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Contact Center's Guide to Migrating to the Cloud & Checklist

Content

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Introduction

Transforming your contact center into a digital enterprise with the help of cloud-based technology is no small task. Stakeholders will require speed, security, and return on investment.

Optimizing your migration project with powerful third-party software can help you to meet delivery timelines and provide reassurance to your stakeholders that goals are being met.

In this guide, we'll help you to accelerate your cloud migration goals by creating an effective strategy that yields fantastic results for your contact center and helps you to deliver unbeatable customer experiences.

You'll discover some key tips for onboarding your contact center's stakeholders, successfully planning the migration project, selecting the right partners and technologies, implementing your strategy and receiving the long term benefits of having a cloud-based contact center.
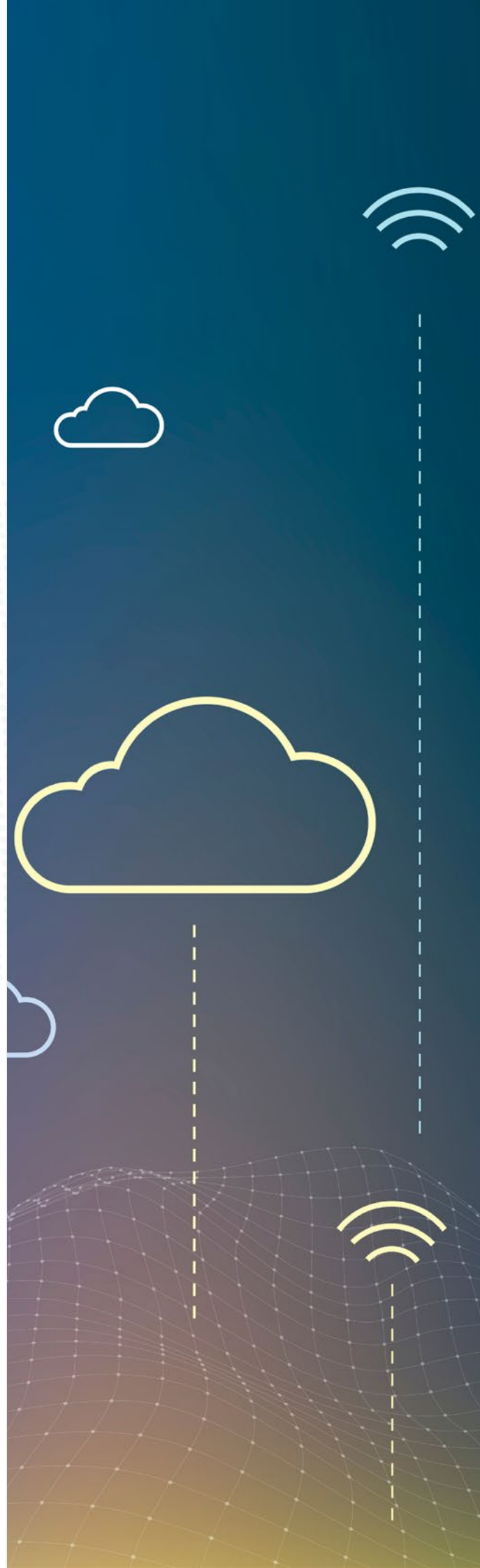
Contact Center Cloud Migration Checklist

The need for consistent, high-quality customer service across various communication channels and evolving technologies are prompting contact centers with on-premise hardware to move to the cloud.

As consumers' expectations are constantly rising, delivering an unbeatable customer experience is essential for businesses wishing to remain competitive.

Your contact center's new cloud environment will largely determine the success of its service delivery and, consequently, your bottom line.

83% of businesses identify AI solutions as key components in improved customer experience (CX), and the cloud is here to facilitate these improvements.

When initiating a migration for your contact center, it's crucial to have a strategic plan and process in place.

Evaluate and plan what you need

The first step for a successful migration is establishing the outcomes and what will be required in order to get there.

☑ Take stock of current inventory so that you can schedule your plan according to any lease or paid service commitment you have

☑ What does your contact center already do well, and how can you enhance and replicate that once you've moved to the cloud?

☑ What channels will you be using? (Voice, email, chat, SMS, social media)

☑ Identify weaknesses in the current contact center setup and how cloud computing can support and rectify these areas

☑ Which systems need to integrate with the cloud? (Here, look at the core systems such as IVR and caller queue. Also, consider the analytics and reporting that management will need access to and the customer relationship management (CRM) tools that service teams use.)

☑ Establish key performance indicators. These will be the benchmarks against which you will measure success and prove to stakeholders that your cloud migration process has been a success

Evaluate and plan what you need

What challenges are you hoping to solve with cloud migration?

When you map out the objectives and anticipate the challenges, you'll have better oversight of your migration project. To avoid delays and assure maximum preparation for the new and improved contact center, you should first tackle the important questions that are likely to arise around your cloud-based migration.

Schedule your move:
Decide on the features that need to be migrated first and create an achievable timeline.

Plan for new platform training:
It's essential to have the plan outlined and ready for implementation.

Create a communication plan for employees and partners of the contact center:
An effective communication strategy will update all stakeholders on the upcoming changes and how this may temporarily affect customer service. The migration should have minimal impact on business operations.

What features will your contact center need?

Now that you've laid out the requirements from a functional point of view, the next step is to find and suggest suitable solutions.

The cloud provides the contact center with the opportunity to optimize performance in ways that on-premise systems cannot; this is achieved through the integrations and features you can build into existing systems.

It's important, however, to only select the features that will truly benefit your business without overcomplicating current processes or increasing expenditure.

Examples of features the cloud system may need:

1. The ability to provide a standardized customer and agent experience throughout the various communication channels

2. Global queuing capabilities for international service providers

3. Smart routing based on analytics

4. Real-time data visibility across all integrated systems

5. Support for collaboration throughout the enterprise across different management levels
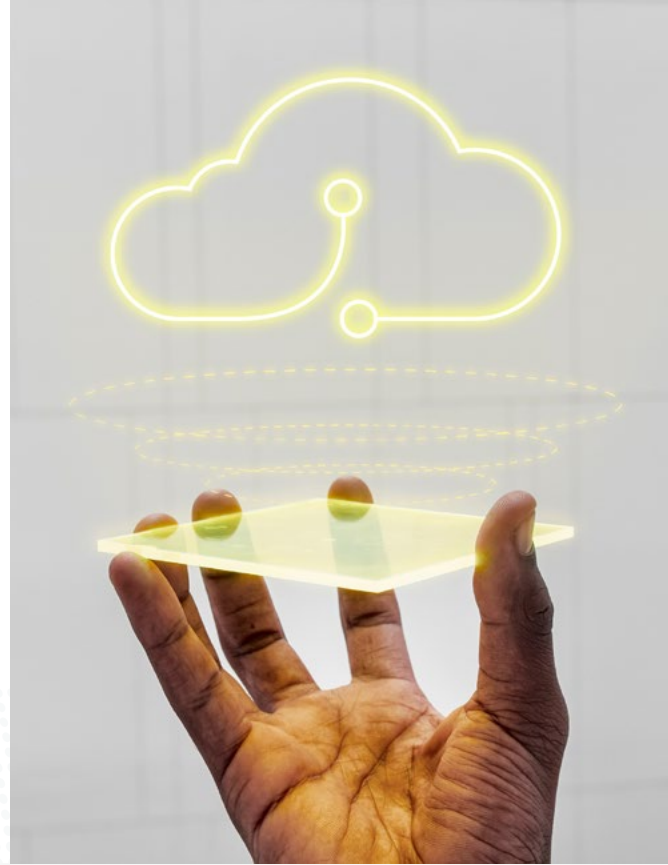
While deciding on features, you should also factor in the importance of continual testing.

Automating verification will help you to identify niggles in the migration process faster and auto-generate new scripts that can speed up resolutions.

Taking this step will tackle preventable problems from spiralling out of control in the live environment and affecting customer experience.

Stakeholders will also receive reassurance that the migration will not face any unexpected or costly challenges.

There are things that the contact center may do exceptionally well, and those are the aspects you'll want to keep or enhance in the cloud system.

There are other elements that may yield little value in the future, such as legacy systems that only create setbacks.

Discerning what to keep and what to remove will help to propel the migration in the right direction and benefit the contact center in the long run.

What are the Overlooked Benefits and ROI of Cloud for your Contact Center?

Digital transformation is a natural move towards more cost-effective solutions that support the growth and high-quality service delivery that companies aim for.

Fully understanding the benefits of a cloud migration will help to onboard skeptical stakeholders and move the project forward faster. Here are some key talking points to help you get company wide buy in.

Highlight the limitations of your on-prem contact centers, for example:

- Difficult to scale
- High overheads
- Expensive in-house hardware to maintain

- High overhead of skilled staff to support an out-dated system
- Slow to respond to market and environmental changes

A cloud contact center, on the other hand, is hosted within the cloud, which allows for a level of customization and freedom that immediately improves your company's ability to connect with customers and remain a key player in its industry. But these are just the obvious benefits; what other perks can you expect when migrating to the cloud?

Switch to remote working with ease

Current global situation aside, more and more employees are looking for greater flexibility within their roles.

Cloud contact centers can give agents the option to work from home or a different location when the need arises. With cloud-based software, workers can log into all the tools and applications they need to perform tasks and continue to deliver excellent results for your company.

From a broader perspective, giving employees the ability to work from home reduces the cost and emissions associated with commuting, promoting a greener company culture.

Boosts productivity

Cloud center technology aligns with customer relationship management (CRM) tools and helps agents to understand and anticipate queries much more effectively.

When the barriers for an on-prem contact center are removed, agents can become more productive and resolve customer queries with greater speed and efficiency.

With all of the databases now online, and communication tools that instantly connect agents to senior colleagues when support or approval is required, more calls get answered, wait times are shorter, and the outcomes for both the customer and the business are increasingly more positive.

More flexibility

Contact centers must be equipped to deal with varying traffic loads. Communication can fluctuate regularly, either due to seasonal demand or sudden changes in the market.

Traditional call centers are often limited as to how they can respond to these fluctuations as they're locked into the fixed infrastructure and the costs they've undertaken around it.

If inbound calls peak, a cloud contact center can quickly shift resources and respond in an agile way, ensuring the business continues to deliver excellent customer experiences (CX).

Furthermore, thanks to automated experience testing, teams can be alerted to issues and quickly generate corrective scripts when those busy times do come.

Why cloud contact centers are worth the investment

Customer expectations are changing, and, understandably, there is a low levelof tolerance for slow response times or glitches throughout the customer journey.

Businesses that want to outperform their competitors and remain profitable are looking for more efficient digital solutions, a primary one being becoming a cloud-based contact center.

A virtual infrastructure can help your client foresee challenges and problems long before they become company-wide issues. What's more, the contact center's reliability improves, removing friction for the customers and agents.

As employee productivity increases and more flexible working conditions become viable, the contact center can enjoy not only the best pick of talented individuals to hire, but better financial results, too.

No longer hindered by the limitations of a physical premise, the contact center can take more innovative steps and explore new services and products to add to its catalog without worrying about overloading its communication channels and contact center capabilities.
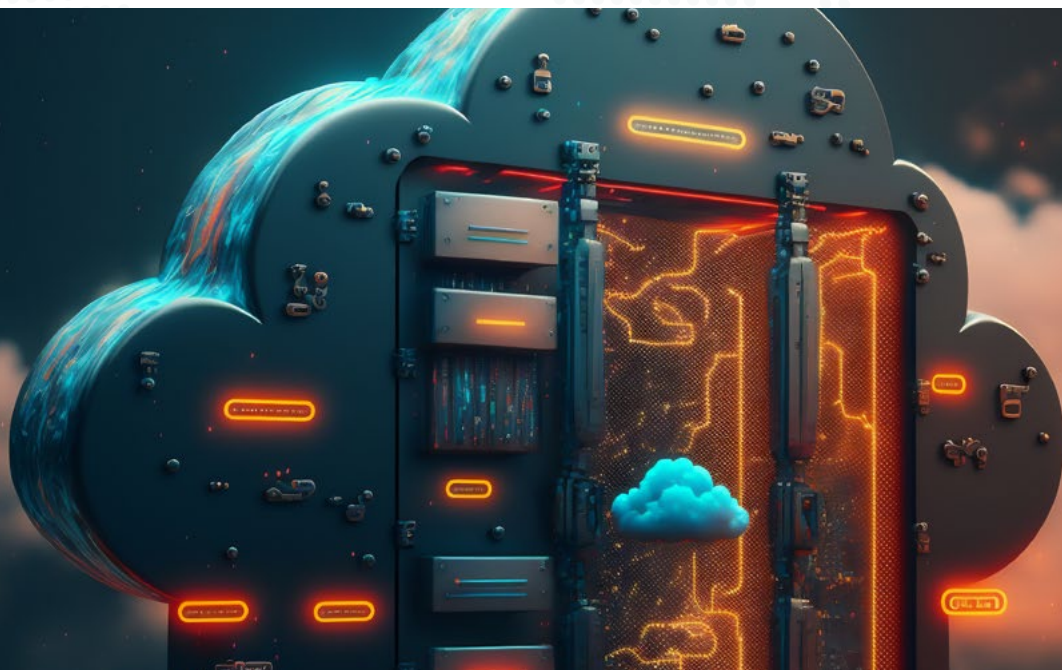
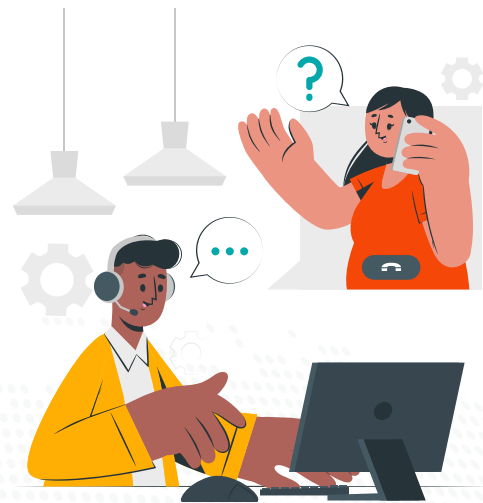# Build a Successful Cloud Migration Project Plan

When initiating a cloud migration project for your contact center, it's important to address the concerns of your stakeholders and layout the objectives to effectively mobilize your planning process.

While digital transformation (DX) is inevitable and there are obvious benefits, there's plenty of considerations to make first.

A cloud migration project is a significant financial undertaking for a contact center, getting stakeholder buy-in and reviewing the ultimate impact on customer experience (CX) will take priority.

Formulating a plan that demonstrates how the proposed technological integrations and processes will help your contact center reach its goals is essential.

With so many different technologies and 3rd party tools needing to work seamlessly to deliver a great customer experience, every organisation will take a unique path towards cloud migration and the adoption of new technology.

Listing your objectives and aligning them with the required technology partners and desired customer experience will ensure optimal functionality and an end result that provides long term opportunities for your contact center.

Tech selection

It's likely that you may choose a "lift and shift" solution, or may want to adopt a fully cloudnative offering. Your decision will be affected by the vision for the contact center's future, as well as the costs associated with implementing and maintaining cloud technology.

A full SaaS solution will enable you to scale; it will afford you the benefits of integrating with cloud optimizing software and enable further AI development and automation in the future. A cloud contact center is made up of a complex set of internal and external systems that are required to work in harmony to deliver a highly optimized customer experience.

It's imperative to look at how the entire technology stack operates and integrates together rather than looking at each component in isolation to ensure a stable experience across theentire customer journey.

When considering different products for the migration, pick suppliers that can demonstrate the value they add to the project. This will help you and your stakeholders to envision the outcomes of the cloud migration.

Be sure to select SaaS partners who can provide free demonstrations that fully illustrate the ROI their products provide.

Take the opportunity to get your questions answered and gain an understanding of how the software integrates and complies with existing infrastructures.

This is also a chance to get a glimpse of what the user experience (UX) will look like.

When working with a migration specialist, ensure they're able to carry out validation testing across your entire contact center operation to demonstrate how the new tools have integrated with your carrier, network, CRM and any other third party integrations your contact center utilizes.

Having this functionality will also provide assurances that they have the tools available to develop and deliver your cloud contact center solution in the most time and cost-efficient manner possible by demonstrating that issues can be identified quickly and the project can be carried out smoothly.

Implementation

For the implementation to be successful, you need to clearly outline your existing processes and the requirements you have for the migration.

Define your contact center's goals and the time scale you're working to; specify the best practices you wantto put into play in the new cloud-based environment.

Your plan will have to demonstrate how the implementation will incorporate testing and training as part of the migration.

Automated testing will speed up the implementation by alerting teams to any setbacks or errors in the new

environment. Select testing software that will provide the results and data you need to oversee the customer's experience as they interact with your new cloud contact center.

The right tools will help you provide reassurance to stakeholders and show that the efficiency of the cloud environment is continually optimized.
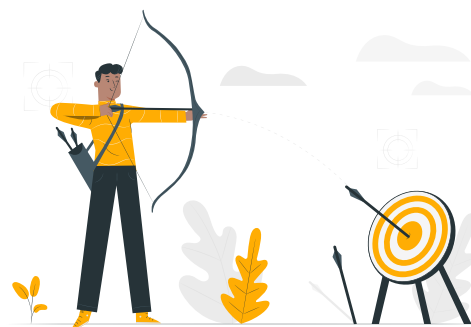
It is also recommended that during this testing phase, you carry out any diagnostics on the contact center's existing infrastructure.

This can help alleviate any concerns the organization may have regarding the stability of the cloud deployment and allow you to identify if any infrastructure improvements are needed before moving forward.

User adoption

Help the individuals within your organisation understand what the new environment will look like and which teams will be involved in the initial launch of your cloud contact center.

Stakeholders need an overview of the next stages and what that will mean for additional integrations that need to be considered for a smooth deployment.

Training is a significant part of user adoption. Make provisions for it in your budget and have a comprehensive onboarding plan that's going to not only upskill contact center agents but also help them to see the value in the new cloud-based model.

Perceived challenges

It's often the case that the adoption of new technologies is met by resistance.

There's a lot that users have to take on board on top of existing workloads, and if the benefits are not presented to all the stakeholders in a way that gets them excited about the cloud, your plan may not be easily accepted.

Make an effort to show how the new environment is going to streamline operations and improve your contact center agents' workflows.

You can also use this opportunity to demonstrate how the cloud migration will allow the contact center to be more innovative when delivering new products and services and how its responsiveness to changes in the market can now be rolled out more efficiently.

Devise an engaging training plan that will quickly win over the skeptics. Point out that cloud-technology will now facilitate seamless remote working and provide the contact center with a variety of on and off-site operational models. In turn, this will reduce costs and provide further benefits when sourcing new talent.

Preparing for the inevitable challenges is an essential part of gaining stakeholders' trust.

By simulating peak contact conditions through load testing, stakeholders can gain further assurance that the cloud can handle the business requirements.

Get Ready for your Next Cloud Migration Project With Occam

We hope this guide provided you with some useful ideas on how to accelerate and optimize your contact center's migration project.

To discover how Occam's robust automated testing system can save you time, mitigate risk and provide confidence in your cloud migration project, book a call with the team.

You can receive a technical walkthrough of all the features and benefits that come with our software, as well as ask all the essential questions you may have regarding your cloud migration project.

📞 **Book your 15 minute migration call here**

Summary Checklist

Steps to take

Take stock of the current inventory so that you can schedule your plan according to any lease or paid service commitment you have ✓

Consider what your contact center already does well, and how this can be enhanced and replicated once you move to the cloud

Understand the channels you'll be using (voice, email, chat, SMS, social media)

Consider which systems need to integrate with the cloud to help the contact center reach its goals

Identify weaknesses in the current contact center setup and how cloud computing can support and rectify these areas

Establish key performance indicators for the migration project and beyond

Decide on the features that need to be migrated first and create an achievable timeline

Plan for new platform training to assist with user adoption

Create a communication plan for employees and partners of the contact center

Provide an overview of next stages for stakeholders

List the features that the contact center will need, factoring in how to perform continual testing

Consider how automated validation testing can be used to map out the contact center's customer journey, to see how it will be affected by the migration and whether you are looking to change anything in this process

Consider the inevitable challenges of the migration and how you will manage these to avoid delays during the project

Integrate load testing to your deployment model to demonstrate how the infrastructure will perform during peak times

Review your plan and ensure you have personalized the migration specifically for your contact center's requirements

Contact the Sales Team today to discuss how Occam Networks can provide efficiencies to your business

About Occam

After nearly two decades of professional experience together providing voice and data solutions for global blue-chip organizations, we've created a company focused on providing innovative, automated testing software to support contact centers and enterprise UC systems.

Fueled by a commitment to continuous innovation, our team is passionate about ensuring our customers can deliver the type of customer experience that allows them to achieve their business objectives.

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