A checklist: migrating your traditional phone system to the cloud

Introduction

Digital transformation is changing the ways businesses operate, redefining where and when employees work and how they collaborate with others. Companies of all sizes are discovering that to keep pace with today's market, they must start to use digital collaboration tools that build productivity without restriction. According to a Synergy Research study, there's been a tremendous growth in the adoption of cloud-based Unified Communications (UC) applications – including telephony, web conferencing, group messaging and video. These allow you to communicate more effectively and quickly.

Replacing your current phone system might seem daunting – but it doesn't have to be. We've developed a checklist that will help you to plan, design and carry out your migration easily.

1. Work out what your business needs

It's vital to know why you're migrating. Write down your vision and plans to justify the project to other influencers in your organisation. Typically, organisations need to:

- upgrade their systems

- support new collaboration applications

- mitigate against risk and ensure reliability

- have a solution that can be supported by current IT resources.

Here are a few things to consider

- Did you know that more than 50 per cent of installed on-site phone systems are at the end of their life?*

- Did you know that 80 per cent of organisations are looking to move to cloud-based unified communications in the next two years?**

- How much are you spending on maintenance and associated fees with your current systems?

- What are your competitors doing? Is collaboration making a difference for them?

- Management alignment is critical: what metrics will you analyse? How will you make a final recommendation on how to proceed?

When defining your business needs, it's critical to consider the impact and risk of maintaining the status quo. While there's always the option of doing nothing, that choice entails both risks and rewards. Know what the impact on your business would be if your system became unavailable.

Getting early feedback about perceived needs, the status quo and possible changes can go a long way to delivering a project that adds value.

* Source: "Unified Communications Market Size Worth $143.49 Billion by 2024: Grand View Research Inc.", Markets Insider.

** Source: "Collaborating in the cloud", Angie Mistretta, BT Global Services.

2. Develop suitable use cases

Decide the most effective way of getting your company to collaborate. Business outcomes are a key consideration when developing use cases, so think about the relationships between qualitative and quantitative outcomes. For example, improved communication (qualitative) helps to drive more sales (quantitative).

- Improved communication between staff inside and outside the office.

- Sales team have more time in front of customers.

- Increase sales revenues.

If you're developing a sales use case, you could talk about new collaboration possibilities in the office, on the road, at a customer meeting or working at home. You should ask key decision makers and stakeholders for their input on other scenarios, to ensure you've identified the right business outcomes.

Speaking to groups and departments (including executives, sales, contact centre, field workers and remote workers) is a great start. Identify the key stakeholders in these groups - and don't assume they know what's available today. Ask them:

- how does your existing solution work?

- how would you make a more richly-featured and functional collaboration application work?

Industry experts are also invaluable in helping you to develop use cases. Discuss how other organisations are using collaboration applications or ask for demonstrations, so that you can familiarise yourself with solutions used in situations like yours.

3. Work out the model that suits you best

For the last ten years, organisations considering phone systems had one choice: an on-site system. Now, the evolution of cloud services means that there's much greater choice in how your users can communicate and collaborate. But which deployment model will make your organisation the most effective?

Cloud delivers certain benefits, including:

- **agility:** change and/or integrate new collaboration applications and services on demand as needs evolve

- **flexibility:** enjoy more predictable costs and the ability to adapt almost immediately

- **redundancy:** providers are responsible for the redundant architectures and state-of-the-art data centres that support cloud capabilities, and offer SLAs and availability guarantees. Many potential issues (i.e. loss of power, access to equipment) therefore disappear.

An on-site solution can involve significant capital investment and complex installation projects. Almost immediately, the organisation will have to upgrade software, which means using professional services. The need for ongoing software and hardware upgrades and the associated mini-projects is costly, in both time and resources.

With the cloud, you only sign up once. Communication and collaboration then become operating expenses (Opex). The end-of-life risk disappears. Your provider oversees all hardware and software upgrades. You can remain as current as your strategy dictates, without having to manage an endless cycle of projects and investments.

For further reading, see **Seven myths about the cloud-based digital workplace.**
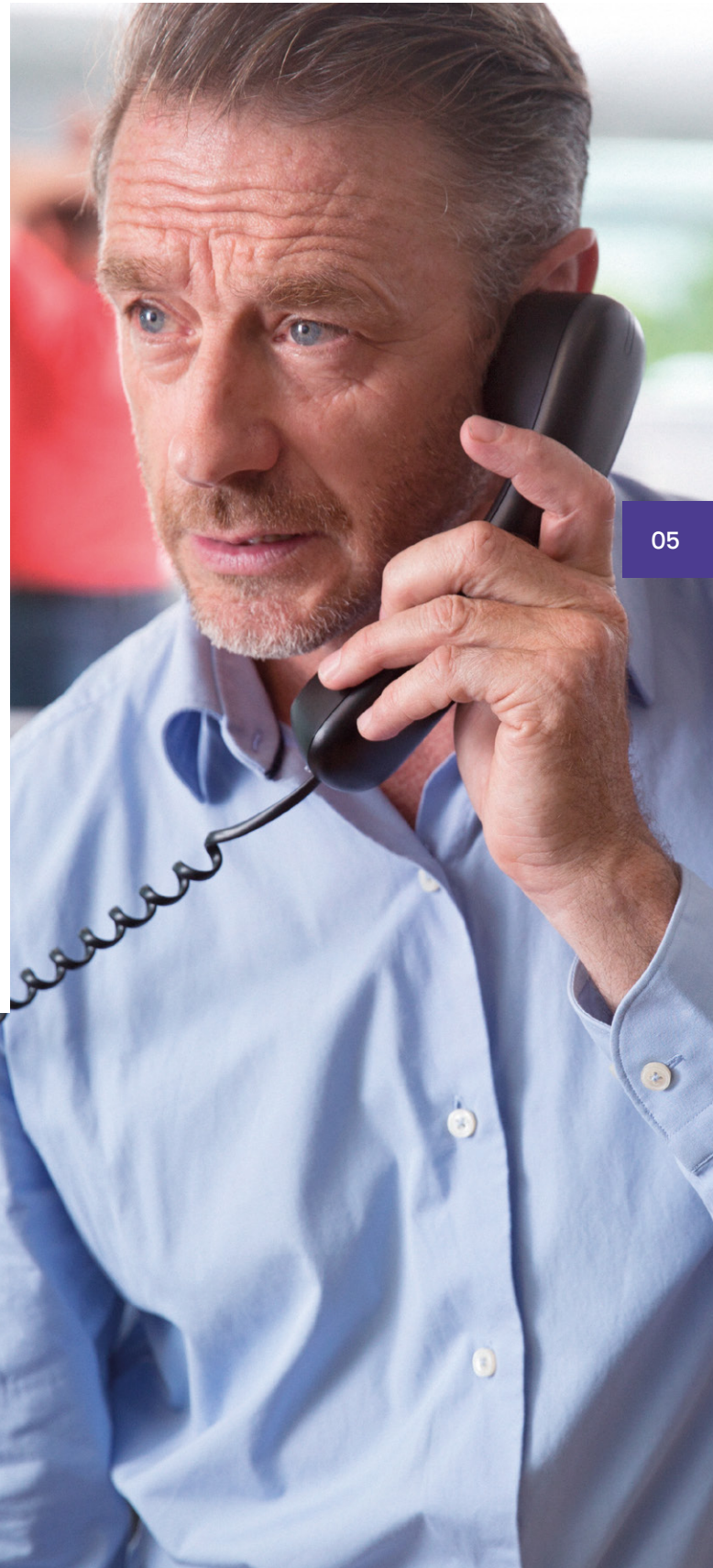
4. Reduce migration risks by running a pilot

Pilot programmes are revolutionising how organisations take up cloud-based communication and collaboration. The service provider will have a ready-to-go solution which simply has to be customised to your needs. By conducting a 30-day pilot with the key decision makers and stakeholders who helped you to build your use case model, you can collect valuable feedback and work out whether you can achieve your desired outcomes. A pilot reduces any surprises when rolling the system out, and you're also securing the essential buy-in of key people before imposing the solution on the wider user community.

To find out more, **watch this webinar.**

Other risk mitigation strategies

- Pick a provider who has a proven record of completing certified IP-readiness network assessments.

- Engage a professional project manager to plan the scope of the installation.

- Roll out site-by-site or in phases to fine-tune the scope of work over time, noting successes and any areas for improvement.

- Test your post-deployment and support procedures before roll-out, to identify any potential issues.

- Create a communication plan so that employees are not only aware of the project, but also of its status and anticipated benefits.

- Get employees involved in planning at an early stage, and select representatives from each unit to help champion the cause.
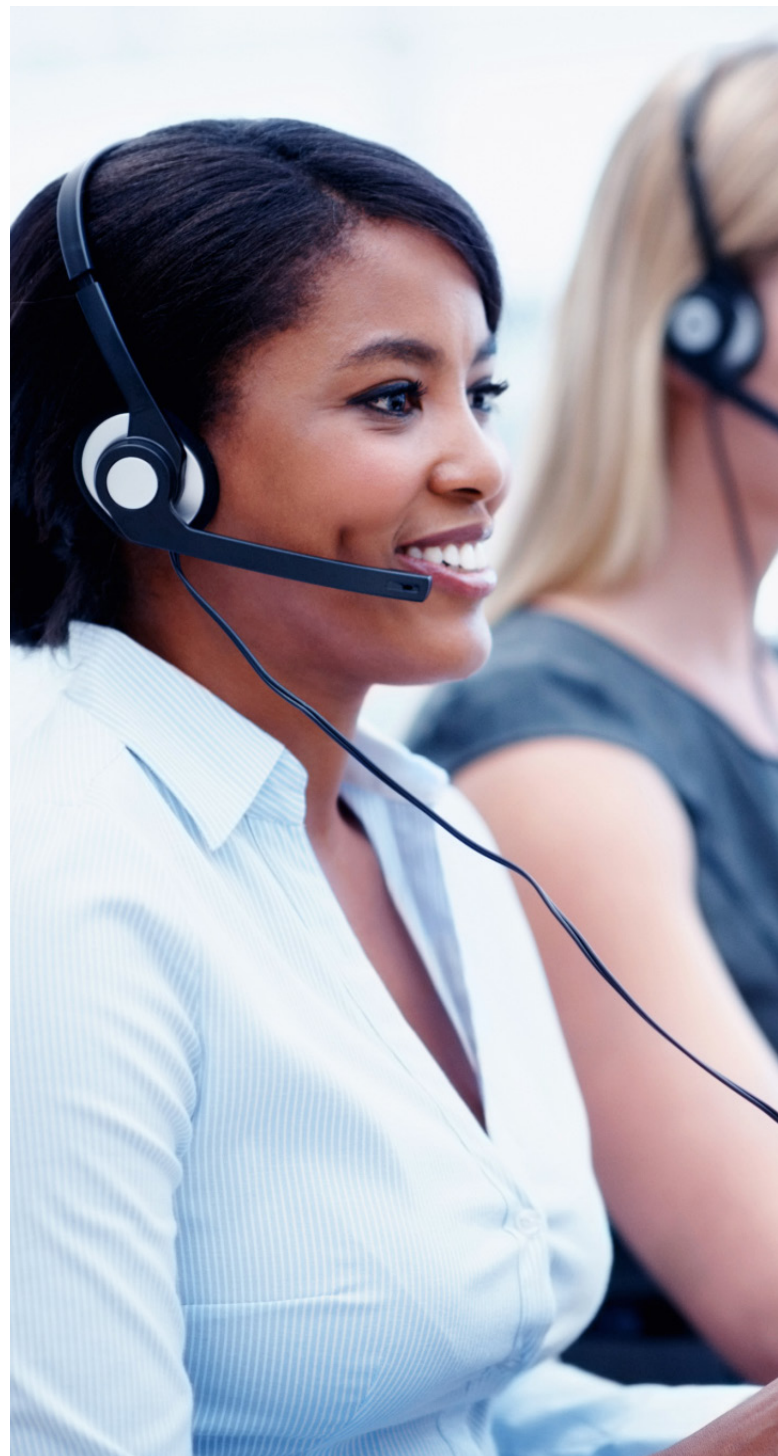
5. Prove the value of migration

Once the pilot and subsequent roll-out are complete, go back to the stakeholders who provided feedback during development. Review the expected and actual business outcomes, and note their experiences. You can then show your management team your proof of achieved value.

Collaboration is constantly changing, so there'll be further use cases that you'll want to tackle. Think about them and plan the timelines involved. Digital transformation brings individual work into the virtual space, which separates the process of work from its location. Research published by MIT Sloan shows that collaboration and networking tools aid communication between employees, wherever they are*. A successful use case – such as sales staff improving communications in the field – can highlight the need for new use cases, including better communications with key suppliers and customers.

A practical example

We've used everything we know about cloud-based communications to develop BT Cloud Work - a powerful cloud-based phone system combined with UC tools, such as video meetings and team collaboration. It's all hosted in the cloud, so it's flexible enough to work in the same way as your organisation does. And when you grow, it can grow, too.

BT Cloud Work is built with an open platform, so it can be integrated easily into your existing apps and workflow. And our experts will help you to make the most of every feature.

To learn more, **visit our web page.**

* MIT Sloan: "The Nine Elements of Digital Transformation", Westerman, Bonnet, McAfee (2014)

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