The essential migration checklist for identifying the right customer experience solution

Your contact center is integral to your customer experience and business success. Yet, when you face the multifaceted challenge of meeting rising customer expectations and managing existing contact center operations, your success hinges on having the right contact center technology.

Legacy systems can limit channels and customer information—and create boundaries that affect business operations and customer experiences. With the right contact center solutions and provider to deliver the service your customers expect, you can pave the path to ongoing success. And this begins with a migration journey that empowers you to achieve your desired goals and outcomes.

Use this migration checklist as a guide to explore different solutions and establish your business and technology requirements.

Consider these items as you define your goals, identify a solution and evaluate vendors.

Identify your goals

1. **Which of these business outcomes are most important for your organization?**

   Reduce total cost of ownership

   Increase or accelerate new solution ROI/time to value

   Improve Net Promoter Score (NPS)

   Improve service metrics like first call resolution, average hold time, etc.

   Reduce customer churn/increase retention

   Simplify infrastructure/solution management

   Improve agent/employee satisfaction (eNPS)

   Reduce agent/employee turnover

   Solve integration issues that affect business operations

   Reduce IT support and development challenges

   Improve security and compliance

   Increase new sales or up-sell revenue

   Increase customer loyalty/lifetime value

Determine the type of solution you need

2. **Which deployment model is best for your organization?**

   Cloud – Offers the highest level of business agility and process simplification. A cloud solution easily scales up or down, as needed. It offers the added benefit of subscription-based service, with a predictable recurring operating expense, rather than a large, up-front capital expenditure.

   Hybrid – For organizations in verticals where security and compliance regulations require them to maintain some on-premises control, you can deploy cloud applications and services with on-premises platforms.

Important tip

If cross-channel integration and customer experience quality and consistency are important, ensure the customer experience platform you choose can connect all channels. It also should be able to transition between them smoothly to deliver true, seamless customer experiences. Today, most vendor solutions only support siloed channels that deliver disjointed customer experiences.

3. How much flexibility do you need?

We need to easily adjust staffing levels up or down as needed

We need to easily connect with other applications or services, such as CRM systems, workforce management systems, unified communications, and cloud APIs

We need to quickly roll out new features, services or capabilities as our business needs change

We want to quickly and easily consume new innovations

4. What capabilities do you need?

a. Core contact center

Single routing engine

Inbound voice

Outbound voice

Basic IVR

Callback

Customer authentication

Voice recording

Reporting

b. Digital channels

Chat

Email

Social media

Messaging/SMS

c. Omnichannel workforce optimization

Workforce management

Recording and quality management

Speech and/or text analytics

Strategic planning

Coaching and training

d. Artificial intelligence (AI)-based automation

Advanced routing (predictive)

Customer journey management

Data analytics

Voicebots, chatbots or blended bots and agents

Predictive web engagement

Multimodal and visual IVR

Evaluate vendors

5. What is the vendor's customer experience technology expertise and track record?

Has established solution(s) that are recognized in the industry

Has a proven offering around the deployment model you want/need, including published customer success stories with business outcomes and references in your industry

Strong product roadmap and track record of investment in innovation

6. What is the vendor's level of stability?

Find out how long the company has been in business

Decide if the company's leadership and vision align with your own business priorities and is clearly communicated

Determine whether the company valuation and revenue are growing consistently

Determine whether the company has solid, liquid financial reserves

7. What is the vendor's customer migration experience?

Determine if it will prioritize your business goals or its own

Find out what it offers to assure customer success, post-migration

Find out how many migrations it has successfully executed

Determine whether it has a well-defined migration process or methodology

Read peer review sites

Speak directly with at least three (3) other customers the vendor has migrated

Next steps

If your underlying contact center technology is reaching end of support or making it increasingly difficult to meet today's customer expectations and business demands, Telstra is here to help. We'll evaluate your needs, pinpoint gaps in your plan and apply proven strategies to reduce the risk and complexity of the migration process.

Get started by requesting a call back to see how a modern cloud contact center platform moves you forward to an omnichannel customer experience.

About Telstra Contact Centre Genesys Cloud

A simple, cost-effective, ready-to-go solution that enables you to delight customers with rich, personalised and memorable experiences. Contact Centre Genesys Cloud is affordable and quick to deploy, ideal for contact centres with 10 to 500+ seats, or larger businesses with simpler requirements. Fast and easy to configure, all you need is internet access to get started.

For the appropriate network model, please contact your Telstra Account Executive.

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