

A person is sitting at a wooden desk, working on a laptop. A white cup of coffee sits on a saucer next to the laptop. The person is holding a black smartphone in their right hand. The background shows a window with a view of the outdoors.

# MIGRATING YOUR PHONE SYSTEM TO THE CLOUD

A Step-by-Step Guide

[www.it4ps.com](http://www.it4ps.com) / 888.546.8353







## CONSIDERING A MOVE TO THE CLOUD?

There's a lot to think about with any operational change—especially one that involves core business systems. But migrating your communications to the cloud is not as risky or complicated as it may seem. With a bit of planning and the guidance of a trusted partner, making the switch can be relatively simple and straightforward—and lead to big benefits.

This eGuide includes key considerations and a step-by-step plan to help your organization successfully move your communications to the cloud.

## PLANNING YOUR MIGRATION

Before you start looking at cloud solutions, there are two key components that will help you set the stage for a successful migration to the cloud:

### ➤ **Confirm Your Business Goals**

Get a clear understanding of your organization's short- and long-term goals. Are you hoping to streamline processes? Offer more personalized customer experiences? Free up IT resources for other projects?

Cloud communications offer plenty of benefits, but understanding which outcomes are most important will help you select the right solution for your organization.

### ➤ **Review Your Budget**

Accurately comparing costs for on-site and cloud phone systems means looking at more than just the price tag. Gather data about your existing investment, including licensing fees, hardware and infrastructure costs—and remember to factor in the costs of maintenance and associated resources, as well as potential business growth. As you're setting your budget, evaluate which outlays will go away and when, how expenses will change (i.e. CapEx to OpEx) and shifts in resource allocations to get a holistic picture of your communications costs.



12 MONTHS



11 MONTHS



8-10 MONTHS



6-8 MONTHS



3-6 MONTHS



1-3 MONTHS

## STEP-BY-STEP PROJECT TIMELINE

With your objectives and budget in place, it's time to roll up your sleeves and plan your cloud migration project. As with any initiative, giving your team proper time to plan, analyze, test and communicate will be the key to success.

Use this step-by-step timeline to keep your cloud migration on track.

### T- MINUS: 12 MONTHS

Review your current solution(s) and contract terms.

- › Take note of contract expiration dates and penalties, avoid auto renewal clauses
- › Understand your financial investment to date and what, if anything, is still owed.
- › Survey employees on likes and dislikes of your current system, plus "wishlist" items.
- › Engage a specialist as a resource



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## T- MINUS: 11 MONTHS

Identify and establish your core team. Ideally, this group should include:

- ▶ **C-Suite Executive:** Your executive sponsor who will build enthusiasm among leadership and staff. They can also assist in removing internal obstacles.
- ▶ **Technology Experts:** IT leaders or solution experts who have an intimate knowledge of your existing systems and technical resources. They will play a critical role during the actual migration and beyond.
- ▶ **Business Advocate(s):** These cross-functional leaders understand how communications tools fit into your corporate goals and can define business process requirements accordingly.
- ▶ **Project Manager:** This person will take the lead on administrative elements to keep the project on track, such as status meetings, project plans and related documentation.
- ▶ **Early Adopters:** Employees from various roles and departments who will be a sounding board for early cloud solution designs, help with testing and evangelizing the final solution.



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## T- MINUS: 8-10 MONTHS

Know how your communications relate to and impact organizational priorities.

### › Review Current Business Processes & How They Compare to What is Preferred/Optimal

Where are there gaps? What is the impact on productivity? How do they affect the experience your customers have? Do they help/hinder your organization's ability to differentiate itself? Do they help/hinder your bottom line?

### › Conduct an Audit of Key Technologies That Support Business Processes

Which solutions integrate with your current phone system? What doesn't integrate, but should? How effective are these integrations, and what would make them better?

### › Compare Processes & Technologies to Your Organizational Goals

How much short-term growth or change is expected? What is the most important benefit to gain from moving to the cloud?



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## T- MINUS: 6-8 MONTHS

**Research potential vendors and identify 3-5 finalists.**

- ▶ Seek providers with established expertise in business communications and a track record of reliable, high quality solutions.
- ▶ Look for solutions that simplify the user experience by offering multiple communications and collaboration channels in a single interface and support integrations with your other cloud applications.
- ▶ Ensure vendors have not only the features you need today, but show clear signs of innovation to “future-proof” your decision.

For cloud deployments consider “as a Service” ability as well as local deployment and management (These are often not the same entity)



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## T- MINUS: 3-6 MONTHS

Evaluate your finalists and select your vendor.

- ▶ **Get a Demo:** Be clear on which features are important for you to see. How easy are they to use? How frequently are new features released?
- ▶ **Know What's Included:** Be sure to ask what features are included in the subscription price, plus how easy it is to add new users or a la carte functionality.
- ▶ **Understand Their Cloud Architecture & Security:** Vendors should be able to provide details about their network and application redundancy, security measures and monitoring practices. Check out their network availability website for proof points on service uptime.
- ▶ **Get Details on Implementation & Support:** A cloud phone service is exactly that—a service. Choose a vendor who will support you through the initial implementation and offers multiple channels for ongoing support.
- ▶ **Know the true costs** Cloud services for voice require a robust internet and network to operate smoothly, plan for any needed upgrades. Also consider redundancy



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## T- MINUS: 1-3 MONTHS

Prepare your implementation and internal communications plans.

### › Consider a Phased Approach

Pilot your cloud solution with a smaller group first to smooth out any kinks before deploying more widely.

### › Anticipate Potential Obstacles

Avoid scope creep by making sure your core team is on the same page early on. Be firm on deadlines and take steps to ensure the process doesn't drag on indefinitely.

### › Create a Training & Communications Plan

A documented rollout plan builds excitement, helps to overcome resistance and prevents last-minute snags that could interrupt operations.





## DRIVING CLOUD ADOPTION

A key performance metric for any rollout is adoption. Here are a few key techniques that can help drive user uptake.

### › **Ambassadors Are Essential**

Tap into your early adopters as rollout ambassadors. Be clear on what you need them to do, give them tools to promote the new solution and emphasize the valuable role they play.

### › **Different Generations, Different Tactics**

With multiple generations in the workplace and a growing number of remote workers, no training solution will fit everyone. Include a mix of training methods such as online learning, group workshops and webinars.

### › **You Can't Overcommunicate**

It's important to communicate early and often. Engage an internal communications expert and let them take the reins on best practices during the rollout.





## GET STARTED

The cloud is waiting, and now you've got the tools you need to take your business there.

Learn more about how Mitel's cloud communication and collaboration solutions can make your migration to the cloud a success. Learn more at [it4ps.com](http://it4ps.com)

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