

The essential checklist for Genesys on-premises customers moving to the cloud

Your contact center is integral to your customer experience and your business success. Yet, when you must meet rising customer expectations and manage existing contact center operations, your success hinges on having the right contact center technology.

As on-premises systems age, they 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. This begins with a journey that empowers you to achieve your desired goals and outcomes.

Use this 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 TCO
- Increase or accelerate new solution ROI/time to value
- Improve Net Promoter Score (NPS)
- Improve service metrics, such as 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 a subscription-based service, with a predictable recurring operating expense, rather than a large, upfront capital expenditure.
- Cloud services – For organizations in verticals where security and compliance regulations require them to maintain some on-premises control, you can subscribe to cloud services that work 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 those channels 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 necessary.
 - 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 innovations.
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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. Integrations

- User and group sync
- Database and analytics
- Voice service integrations
- Data dips/web service integrations (REST and/or SOAP)

d. Omnichannel workforce optimization

- Workforce management
- Recording and quality management
- Speech and/or text analytics
- Strategic planning
- Coaching and training

e. 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
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Evaluate vendors

Important tip

Most customer experience technology vendors specialize in one platform model or only support organizations of a specific size.

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.
- Has a strong product roadmap and track record of investment in innovation.

Important tip

Confidence in a vendor's long-term viability is important to ensure continuous support and maintenance. New or emerging companies might incur additional risks.

Important tip

Ask the vendor if their business model is transactional in nature or more service/business-oriented. There is an important distinction between the two.

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 are clearly communicated and align with your business priorities.
 - Determine whether the company valuation and revenue are growing consistently.
 - Determine whether the company has solid, liquid financial reserves.
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7. How involved will the vendor be in your project?

- Determine if it will prioritize your business goals or its own.
- Find out what the vendor 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 for other companies' experiences working with the vendor on similar projects.
- 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, Genesys 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.

For more information, contact:



Altivon designs and implements Genesys-based contact center solutions across North America. Leverage our more than 25 years of experience to deliver great customer experience, increase employee engagement, and enhance business outcomes.

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