

Customer Migration Checklist - Telephony



When deciding to move to the cloud it is of primary importance to make sure that any technical changes are closely aligned within business goals and policies.

- What does the company really need in a cloud based phone solution?
- What feature or service are you looking for?
- How does all this fit into the company departments and budgets?



Understand your various needs per space and user type.

- A conference room requires special consideration, sufficient audio will be needed so everyone can hear, and this audio will need to be integrated with another device present.
- Analog devices such as fax machines will need to interface with the cloud.
- Public area phones may need special configuration, giving them a different line from the line your employees use
- Contact centre agents may not need any desk phones at all if they can use softphone application installed on their computers



Capacity planning is always critical when designing a network-based IT and Telephony solution. You will need to make sure that you have enough bandwidth for any situation and plenty of redundancy in case you lose a connection.

- What happens when all systems need internet data flowing through the cloud?
- How much bandwidth will you need to ensure you don't have any bottle necks or possible congestion issues during peak usage?
- Consider how a cloud-based phone solution will fit into your present IT environment.



As part of planning, you will need to determine the extent of usage anticipated and make sure you account for future growth.

- How many desktop users will you have?
- How many software users?
- How many users will be accessing your cloud phone system through external devices such as smartphones, laptops, tablets, etc.



A call flow analysis will help you in planning.

- What assessment can you make regarding your current phone system that will help you with the new one?
- Do you have call routing that directs calls to specific customer service personnel?
- What about work groups or hunt groups of your existing system?



Another important issue to account for in the migration to cloud is number porting.

- Get a list of all your existing numbers to be migrated to your new system.
- Seek guidance and ensure you can verify each carrier for each number.
- Seek guidance on possible migration paths and downtime.

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