OCCAM

Resellers Guide to Migrating Customers to Cloud-Based Contact Centers + Checklist

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Introduction

Helping contact centers become digital enterprises with the help of cloud-based technology is no small task. Your clients demand speed, security, and return on investment.

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

In this guide, we'll help you to accelerate your service by planning effective cloud-migration strategies that yield fantastic results for your clients and for your business.

You'll discover some key tips for onboarding contact center stakeholders, successful project scoping, designing fool-proof plans, and continuously adding value to your migration services.

Contact Center Cloud Migration Checklist for Project Scoping

The need for consistent, high-quality customer service across various communication channels and evolving technologies is 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.

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The contact center's new cloud environment will largely determine the success of their service delivery and, consequently, their 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.

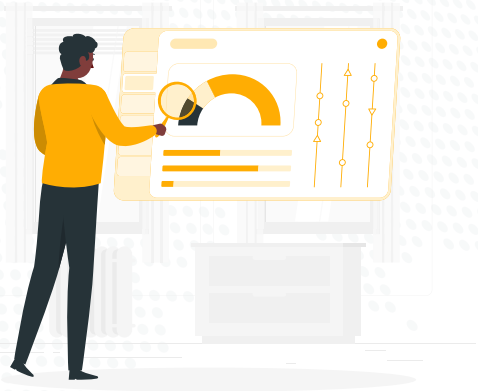
When initiating a migration for your contact center client, it's important to have a strategic plan and process in place.

To help you, we've created this easy to follow checklist for project scoping.

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 your client has
- ☑ What do the end-users need?
- ☑ What does the contact center already do well, and how can you enhance and replicate that once they move to the cloud?
- ☑ What channels will you be using? (Voice, email, chat, SMS, social media)
- ☑ 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)
- ☑ Identify weaknesses in the current contact center setup and how cloud computing can support and rectify these areas
- ☑ 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



What challenges is the contact center looking to solve?

When you map out the objectives and anticipate the challenges, you'll have better oversight of your 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.

What elements do you need to move?

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.

If you're implementing a hybrid strategy to begin with – that is, one where the contact center environment is partly tethered to on-prem systems while integrating with the cloud, you should begin by migrating mission-critical elements.

From here, you can launch other initiatives. Consider how the contact center's customer journey will be affected by the migration of new and old elements and whether you are looking to change anything in this process.

This will help you to determine which core systems still fit the profile and what new technologies can be brought into play to optimize the customer experience.

With the right tools and processes in place, your client can enjoy all the benefits of new cloud-based solutions within budget and to a deadline.

Highlight the Overlooked Benefits and ROI of Cloud for your Contact Center Client

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

Highlighting the benefits of a cloud migration for your client will help to move your project forward faster.

We've got some key talking points that you'll want to bring up in your proposal.

Start by discussing the limitations of 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 on an internet server, 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 your clients 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

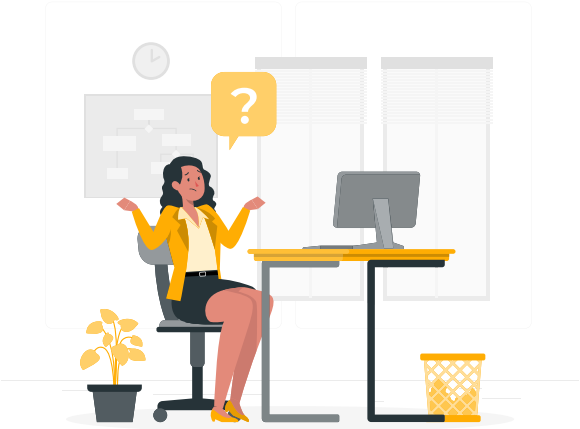
Contact centers must be equipped to deal with varying traffic loads.

Communication will fluctuate regularly, either due to seasonal demand or sudden changes in the market.

Traditional contact centers are often limited as to how they can respond to these fluctuations as they're locked into the 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 proposing a cloud migration project to a contact center, it's important to put their concerns and objectives at the forefront of your planning.

Many would argue that digital transformation (DX) is inevitable, and simply start listing the necessary steps and implementations that would mobilize the process.

Unfortunately, that's not always going to bring your potential client on board.

Not only is a migration project a significant financial undertaking for a contact center, but there are other elements such as stakeholder buy-in and the ultimate impact on customer experience (CX) that will be amongst their primary concerns.

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

Whilst many recognize the importance of adopting cloud technology, with so many different technologies and 3rd party tools needing to work seamlessly to deliver a great customer experience, no two organisations will take the same path towards migration and the adoption of new technology.

By aligning your objectives with your customer's goals, you will ensure optimal functionality and an end result that provides long term opportunities for the contact center and you as a third-party support specialist.

Tech selection

With cloud migration, your contact center customers are likely to be looking for a "lift and shift" solution, or they may want to adopt a fully cloud-native offering.

Their decision will be affected by their 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 them to scale; it will afford them the benefits of integrating with cloud optimizing software and enable further AI development and automation in the future.

Having to work with a number of different providers and technology, some of them for the first time, can be a daunting and somewhat difficult task.

Their performance has a direct impact on your customers' opinion of you and the success of the project. With that in mind, it's imperative to be able to not only validate their service in isolation but to look at how the entire technology stack operates and integrates together and demonstrate the cohesive solution you've created to the customer.

When proposing different products for the migration, pick the suppliers that allow you to demonstrate the value they add to the project.

This will go a long way towards helping the customer envision the outcomes of the cloud migration.

Be sure to select SaaS partners who can provide free demonstrations so that you can show your clients the expected ROI from your services.

By doing this, you can answer any opposing questions early on in the proposal process and back up your answers by showing how the software integrates and complies with existing infrastructures as well as give a glimpse into the expected user experience (UX).

Your proposal should factor in the carrier, the network, the existing or future CRM, and anythird party integrations that will be brought into the cloud environment.

It's important to show how all of these components will align with any new technology you're introducing so that the customer can be assured of the functionality and cooperation between all the different platforms and technologies.

Demonstrating this will also provide assurances that you have the tools available to develop and deliver the cloud contact centre solution in the most time and cost-efficient manner possible.

Implementation

For the implementation to be successful, communication is key. You must develop a strong understanding of your customer's business requirements and processes.

Get under the hood of what the contact center's goals are, the time scales they are working to, and the best practices they want to put into play in the new cloud-based environment.

Taking a holistic approach to validation testing–that includes all existing platforms and integrations – will help to uncover any issues and keep the project on the track. 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.

Show your customer which testing software you propose and the results and data you will be able to extract from the testing process.

This will reassure them that all bases are being covered and that the efficiency of the cloud environment will be maximized thanks to this information.

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 your customer to understand what the new environment will look like and which teams will be involved in the initial launch of the 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

Put yourself in your customer's shoes. 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 the contact center agents' workflows.

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.

Showing your client how you're going to deal with inevitable challenges is an essential part of gaining their trust.

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 their responsiveness to changes in the market can now be rolled out more efficiently.

By simulating peak call conditions through load testing, your customer can gain further assurance that the cloud can handle the requirements of the business.

In turn, this will also enable your business to play an instrumental role in future upgrades and developments of the contact center's cloud environment. You will become an indispensable ally in ensuring that operations continue to run and scale smoothly.

Add Value To Your Cloud Migration Services

When helping contact centers migrate to the cloud, optimizing their functionality is an essential part of the process.

Demonstrating how you're going to deliver on your promises – now and in the future – is a key part of building an ongoing relationship.

You'll be helping your customer to achieve their goals and positioning yourself as a key player in their cloud optimization initiatives.

In the planning stages of the migration, you should look to integrate the solutions that will help to distinguish your service from competitors and bring in ROI.

Deploying cloud solutions that help your customer's contact center tackle the challenges that come with varying service demands will make you an indispensable part of their cloud migration journey and beyond.

Customer experience

Customer expectations are changing rapidly, and contact centers are responding to the evolving demands by upgrading their technologies.

These investments are driven by the desire to create flexible and scalable solutions that can provide a continuously improving service.

When discussing the cloud migration with your client, the first step to ensuring success is understanding their goals around customer experience (CX).

Identifying the limitations set by an on-premise contact center and envisioning an improved model that eliminates these restrictions will help to get everyone on the same page.

Get stakeholders on board

For most individuals within the contact center, the migration may be perceived as a technical undertaking that is beyond their scope of understanding.

For this reason, people may be reluctant to accept the proposed changes in fear of how it may affect their daily tasks and routines – even if they are inefficient.

Stakeholders may be wary of the loss of control.

Whereas an on-premise contact center provides a more tactile experience, a cloud migration may prompt agents to feel like they're plunging into the unknown.

To help stakeholders recognize the value in the migration, it's important to demonstrate how the move will save them time and improve their interactions and outcomes with customers.

When approaching stakeholders, don't use overwhelming technical jargon that may prompt hostility towards the proposed project.

Focus on how the migration will streamline their workflows and eliminate the tedious and stressful elements of their day-to-day tasks.

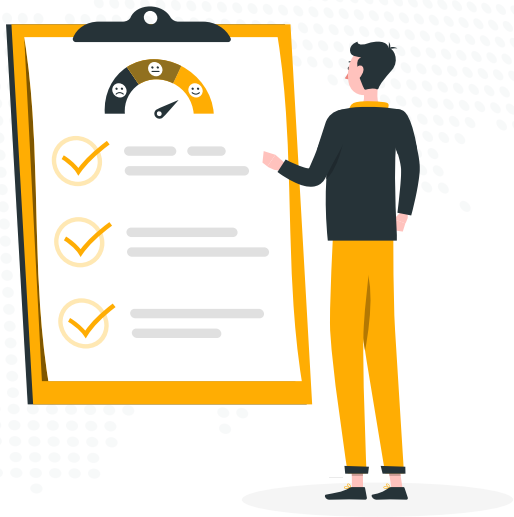
When customers have a smooth experience navigating through the IVR, agents are far less likely to encounter friction or resistance when they speak to the customer.

Build confidence

Significant technical changes can put everyone on edge about potential hiccups that may affect CX.

Build up your customer's confidence by showing how you're going to use automated validation testing software to map out the customer's CX environment and obtain accurate information that will help you to foresee and manage any challenges.

A deployment model that integrates stress testing will help stakeholders to understand how the infrastructure will perform during peak times provide an added layer of reassurance.



To encourage buy-in from the traditional on-prem customer, you can expand your monitoring system and show how you're going to provide the same level of visibility they were used to.

For large, established contact centers, loss of control and insight into their system is a significant worry, so including dashboards and monitoring tools can go a long way to inspiring confidence in the proposed migration.

You can either build your own tools, or bundle up a collection of third party tools to provide a detailed picture of what's going on in the cloud contact center.

Build a lasting relationship

The migration won't be a set and forget procedure. Your contact center client will undoubtedly want to optimize their processes and scale their services as the business evolves.

As a migration specialist, you can position yourself as the contact center's go-to consultant regarding integrations and other enhancements of the existing infrastructure.

Personalize the migration to ensure that the delivery plan matches the client's needs and expectations.

This will help to cement your relationship with them by demonstrating your interest and commitment to delivering all the benefits and ROI from the migration. It's vital for your customer to understand the migration journey doesn't end once everything goes live.

Receiving ongoing support and guidance will help to keep their business competitive and growing sustainably.

To achieve this, you must show the measurable results that have been achieved so far, and how continuous testing and improvement of the systems will further enhance their service.

As a value-added reseller and migration specialist, you want to position your business as the obvious choice for contact centers that are looking to upgrade their services through cloud technology.

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 migration projects.

If you have any questions, or would like to speak to our experts about automated validation testing for your cloud migration and maintenance, Get in touch with us today.

We'd also like to invite you to watch our on-demand webinar: Accelerate your cloud migration projects with validation testing.

Occam's VP, Gregg Lander, discusses how adopting automated validation and monitoring into our technology set ensures that you're perfectly positioned to bring your current on-premise customers and new customers over to cloud.

Learn how to boost retention and enjoy successful long term partnerships with your customers.

Book your 15 minute migration call here

Watch our On-Demand Webinar

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 your client has	✓
Consider what the end-users need	✓
Consider what the contact center already does well, and how you can enhance and replicate that once they move to the cloud	✓
Understand the channels that they will 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, end-users 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 proposal and ensure you have personalized the migration to make sure the delivery plan matches the client's needs and expectations	✓

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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