

Checklist for a successful

Cloud Contact Centre Migration

A step-by-step guide for your journey into the cloud

Migrating your contact centre to the cloud doesn't have to be intimidating. The journey can be exciting and successful with the right guidance and a trusted partner by your side.

This checklist will help you plan, execute, and monitor your cloud migration for sustained success.

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Identify

your needs and goals

- ☐ Enhance Customer Experience for happy, loyal customers
- ☐ Improve Agent Experience for optimum efficiency
- ☐ Business Objectives such as:
 - Operational agility/flexibility
 - Reduction of the IT burden
 - Security and compliance
 - Business continuity
 - Cost certainty
 - Scalability

Define

the challenges you are solving

- ☐ Streamline multi-site or global operations
- ☐ Support at-home agents
- ☐ Reduce complexity of hardware maintenance

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- ☐ Eliminate tech inefficiencies such as multi-versions or lengthy upgrades

- ☐ Consolidate contact centre infrastructure, PBX, and telecom suppliers with one vendor

- ☐ Stop paying for more than what you use and move to a more flexible pricing model

Understand

your legacy systems

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- ☐ Assess your legacy applications

- ☐ Consider integration needs with business tools such as CRMs, ticketing systems, line of business, and/or other third-party systems

- ☐ Consolidate and simplify disparate systems, channels and data

Pinpoint

your must-have features

- ☐ Skills-based Routing
- ☐ Unified Agent Desktop
- ☐ Omnichannel communication
- ☐ Real-time Reporting & Analytics
- ☐ Intelligent automation
- ☐ Collaboration tools such as, Microsoft Teams

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Choose

a provider you trust

For an optimal chance to success, your migration partner defines a realistic strategy tailored to your individual requirements, including:

- ☐ Capabilities and features that align with your needs
- ☐ A flexible pricing model
- ☐ Delivered in your required timeframe
- ☐ Compliance with regional, global, or industry-specific regulatory requirements
- ☐ Reliable and secure services
- ☐ Performance and satisfaction reporting

- ☐ Proactive, predictive, and preventive service and support options

- ☐ Scalability and customisation

- ☐ Ability to accelerate time to value

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Ensure

minimal service interruption

- ☐ Apply an agile, phased delivery – instead of trying to do everything at once

- ☐ Minimise disruption and prevent delays

- ☐ Reduce risk and complexity

- ☐ Avoid common migration pitfalls

- ☐ Mitigate negative impact on your UX, dependencies, performance, scalability, or your ability to meet SLAs

- ☐ Apply change management processes

Monitor

success

- ☐ Ensure your new cloud-based contact centre meets performance and customer experience expectations
- ☐ Metrics to evaluate success include cost, time, business interference, governance, infrastructure, user experience and security

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Are you ready?

To take the next step on your cloud contact centre journey? Getting started is easier than you think.

Contact us

For a no-cost assessment.

Contact us



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