EMPIRIX

an Infovista company

7 critical steps for planning a successful contact center cloud migration

August 2021

Introduction

Planning goes a long way

There are many reasons to migrate contact centers to the cloud, such as achieving scale, optimizing costs and the introduction of new capabilities, such as those of speed, control, accessibility and security.

Building a plan that identifies the required steps helps ensure that your project goals are met on time, scope and budget.

This eBook provides a guide to a 7-step process based on the experience we have gained helping companies migrate their contact centers to the cloud:

1. Understand what you have: the configuration audit
2. Choose a path: what migration route to take
3. Technology evaluation
4. Business goals
5. Define the budget
6. Optimization review
7. Define acceptance criteria

Following these steps will help you build an implementation plan that identifies issues early and avoids costly fixes later in the cycle.

Step 1

Understand what you have: the configuration audit

According to the Consortium for Information & Software Quality™, **fixing problems post-deployment is at a minimum 10 times as expensive as the cost of implementing a cloud migration project properly.** Therefore, most of the cost of rolling out an effective cloud migration project should be spent on design and discovery in addition to baselining the roadmap of the project.
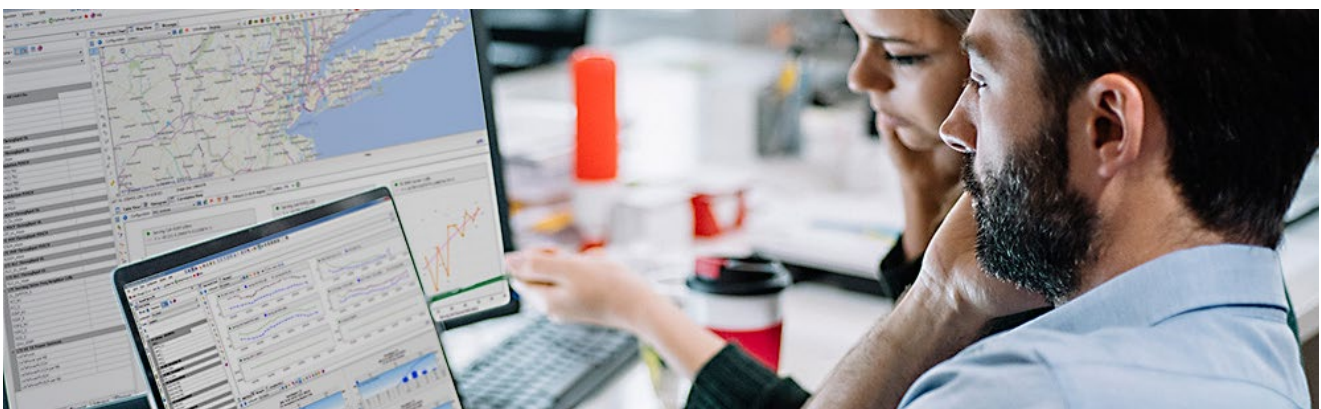
A configuration audit is therefore a natural step before you start the process of migrating to the cloud. Many objects and configurations will have been layered on top of each other for over 20 years, over several different versions of legacy solutions. Additionally, some of those configurations may already have been workarounds to fix bugs, or temporary fixes for applications that had not been fully developed and tested. Another consideration is that, over time, the experts in dealing with these complex solutions may have moved on from the company, resulting in the rationale behind the configuration being lost.

> **Simply exporting the current configuration does not provide context for how it is used in day-to-day operations**

An in-depth analysis of the entire configuration is therefore essential; **simply exporting the current configuration does not provide context for how it is used in day-to-day operations.** You want to scan entire directories and audit announcement messages, route points, vectors, and audit business hours logic. You should also perform detailed network and call tracing to discover if any of those routes are currently being travelled or exist in any of the signaling paths to their destination contact centers or queues.

Your specific approach may vary in accordance with your tools and how well their data collection methods operate. Due to the complexity of the task, once the data reporting tools are in place, this step may require 35 to 45 days to run. This is due to some routes potentially being used infrequently. So, in order to capture sufficient customer behavior data and usage, you need a long monitoring window. Also, consider that if you operate within a business with a lot of seasonality, this step should be completed during 'peak' season.

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Step 2

Choosing a path: what migration route to take

You now have operational data and an analysis on usage and an understanding of which applications provide the most value to the business. It is now **time to make decisions on which applications are selected for each migration strategy**. This means choosing to keep or to retire a specific application/ functionality. Some applications may require a rewrite or a decouple and consolidation with the items that you identified for retirement.

Is the cloud migration effort a re-host with the same solution vendor, i.e., a 'cloud'-enabled version? Or will there be a re-platform of the entire application to a

new vendor? If this is the case, then **it is likely that the platform vendor may have already created migration tools** to accelerate your process and will provide some guidance on the migration, as they have a vested interest in transferring you to the platform, and to start recognizing revenue and delivering value.

> **" It is likely that the platform vendor may have already created migration tools "**

Step 3

Get to know what is important: technology evaluation

Prioritizing and sequencing the different applications may require input from many sources of information but you will also want to determine the actual methods for evaluation.

Which characteristics will you base your priorities on?

- Risk/complexity (easiest or hardest first)
- ROI/potential
- New capabilities benefit

When choosing how to rank, order and prioritize the value to your business and the complexity of the migration, you have important strategies and considerations to take. Those that aim to accelerate time-to-value will front-end the high-value applications but these applications tend to be more complex. Furthermore, if this is an organic migration by your organization, there will also be a high risk of complications with the project as the team lack the required experience necessary for a high-value, high-complexity migration.

Organic teams and those with insufficient experience may therefore choose a low-complexity, low-value first step, which will enable the teams to learn as they go and allow for a wider variance in quality as they gain insight and understanding into all the tasks involved in a migration project.

Holding the basic details and a skills assessment of the team, coupled with the relative value/risk to the business and with the evaluated complexities associated with the move, will help you determine the best prioritization strategy based on the longer-term goal of success.

> **IMPORTANT**
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> Senior management expect to see 'momentum', **so ensure that you have baseline documents and usage analysis reports** to demonstrate this and report to senior management. This is critical for them, in order that they allocate the resources and timing to complete this step. Briefing senior management on why technology projects fail and the high cost of a poorly configured software rollout into production will help them with the context they need to understand why this step is the most important.
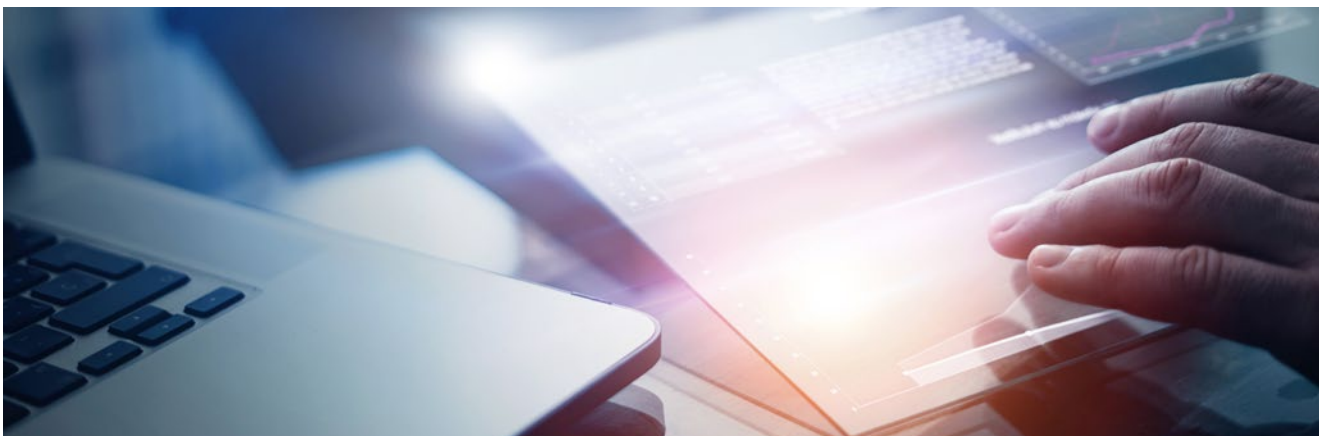
Step 4

Get to know what is important: business goals

For this step you will have to get the **key business drivers directly from C-level executives**. Be prepared by reading and taking notes on their previous public statements or what they have commented on to their shareholders or analysts.

What have they mentioned or highlighted about 'accelerating time-to-market' or expanding their market footprint? What part of migrating to the cloud do they hope the business can accomplish? Is the total cost of ownership reduced by migrating to the cloud?

Is the migration seeking to optimize efficiency, or is it about being agile to market demands?

These expectations will help guide the team towards which optimization opportunities, which sequence or which applications are prioritized over others.

Once you have the C-level's public statements, the next step is to set up a meeting and confirm their thoughts or confirm with them their new direction.

> **Is the migration seeking to optimize efficiency, or is it about being agile to market demands?**
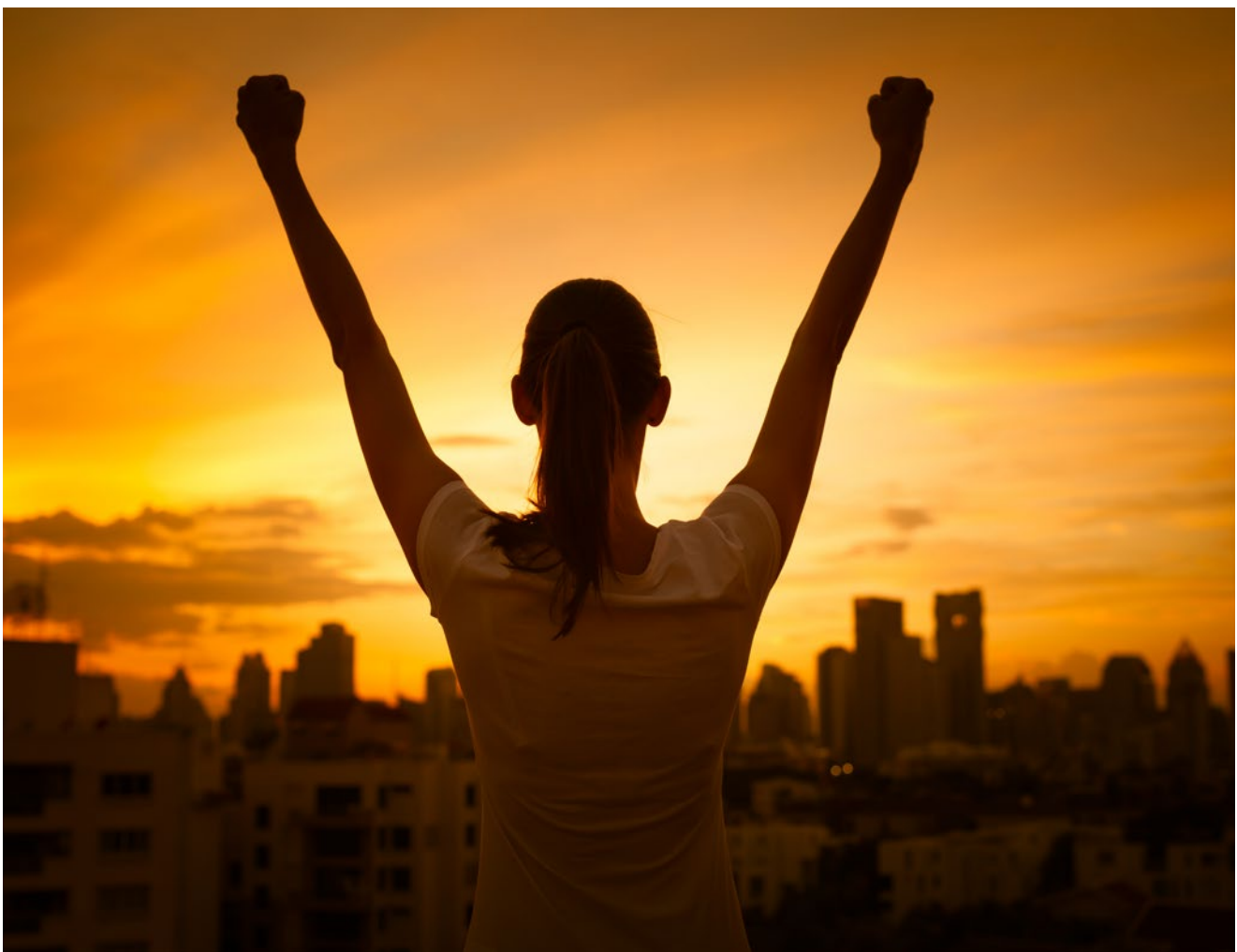
Step 5

Define the budget

You have now discovered three major pieces of information before you have begun this project:

1. Your migration path options
2. The business goals for your migration
3. The value, risk and rewards, plus the relative complexity of each application to be migrated, along with identifying the skills gap of the teams involved

This is an excellent opportunity to revise and consult with management on the funding and budgeting for the next phase of the project. With a front-ended model of high value first, you have an opportunity to seek external expertise to accelerate and manage these items before the project starts.

Risk mitigation is a critical consideration in the strategy and this is a crucial point to re-evaluate and discuss with the stakeholders the pros and cons of funding, cashflow analysis, and when to spend and when to seek ROI during the migration timeline.

The budget should include design validation, stress testing and ongoing monitoring to ensure the applications implemented can meet the goals of the business. The more this testing can be automated and applied early in the implementation cycle, the better the chance of meeting your timeline with minimum disruption after going live.

> " **The budget should include design validation, stress testing and ongoing monitoring** "

Step 6

Optimization review

What is legacy but relevant and what is legacy and useless? The goal of this step is to create a cloud migration profile of what the business outcome will be and think about how the current system aids or detracts from those outcomes.

Multi-queue inefficiencies

In our experience, we have noticed workarounds and complete misunderstandings of queuing and routing systems embedded inside legacy systems. We have seen companies that have customer segmentation built inside their IVR, routing to specific queues. We have also seen the use of agent skill-based routing where agents are assigned to some queues but not others despite having the skills and experience required to participate and add value to the business inside those queues.

Sometimes this is due to too many stakeholders but it is mostly because many years of evolving technology have passed without people pausing to understand best practices, along with their failure to remove legacy workarounds.

During your usage analysis you have likely discovered that 40% or more of your configured route-points are not actually in use or taking transactions. Before you start to delete items based on what you now think you do not use, you must consider that your reports may be wrong or your customers' corner cases may not have been triggered during the 35- to 45-day study period mentioned in Step 1.

Optimization and standardization

Therefore, **automated customer experience transactions MUST be set up and activated before the next step.** Your high-value IVR and self-service transactions must be continuously monitored. Both during and after business hours, you must execute these transactions in the background before you attempt any configuration 'optimization and cleanup' exercises. This will serve as an early warning system that any cleanups that you have identified as low-risk, obsolete functions are or are not actually being triggered and leveraged somewhere in the ecosystem that was not identified earlier. It gives the team an opportunity to back out of those changes before a larger section of customers are negatively impacted.
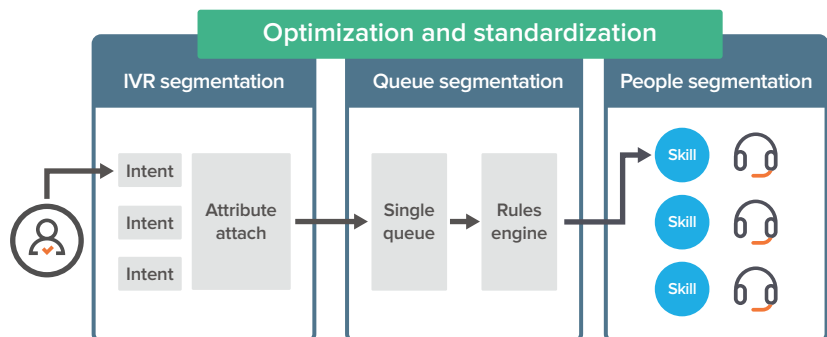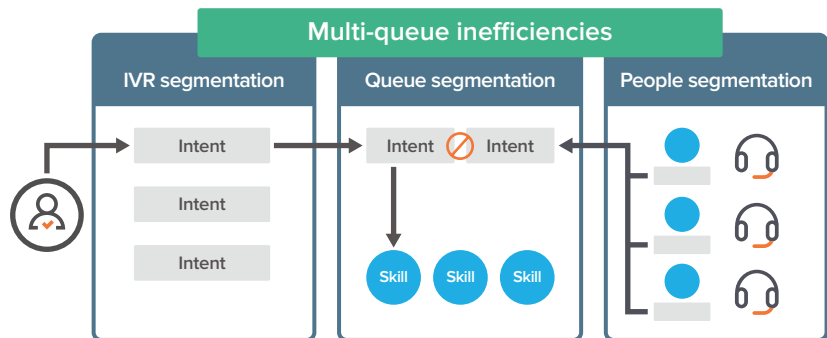
> **Automated customer experience transactions MUST be set up and activated before the next step**

Step 7

Define acceptance criteria

Before anything is moved, take a deep dive on what has been done to establish what 'success' and 'finished' look like from an enterprise, end-user and customer perspective. **There is a major key element to ensure everyone is in alignment: definition of terms.**

Do not underestimate the importance of this. Many technology projects slow down, fall down and fail due to the lack of clarification of terms between different teams. To avoid miscommunication, it is of the utmost importance to establish an independent definition of words. For example, simple words such as 'switch' have been known to confuse voice application and data routing teams working together. Likewise, 'Intent', 'Journey', 'vLan', 'MAC' and even 'TFN' vs

'DID' also need to be defined and published, with no substitute or specialized words being accepted in their place.

Create well defined acceptance criteria from four different perspectives:

1. From the eyes of the customer
2. From the eyes of the operations team
3. From the eyes of the development team
4. From the eyes of the executive

Even if the executive acceptance criteria are duplicated for each item – for example, 'operates at a lower cost of ownership than legacy system' or 'offers better efficiency than legacy system' – it is important to state what they are. The time your team spends on this step will save thousands of hours of arguments, delays and finger-pointing later, and will give an objective third party who picks up these artifacts a clear path on how to decide based on the groundwork laid out here.

> " **There is a major key element to ensure everyone is in alignment: definition of terms** "

Author: Jeff Reedy
VP Product | Empirix
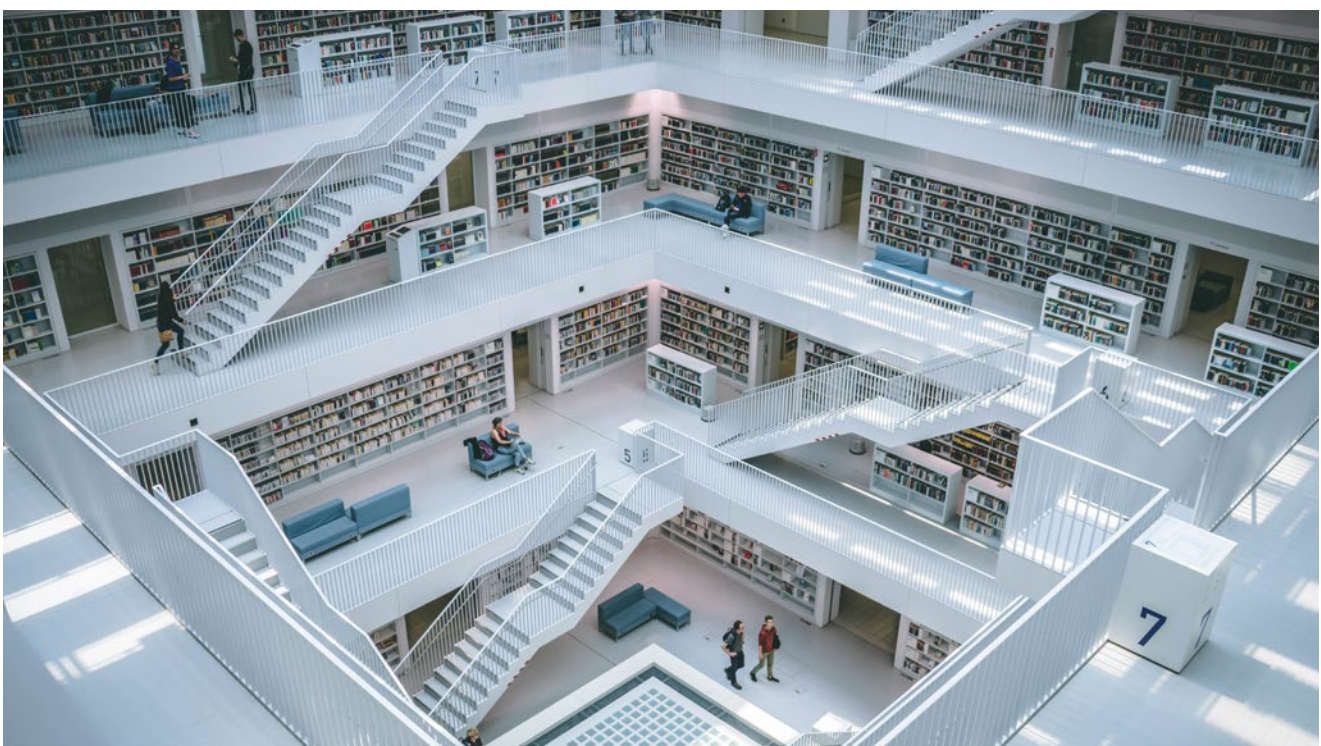
About Hammer

Hammer and Hammer Cloud Platform from Empirix, an Infovista company, deliver massive volumes of automated human behavior interactions to speak to and navigate applications, mimicking real-world citizen or customer engagement. This enables technology and business leaders to gain unique insights into their solutions' ability to meet business objectives once released to the public. The artificial intelligence inside the Hammer Cloud measures any slowdown or disruption in quality of experience (QoE), allowing teams to optimize configurations or re-allocate resources efficiently. Hammer Cloud is also used to validate emergency scenarios and test team capabilities to restore services in case of a disruption.

About Infovista

Infovista, the global leader in network lifecycle automation, powers complex intelligent networks to ensure they deliver brilliant user experience, maximizing productivity and efficiency, securely. At the core of the company's approach are automation and analytics, enabling Infovista software solutions to span the entire network lifecycle. From managing service legacy networks to optimizing 5G deployments, from providing applications visibility to securing and controlling the extended edge, Infovista helps Communications Service Providers and Enterprises to fully unlock their digital business potential. More than 1,700 customers, including 350 Mobile Network Operators, around the world rely on Infovista. **www.infovista.com**