CCaaS Migration Playbook

From On-Prem PBX & Contact Center to Cloud

The Case for Migration

Legacy on-prem PBX and contact center systems are costly, inflexible, and lack the features modern customers expect. Maintaining aging hardware drains IT budgets while limiting your ability to deliver omnichannel experiences. The UCaaS market is projected to reach **$262B by 2030**, reflecting the massive shift to cloud communications.

Migration Drivers

- **End-of-Life Hardware** — Aging PBX systems approaching or past vendor support deadlines
- **High Maintenance Costs** — Expensive break-fix contracts and specialized technician requirements
- **No Remote Work Support** — Legacy systems not designed for distributed or hybrid workforces
- **Lack of Omnichannel** — No native support for chat, SMS, social media, or video channels
- **Poor Analytics** — Limited visibility into call metrics, agent performance, and customer journeys

Key Benefits of Cloud Migration

30-50% Cost Reduction	**99.999%** Uptime SLA	**2-3x** Faster Deployment	**Infinite** Scalability

Migration Phases

Phase 1

Discovery & Assessment

Weeks 1–3

Inventory all voice, video, and contact center systems. Document call flows, IVR trees, and integrations. Identify user personas and requirements. Assess network readiness including QoS configuration, bandwidth availability, and jitter tolerance.

Phase 2

Platform Selection

Weeks 3–5

Evaluate UCaaS/CCaaS platforms against requirements. Consider: Microsoft Teams, Cisco Webex, Zoom, RingCentral, Five9, NICE inContact, Genesys. Run a pilot program with 50–100 users to validate functionality, call quality, and integration compatibility.

Phase 3

Design & Build

Weeks 5–10

Network QoS configuration, SBC deployment, number porting plan, IVR/call flow recreation, CRM integrations (Salesforce, ServiceNow, HubSpot), user provisioning, and endpoint selection (desk phones, headsets, softphones).

Phase 4

Migration & Cutover

Weeks 10–16

Phased migration by site or department. Parallel running period to validate quality. Coordinated number porting windows with carriers. Comprehensive user training and adoption programs. Cutover validation testing at each stage.

Phase 5

Optimize & Evolve

Ongoing

Quality of Experience (QoE) monitoring, adoption analytics and usage tracking, progressive feature enablement, contact center performance tuning, and quarterly business reviews to align platform capabilities with evolving business needs.

Phase	Wk 1-3	Wk 3-5	Wk 5-10	Wk 10-16	Ongoing
Discovery					
Selection					
Design					
Migration					
Optimize					

Key Considerations

Network Readiness Checklist

- ✓ Bandwidth per concurrent call: minimum 100 Kbps (G.711) per call
- ✓ QoS marking: DSCP EF (46) for voice, AF41 for video
- ✓ Jitter buffer: target < 30ms jitter, < 150ms latency
- ✓ LAN assessment: PoE availability, switch capacity, VLAN configuration
- ✓ WAN assessment: circuit redundancy, failover testing, SD-WAN readiness
- ✓ Internet breakout: direct internet access vs. backhauled traffic
- ✓ DNS and DHCP: reliability and redundancy for endpoint registration

Risk Mitigation

Risk Area	Mitigation Strategy
Call Quality	Parallel running period, QoE monitoring, dedicated voice VLANs
Number Porting	Phased porting windows, temporary forwarding, carrier coordination
User Adoption	Phased rollout, training programs, champion users, help desk support
Integration Failure	Pre-migration testing, API validation, rollback procedures
Downtime	Cutover during low-traffic windows, rollback plan, parallel running

Schedule a Collaboration Assessment

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