

Your Definitive Cloud Migration Checklist



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With the cloud market growing at six times the rate of other IT services and estimated to be a \$300 billion business by 2021, according to Gartner, many companies are looking to keep up with this trend by moving on-premises systems to the cloud. The process of cloud migration involves moving data, applications, or other elements of the business that are currently stored on localized hardware or software to a cloud environment.



With the right planning and strategy, your cloud migration can go off without a hitch.

As Grand View Research noted, unified communications (UC) is one of the largest areas being converted to the cloud, with many organizations praising cloud-based UC solutions for "providing easy-to-manage and consistent telephony services across numerous office locations in different geographies."

While migrating to the cloud can be a complex process requiring extensive planning, companies large and small are seeing that the benefits of cloud-based solutions like unified communications as a service (UCaaS) outweigh the costs. By migrating to the cloud, many organizations are benefiting from reduced overhead costs, streamlined management of UC infrastructure, remote access, and improved performance.

If your organization is considering a move to the cloud, this migration timeline and checklist will help you successfully prepare for the big move.



Cloud Migration & Deployment: the Good, the Bad, and the Ugly

Learn tactics, strategies, and what to consider when migrating to and deploying a cloud communications platform.

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Month One: Develop a Cloud Strategy

No cloud migration process should be undertaken without a clear understanding of what you want to accomplish and how you will evaluate success. To build a comprehensive cloud strategy start by:

- Determining what benefits of a UCaaS solution are most important to achieving your business goals.
- Evaluating which applications you use frequently and would benefit from being housed in the cloud.
- Establishing baseline metrics of your current solution.
- Setting KPIs for a post-migration cloud environment.

Preparing for a cloud migration involves reflecting on your current tools and communications channels and assessing how a cloud integration would benefit your employees and clients. It also means creating a timeline for migration and determining how to get all stakeholders – including your employees – on board with a move. Outlining these details ahead of time will help the migration go smoother.

While making sure the communications tools your organization uses have properly migrated is critical, it's also important that you set employees up for success.

Month Three: Find the Right Partner

Choosing the right partner is one of the most important aspects of successfully moving to the cloud. You want a service provider who will walk you through the complex cloud migration process, will provide the appropriate level of service and data protection, and will be responsive to your needs on an ongoing basis. Here are some key questions to ask about the provider you're considering:

- Does the provider have an established reputation hosting a UCaaS platform?
- Is the provider compliant with the regulatory requirements of your business (i.e., PCI, HIPAA, NIST, etc.)?

- Does the provider have safeguards in place, such as multifactor authentication, entry login, and database encryption, and can they provide a private cloud environment if your business requires an extra level of security?
- Do they offer monitoring of key performance and availability metrics?
- What is the provider's service-level agreement, and do they offer a guaranteed level of uptime?
- Can you get support for and prompt answers to technical questions or help with any issues?

Vetting your third-party cloud providers according to these questions can help you choose the right partner for the job. It'll also help you ensure that your provider is aligned with the specific needs of your organization.

Month Six: Execute Your Migration

It's now time to make your move to the cloud — which can be both scary and exciting. If you follow these cloud migration best practices, you can minimize downtime and other issues:

- Assess your data privacy requirements. Any storage location for HIPAA- or PCI-compliant systems will need an extra level of security.
- Determine what dependencies you have and consider those dependencies when deciding in what order to migrate applications.
- To test the process, move your least critical applications first. When these have successfully migrated, move onto your larger, more disruptive applications and tools.
- Have a plan in place to limit the impact of downtime as much as possible. Consider doing most of the legwork during off hours.
- Use an automated or manual test to check that everything migrated successfully.

While making sure the communications tools your organization uses have properly migrated is critical, it's also important that you set employees up for success. Including them in the process and regularly checking with them to ensure they are familiar with cloud-based tools is essential.

One Year: Evaluate Your Success

You've planned, strategized, and implemented — now it's time to determine if you're meeting the KPIs you established a year ago and if everything went as planned. You'll want to consider:

- Are you pleased with the level of service, protection, and support you've received from your provider?
- What benefits, such as faster service, lower costs, or better performance, have you achieved? How can you streamline processes to achieve even more?
- Have your employees successfully adopted the new technology? What can you do to help your employees with the adjustment?

A successful cloud migration requires appropriate planning and thoroughness. But the benefits of being able to scale your business, increase availability, and provide your team real-time access to cloud-based collaboration and communications tools while lowering overhead are well worth it.