

A Genesys eBook

An IT manager's guide

The call centre technology migration playbook

Make your next move confidently



Introduction

Moving to a new application, particularly one that consolidates multiple capabilities, is daunting. But with an understanding of the process and a bit of planning, it doesn't have to be as difficult. This playbook gives you a running list of the people you should identify and the tasks you should complete to set yourself up for success in the cloud contact centre.

Take the following steps to assemble your internal project team, assess readiness and make key decisions about your contact centre technology migration and implementation.



Step 1: Assemble an internal project team

Ensure you have the right set of stakeholders and subject matter experts on-hand to make the transition smooth.

Business sponsor

- Articulate business vision
- Identify and provide needed people and funding
- Oversee the successful deployment and adoption of the Genesys® PureCloud® platform

Pro tip: Get buy-in from each team member in advance. Nobody likes a surprise task.

Project manager

- Create an internal project scope and timeline
- Align and oversee participation of all necessary people
- Collaborate with Genesys or the implementation project manager at your partner's organisation

Contact centre administrator

- Set up and manage users, groups, call flows, queues and scripts
- Perform moves, adds, changes and deletes
- Perform all troubleshooting and support for internal teams

IT and network administrator

- Ensure a robust network and environment that's free of any latency or jitter
- Understand and manage all system interdependencies
- Serve as main point of contact for any LAN/WAN/telecom-related issues

Contact centre supervisor

- Manage and monitor call centre personnel (agents)
- Manage all scheduling, training, reporting, forecasting and KPIs

Contact centre agent

- Use solution on a day-to-day basis

Developer (if integrating via API)

- Find web developer familiar with JavaScript and REST-based APIs
- Integrate platform API, co-browse, web hooks, web service data dips, etc.



Step 2: Conduct a network-readiness audit

This checklist helps you determine whether your company's network and environment are ready and able to support a stable cloud contact centre.

For the IT and network administrator:

✓ Review your physical environment to see whether it meets requirements and can provide a strong foundation.

- Network cabling is Cat 5e or better
- Phones support Power over Ethernet (PoE) or use power adapters
- Telephony servers run on diverse power
- Facility environments meet hardware requirements

Pro tip: To support the phones you intend to connect to each switch, make sure that your network switches have the necessary power. You can find switch power information on the switch itself or on the manufacturer's website.

✓ Review the system and SIP provider's minimum technical requirements and ensure you can meet them.

- Computing devices meet minimum system requirements
- Local security exceptions have been set up on computing devices, ensuring continued access to the cloud solution
- SIP trunk meets baseline functionality and traffic requirements

✓ Prepare to connect your network, clients and appliances to a cloud solution by identifying interdependencies.

- Security exceptions have been set up on network firewalls and security devices
- Assess the reliability of internet connections at all company locations
- Provision the necessary bandwidth for VoIP on your LAN, WAN, WLAN and internet

Pro tip: Work with your internet service provider to ensure you have a fully diverse internet connection.

✓ Establish a high quality of voice and video traffic on your network.

- Enable Quality of Service (QoS) on your routers, switches and wireless devices
- Establish minimum performance target metrics for latency and packet loss

Pro tip: The network QoS process is different, depending on the provider and model of your network hardware. Refer to the manufacturer's documentation for your specific hardware setup.

Step 3: Decide on your implementation approach

No matter which implementation method you choose, you need the right combination of experts from a wide range of disciplines working together to provide a clear path forward.

Provider-led implementation

- Do we want hands-on expert training to set up and configure key capabilities?
- Are the provider's services remote or onsite?

Partner-led implementation

- Will the partner only assist with deployment?
- Will we need post go-live assistance with moves, adds, changes, deletions and support?

Customer-led

- Do we have the right in-house expertise to successfully conduct network and operational-readiness reviews?
- Can we dedicate the right number of in-house resources to achieve our go-live plan and business outcomes in the expected timeline?
- What self-service training and resources are available?
- Do we have budget for professional services if we run into trouble?
- What is our tolerance for risk?

Pro tip: Customer-led deployments can be challenging. Be sure you have dedicated resources to ensure success. For more details, let's talk.



Step 4: Getting ready for go-live

Set expectations for on-boarding and go-live with the right discovery, design and documented plan.

IT and network administrator

1. Complete a technology and environment “map” of system interdependencies based on the audit in Step 2
2. Provide a map to your customer success manager

Project manager

Document go-live plan

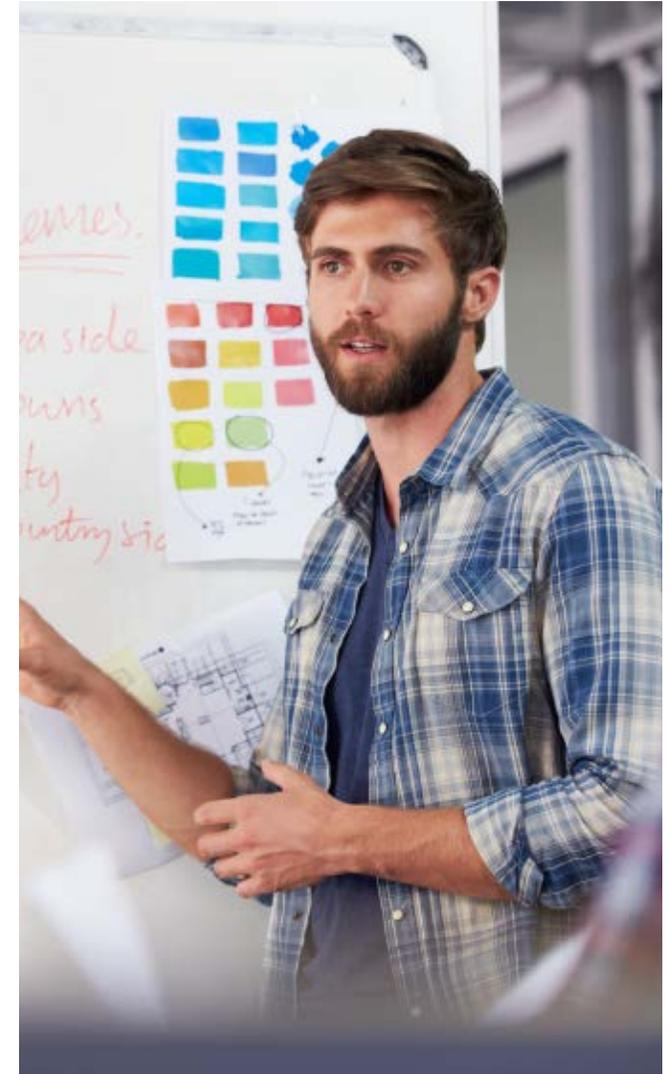
1. When is go-live?
2. Within your company, who will monitor this?
3. If there’s provider-led onboarding, who will monitor it? If there’s partner-led onboarding, who from the partner will monitor it?
4. How will feedback from your end customers and agents be communicated to the person monitoring?
5. What’s your plan to process that feedback?

Pro tip: Consider the cadence of provider check-ins to ensure a smooth transition during early adoption.

Agents, contact centre admin, IT and network admin, contact centre supervisor

Training

1. Agents and supervisors
2. IT managers
3. Plan for future hires and on-going training



Step 5: Working with Genesys

Adopting a new contact centre solution goes well beyond the initial deployment. Genesys is with you all the way. We combine success planning with expert guidance and engagements to continually drive your goals and grow your skills. Please take advantage of our expertise and know that you're not in this alone.

Available to all cloud and subscription customers on Genesys PureCloud, PureConnect™ and PureEngage™ platforms, the PureSuccess framework gives you customer experience expertise and services that facilitate your ongoing success.

For more information, contact:



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