

LEARNING MADE EASY

Cyara Special Edition

# Contact Center Cloud Migration

for  
**dummies**<sup>®</sup>  
A Wiley Brand



Weigh the  
pros and cons

Build, deploy, and tune  
your cloud contact center

Set the stage for a  
successful migration

Brought to you  
by

CYARA 

William LaRuffa  
Andriy Zakharchenko

## About Cyara

Cyara revolutionizes the way businesses transform and optimize their customer experiences. Cyara's AI-based CX Transformation Platform empowers enterprises to deliver flawless interactions across voice, video, digital, and chatbot experiences. With Cyara, businesses improve customer journeys through continuous innovation while reducing cost and minimizing risk. With a 96% customer retention rate and world-class Net Promoter Score (NPS), today's leading global brands trust Cyara every day to deliver customer smiles at scale.

To learn more, visit [cyara.com](https://cyara.com) or call 1-888-GO-CYARA.

# Contact Center Cloud Migration

for  
**dummies**<sup>®</sup>  
A Wiley Brand



# Contact Center Cloud Migration

Cyara Special Edition

**by William LaRuffa and  
Andriy Zakharchenko**

**for  
dummies**<sup>®</sup>  
A Wiley Brand

# Contact Center Cloud Migration For Dummies®, Cyara Special Edition

Published by  
**John Wiley & Sons, Inc.**  
111 River St.  
Hoboken, NJ 07030-5774  
[www.wiley.com](http://www.wiley.com)

Copyright © 2024 by John Wiley & Sons, Inc., Hoboken, New Jersey

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

**Trademarks:** Wiley, For Dummies, the Dummies Man logo, The Dummies Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc., is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: WHILE THE PUBLISHER AND AUTHORS HAVE USED THEIR BEST EFFORTS IN PREPARING THIS WORK, THEY MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES REPRESENTATIVES, WRITTEN SALES MATERIALS OR PROMOTIONAL STATEMENTS FOR THIS WORK. THE FACT THAT AN ORGANIZATION, WEBSITE, OR PRODUCT IS REFERRED TO IN THIS WORK AS A CITATION AND/OR POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE PUBLISHER AND AUTHORS ENDORSE THE INFORMATION OR SERVICES THE ORGANIZATION, WEBSITE, OR PRODUCT MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING PROFESSIONAL SERVICES. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR YOUR SITUATION. YOU SHOULD CONSULT WITH A SPECIALIST WHERE APPROPRIATE. FURTHER, READERS SHOULD BE AWARE THAT WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ. NEITHER THE PUBLISHER NOR AUTHORS SHALL BE LIABLE FOR ANY LOSS OF PROFIT OR ANY OTHER COMMERCIAL DAMAGES, INCLUDING BUT NOT LIMITED TO SPECIAL, INCIDENTAL, CONSEQUENTIAL, OR OTHER DAMAGES.

For general information on our other products and services, or how to create a custom *For Dummies* book for your business or organization, please contact our Business Development Department in the U.S. at 877-409-4177, contact [info@dummies.biz](mailto:info@dummies.biz), or visit [www.wiley.com/go/custompub](http://www.wiley.com/go/custompub). For information about licensing the *For Dummies* brand for products or services, contact [BrandedRights&Licenses@Wiley.com](mailto:BrandedRights&Licenses@Wiley.com).

ISBN 978-1-394-18475-0 (pbk); ISBN 978-1-394-18476-7 (ebk)

## Publisher's Acknowledgments

Some of the people who helped bring this book to market include the following:

**Editor:** Elizabeth Kuball

**Acquisitions Editor:** Traci Martin

**Editorial Manager:** Rev Mengle

**Client Account Manager:**  
Cynthia Tweed

**Production Editor:**

Saikarthick Kumarasamy

**Special Help:** Joe Kraynack

# Table of Contents

INTRODUCTION .....	1
Foolish Assumptions.....	2
Icons Used in This Book.....	2
Beyond the Book.....	2
<b>CHAPTER 1: Getting Started with Contact Center Cloud Migration .....</b>	<b>5</b>
Weighing the Pros and Cons of Contact Center as a Service.....	6
Benefits of CCaaS.....	6
Potential downsides of CCaaS.....	8
Migration challenges .....	8
Laying the Groundwork for a Successful Cloud Migration.....	10
Stepping through the Cloud Migration Process .....	11
Step 1: Audit and document.....	11
Step 2: Design and plan .....	12
Step 3: Build and test.....	12
Step 4: Release and deploy.....	13
Step 5: Maintain and enhance.....	14
<b>CHAPTER 2: Preparing for Migration.....</b>	<b>15</b>
Starting with the Right Questions .....	16
Choosing a Contact Center as a Service Provider .....	17
Auditing and Documenting Your Existing Contact Center .....	18
Mapping existing customer journeys.....	18
Setting benchmarks.....	18
Cataloging existing channels, technologies, and integrations.....	19
Obtaining stakeholder input .....	20
Designing Your New Cloud Contact Center .....	20
Designing new customer journeys .....	20
Adding channels.....	21
Expanding functionality .....	21
Planning Your Contact Center Migration.....	21
Choosing a migration strategy .....	22
Integrating testing into your contact center.....	22
Building your migration team .....	24
Documenting your migration plan .....	25

<b>CHAPTER 3:</b>	<b>Building and Continuously Improving Your Contact Center</b> .....	27
	Building Your Cloud Contact Center .....	28
	Configuring the interactive voice response system.....	29
	Designing chatbot interactions .....	29
	Implementing conversational artificial intelligence.....	30
	Integrating other third-party solutions .....	31
	Designing a unified agent desktop .....	31
	Setting up monitoring and analytics.....	31
	Implementing workflows and processes .....	32
	Training contact center agents on the new system.....	32
	Testing Your New Contact Center .....	32
	Performing functional and regression testing .....	33
	Performing agent experience testing.....	33
	Conducting performance tests .....	34
	Going Live: Releasing Your Contact Center.....	35
	Monitoring and Fine-Tuning for Continuous Improvement .....	36
	Monitoring customer journeys .....	36
	Optimizing the customer experience .....	37
	Monitoring global numbers.....	37
<b>CHAPTER 4:</b>	<b>Ten Tips for a Seamless Migration</b> .....	39
	Assemble Your A-Team.....	39
	Start with a Detailed Plan .....	40
	Select the Right Contact Center as a Service Provider.....	40
	Establish a Pre-Migration Baseline.....	40
	Set Post-Migration Expectations .....	40
	Follow a Clear and Proven Process .....	41
	Integrate Comprehensive Testing .....	41
	Automate Everything Possible.....	41
	Perform a Phased Migration.....	41
	Ensure Continuous Monitoring after Deployment.....	42

# Introduction

In today's fiercely competitive business landscape, delivering exceptional customer experiences has become the cornerstone of success. More and more organizations are relying on cloud infrastructure and technologies, specifically via Contact Center as a Service (CCaaS) platforms, to enrich customer experience (CX) while reducing costs. In fact, the mass migration of contact centers to the cloud is accelerating, driven by industry and competitive pressure, the promise of cost savings, scalability, and, in the case of U.S. government contact centers, a mandate to move to the cloud by 2025.

According to International Data Group (IDG), 50 percent of organizations with a contact center were expected to switch to a cloud-based infrastructure by the end of 2022, and that number has only increased in 2023, thanks to the proliferation of new tools, such as chatbots, conversational artificial intelligence (AI), advanced analytics, and evolving customer expectations. Organizations must keep pace or risk losing market share and revenue.

Migrating to a CCaaS solution offers businesses many compelling advantages, making it a strategic move for enhancing CX and optimizing contact center operations. Legacy on-premises contact centers are often difficult and costly to maintain and scale, and they lack the compute and storage demanded by the latest technologies. By leveraging CCaaS, organizations can enjoy scalable, seamless multichannel CX, as well as improved reliability and security, all at a lower cost and without the need for a substantial up-front investment.

With evolving workforce and customer demands, operating your contact center from the cloud means more flexibility and agility to be able to respond to changing market conditions or new working models. Furthermore, CCaaS solutions offer advanced analytics and AI-driven features, empowering businesses to glean valuable usage insights while enabling personalized customer experiences and more efficient customer service interactions.



# Foolish Assumptions

To align the book with your needs and interests, we made a few foolish assumptions about you:

- » Your role in your organization is that of a chief information officer (CIO), chief technology officer (CTO), enterprise architect, CX executive, or contact center leader responsible for cloud infrastructure and contact center operations.
- » You're familiar with cloud service providers but maybe not quite as familiar with CCaaS providers.
- » You have a general understanding of CX principles and how they impact your contact center operations.
- » You're committed to delivering best-in-class customer service and using every modern technology to do it.

## Icons Used in This Book

Throughout this book, icons in the margins flag special content. As you read, watch for the following icons:



REMEMBER

We hope you'll remember most of the information and insight presented in this book, but these are the key points.



TIP

This icon indicates tips that can save you time, effort, and money.



WARNING

When you spot this icon, proceed with caution. Danger ahead!

## Beyond the Book

This book is not a detailed instruction manual on how to migrate your contact center to the cloud. Its purpose is to give you a general understanding of what migration involves and provide you

with the information and guidance you need to get started and avoid common pitfalls.

To find out more about CCaaS and migrating your contact center to the cloud, visit [www.cyara.com](http://www.cyara.com). The website provides in-depth insights, white papers, videos, blog posts, and more on how to ensure your CX is keeping your customers front and center.

## IN THIS CHAPTER

- » Weighing the pros and cons of contact center cloud migration
- » Recognizing the challenges you're likely to encounter
- » Setting the stage for a successful transformation
- » Getting a bird's-eye view of the entire process

# Chapter 1

# Getting Started with Contact Center Cloud Migration

**M**igrating a contact center to the cloud involves transitioning some or all its applications, data, integrations, and other digital assets from on-premises servers to a cloud platform. Cloud platforms provide online storage, computing resources, and application programming interfaces (APIs) for developing and hosting the contact center, while numerous third-party vendors offer specialized Contact Center as a Service (CCaaS) solutions for designing, building, testing, deploying, operating, and monitoring cloud-based contact centers.

This chapter brings you up to speed on the basics of migrating an on-premises contact center to the cloud. We start by disclosing common pros and cons along with the typical challenges of migrating an on-premises contact center to the cloud. Then we lead you through the process of laying the groundwork for a successful migration and take you step-by-step through the migration process.

Don't worry — we don't dig into the nitty-gritty of executing a successful cloud migration just yet! The purpose of this chapter is to establish a conceptual understanding of what's involved and what you can look forward to when you've reached the cloud.

## Weighing the Pros and Cons of Contact Center as a Service

When you start to consider whether to migrate your contact center to the cloud, the choice you face is usually clear: Do you want to keep your on-premises contact center, transition to CCaaS, or select a hybrid solution (a combination of the two)? Nobody can make that decision for you. But what we can do is provide some information and insight that your organization's stakeholders can use to make a well-informed choice about what's best based on your specific business and customer needs. In this section, we present the pros and cons of CCaaS in comparison to on-premises solutions and reveal the common challenges you're likely to encounter when you decide to move your contact center to the cloud, in whole or in part.



REMEMBER

Traditional contact centers are telephony-based, and they've worked very well for a long time. Cloud-based contact centers are a different animal altogether. Many CCaaS offerings include an assortment of channels, technologies, applications, and integrations, along with additional perks, such as built-in productivity tools and artificial intelligence (AI) integration.

### Benefits of CCaaS

CCaaS offers numerous advantages over its traditional on-premises counterpart:

- » **Fast, virtually unlimited scalability:** Whether you run a contact center with seasonal shifts in volume, or you simply need to expand your business and manage multiple sites more efficiently, it's as easy as purchasing more bandwidth and cloud storage. You don't need to add more physical infrastructure to scale your business.
- » **Remote access:** Whether your workforce is onsite, remote, or some combination of the two doesn't matter, because

everyone's connected. The cloud isn't constrained to any physical location.

- » **Seamless, omnichannel customer experience (CX):** Modern contact centers typically blend voice calls, live chat, email, and chatbots across various devices, mixing delayed and real-time engagement. It often starts with digital connections driven by AI and moves toward phone calls that are handled by human agents.
- » **Faster, more efficient updates:** With on-premises technology, every vendor update requires your IT team to deploy and test. CCaaS shifts the burden to the vendor, providing you with continuous innovation and rapid deployment, especially when combined with automated testing.
- » **Access to more powerful analytics and reporting tools:** Whether you need insight into agent performance, average downtime, day-by-day call volume, or specific customer details, CCaaS provides access to robust analytics and reporting tools to get the job done. With a full view of your contact center, you can drill down on efficiency while dialing up the CX.
- » **Lower costs:** With less reliance on physical infrastructure, more flexibility around remote labor, and a more efficient process for system updates and maintenance, contact centers that rely on the cloud tend to spend less money in the long run.



REMEMBER

For newer or smaller organizations that may not have the budget to build their own on-premises contact center or upgrade their existing center, CCaaS provides a low cost of entry that can grow with the organization. Note that with CCaaS, you convert capital expenditures (CapEx) into operational expenses (OpEx), which can improve your organization's ability to manage its IT budget.

- » **Improved reliability:** Cloud-based contact centers live on a distributed network, so if one server goes down, workloads can shift to another server. With an on-premises contact center, any hardware or software failures are likely to cause latency or even service outages.



TIP

When weighing the benefits of migrating, consider the people who will use the contact center and how changing the way you deliver CX will impact your business and your customers.

## Potential downsides of CCaaS

CCaaS does have some potential disadvantages when compared to on-premises contact centers, including the following:

- » **Dependence on internet connectivity:** Any disruptions or slowdowns in internet connectivity can hamper the functioning of the contact center. Also, depending on the locations of data centers and end users, there could be latency issues affecting real-time communications.
- » **Data security concerns:** Storing sensitive data off-premises can increase risks. Many providers implement strong security measures, but no system is impervious.
- » **Integration challenges:** Many CCaaS solutions can integrate with common customer relationship management (CRM) and enterprise resource planning (ERP) systems, but integrating with bespoke or less popular software applications can be challenging.
- » **Additional costs:** The upfront costs are typically lower for CCaaS compared to on-premises solutions, but costs associated with additional features, upgrades, data storage, or increased usage can offset those savings.
- » **Quality of service:** Relying on third-party vendors for essential operations makes you dependent on their service quality. Any downtime or issues from the vendor's side can affect your operations.
- » **Vendor lock-in:** Some CCaaS providers may use proprietary technology, making it challenging to switch providers or revert to an on-premises solution without significant time and cost implications.
- » **Loss of control:** With on-premises solutions, businesses have full control over their infrastructure and software. Using a third-party CCaaS provider requires relinquishing some of that control.

## Migration challenges

Migrating a contact center to the cloud is a major undertaking, and any attempt to rush into it can result in a costly catastrophe.

Project delays and cost overruns are common. But why is it so challenging? Consider the following factors:

- » **The complexity of the legacy contact center:** Many legacy systems have been built over years or even decades and include custom or unique integrations and third-party technologies and tools. Tracking down the people who built the existing system and obtaining from them the proprietary knowledge needed for a smooth transition can be a tremendous obstacle.
- » **Pressure to migrate sooner than planned:** Pressure may come from corporate/executives, competitors, or even the providers of your existing contact center infrastructure or software if they make the decision to no longer support the platform you're operating on.
- » **Pressure to add new capabilities:** Another source of pressure is the demand to introduce or improve CX technology and integrate conversational AI, predictive routing, and other advanced capabilities into the contact center.
- » **Budgetary constraints:** Although cloud migration typically gives you more bang for your buck, estimating the total cost of a cloud migration can be difficult, and budget overruns remain common. You need to consider not only the cost of the cloud platform and CCaaS provider, but also costs related to migrating existing data to the cloud, modifying existing applications, training users, securing data, and more.
- » **Inconsistent or conflicting organizational priorities:** Disagreements or confusion over organizational priorities can lead to delays or a lack of resources for executing a seamless cloud migration on schedule.
- » **Lack of skills and resources:** Not all skill sets traditionally associated with on-premises contact centers transfer seamlessly to the world of CCaaS. So, not only do you need to handle the complexity of the migration itself, but you may also need to deal with retraining or restaffing before, during, and after the migration.
- » **The high risk and high cost of mistakes:** CX failures resulting from human error, new technologies and integrations, antiquated testing and monitoring practices, and manual processes can negatively impact revenue.

# Laying the Groundwork for a Successful Cloud Migration

Organizations that prioritize CX face a daunting task of migrating their complex customer journeys and interaction channels to the cloud. To set the stage for a smooth and successful cloud migration, follow a process designed to reduce defects and unplanned work. Such a process should include the following steps or stages:

## 1. Choose a CCaaS provider.

Your CCaaS provider will serve as a crucial partner in transitioning your contact center from point A to point B, providing you with the information, tools, guidance, and connections to other vendors required for a successful migration.

## 2. Assess the legacy environment.

This step involves mapping customer journeys and establishing baselines and benchmarks for successful customer interactions. It's all about getting a clear picture of what your overall CX looks like today, so you know what to move and/or improve as you transition to the cloud.

## 3. Envision your modern contact center.

Take the opportunity afforded by migration to update and optimize your customer journeys and leverage new communication channels and new technologies such as AI.

## 4. Choose a migration strategy.

Decide whether you're going to follow a strategy of *lift and shift* (replicating your on-premises contact center in the cloud), a full-scale transformation to change how you deliver CX entirely, or something in between.

Organizations rarely take a pure lift-and-shift approach. Even those that do tend to still follow the same steps involved in a full-scale transformation to accommodate changes in platforms and technologies.

## 5. Develop a detailed project plan.

Your plan should include a budget, a task list, the names of those responsible for completing each task, timelines, a communication plan, and onboarding and training plans.



## **6. Ensure comprehensive testing is in place.**

Testing (both automated and manual) ensures that you know how the system performed before, during, and after all key steps in migration.

## **7. Build a skilled and experienced migration team.**

Focus on any gaps in skills and areas of expertise. The gaps can be filled by contracting third parties, such as systems integrators. Your cloud provider may be able to help you identify specific gaps that need to be filled.

In Chapter 2, we take a deeper dive into the steps you should take to prepare for a successful cloud migration.

# Stepping through the Cloud Migration Process

Migrating to the cloud can seem like an overwhelming process at first glance, but if you break it down into steps or stages, it becomes much more manageable. Migrating a contact center to the cloud is generally a five-step process:

- 1. Audit and document your legacy contact center.**
- 2. Design your new contact center and plan your migration.**
- 3. Test your existing system and build and test your new contact center in the cloud.**
- 4. Release and deploy your CX to your new CCaaS platform.**
- 5. Maintain your contact center and enhance the CX.**

In the following sections, we cover each of these steps in slightly more detail. In Chapters 2 and 3, we go into much greater depth on each.

## **Step 1: Audit and document**

Unless you're starting entirely from scratch, you need to audit and document your legacy contact center. You need to have comprehensive knowledge of the technology infrastructure and applications you have in place and understand the existing CX, any bottlenecks, and any gaps in your existing contact center.



TIP

Your audit and documentation should include the following:

- » Maps of customer journeys across all channels
- » Existing technologies
- » Existing integrations
- » An assessment of the current CX and how well the contact center performs in terms of service hours of all toll-free numbers (TFNs), capacity limits (with an emphasis on contacts per second), and other performance metrics

## Step 2: Design and plan

Whether you're planning a full-scale transformation, taking a lift-and-shift approach, or doing something in between, plan to spend considerable time redesigning your contact center and customer journey flows. Architectural changes inherent in the migration typically require significant redesign, which is one reason why few companies do a pure lift and shift.



TIP

Always focus on what Day 1 will look like when planning and designing. In other words, start with the end in mind — your vision of the ideal CX. Then, think about what's needed to bring that vision to fruition.



REMEMBER

You may not need to migrate everything or do it all at once. Some applications or services may need to be retired; others may be kept on-premises; and some may be scheduled for a later migration. There may also be a period when both your legacy and cloud contact centers coexist until you're ready to phase out your old system.

## Step 3: Build and test

Building and testing your CX is a process that varies depending on the size and complexity of the CCaaS. Here's an overview of what building and testing a cloud contact center involves:

### 1. Configure the interactive voice response (IVR).

Set up menu prompts that guide customers to the correct department or solution and implement fallback options for when customers select the wrong prompt or don't make a selection. This should always include the option to speak with a live agent.

## **2. Design chatbot interactions.**

Develop scripts or decision trees that govern chatbot responses to customer queries and transfer the customer to a live agent when it can't resolve a query. Integrate the bot with backend systems so it can retrieve and display relevant information.

## **3. Integrate third-party solutions.**

Connect the CCaaS platform with essential systems, such as CRM, ticketing solutions, or analytics tools. Ensure smooth, real-time data flows so agents always have the latest customer information.

## **4. Design and implement a unified agent interface.**

The agent interface must provide access to all necessary tools and data without the need to switch between applications. Through the interface, agents should be able to see a customer's entire interaction history, irrespective of the communication channels used.

## **5. Integrate monitoring and analytics.**

Use tools built into the CCaaS platform or from third-party providers to monitor customer interactions. Configure dashboards to display real-time key performance indicators (KPIs).

## **6. Automate testing to accelerate development cycles.**

Test continuously throughout the development cycle and use the test results to inform each iteration. Automated, design-driven functional and regression testing shortens the feedback between quality assurance (QA) and development, accelerating the development process.

Turn to Chapter 3 for more about building and continuously improving your contact center in the cloud.

## **Step 4: Release and deploy**

When you're ready to go live with your new cloud-based contact center, follow the same rigor during the release-and-deploy phase as you've applied during the build-and-test phase. Consider some prerequisites, such as conducting a final performance test run and even an orchestrated end-to-end test to ensure that your contact center will function like a well-oiled machine upon deployment.



REMEMBER

When the time comes to release and deploy, you have two options: phased implementation (one business unit at a time) or big bang (everything all at once). Phased implementation is generally considered to be best practice. This is because it gives your organization time to learn and adapt to the new system incrementally, tailor solutions to specific business units, and manage risks on a smaller scale.

## Step 5: Maintain and enhance

When you get to this step, give yourself a pat on the back — you've successfully completed your cloud migration! But you still have some work ahead of you. Development is a cyclical process that requires ongoing monitoring and testing to drive innovation and continuous improvement.



TIP

As the system matures and you bring new channels and features online, expand the frequency and volume of your testing to ensure that all system integrations and technologies (old and new) work as expected. Ongoing testing is also crucial for identifying evolving issues in the CX and finding ways to improve or enhance it.

#### IN THIS CHAPTER

- » Answering five key questions before migrating to the cloud
- » Understanding your current contact center
- » Envisioning your future contact center
- » Performing the key tests
- » Putting the pieces in place for a smooth migration

# Chapter 2

## Preparing for Migration

According to a survey by McKinsey & Company, between 2021 and 2024, organizations are expected to waste \$100 billion on inefficient cloud migration, with an average budget overage of 14 percent. Three-quarters of organizations go over budget, and 38 percent fall behind by at least a quarter in completing their migration.

For the most part, these inefficiencies can be attributed to poor planning. In this chapter, we provide the guidance and insight you need to complete your contact center cloud migration on schedule and on budget and ensure that your new cloud contact center meets or exceeds your expectations.

# Starting with the Right Questions

For contact centers prepping for a move to the cloud, part of the planning process involves self-examination. Here are five key questions that will help you chart a successful course and get all key stakeholders on the same page:

- » **What are we moving to the cloud?** Especially at the start, cloud migration doesn't need to include every aspect of the contact center. You can start with a hybrid cloud/on-premises setup or plan to move individual business units one at a time. Examine your core systems, management systems, and service applications to determine the most important candidates for migration.
- » **Is this a replication or a redesign?** If you're happy with your existing customer experience (CX), you may simply want to replicate it in the cloud for a more efficient, flexible, and scalable operation. However, migration is also a great opportunity to evaluate and improve the CX, or to do things like introduce new service channels or customer feedback management.
- » **How will we achieve feature parity?** Your legacy system has probably been tailored to the needs of your business, whereas cloud options are designed for a broader user base. You can use application programming interfaces (APIs) to develop custom applications or source the applications you need from other cloud providers. Ultimately, you should be able to achieve the same features within a more flexible framework.
- » **What new skills will our teams need to have?** Although the cloud unlocks more omnichannel potential for your contact center, it also demands more skills from your agents and IT personnel. Text and voice communication are vastly different, and they require different skill sets. Plus, as cloud and artificial intelligence (AI) technologies make more self-service options available for customers, agents need to be prepared to handle the more complex issues that get passed from these self-service channels and arrive at their desks.

- » **How will this change our budgeting process?** In moving from an on-premises solution to a cloud solution, you're also switching expense models. In place of long-term capital expenditures, you'll pay on a subscription basis, ideally only for the services you need at a given time as your business requirements ebb and flow. This should present a net gain, but it will require an adjustment in how you plan and budget for these expenses.

## Choosing a Contact Center as a Service Provider

One of the most critical decisions you face when migrating your legacy contact center to the cloud is your choice of Contact Center as a Service (CCaaS) provider. Be sure to choose a provider that meets your technology requirements and provides the guidance and support necessary for a successful transition.



TIP

When you're in the market for a CCaaS provider, use the following criteria to compare your options:

- » Analytics and reporting
- » Automation to facilitate migration, development, testing, and monitoring
- » Compatibility and integration potential with your current infrastructure
- » Costs
- » Integration and API flexibility
- » Scalability
- » Security
- » Technologies and functionalities, such as automatic call distribution (ACD), interactive voice response (IVR), conversational AI, and chatbots
- » Training and future support

# Auditing and Documenting Your Existing Contact Center

Auditing and documenting your existing contact center are the critical first steps toward a successful migration. They provide insights into the CX and customer journeys, highlight gaps and inefficiencies, and establish a starting point from which to chart a new course for your future CX.

## Mapping existing customer journeys

When starting any migration, documenting the baseline of customer journeys and communication channels is critical. Without a baseline, you have no way of knowing whether problems found during or after migration are existing problems or new ones. Unfortunately, however, this is one of the areas where many organizations fail because they don't keep their documentation up to date.

Creating a baseline manually is resource-intensive, time-consuming, and prone to errors and omissions. For IVR systems, it requires placing calls manually, traversing every possible path, and covering every customer journey. Many companies have large IVRs with thousands of paths. Manually documenting all these IVRs could require teams of people dedicated solely to this task, working for weeks or even months.



TIP

Instead of relying on manual mapping to discover your existing customer pathways, use an automated testing solution that includes discovery mapping capabilities. In most cases, whole IVRs can be documented in days, with many completed in just a few hours or even minutes. The resulting documentation can then be used to automate the process of creating test scripts. You can also document the baseline and perform functional and regression testing at the same time.

## Setting benchmarks

Benchmarks are essential for evaluating the performance of your contact center and the quality of your CX and will help you to ensure that your new cloud contact center is at least as good as, and ideally far better than, the on-premises solution it's replacing.



Chances are, you already have detailed benchmarks and need to focus on communicating them to everyone on your migration team. If you don't, then be sure to document benchmarks for all contact center metrics you want to track. Common contact center metrics include

- » Abandonment rate
- » Agent utilization rate
- » Average call duration
- » Average handle time (AHT)
- » Call attempts per second (CAPS)
- » Cost per call (CPC)
- » First call resolution (FCR)
- » First response time (FRT)
- » Maximum capacity or concurrency
- » Percentage of calls blocked
- » Toll-free number (TFN) service hours

You should also document metrics for measuring the CX — including customer satisfaction (CSAT) score, customer effort score (CES), and net promoter score (NPS) — and consider developing additional metrics to determine how well the new platform helps your organization achieve the customer outcomes it desires.

## Cataloging existing channels, technologies, and integrations

As part of the process of documenting your existing contact center, compile a comprehensive list of what you already have in place, including the following:

- » Your current contact center infrastructure and service level agreements (SLAs), so you can schedule your migration around them
- » Channels you're already using (for example voice, email, chat, Short Message Service [SMS], and social media)
- » Systems you have in place, such as IVR and call queue
- » Any essential integrations, such as analytics or reporting, configuration management, ticketing and support, and customer relationship management (CRM) tools

## Obtaining stakeholder input

Although you can leverage automation to streamline the process of auditing and documenting your contact center, be sure to solicit input from the people who use and rely on your contact center. Stakeholders, including customers and contact center agents, can provide unique perspectives on how well your current contact center is performing and on the quality of the CX. These people are often the ones most responsible for driving contact center innovation. Therefore, you should work to obtain stakeholder input throughout the migration process.



REMEMBER

Although contact center design and development tend to focus on the CX, don't overlook the agent experience. Seek input from both customers and agents to develop real insights into what your existing contact center does well and how it can be improved.

## Designing Your New Cloud Contact Center

Discovering existing customer journeys is only the beginning. Your future CX shouldn't be constrained by the infrastructure and applications of your existing on-premises contact center. If it is, you're not taking full advantage of what modern cloud technologies have to offer. Cloud migration gives you the opportunity to build a new, future-proof contact center.

### Designing new customer journeys

One of the important benefits of moving to the cloud is having the flexibility to update and optimize customer journeys to fit this new, nimbler environment. To design new customer journeys and redesign existing ones, take the following steps:

- » Collaborate with diverse teams to identify and understand customer behaviors and challenges.
- » Analyze interaction data, customer feedback, and post-interaction surveys to pinpoint customer segments and craft detailed personas that reflect their unique needs and preferences.

- » Organize cross-functional workshops, leveraging existing journey blueprints to map potential new journeys, detailing interactions and expected outcomes at each touchpoint.



REMEMBER

Many modern customer journeys start in self-service and end in agent-assisted service. In the cloud, you can leverage new technologies, such as AI to route customers more efficiently and achieve higher levels of workforce optimization across all your customer service teams.

## Adding channels

The cloud provides access to the full menu of communication channels, including voice, email, messages, live chat, chatbots, social media, and even messenger apps. If your choices were limited in your on-premises solution, consider including additional channels in your cloud contact center.

## Expanding functionality

While you're at it, consider adding technologies and integrations to your contact center to improve efficiency and enhance the CX, such as AI, global queuing, call recording, smart (predictive) routing, analytics/reporting with real-time data visibility, and CRM integration.

# Planning Your Contact Center Migration

All too often, as a cloud migration gets rolling, the contingencies, nuances, and complexities overwhelm even the best migration teams. In the absence of careful planning, unanticipated issues arise, increasing risks of configuration issues, interoperability problems, and privacy and security concerns — all resulting in costly delays.

A project or migration plan serves as a road map for change. It identifies the starting point, the ultimate destination, and the milestones of progress required along the way. It serves as a tool for clarifying resource requirements, ensures clear communication across the organization, and provides a lens for monitoring progress.

## Choosing a migration strategy

Start planning your migration by deciding what you're going to migrate to the cloud, why you're moving it (the business objectives), and how. Migration strategies generally take the form of one of the following:

- » **Lift and shift:** You transition everything from your on-premises contact center to the cloud.
- » **Lift and shift plus:** You transition your on-premises contact center to the cloud and add channels and functionality to enhance it.
- » **Full-scale transformation:** You start fresh — reimagining the CX and building everything in the cloud from scratch.
- » **Agents first:** You start by migrating your customer service agent connectivity to the cloud, keeping self-service and routing in place before making any customer-impacting changes.

## Integrating testing into your contact center

Testing provides a window through which you gain objective insight into how your contact center is performing, and into your customer and agent experiences. Testing should be baked into your contact center migration so it's automated, continuous, and comprehensive. Testing should always be conducted before migration to assess your legacy system's performance and then during and after migration to identify problems and areas for improvement.



TIP

Testing should include the following:

- » **A/B testing:** Enables you to compare versions of a particular application or feature to determine which of them performs better
- » **Disaster recovery (DR) testing:** Evaluates the ability of the contact center to continue to operate or to recover function when the system or one of its components fails
- » **End-to-end testing, including computer telephony integration (CTI) and agent validation testing:** Ensures that the contact center functions properly as a whole and delivers the desired results

- » **Functional testing:** Evaluates a single application and its targeted function in the scope of an application to ensure that it performs according to the specified requirements and meets the intended purpose
- » **Incident testing:** Identifies and documents issues, such as service interruptions and errors or malfunctions that negatively impact the CX
- » **IVR testing:** Ensures that the contact center correctly routes calls, responds to voice prompts, and delivers a seamless CX
- » **Load and performance testing, including high availability (HA) testing:** Provides appropriate validation that an environment can handle traffic volume
- » **Regression testing:** Ensures that new features don't negatively impact a system's existing operability
- » **Systems and integration testing:** Identifies any problems with dependencies
- » **Usability testing:** Evaluates the user interface (UI) and user experience (UX) to ensure that the system is intuitive and user-friendly
- » **User acceptance testing (UAT):** Ensures that the contact center meets the needs and expectations of the people who rely on it, including agents, supervisors, managers, and customers



REMEMBER

Most testing can and should be automated for efficiency and thoroughness, but automated testing is not a substitute for manual testing. For optimal results, both should be performed in tandem. Here's how manual and automated testing work and the pros and cons of each:

- » **Manual testing:** Manual testing relies on human testers who interact with the CCaaS system as end users would. This approach is invaluable for tasks that require a human touch, such as usability testing and UAT.

Manual testing is time-consuming, susceptible to human error, and limited in scalability for repetitive tasks, but it's great for detecting usability issues and subjective concerns, catching unexpected and unique scenarios, mimicking real-world usage, and allowing for real user feedback.

- » **Automated testing:** Automated testing is particularly useful for conducting IVR testing, load testing, and regression testing, as well as for testing routing logic.

Advantages of automated testing include speed and repeatability, scalability for extensive testing, and precision and consistency. Potential drawbacks are that it requires initial setup and ongoing maintenance, it can't identify usability or subjective issues, and it may miss unique or unexpected scenarios.

## Building your migration team

If you have a foolproof process and knowledgeable, well-trained people, you can accomplish just about anything, and this holds true for a contact center cloud migration. Be sure your migration team includes people who can fill the following roles:

- » **Cloud infrastructure and CCaaS providers:** Facilitate the migration and transformation of the contact center to the cloud
- » **Cloud infrastructure specialist:** Evaluates on-premises architecture and identifies necessary changes for cloud migration
- » **Cloud solution architect:** Designs new contact center architecture
- » **Contact center operations expert:** Evaluates the performance and functionality of the new cloud contact center
- » **CX developer:** Maps existing customer journeys, designs new journeys, and builds them in the new CCaaS solution
- » **Data management specialist:** Ensures the secure transfer of customer and organization data to the cloud
- » **Financial analyst:** Assesses the cost implications of the cloud migration, tracks expenses, and identifies cost-saving opportunities
- » **Network specialist:** Designs and configures the network to optimize performance and reliability
- » **Project manager:** Creates timelines, sets goals, manages resources, and keeps the project on track
- » **Quality assurance (QA)/testing team:** Tests the existing and new contact centers and identifies and resolves issues

- » **Security specialist:** Assesses potential risks, implements security measures, and ensures compliance with data privacy regulations
- » **Telecom operations specialist:** Provides insights into current infrastructure and future requirements
- » **Training specialist:** Develops training and support for contact center agents and staff
- » **Representatives from applicable business units/ departments:** Provide insight, feedback, and support



TIP

Collaborate with your providers when building your team and assigning responsibilities. They may fill some of these roles for you or be able to provide competencies that you lack internally.

## Documenting your migration plan

The product of all the preparation you've done leading up to your cloud migration is a detailed written plan. Your plan should always include the following details:

- » Architectures and process drawings, including customer journey maps
- » Benchmarks and targets
- » Budget
- » Key milestones, goals, and objectives
- » Names of migration team members, including any third parties (individuals or partners), and their responsibilities
- » Task list
- » Thorough information about your chosen CCaaS provider



TIP

To be sure you're not overlooking anything, download the Contact Center Cloud Migration Checklist at <https://cyara.com/cloud-migration-checklist-pdf>.

## IN THIS CHAPTER

- » Executing your cloud migration plan
- » Testing throughout the migration process and beyond
- » Releasing your new contact center in the cloud
- » Continuously improving contact center operations

# Chapter **3**

# Building and Continuously Improving Your Contact Center

The time has come to put your contact center cloud migration plan into action. Execution involves building your customer experience (CX) in your new cloud contact center, testing it, deploying and releasing it, monitoring it, and tweaking it through the migration process and beyond for continuous improvement.

In this chapter, we lead you through the overall process, which looks like this:

1. **Build.**
2. **Test.**
3. **Release.**
4. **Monitor and improve.**





REMEMBER

As we discuss in Chapter 1, phased implementation — building, testing, and releasing contact center functionality one business unit at a time — is usually the best approach.

## Building Your Cloud Contact Center

The steps for building a contact center in the cloud are complex and can vary considerably depending on numerous factors, including differences in technologies employed, functionalities, the chosen Contact Center as a Service (CCaaS), and desired channels and integrations. Generally, though, the process will follow these stages:

1. **Configure the interactive voice response (IVR) system.**
2. **Design chatbot interactions.**
3. **Implement conversational artificial intelligence (AI).**
4. **Integrate third-party software and solutions.**
5. **Design a unified agent desktop.**
6. **Set up monitoring and analytics.**
7. **Implement workflows and processes.**
8. **Train contact center agents on the new system.**

These steps give you a bird's-eye view of what's involved in building a contact center in the cloud. In the following sections, we provide additional guidance for each step.

## ADOPTING MODERN DEVELOPMENT METHODOLOGIES

Your cloud and CCaaS providers take the technical infrastructure elements and concerns off the table, so you can focus on designing and improving the CX. As you're mapping/building customer journeys into your CCaaS, employ modern product development methodologies, such as Agile, DevOps, and continuous integration/continuous delivery (CI/CD).

Agile and DevOps focus on collaborating in small, cross-functional teams to quickly develop, deploy, and continuously improve products, services, or solutions. The purpose of CI/CD is to streamline delivery by automating the integration of code changes from multiple developers into a single codebase.

## Configuring the interactive voice response system

To configure the IVR system, take the following steps:

- 1. Set up menu prompts that guide customers to the correct department or solution.**

Ensure that the hierarchy of menu options makes sense to customers and addresses the most common needs first to expedite delivery of answers and solutions.
- 2. Implement capabilities for dynamic IVR options based on caller ID or other information.**

For example, a dynamic IVR might prompt a customer to indicate whether they're contacting an agent about a recent order.
- 3. Implement timeout and fallback options for when customers don't make a selection or they select a wrong prompt.**

Timeout options can offer menu repetition, while fallback options can route the call to a live agent.
- 4. Establish an escalation path.**

Offer customers a path to have their concern escalated to a human agent (for example, by pressing a certain number or saying, "Agent").

## Designing chatbot interactions

To ensure smooth and efficient chatbot-customer interactions, take the following steps:

- 1. Develop scripts or decision trees that govern chatbot responses to customer queries.**

2. **Integrate the bot with backend systems so it can retrieve and display relevant information.**
3. **Utilize natural language processing (NLP) to enable bots to understand and process queries more effectively, even if they're not clearly expressed.**
4. **Include fallback scenarios for when the bot can't understand a query or the query is beyond the bot's capabilities.**
5. **Implement context preservation during interactions, so customers don't have to repeat information and contextual information can be passed to a human agent if necessary.**

## Implementing conversational artificial intelligence

Successfully implementing conversational AI into a contact center is a complex process:

1. **Define the scope and objectives of conversational AI.**

Scope includes channels, use cases (lead generation, customer support, reengagement), integrations, and so on. Objectives may include improving customer service, reducing response times, or increasing efficiency.
2. **Choose a conversational AI platform or solution that meets your needs.**

Evaluate your options based on features, scalability, ease of integration, customization capabilities, and cost.
3. **Gather the data necessary to design and train your conversational AI model.**

Data should include records and transcripts of a diverse range of customer interactions.
4. **Design conversational flows with the help of user experience (UX)/user interface (UI) designers.**

Map dialogues, intents, entities, and responses to align with your business goals and provide a seamless CX.
5. **Train and test the AI model using the data you collected and the anticipated conversational flows.**

Iterate and refine the model continuously based on user feedback.

## **6. Integrate the conversational AI solution with your existing contact center systems, such as customer relationship management (CRM), ticketing, or knowledge bases.**

Ensure smooth data flow and integration to provide agents with relevant information during interactions.

## **Integrating other third-party solutions**

Part of building a contact center in the cloud involves connecting it with essential systems, such as CRM, ticketing solutions, or analytics tools:

- » Use application programming interfaces (APIs) to integrate the desired third-party solutions.
- » Implement real-time or near-real-time data syncing to ensure that all systems reflect the most recent customer data.
- » Plan for scenarios in which integrations may fail or return errors and implement mechanisms for responding to these scenarios.

## **Designing a unified agent desktop**

The agent interface must provide access to all necessary tools and data without the need to switch between applications. Through the interface, agents should be able to see a customer's entire interaction history, regardless of the communication channels used.

## **Setting up monitoring and analytics**

Monitoring and analytics drive and facilitate continuous improvement. To set up monitoring and analytics, take the following steps:

- 1. Use tools built into the CCaaS platform or from third-party providers to monitor customer interactions.**
- 2. Configure dashboards to display real-time key performance indicators (KPIs) so supervisors and agents can make adjustments if required.**

## Implementing workflows and processes

Implementing workflows and processes involves the following:

- » Automating repetitive processes where possible, such as data entry or handling common customer queries.
- » Clearly defining and implementing workflows, ensuring that each step in the customer journey is handled systematically and consistently.
- » Preparing thorough documentation detailing all implemented processes and workflows. This documentation becomes a vital resource for training and future modifications.

## Training contact center agents on the new system

Training should include call handling, using the CRM system, navigating the interface, and handling different customer scenarios.



TIP

Migrating agents to the new CCaaS platform before going live with customers is often the best approach. Many perceived issues in cloud migrations are magnified by agent concerns. It also allows issues to be rectified early before they can impact customers.

## Testing Your New Contact Center

Testing is essential throughout the building of your contact center and beyond to ensure that it's performing well and meeting or exceeding expectations. In this section, we describe some of the many tests available for analyzing your contact center performance and functionality.



TIP

You should test early and often when issues are easier to identify and resolve. This approach accelerates your cloud migration and prevents defects from making their way into production. Putting off testing until later in the process allows problems to grow in number and complexity. We strongly recommend close collaboration between your CX developers and testers. As your developers are designing their code, your testers should be designing and conducting their tests in parallel.

## Performing functional and regression testing



TIP

Functional and regression testing are essential for ensuring that your contact center is meeting its functional requirements and that any changes being made aren't breaking the system:

- » **Functional testing:** Validates that a system or application is meeting its functional requirements
- » **Regression testing:** Ensures that recent code changes or enhancements have not adversely affected existing functionality or performance

Agile development practices may integrate the two testing types into a continuous testing methodology that increases coverage with each development cycle.



WARNING

Although important, functional and regression testing can make incremental changes more challenging and increase development time and costs. Adopting the right CCaaS platform, leveraging automation, and following best practices in automation can streamline the process and help control costs while improving CX quality.

## Performing agent experience testing

The goal of agent experience (AX) testing is to ensure that the customer-to-agent experience is flawless, which means ensuring that the agent's desktop experience proceeds without a glitch — from answering calls to placing calls on hold, looking up customer account details, getting information from a CRM or other applications, or performing other tasks to resolve increasingly complex customer inquiries.



TIP

AX testing should include the following:

- » Checking routing logic to ensure that interactions are routed to the correct agent with the skills to address the customer's concerns
- » Checking computer telephony integration (CTI) to ensure that it's operating properly, and that customer interaction data is complete and accessible by the agent at the right time, so customers don't have to repeat themselves

## Conducting performance tests

CCaaS providers ensure infrastructure stability, eliminating many of the performance issues of the past. However, integration of third-party solutions, legacy infrastructure, connectivity, and configuration have introduced new challenges.



TIP

To overcome these challenges, you can employ various types of performance testing, including the following:

- » **Business continuity testing:** Assesses the organization's ability to keep the contact center up and running or restore its operation in the face of potential threats and disasters. It includes disaster recovery (DR) testing and high availability (HA) testing.
- » **End-to-end (E2E) testing:** Simulates the CX, ensuring that all systems, applications, and integrations function properly alone and together to deliver the desired outcomes for customers and agents.
- » **Integration testing:** Evaluates parts of the contact center individually and in combination with other components of the CX.
- » **Load testing:** Simulates a real-world load to determine how the contact center behaves under normal and peak load conditions and identify any bottlenecks.
- » **Scalability testing:** Evaluates an application's ability to scale up or down the number of user requests or other performance vectors. Scalability testing is usually performed when individual applications are integrated into the CX.
- » **Soak testing:** Also referred to as endurance testing, soak testing evaluates how the system behaves under a typical production load with sustained use. It's useful in identifying performance issues that may develop over time, such as problems resulting from memory leaks.
- » **Stress testing:** Subjects applications to shorter, higher-frequency interactions or extreme interaction concurrency to identify the breaking point of the application or even the contact center as a whole and gain insights into how the system recovers and maintains stability.

# Going Live: Releasing Your Contact Center

Awesome! Your new contact center in the cloud passes all the tests and meets or exceeds the needs and expectations of your customers and stakeholders. It's showtime! You're now ready to proceed to *release* your contact center — make it available to customers, agents, and other end users.



REMEMBER

You'll likely be releasing your contact center in phases, one business unit at a time. If you're doing this type of phased implementation, you'll have several releases, which may be weeks or even months apart.



TIP

To ensure a smooth release with minimal risk of business interruptions, take the following steps:

- 1. Develop a detailed release plan.**

Include a timeline, communication strategy, and marketing materials, and provide any necessary training or support for employees.

- 2. Conduct a soft release.**

Make your contact center available to a limited number of end users so you can identify potential issues and gather feedback.

- 3. Address issues identified during the soft release.**

Use what you learned to make necessary repairs and improvements to the contact center.

- 4. Conduct a full release.**

Make your cloud contact center available to all customers, agents, and other end users.



WARNING

To avoid costly business disruptions, don't retire your legacy contact center until you're sure that your cloud contact center is operating flawlessly. By doing so, you still have a rollback option if you encounter any significant issues.



# Monitoring and Fine-Tuning for Continuous Improvement

Your CCaaS must evolve in step with your business, your customers' ever-changing needs and expectations, and improvements made by your competitors. Additionally, you'll eventually need to modify existing customer journeys, create new ones, add communication channels, integrate software solutions, add agents, and make other changes. But with every change you make, ask the question, "How is this change impacting my customers?"

For example, suppose you added a half-dozen new agents through business process outsourcing (BPO) who are working remotely from their homes. How do you know if the quality of the connection on the last mile to their headsets is working consistently? Only ongoing monitoring and testing can deliver the real insights you need.

## Monitoring customer journeys

Monitoring customer journeys is paramount to understanding and optimizing the CX. By closely observing these journeys, you can identify pain points, ensure seamless interactions, and continually refine touchpoints to meet customer expectations.



TIP

To monitor customer journeys effectively, take a holistic approach that employs the following two fundamental types of testing:

- » **Black-box testing:** Evaluates system functionality based on its inputs and outputs from a user's perspective
- » **White-box testing:** Delves into the system's internal structures, ensuring that the underlying mechanisms function flawlessly

Using these two testing methods in tandem creates a synergy that drives the development of a quality CX when built on the foundation of a resilient and efficient infrastructure.



TIP

Another way to take a holistic approach to monitoring customer journeys is to use CX monitoring to add context and depth to system-level monitoring:

- » **System-level monitoring:** Focuses primarily on the technical performance and operational aspects of call center operations, such as network performance, server uptime, software functionality, and other technical metrics.
- » **CX monitoring:** Shifts the focus from technical metrics to customer-centric metrics. It measures how satisfied customers are with their interactions, the resolution of their issues, and the overall experience. It often involves collecting feedback from customers through post-call surveys, email follow-ups, or other methods. This feedback provides valuable insights into the customers' perception of the service, allowing for more targeted improvements.

## Optimizing the customer experience

Monitoring customer journeys provides you with the information and insights necessary to fine-tune those journeys. Fine-tuning is an iterative process like that of CI/CD practices which are characteristic of Agile and DevOps methodologies. Just as CI/CD emphasizes frequent code integrations and consistent deliveries to adapt swiftly to changing user requirements, refining customer journeys requires regular check-ins, updates, and deployments to address real-world feedback.

By applying Agile best practices to CX development, you can adopt a flexible, customer-centric approach, allowing you to adapt rapidly to feedback and changing market dynamics. Taking an Agile approach also delivers the following benefits:

- » Enhances customer satisfaction and loyalty
- » Improves operational efficiency
- » Decreases resolution time
- » Cultivates a culture of proactive responsiveness within the organization
- » Ensures that the business remains competitive and relevant in an ever-evolving marketplace

## Monitoring global numbers

Additionally, for contact centers serving customers around the world, continuous global number monitoring is also essential.

This is testing and monitoring from your customer's perspective, to ensure they can reach you and communicate clearly and effectively, no matter where they're calling from.

Your numbers will perform differently when generated from different networks and dependent on local telecom carriers, and without in-country number testing you would otherwise never know how well they're performing or if they're even operational. Global number monitoring tests your numbers locally and proactively, ensuring that all your customers can easily reach and communicate with you. Outbound number testing can also be used to ensure that you can always effectively connect with them.

During this maintenance and tuning phase, be sure to have a practice in place of testing your contact center systems after each change to ensure updates haven't introduced issues and have a plan at the ready for rolling back to recent working versions in the event of any mishaps.



**REMEMBER**

For monitoring to be effective, set it up to start running at the beginning of your cloud migration journey. Be sure it covers all customer journeys and channels to assess quality in voice, AI, and digital applications. Monitor connections to backend systems, business rules, agent routing, and other components. Assess availability, transaction completion, performance, and any other attributes that are key to satisfying customers and providing a great CX.

## IN THIS CHAPTER

- » Starting with a solid migration plan, a solid team, and the ideal CCaaS provider
- » Establishing a baseline and metrics
- » Approaching migration in phases
- » Leveraging automation and integrating comprehensive testing

# Chapter 4

## Ten Tips for a Seamless Migration

This book details the key aspects of contact center cloud migration, including documenting your existing on-premises solution to deploying and managing your new Contact Center as a Service (CCaaS) solution. This chapter focuses on the critical things you and your cloud migration team should do to prevent potentially costly errors and delays over the course of your migration.

### Assemble Your A-Team

At the bare minimum, your cloud migration team should include the following:

- » Executive sponsor
- » Project manager
- » Customer experience (CX) developer
- » Security specialist
- » Several contact center agents who will be using the new system daily

## Start with a Detailed Plan

This plan should include the following:

- » Your budget
- » A task list
- » Key milestones
- » Names of migration team members
- » Names of any third-party providers
- » Maps of your existing and planned customer journeys

## Select the Right Contact Center as a Service Provider

Choose a CCaaS provider that offers both the technical solutions for your future contact center and the expertise and partnership commitment that will empower your organization to make a seamless transition.

## Establish a Pre-Migration Baseline

Document the baseline for existing customer journeys and channels, so you'll know whether problems found during migration are preexisting or were introduced during it.

## Set Post-Migration Expectations

Design future customer journeys and set benchmarks for both performance (for example, call attempts per second [CAPS] and toll-free number [TFN] service hours) and customer satisfaction (such as customer satisfaction [CSAT] score and net promoter score [NPS]).

## Follow a Clear and Proven Process

Take a five-step approach to migration (see Chapter 1 for more details):

1. **Audit and document.**
2. **Design and plan.**
3. **Build and test.**
4. **Release and deploy.**
5. **Maintain and enhance.**

## Integrate Comprehensive Testing

Comprehensive testing through all phases of migration enables your team to identify and address problems as early as possible and ensure that the finished product meets or exceeds your expectations.

## Automate Everything Possible

Automation can save you weeks of work when it comes to documenting and auditing your current contact center and ensuring that the new CCaaS is meeting your customers' evolving needs. It's also less prone to error than the more manual alternatives.

## Perform a Phased Migration

Migrate one department, business unit, or function at a time, and then lather, rinse, and repeat until the migration is complete. Everything doesn't need to be (and usually shouldn't be) migrated all at once.

# Ensure Continuous Monitoring after Deployment

Design a comprehensive and ongoing monitoring plan that ensures your global numbers work correctly, holistic customer journeys work as designed, and agent environments — even at home and remote — enable your team to effectively perform their duties.



# Migrate Your Contact Center to the Cloud Up to 2x Faster



Start Leveraging New AI-Driven Contact Center Capabilities Sooner.  
**Accelerate Your Cloud ROI.**

Learn more at <https://info.cyara.com/migrate-faster>



# Deliver a better CX in the cloud

A mass migration is underway. More and more businesses are moving their contact centers to the cloud to leverage the latest technologies including artificial intelligence and real-time analytics, extend their reach across more channels, deliver cutting-edge CX, and adapt to an increasingly remote workforce. You know you need to make the move, but how do you tackle such a massive project efficiently and cost-effectively without business interruptions and without losing capabilities you already have? This book answers that question by leading you through the process of planning, building, deploying, and tuning your new cloud contact center.

## Inside...

- Choose an effective migration strategy
- Develop a comprehensive migration plan
- Get up to speed on the five-step migration process
- Leverage the power of automation to accelerate migration
- Monitor and continuously improve upon your new cloud contact center



**William LaRuffa** of Cyara's Global Solution Architect team, has been successfully leading cloud contact center migrations since 2012. **Andriy Zakharchenko**, Cyara's Product Evangelist, has been driving contact center migration for clients and providing thought leadership for the last ten years.

Go to **Dummies.com**<sup>™</sup>  
for videos, step-by-step photos,  
how-to articles, or to shop!

ISBN: 978-1-394-18475-0

Not For Resale



for  
**dummies**<sup>®</sup>  
A Wiley Brand

# **WILEY END USER LICENSE AGREEMENT**

Go to [www.wiley.com/go/eula](http://www.wiley.com/go/eula) to access Wiley's ebook EULA.