



The 2023 Guide to Contact Center Cloud Migration

**For a flexible, frictionless transition to the
cloud and faster time to value**



Introduction

This guide walks you through the ins and outs of planning for a flexible, frictionless transition to the cloud.

Cloud migrations are a lot like renovating a home. Before you get started- you need to develop a plan. You'll need detailed requirements, a timeline, cost calculations, and experienced resources lined up to assist in with project.

A. Planning and Assessing

1. Define your objectives

Document what you expect to gain by moving to the cloud. Are you looking to lower your overall costs? Upgrade to the latest technology? Improve your customer experience? By what timeframe? Make a list of what you want to achieve. An experienced partner can often provide additional perspective.

2. Establish your contact center technology roadmap

A well-defined roadmap helps you understand where you are today and plan for how you will achieve your vision for the future. It serves as a guide for your design, implementation, and support activities. Begin by detailing what you have today and how it will take shape in the future for each of these key areas:

- # Agents (now and into the future)
- Inbound channels and number of queues
- What self-service automation is offered?
- Will you be implementing conversational AI?
- What outbound campaigns exist or will be needed?
- Do you require quality management or screen recording?
- Do you handle payment processing ?
- KPIs, reporting, and analytics
- What integrations are required? (ie. CRM or Workforce Management)
- How will you train your staff?
- What skillsets will be required to support your new cloud technology?

3. What type of cloud is right for you?

It's important to understand the type(s) of cloud environments supported and to find the option that works best for you. Below is a listing of the most commonly available cloud environments:

- **Public**
 - Services are owned and operated by a third party
 - Multiple organizations are supported
 - Connectivity is over the internet
 - Pay-as-you-go approach/Is cost-effective
- **Private**
 - Cloud dedicated to a single organization
 - Connectivity is over internet or private network
 - More control/flexibility
 - Maintenance must be provided by the organization which can be costly
 - More expensive
- **Hybrid**
 - Combination of public and private cloud
 - Increased deployment options
 - Must be sure to review for any compatibility and compliance issues
- **Multi-cloud**
 - Many enterprises use more than one cloud (combination of public, private, hybrid) either simultaneously or for disaster recovery (data in one cloud location; contact center software in another)
 - Companies sometimes have components in Google, AWS, and other platforms (individual clouds)

4. What components of your contact center are already in the cloud?

Complete a full assessment of your existing tech landscape and document what areas have transitioned to the cloud. Stitching systems together can add a layer of complexity to a migration.

5. What items cannot be moved to cloud?

List the applications and components in your environment that cannot be housed in the cloud, such as custom service platforms, and plan for necessary integrations.

6. Do you have resources to support the move?

The right team with the right skills, training, and expertise is crucial for a successful cloud transition. At a minimum, you'll require:

- Business analyst
- Technical Architect
- User interface and user experience designer(s)
- Voice User Interface designer or speech scientists if your environment supports speech or natural language
- Engineers to develop interaction flows and construct 3rd party integrations (those drag and drop designs hardly ever work as expected)
- System administrator
- Quality assurance to conduct user acceptance and load testing
- Tech support to troubleshoot issues an interface with vendors
- Change management to oversee documentation of updated process and training



Research conducted by Waterfield Tech reveals the primary reasons CX leaders give for not moving to the cloud are cost, competing priorities, and shortage of resources.

Are there critical gaps in your resourcing? Do they have the bandwidth to dedicate themselves to a migration? Working with a partner that specializes in contact center technology and solutions can be a efficient, and cost saving alternative to onboarding new resources- helping to speed your migration and increase your time to value. Often in as little as 12 weeks.

7. Omnichannel considerations

Your customers expect an effortless experience. Take advantage of moving to the cloud with a fully integrated channel support for voice, callback, chat, email, SMS (text) and social components. Many organizations are finding a 30% containment boost via automation of these channels. Know the differences between a virtual agent and a bot.

8. Know your compliance requirements

Understanding your industry specific compliance and security requirements is critical. A few of the most common include:

- Healthcare -> HIPAA(Health Insurance Portability and Accountability Act)
- Government -> FISMA, FedRAMP
- Financial / Banking -> PCI-DSS
- Orgs with Global Presence - > GDPR / Data Residency

9. What kind of ongoing support will you need?

The most advanced solution providers wrap a comprehensive CX service layer around your cloud migration giving you one flat-rate subscription to lower your migration costs to deliver a longer-term and faster time-to-value. In this scenario, you will get one bill with predictable pricing that can also be scaled with your business. This advantage is you are not having to manage multiple technologies and billing structures. Consolidation of technologies into one flat rate helps manage costs.

Ongoing support is costly and time-consuming. Moreover, you don't want a migration to take a long time to implement. You also want to continually evolve and upgrade your contact center in the future to keep up with business needs. Support should include some of these key components which, when handled by an experienced external partner, can ultimately result in substantial costs and staff savings of \$100k and more for your organization:

- Quality Management
- Integrations
- Analytics and reporting
- Training
- Answering questions
- Moves/Adds/changes
- Proactive monitoring
- Backups
- Incident Tracking, Management & Resolution
- Future business planning and reviews

Some common terms you may hear during the migration process:

Known as the "R's of migration", depending on your business requirements, there are several different options to consider.

Bot – (is short for robot) software communication/application program that is programmed to perform tasks through robotic process automation. Bots are used to automate certain tasks and can be used to simulate human conversation.

Rehosting – Also known as "lift and shift," rehosting involves transferring an exact copy of your current environment without making extensive changes. This is the quickest ROI and saves on infrastructure costs. Companies with a conservative culture or no long-term strategy for harnessing advanced cloud capabilities are well suited for rehosting.

Replatforming – Similar to "lift and shift," with a few further adjustments for optimization. These changes can be made in advance of a cloud migration or in some cases, retroactively.

Repurchasing or Rehosting– involves moving your applications to a new, cloud-native product, most commonly a SaaS (Software as a Service) platform (for example: CRM to Salesforce). Teams must be trained on the new platform.

Refactoring or Re-Architecting– This entails rebuilding your applications from scratch. This is the most expensive option as it involves the most work and is best for very old legacy environments to be compatible with new technologies. Refactoring may involve the breaking of existing applications into independent services.

Retiring– The removal of applications that are no longer useful

Retaining – Sometimes the organization is not yet ready for cloud adoption (recent upgrades, unable to take off-premises for compliance reasons) and may hold off on cloud migration until a later time.

Virtual Agent – A virtual agent is an online bot, often called a chatbot or voicebot, that uses artificial intelligence (AI) and machine learning to hold intelligent and informed conversations with customers. Virtual agents might mimic humans, like having a name and using casual language to seem less robotic. Voicebots are used within an interactive voice (IVR) system to simulate a human conversation and to minimize callers time listening to menus and pressing corresponding numbers to continue to their desired call resolution.

10. Identify what you have, what you need, and what you don't need.

- Review your data, workflows, programs, and platforms to determine what you will keep, what you can archive, and what may be deleted.
- Map your entire environment, including dependencies, services, applications, and physical and virtual server configurations. Capture everything including shadow IT implementations and third-party resources that could complicate migration if not properly considered.
- Collect data that you will use to help determine your strategy and plan for migration. This includes not only the technology itself but also how the people in your organization interact with that technology.
- Identify any additional interdependencies

11. Establish your deployment window.

How fast you get your contact center up and running will impact your business. Speed is critical. Technology upgrades, integrations and transitioning platforms can be a challenge. Ideally, a contact center can be migrated within a 12-week time span though some are more complex and can take longer. The right partner can help you build a plan for a seamless and quick transition.

12. Will the migration affect daily operations?

It's likely that daily functions and processes could be interrupted during your cutover. It is a good idea to have a business continuity plan and develop company-wide communications to employees alerting to planned disruptions during the migration.

13. Who will manage security?

In a private cloud environment, the enterprise is responsible for security covering infrastructure, physical and virtual networks, firewalls, and operating systems. For the public cloud, the Cloud Service Provider (CSP) owns the infrastructure and network while the enterprise is responsible for workload OS, applications, virtual network, and user access to the environment and data. Insecure APIs, poor security practices due to weak encryption or data breaches, and misconfiguration of policies can impact migrations. It is vital to detect and address any security concerns at the earliest possible time. Your current and future cloud environment should employ preventive measures including strong access management and password policies, data encryption, completing regular cloud environment audits, and employing user compliance procedures.

14. Define team roles

Whether you work with an experienced contact center firm or go direct with the platform manufacturer, it will be necessary to provide a list of key contacts in your organization to turn to for questions and guidance throughout the migration. This often includes a migration architect leader (IT); network administrator, project manager, quality assurance leads, and a training coordinator.

B. Pilot the Migration

Cloud migrations can be complex and bring unexpected challenges. To limit early exposure to these challenges, some businesses opt to pilot a migration within a single department or with a select group of agents before rolling out company wide. This ensures you have the opportunity to:

- Resolve any issues that surfaced during the design phase
- Develop a runbook that documents the process. This should be part of your IT Infrastructure library protocols. These increase consistency and standardization and can speed troubleshooting and incident management.
- Test that interactions are routed to the appropriate agent and ensure that rollover options are working as expected.
- Test that performance response time meets baseline requirements.
- Troubleshoot failures, service outages data anomalies or performance glitches
- Ensure dashboards and reports are measuring against defined KPIs

Other Considerations:

Now is the time to think about conversational AI.

[Gartner's "2022 CEO Survey –The Year Perspectives Changed"](#) revealed 91.5% of leading businesses invest in AI on an ongoing basis. However, only 14% of respondents to Waterfield Tech's [Top Trends for 2023 Survey](#) say they've implemented conversational AI.

Conversational AI enables consumers to interact with computer applications as they would with humans. By leveraging this tool, retailers can replace limited chatbots and clunky IVR menus and simply ask customers: "How can I help?", then get them to the right place. That could be a priority agent queue, low-friction deflection to digital channels, or smart, conversational self-service that ensures customers' needs can be met quickly, rather than forcing them to wait in queue and risk losing a sale, or worse: losing a customer forever. Conversational AI allows you to efficiently automate high frequency contact types, while making the most of your human agents and digital channels. This is particularly beneficial as retailers struggle to hire people in their contact centers given the ongoing labor shortage.

In addition, conversational AI can deliver richer and more relevant insights than what companies currently get from other contact center technologies. With Conversational AI, you'll know what customers contact you for most. What products they're asking about. And what problems crop up often. These insights create opportunities for better automation, digital deflection, and workforce management.

Are you taking advantage of Workforce Optimization?

As more and more agents and staff work remotely, it's time to consider how workforce optimization can positively impact your organization. Solutions that blend increasing employee engagement and productivity are having profound impacts on organizations and include efficiency gains, better customer experiences, maximizing service opportunities and revenue generating possibilities. Forecasting, HRIS integrations, time adherence monitoring, desktop, and speech analytics together with quality and performance management techniques are just some of the many key components that can also be integrated with your contact center platform and other technology systems.

Ready to Ascend to the cloud?

Many companies get tripped up by technology. They either invest in the wrong tech, or they don't use it to its full potential. That's where we come in. We're expert optimizers. Strategists. And translators. We make tech work for you to provide painless customer communication. We facilitate systems talking to each other across different brands and data silos. And we align people, processes, data, and technology to support your business needs.

Technology is a tool to be used for building something great. Our solutions do just that.

About Waterfield Tech

Waterfield Tech transforms customer engagement for organizations worldwide. Operating across six continents, our employees leverage a consultative, platform-agnostic approach to design, build, and manage scalable, omnichannel customer experience solutions. Our breakthrough innovations in contact center technology, automation (conversational AI) and workforce engagement reduce business costs, improve customer satisfaction, and help customers deploy a smarter utilization of the human workforce. To learn more, visit [waterfieldtech.com](https://www.waterfieldtech.com).
