

The Cloud Contact Center Migration Guide

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Chapter 1:

What is CCaaS?

CCaaS is an acronym for "Contact Center as a Service," which is the standard industry definition.

Alternative to the legacy on-premises contact center solution used for decades involving hardware, software, patching, security, management, and headaches, CCaaS utilizes a cloud-based solution to manage all the critical parts of the "Contact Center" for you "as a service."

Every element of the solution from IVR to QA and beyond is provided by one or many providers all working together to enhance your agent and customer experience.

This cloud service takes all the technology management headaches off your plate so you can get down to the business of building a great CX.

Benefits and Challenges of a Cloud Migration

As a contact center manager, you're in the business of supporting clients, the customer experience, and driving value your agents, **not managing complex hardware and software solutions involving dozens of moving parts.**

Finding the right cloud platform to do this for your organization makes sense and should allow you and your team to focus on the needs of customers or patients.

The only issue is having to make a major procurement decision without the industry expertise and experience to see the mistakes **you do not have to make.**

With legacy IT services like Internet bandwidth, a 1GB Internet pipe is a 1GB Internet pipe regardless of the provider.

When selecting a hosted VoIP provider (for example), customers have a standard measuring device to weigh one offering against another and they can quickly see both in advance and then post-purchase if what was contracted is what is being delivered.

With CCaaS vendors, this is never the case, and being responsible for a major technology shift can invite finger pointing post vendor selection.

There are the complicated questions for a CCaaS deployment which must be understood and answered pre-contract. Here are just a few factors that all weigh into the selection of a CCaaS vendor:

1. What is the complete CCaaS offering or if you are only being shown what the vendor wants to show?
2. Which vendor is going to implement this solution with the greatest speed and efficiency?
3. What are going to be the extra costs and are you being steered to buying applications you do not yet need?
4. Does the CCaaS provider have the integrations you require working now (billing) with other clients or are they on a roadmap even worse in a POC?

So the definition of "CCaaS" **now drastically changes to be:**

- A cloud-based solution that fits my unique contact center requirements.
- A solution that does not require a forklift of my LAN environment and overburden my IT teams with lengthy and confusing deployments.
- A solution that empowers my agents and support my customers in a way that makes an impact and is predictable for them."

The **problem** with this new definition:

The problem with this new definition is **it is a procurement challenge for any contact center manager.**

For your consideration, if this was that 1GB Internet decision we mentioned earlier, one could call a few vendors, get a few prices, negotiate to a degree and then sign a contract with basic installation process thereafter.

However, with a CCaaS deployment there are multiple layers of change that effect every element of an organization and false starts and unfulfilled expectations can have a massive ripple effect.

There are hundreds of items to consider in this selection process. The vendors you will look at are not speaking the same language (often times intentionally to mask product deficiencies).

Again back to that Internet circuit, 1GB is defined and has a standard; with the CCaaS solution, what one vendor may define as “Full Omnichannel,” another may describe as “Nothing Near Omnichannel.”

So the challenge then becomes shifting your focus from being an expertise & training manager for a contact center team to an expert in:

- 1. CCaaS Platforms*
- 2. Cloud Procurement Strategies*
- 3. IT & WAN Designs*
- 4. CRM/WFM Integrations*
- 5. Process mapping*
- 6. RFP writing & weighting*
- 7. Demonstration prep & scoring*
- 8. Proposal review*
- 9. Negotiations and Contact Language*
- 10. UAT*
- 11. Project Management*

Chapter 2:

Are You Ready to Migrate?

Once you understand the gravity of the project before you, it will invite the most critical question of the project:

"Are we ready to take this on?"

If the answer to that question is yes, then you and your organization need to ask the below questions:

- *What am I missing about our business and my team?*
- *Which pitfalls from this migration are we not seeing?*
- *How much time can we spare for this?*
- *Who needs to be involved?*

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- *How far can I go with this out of the gate?*
- *What is my actual budget?*
- *How easy will it be to get the C-suite aligned with the goals of my agents?*
- *Which vendors do I bring to the table?*
- *Where do I find out which vendors are worth the time?*
- *When do I get IT involved, and will they work with the new vendor well?*
- *Are our processes ready, or do they need to change? Does each department supply my CRM with good information?*

These questions come down to a simple, fundamental and critical concept:

You must understand your capabilities and your company's ability to manage change, so the project meets your organizations expectations.

It is then easy to make the point that **if you DO NOT understand all of this, then it will result in a poorly executed transition to the cloud**, and the repercussions of which could be more than just pride.

As a Contact Center Manager who is considering the migration to a cloud based environment as well as the selection of a cloud vendor, it is your responsibility to keep a **trained eye on the needs of your agents and customers** and always control the pace and tone of making your selection with the CCaaS sales teams.

Chapter 3:

Selecting a Partner

As you go down this road of selecting a new vendor, **there are multitudes of considerations**, from finding the right features and integrations that are required day one to narrowing down the list of cloud providers to consider.

Choosing the right partner to help with this selection is crucial.

As frustrating as it is for smaller contact centers, **many CCaaS providers will not respond to an RFP under 100 agents.**

By working with an experienced partner, those same providers can be brought back to the table based on the partners portfolio of managed business with the higher ranked providers and benefit from working with a team that knows the right questions to ask in a CCaaS Specific RFP.

The vendor with the highest technical response to a client's needs rarely wins the deal. The Cloud provider that provides the best end-user experience to the client and the agent has won more often than not. Putting your agent's needs first is critical to customer experience success.

For smaller contact centers considering a cloud migration, the biggest mistake that can be made is to review the current Gartner Quadrant and invite the top three companies to bid.

Alternatively writing the large bellwether providers off based on your agent count and going to a recent upstart CCaaS provider without fully vetting their technology and financial roadmap.

The goal is to select the right cloud vendor so you only have to do this once.

The right partner to work with you on this selection will have the time and resources to work closely with every member of your organization from Agent to C-Suite and have the clout with ALL the cloud providers to find you the right solution.

Questions to Consider With a CCaaS Provider:

- *Which vendor has a culture that matches our needs?*
- *Is their sales team willing to work to earn our business?*
- *Which one has the most complete offering that matches our road map?*
- *Which vendor provides adequate training and support during go-live?*
- *Which have the experiences with similar customers to us that will benefit our organization?*
- *Which providers are willing to answer an RFP for under 100 agents?*

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- *Who gives a good demo vs. who can supply the needed service?*
- *Does the client side have a clear vision that will not distract them from the bells & whistles?*
- *Can the cloud provider present “USE CASES” to work from for a standard demo?*
- *Does the client truly need these new “must-have” capabilities?*
- *Which vendor prefers to work with clients of this size?*
- *Who can partner with this client to drive revenue?*
- *Who has the right level PM and engineers available to tackle this project?*
- *Who’s support model matches their needs?*

The most highly rated vendor will always be one that precisely matches your needs more so than the top-rated one against their peer group.

Chapter 3:

Negotiating With Your Vendor

Once you decide on a vendor (or two in the final stages of an RFP), the next element in the challenge will come from **getting the best deal possible.**

Getting the deal you want is a challenging piece as many of our clients say the same thing at the beginning “my legal is going to be a nightmare as they are always difficult and always backed up.”

However, this is not the real challenge in our eyes as there are ways to move that along quicker with proper planning; **the real challenge is knowing what to negotiate and what to give back to win the deal you want.**

Have you ever bought a car? Was the buying process fun? Most likely, it was not fun at all,

mainly because you didn't know where to start and how low you could get them.

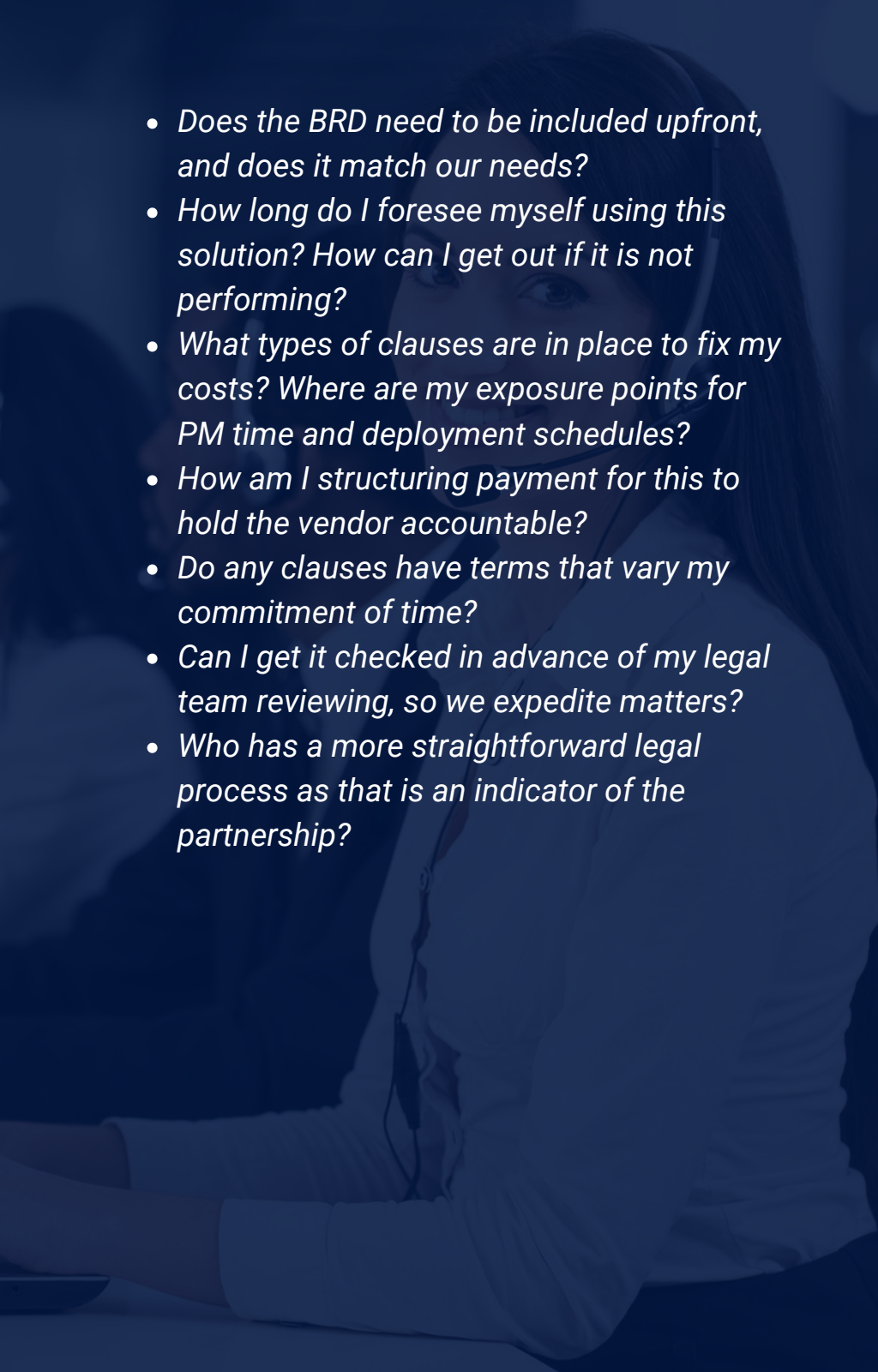
You probably felt like you needed to bring someone along with you for support, which is very common.

Negotiating with your vendor is very much the same, except it is much more expensive, and if you get it wrong there can be worse ramifications than trading it in six months later.

When it comes to the negotiation stage with a Cloud Provider, **these are the questions the supplier needs to answer BEFORE the contract is signed:**

- *Does the BRD need to be included upfront, and does it match our needs?*
- *How long do I foresee myself using this solution? How can I get out if it is not performing?*

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- *Does the BRD need to be included upfront, and does it match our needs?*
 - *How long do I foresee myself using this solution? How can I get out if it is not performing?*
 - *What types of clauses are in place to fix my costs? Where are my exposure points for PM time and deployment schedules?*
 - *How am I structuring payment for this to hold the vendor accountable?*
 - *Do any clauses have terms that vary my commitment of time?*
 - *Can I get it checked in advance of my legal team reviewing, so we expedite matters?*
 - *Who has a more straightforward legal process as that is an indicator of the partnership?*

Negotiating a CCaaS Contract

Cloud service contracts are understandably complicated.

Simply understanding contract law **does not always translate to understanding the complexities of Contact Center as a Service** and how the two are connected.

Knowing what the legal pitfalls are in advance and where to look for these in comparison to that 1GB internet circuit we discussed earlier is critical.

These contracts are more than just a fixed payment for a fixed term and then avoiding an auto-renewal.

These have complicated escalations in price, SLA terms, implementation costs, timelines & deliverables, services that are beholden to third-

party vendors, conditions in place that your team must abide by, and many other factors that can lead to cost overruns and false starts.

Turning Legal into a **Win**

Client side legal may not know what CCaaS will do for the business in addition to the proper timelines.

They may not be aware of what your peer group has already negotiated with this vendor.

They may not even know if certain things are industry standards or unrealistic asks.

So perhaps, like in the example of buying a car, this is much more expensive and visible to your professional career than it will be to legal's.

It is wise to consider bringing in a resource with experience in these matters so that your team crafts a great overall deal for the organization.

Chapter 4:

The Power of Planning

Once the “deal is executed,” next comes the hard work of the implementation phase, **which is the most complicated portion of the whole project because now the real work begins with your teams.**

So much goes into this phase that it will be daunting now if you haven’t used your time in advance of this stage to plan correctly.

Yes, the work begins now with the vendor, **but advance work must be done internally to make that work effectively.**

- *Have you used the RFP process time to clean up your CRM?*
- *Have you staged your UAT teams and cases properly?*
- *Have you built and modified desired workflows to match your new tools?*

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- *Have you integrated IT into the fold so that your infrastructure is ready to support the latest cloud technologies?*
- *Have you ordered and maximized new bandwidth?*

Examples of Classic Mistakes

Cloudlinx once had an engagement with a client who was adamant about managing a new service alert model involving text messaging to their clients once they went live.

The client was warned to clean up the CRM to include cellphones and start gathering client cell numbers.

When the client kept pushing it back, Cloudlinx had to begin that phase after the new contact center was running, which then caused months of delays and frustration until they could launch the new service program.

We highlight this now as a way to demonstrate **the power of planning and finding the right partner.**

When a client looks to bring in an outside party, it needs to be decided on WHY they are bringing them in in the first place.

It must be for more than their expertise; it has to also be for what they **free you up to do on your own in partnership** back to the consultant.

Benefits of working with an Experienced CCaaS Partner:

- *Allowing the partner to do the heavy lifting of managing an RFP process so you can clean up your systems and client data.*
- *Allowing the partner to focus on your process documentation so you can focus on the vendor management.*
- *The right partnership will allow you to focus on how the solution you are contracting for is going to turn your agents into enablers of your organizations mission statement.*

Best practices have shown us not to focus on which vendor is the most cost-effective or which vendor has the best widget for your needs.

It's far better to invest in finding the partner has gathered the correct information and understands your business while you focus on understanding how your agents want to work and what they need to move forward properly.

This is so that when a vendor is selected, all the information gathered jointly with the consultant will yield a quick start and avoid the pitfalls that stop a project.

Chapter 5:

Executing Your Migration

As Cloudflix is a unique partnership in the CCaaS space, in that **our model is at no cost to our clients and our services continue with the project well past completion**, we have a unique perspective on this phase of the project.

The Cloudflix approach is simple and it is what you as a contact center manager should be looking for in a partner.

A partner's role is to enhance your agent's abilities, to hold the cloud vendor accountable and to keep the project moving by avoiding roadblocks in understanding.

The right partner **will allow you to focus internally on CCaaS adoption** while they act as your advocate with the vendors.

We believe that in the CCaaS space, **the client still must have a direct relationship with their cloud vendor.**

There are simply many parts and too many people involved in this transformational project for your team not to be directly involved with the vendor during project deployment.

Where many contact managers say they struggle with aligning resources properly because they are understaffed, and their teams are not prepared to tackle this project because they do not have the training to work with outside vendors on scale. When pressed, the contact center managers all give a little more color to their concern.

They say it is not that their people don't know what to do, but are unfamiliar with keeping the project on course or recognizing when the project is going astray.

They fear their teams will miss things that they should see, which will cause delays, or they fear that their team will say YES to requirements that they are not ready for, which will add costs.

This is understandable but is also problematic.

Cloudlinx has a proven track record in taking these concerns off the table in that we ensure the following:

- **All levels of management universally understand the goals of the project.** The sales team properly relays what is needed to the operations staff, and there is no confusion at hand-off.
- That the **BRD is built intelligently** and adhered to.
- **No hidden costs or scope creeps** in that could impact costs.
- **Your team has an expert** to communicate ideas with and if needed, changes are done quickly to avoid wasted effort. We will ensure that everyone is speaking the same language during calls and that working calls are working calls and regroup calls are just that – this is a huge effort and one that clients never fully appreciate until we are in action.
- UAT is proper, and issues are addressed.
- Hypercare issues are resolved by **ensuring accountability at all levels.**

We hope this guide was insightful and that it can help conceptualize the challenges and strategies for a successful CCaaS migration.

As a project lead, **your primary goal with a cloud migration is to get the team to the finish line quickly**, with confidence and excitement, not troubleshooting issues and finding mistakes.

Cloudlinx works to ensure that you can do just that, so you can reap the rewards of a successful CCaaS migration.

If you can transform **your agents into enablers** and you are able to **orchestrate every interaction with your clients**, then you will be delivering world class support and you will enjoy the benefits and comfort from knowing you made the right call with a cloud vendor.

Book a **Free Q&A Discussion**

Still working on a cloud migration strategy for your contact center? Be sure to get the answers you need **before** talking to the providers.

Book a **FREE Q&A discussion** with a cloud migration specialist [here](#).

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