be the key to achieving this perfect harmony.

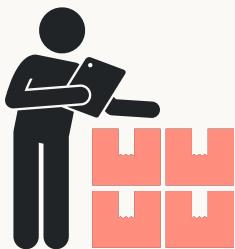
Before investing time and resources into researching different VoIP solutions, it's a good idea to establish a budget ahead of time. Work with your accounting and IT departments to develop a realistic technology budget.

When creating your budget and vetting vendors, we recommend doing the following:

- Analyze how much you are already spending on administrative technology software.
- Make sure you can add and drop licenses as you need.
- Explore discounts and special offers available to legal services organizations.
- Consider training and hardware upgrade costs.

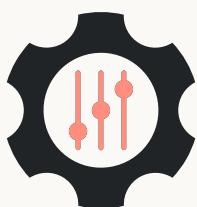
Projected Timeline

Before undertaking a phone system improvement project, it's a good idea to understand how long the process can take to help with strategic planning. These are projected timelines and may vary based on need.



Discovery (1–2 Weeks)

Document all existing lines, extensions, fax numbers, and emergency lines. Document the current intake workflow's pain points (ex: "The longest hold time is always on Tuesdays at 10 AM").



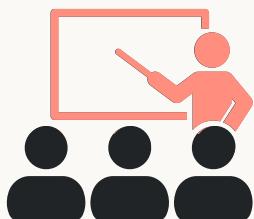
Configuration & Design (2–4 Weeks)

Work with the vendor to create a phone tree, set up call routing logic, and complete the CMS integration. Make sure your vendor is prepared to assist a legal aid organization with your unique needs.



Pilot Testing (1 Week)

Test the full system with a small, specialized group of staff members. Focus testing on key scenarios: live call queuing, call quality on mobile devices, and successful logging to the CMS.

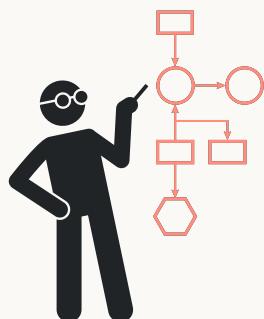


Full Deployment & Training (Ongoing)

Roll out the system to all staff. Conduct initial training and designate staff members who are responsible for consistent maintenance and updates.

Future Considerations

Now that you've seen what's possible and what's available, what now? We've laid out a couple of ways you can begin your phone improvement project.



Designate a Project Lead

Assign an individual (not necessarily IT) to champion this transition and coordinate efforts. This person should be familiar with technology and the organization's needs.



Document the Current Situation

Document past and ongoing phone system issues:

- Dropped calls
- Duplicate calls
- Ineffective transcription features
- Lack of CMS integration

What are the most frustrating pain points? What would be helpful for staff? For clients? For management? Coordinate with leaders of different internal stakeholders, like intake, attorneys, and management.



Research, Research, Research

After you've developed a list of support areas for your team, research what tools are available to address these needs, including tools that help you create your own solutions. For example, maybe your organization needs intake queue support. Researching vendors that can help you develop a curated intake triage process is a great starting point.

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