THE ULTIMATE
PBX TO CLOUD CONTACT CENTER MIGRATION GUIDE

Use this practical guide and checklist to help you and your team successfully migrate away from your PBX to the cloud.

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Enjoy this down-to-earth practical migration guide and checklist to understand what's really involved when moving your contact center to the cloud. Migrating away from your trusted onsite platform is an implementation project ripe with errors, stressful moments, and lots of aggravation… *if* you're unprepared.

This guide addresses the various stages of the migration and planning process all the way through implementation so you can plan accordingly and be confident every step of the way.

Large Businesses Are Moving Contact Centers to Cloud

Cloud computing has gone beyond the novelty stage and is now a robust, mature platform for business services of all kinds. Most businesses are on the cloud now, and many companies have developed a multi-cloud environment to provide additional redundancy and reliability.

This innovation has reached contact centers and the software they use to support agents and managers. Modern platforms offer AI and machine learning as well as personalization and sales support, all while making it easier for customers to get in touch. Cloud solutions are becoming more powerful because of their support for remote teams and easy setup of new channels.

Sooner or later, every business will move all or part of their communications to the cloud -- and that includes contact centers, support agents, and traditional phone systems. The question is how many customers will be lost when companies drag their feet.

Legacy Equipment Will Eventually Become Obsolete

We all know the old saying "If it ain't broke, don't fix it." But in an ever-evolving business technology market, you can't afford to continually rely on deficient, obsolete legacy equipment if you want to compete with others in your space.

Many of us look with fondness on the equipment that we "grew up with" in the business. But unfortunately (or not), eventually all legacy solutions reach the end of their lifecycle and find themselves unceremoniously transported to the trash heap of comm system history.

If you don't want to be left behind, at some point you'll have to face the facts. Cloud-based contact centers and phone systems offer significant improvements in efficiency, flexibility, reliability, and cost savings over traditional, on-premise installations.

There's no getting around it.

1 **FIRST STEP IN CLOUD MIGRATION PLANNING**
Determine Roles and Responsibilities

Once you ultimately decide to move your contact center to the cloud and who your cloud provider will be, you will need to come up with a plan.

If you are still uncertain about choosing a contact center software provider, let us know and we'll be glad to provide a professional assessment based on our extensive industry experience and strategic partner relationships with the best providers in the industry. We'll also offer a personal free demo and pricing.

First, you'll have to figure out what needs to be done and who needs to do it.

Delegating parts of the preparation and migration process to trusted individuals in your organization means that you'll have people who can delve deeply into the details of your plan and deal with issues that you hadn't yet considered in your initial meetings.

Assigning roles is an important part of any project, but especially crucial for such large-scale efforts such as migrating to a cloud contact center system.

Here are some recommended roles to start your process. Not all of these roles are required. Keep in mind if you are working with a support partner such as Converged, some of these roles may be handled directly by the partner or your software provider.

IT Expert/Leader

Designating a team of IT experts is essential to the entire process of migrating to a cloud contact center and integrating it effectively with CRMs and other tools.

There will be significant networking and IT tasks to be completed for a smooth transition. One important requirement for any change to a live system or network is a change management plan.

Working with the cloud service provider and others within the organization, your experienced IT professional should develop a clear Method of Procedure document to guide every step of the migration.

In addition, there are tasks such as capacity planning, internet connectivity, wi-fi, headsets, and other miscellaneous components that require the technical know-how of an IT expert. Standardizing equipment isn't necessary with cloud contact centers, but it can make troubleshooting issues much easier. Pairing a cloud solution with a common set of compatible equipment for every agent ensures reliability and access even as you mix remote and on-site staff.

If you don't have an IT professional in-house or need additional help, you may want to hire an external IT consultancy just for this project.

Company Leadership, Managers, Supervisors

Company managers will need to direct and supervise the move. Of primary importance is the need to make sure that any technical changes are closely aligned with business goals and policies.

- What does the company really need in a cloud-based phone solution?
- What features or services are they looking for?
- How does all this fit into company and departmental budgets?

Software selection and user licensing agreements should be chosen based on immediate business needs as well as management's view of long-term growth or regional expansion.

Project Manager

A project manager gets into all the nitty-gritty of the coordination of tasks and resources. And there are plenty of logistics to coordinate.

There are meetings with all parties, documents requiring signatures, time schedules for activities, allocation of resources, and other assistance where needed. A project manager keeps communication channels open from start to finish of the project between internal and external points of contacts.

For your size and scale, consider having multiple project managers for installation and migration as well as ones for rollout, training, and ongoing support. Breaking down the project into phases can identify where you might need a separate individual or team to prevent any one person from being overwhelmed.

Initial Training for Early Adopters

Initial training on new equipment and software is important, particularly for early adopters of the technology.

During the startup of a cloud-based contact center solution, you will need to designate personnel to show new users at least the basics of how to use it, along with documentation that will answer any questions that they may have. Provide a Project Manager for this effort to not only keep the rollout on track, but to also provide updates and support for other organizations.

If you operate multiple contact centers and will migrate distinct locations or regions in phases, a training-focused feedback mechanism can continually improve your organization's capabilities.

Once the new solution is rolled out, there will undoubtedly be some issues that users can't solve themselves. You'll need to have technical support available, either onsite, by phone, or online, to address any problems that may arise.

SECOND STEP IN CLOUD MIGRATION PLANNING
2 Project Planning and Design

Despite any assurances from well-meaning cloud contact center vendors, there is not a "one size-fits-all" solution for your company's or agents' needs. Every business is different, with its own unique challenges and usage requirements, plus any needs for integration with existing or new customer management and relationship software.

Project planners will need to develop a comprehensive design that accounts for existing and future network infrastructure, the physical campus environment, and the business functions that the system will support.

This cannot be stated enough especially with larger businesses and those that utilize contact center environments: A project plan and design should account for all the variations in your IT environment – beyond the simple desk phone or outdated laptop. Review what agents use now and what you plan on outfitting them with over the coming years, including the potential for changing operating systems and platforms.

It's important not to let the cloud vendor's project manager or sales rep rush you through this process. That's why many companies use a vendor partner, like Converged Technology Professionals, to ensure the interests of the customer are always made first, ensuring the project proceeds at your pace, not the vendor's.

Understand your Various Needs Per Space and User Type

Map out requirements for each user or department using the platform and how they will interact with it.

- Contact center agents may not need any desk phones at all if they can use softphone applications installed on their computers.
- Agents in separate locations may have different standard kits, requiring a tool that works across Windows and Linux, for example.
- Adding new service channels, such as chat and SMS, will place more emphasis on the computer than a desk phone.
- Managers will require access to calls and customer service points as well as dashboards and agent data. Consider how you will permission this and if it may require geographic limitations.
- Analog devices such as fax machines will need to interface with the cloud.

Document all Network Changes

Any planning and design documents should also deal with the configuration changes required to make the new solution work.

You will need diagrams that illustrate port configuration changes or additions to your current network. Routers, switches, firewalls, and other network devices should be configured to accommodate all the changes in data traffic.

User settings, connection types and integration requirements should be clear and uniformly presented.

Device and service settings should allow for optimal quality of service (QoS), accounting for possible latency, jitter, and other issues, preferably across different tiers of bandwidth and connection strength.

Understand Security Requirements

Security is paramount in today's risky Internet environments. Research all the potential security vulnerabilities for the hardware and software that you will be installing. Review permission levels and access points, especially where vendors or third-party solutions may be able to enter the system.

Make sure that all firewall settings allow for the TCP ports used by the software, and limit access with access control lists and other security strategies. If you're expanding to the cloud to support off-site and remote workers, create a specific plan for how these individuals can secure their connection to your system. Determine what training and support that the vendor can provide, as well as local ISPs and your IT team.

Plan for Bandwidth Capacity for Voice and Data

Capacity planning is always a critical issue. One benefit of a cloud solution is that it stays up even if a local site loses power or experiences a disaster.

Take a close look at your current contact center usage.

- What happens when all that becomes Internet data flowing through the cloud?
- How much bandwidth will you need to ensure you don't have any bottlenecks or possible congestion issues during peak usage?
- Cloud systems require bandwidth between the contact center platform and connected data sources as well as between each user and the platform. As your workforce size and locations grow, these needs will scale.
- Consider how a cloud-based phone solution will fit into your present IT environment.

Determine Growth Expectations for Usage Requirements

As part of the planning process, you'll need to determine the extent of usage anticipated, and make sure to account for future growth.

- How many on-site users will you have?
- How many remote users?
- How will leadership monitor agent performance and other customer service metrics?
- Who else will need access and will these positions grow if your agents scale up?
- How many users will access the platform through external devices, such as smartphones, laptops, or tablets?

Review and Document Your Call Flow (Call Routing)

A service and call flow analysis are essential in your migration planning.
- What assessments can you make regarding your contact center system that will help you with the new one?
- Do you have call routing that directs calls to specific customer service personnel?
- Will routing work across different communication channels such as social media, click-to-call buttons, etc.?
- What do you need to do to include new options or add channels down the road?
- What about the workgroups or hunt groups of your existing system?
- All of these processes will need to be replicated or optimized in your cloud system.

Research and Know What Phone Numbers are Porting

Another prominent issue to address in migration planning is number porting.

Get a list of all your existing numbers that will be ported to the new system.

Make sure that you can verify the carrier for each number. Work with your vendor to understand how porting may differ or if there are outside requirements that may vary.

You will likely need to gather information from the carrier (AT&T, Verizon...) so that you can keep the same numbers in the new solution. This could involve a lot of documentation and communication with carriers -- and don't be surprised if there are delays.

You'll want to make sure you get a good head start with this task, and whoever is responsible for gathering this information is very detail-oriented.

Determine the Budgetary Costs

And of course, you're not done planning until you have counted the entire cost of the move.

Calculate how much you will need to spend on equipment and the associated labor for any equipment or gear upgrades, and the contact center migration itself. List all the hardware you will need, such as switches, routers, and headsets if you need to upgrade or change to supported models. Consider any special software you'll need to buy — don't forget about software licenses — and if you'll need to hire outside IT support for integration or customization.

Make sure everything you're purchasing is compatible with everything else. Thankfully, cloud platforms are often designed to work with a broad range of desktops, laptops, tablets, and smartphones.

Budget creep, especially in terms of hardware, is one area we often see neglected when companies try to go this alone, so remember to check compatibility on everything to avoid any unexpected last minute gotchas.

3 **THIRD STEP IN CLOUD MIGRATION PLANNING**
Project Implementation & Training

Before you go live with any new solution, it's always best to test it thoroughly. If you don't have an IT lab for all your testing, you could set up a few devices or a single department and use that for your lab. Some cloud vendors also offer sandboxes for you to use, though you might want to establish clear guidelines and support for these tests.

Build test cases for each function of the system and run through them in a methodical way, noting the results in a robust and complete report. Any failures should be addressed before any part of your system goes live.

If the implementation may have an impact on critical data systems, consider an overnight maintenance window for testing or installation.

Follow a well-written procedure with adequate rollback options in case things go wrong. Leave nothing to chance when installing a new solution. If your vendor doesn't provide a clear list of elements to test individually and together, reach out for some help understanding what you might need to verify in initial stages.

The More Organized Your Training, The Smoother It Will Go

Implementation of your cloud contact center solution should be done in an orderly fashion. For large networks and separate locations, schedule implementation and training for individual sections or departments over a period of time to limit disruptions.

Implementation teams should include designated individuals from your company, any vendors, and any third parties involved in the solution. Make sure that all communication lines are open with all parties.

Once the system is in place, immediately begin training users. Trainers may come from internal resources or from your vendors or partners. Be sure to have adequate online and printed training materials and provide classes if needed.

Successful change management requires your users to become comfortable enough with a system to easily adapt to it and use it, instead of looking for workarounds to do things the "same old way."

Ensure training addresses not only end user training, but that it is clearly explained how the new tools benefit them. For cloud contact centers, this often includes their ability to solve customer issues faster, more engagement options with customers through multiple digital channels, and easier access to integrated CRMs and other internal data systems.

Even after the initial training, keep in mind that there may be further questions or adjustments required days or even weeks later. Have a clear plan for ongoing training before you start the implementation process.

Project Go-Live

The implementation of your new cloud contact center solution into a live environment should not be arbitrary or accidental.

When you set a definite go/no-go date and time, everyone must have a clear understanding of the target.

Just be sure that you don't schedule it during a busy season in your company. You want to reduce the impact of these changes as much as possible. And you may want to start production during a late-night maintenance window just to be sure.

Prior to giving the green light, you might consider having a room set up where users can come in for a brief training on the equipment and software. Don't let your employees be surprised come Monday morning with a new system that is totally unfamiliar to them. Ongoing training can continue after the go-live.

Use a Final Checklist

You should run through a final checklist before go-live to make sure everything is ready. Have digital and paper versions available to help get all leadership on the same page and to take notes as you verify each step. Remember, you'll likely have adoption in stages, so lessons from the first go-lives can simplify the process for other teams.

- Has all the porting been done? Are all the network connections in place?
- Are user permissions set up properly?
- Do users know what equipment to use and other requirements?
- Are there any last-minute tasks to complete?
- Your project manager should be very active in overseeing the transition. Make sure your checklist is thorough. Get final approvals from appropriate teams and individuals. And leave yourself enough time to get this done properly.

Be vigilant. You've got a lot riding on this.

Post-Implementation

Once the implementation is completed, it's easy to sit back and think it's a wrap. This is where many businesses fail to recognize the importance of measuring the success of the investment post-implementation.

Know your goals and metrics

In the preliminary stages of planning the migration process, there were specific goals the business wanted to achieve. Locate those goals and set quarterly dates for when you will review. Use these findings to justify why the move to cloud was well worth the investment.

What metrics will you need to use to measure the success of these goals? For example, if one of your goals was to improve customer engagement, which metrics are needed to measure the outcome?

Remember, not all goals are financial in nature. Some beneficial metrics include gaining improved SLAs for heavy call volumes, increasing the use of customer-demanded channels such as web video, chat, and text, and agent satisfaction levels.

Work with your team

Measuring the success of the implementation will involve coordinating with people in various departments.

Cloud contact centers can support inbound and outbound calling, customer service, lead validation, and customer acquisition. That covers sales, marketing, product, service, management, and other departments. Accounting will need to be brought in to confirm changes as well.

Use multiple departments to help validate benefits, such as combining HR data and call resolution time to ensure that your agents are performing at higher levels and that your headcount is growing at a reduced rate.

Conclusion

Rolling out a new cloud contact center solution will be less risky and less stressful if you've properly laid all the groundwork. That means involving all the necessary people in the process, making this a team effort.

Migrating to a new cloud solution can be more complex and problematic than installing a brand-new system for your business because of the need to keep existing data and maintain its structure and validity. There's no substitute for thorough preparation. Getting ahead of yourself can be both embarrassing and costly.

Do your research, get everything documented, and ask a lot of questions. Only then will you have the best chance of eliminating the errors that can make for a less-than-optimal rollout.

A good checklist can go a long way toward success in any IT project. We've put together the following printable planning checklist at the end of this guide to help get you started and lay a foundation for success.

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PBX TO CLOUD MIGRATION
PLANNING CHECKLIST

Determine Roles & Delegate Responsibilities	Inhouse/ Outsourced	Status	Notes
○ Lead IT Network Expert			
○ Company Leadership/Mgt/Supervisors			
○ Project Manager/Coordinator			
○ Trainers for Early Adopters			
○ Early Adopters for Early Testing			
○ Corporate Trainers			

Project Planning & Design

Needs per Space/Department/User Type

○ Executives			
○ Agent Managers			
○ On-site Call Center Agents			
○ Remote Call Center Agents			
○ Marketing			
○ Sales			
○ IT/Support			
○ HR			

Document all Network Changes

○ Routers			
○ Switches			
○ Firewalls			
○ Personal (remote) Requirements			
○ Software			

Project Planning & Design	Inhouse/ Outsourced	Status	Notes
Understand Security Requirements			
○ Federal/State/Industry			
○ Cross Country Requirements			
○ E911			
○ Internal Security Policies & Practices			
○ Remote Access Security and Data Protection			
Bandwidth Capacity (Voice & Data)			
○ QoS, Jitter, Latency, etc.			
○ Data and Voice Usage Projections			
○ System and Integrations Projections			
○ Bottleneck Scenarios			
○ Redundancy			
Usage Growth Expectations			
○ Desktop Users			
○ Software App/Remote Users			
○ Office Expansion Plans			
Review & Document Current Call Flow and Routing			
○ Work Groups			
○ Hunt Groups			
○ IVRs			
○ Call Flow Monitoring & Analytics			
○ Dynamic Changing Capabilities or Requiremients			
Number Porting			
○ Obtain Accurate List of All Owned Numbers With Carrier(s)			
○ Determine Which Numbers to Port			
○ Complete Necessary Forms			
○ Document Numbers with Call Flows & Routing			

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PLANNING CHECKLIST

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Project Planning & Design	Inhouse/ Outsourced	Status	Notes
Determine Equipment Costs			
○ Replace Incompatible Hardware & Gear			
○ Aquire Uniform Kits for Remote Staff			
○ Firewalls (Remote users too)			
○ Desk Phones or Headsets			
○ Software Upgrades			
○ Hardware Upgrades			
○ Firmware Updates for Hardware			
Project Implementation & Training			
Internal Test Lab Environment			
○ Create Test Cases/Scenarios			
○ Systematically Track Results			
○ Retest All Changes/Modifications			
○ Plan for Critical Data Systems Testing During Maintenance Window			
○ Training Dates			
○ Training Materials for Users			
Implementation Roll Out			
○ Choose by Department or Company-wide			
○ Create Document for Dates, Roles & Responsibilities			
○ Determine Troubleshooting Processes			
○ Designated Trainers			
○ Distribution			
Project Go-Live			
Create Final Checklist of each Scenario to Test			
○ Create Scenario Checklist			
○ Receive Final Approvals			
○ Be Diligent			
○ Create Assessments and With Other Departments or Regions			

PBX TO CLOUD MIGRATION
PLANNING CHECKLIST

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Converged Technology Professionals helps businesses experience the many benefits that migrating to a cloud based contact center solution offer. As a RingCentral Preferred Partner and a Mitel Platinum partner, Converged Technology Professionals delivers professional industry guidance and advisement that helps businesses make informed decisions throughout the migration process from research to implementation and ongoing support.

Contact us to learn more about Converged Technology Professionals or request a cloud contact center demo.

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