

7 steps to a risk-free cloud migration



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Executive summary

CIOs face a formidable challenge.

They have to ensure their organization's technology stack remains current with the latest advancements. Equipping end-users with productivity-enhancing tools, like artificial intelligence, while minimizing disruptions to workflows is a must.

And they have to do that while controlling expenditures. It's a delicate balancing act.

Moving from an on-premises to a cloud-based PBX system is a significant step in upgrading your communications infrastructure. But the path to a cloud migration can come with its fair share of challenges and potential stumbling blocks.

This white paper outlines a strategic roadmap, with seven essential steps to navigate the migration process with confidence to ensure a risk-free transition to a cloud PBX solution powered by AI. By embracing these steps, organizations can not only mitigate potential risks but also unlock the full potential of cloud technology to drive innovation, enhance productivity, and stay ahead in today's competitive marketplace.



Assessment and Planning

As the saying goes, “The journey of a thousand miles begins with a single step.” When it comes to migrating your on-premises to cloud PBX, that initial step could be the most crucial one. Start by assessing your current state, considering variables like:



Users



Locations



Call Queues



User groups



Required features

This assessment will ensure that you have a clear understanding of your organization’s needs and requirements, allowing you to tailor your migration plan accordingly. By evaluating users, locations, call queues, user groups, and required features, you can also identify potential challenges and opportunities early on. This proactive approach sets the stage for a smooth and successful migration, minimizing disruptions and maximizing the benefits of your new cloud PBX system.

STEP 2

Security and Compliance Review

Once you've assessed your current state and identified your migration needs, the next crucial step is to prioritize security and compliance.



Both security breaches and non-compliance with industry and local regulations can be costly, so safeguarding sensitive data and ensuring regulatory compliance are critical.

Conduct a thorough review of your organization's security policies and compliance requirements, taking into account industry regulations and best practices. As you evaluate cloud PBX providers, ensure their security features and protocols meet your organization's standards. If your organization is considering leveraging AI as part of your cloud PBX solution, be sure to gain a deep understanding of [how your data may be used](#) and the [guiding principles](#) towards AI of your potential cloud PBX provider.

Additionally, be sure to assess each provider's track record in data protection, encryption, and threat detection. By prioritizing security and compliance from the outset, you can mitigate risks and build a solid foundation for a secure cloud PBX environment.

[Get RingCentral's Complete Guide to Cloud Communications Security](#)

Vendor Selection and Due Diligence

Choosing the right cloud PBX provider is a critical decision that can significantly impact the success of your migration journey.

Begin by conducting thorough research and evaluation of potential vendors to find the one that best aligns with your organization's needs, goals, and values. Consider factors such as [reliability](#), [reputation](#), and [scalability](#).

During the due diligence process, delve into the vendor's track record, [financial stability](#), and [experience](#) in providing cloud communication solutions. Request [references and case studies](#) to gain insights into their past performance and customer satisfaction levels. Additionally, assess the vendor's [data security](#) measures, [compliance certifications](#), and [privacy policy](#) to ensure they meet your organization's requirements.

Cloud PBX technology is advancing at a rapid pace, especially as AI becomes infused across business communications. Your prospective PBX provider should not only be [embracing these technologies](#), but have a robust AI roadmap to solve workflow challenges and enhance user productivity.

Your cloud PBX should also enhance your existing workflows and be embeddable into your preferred business apps and processes. [Integrating your cloud PBX](#) with these apps can boost productivity while helping you maximize your ROI.

Ultimately, selecting the right vendor requires careful consideration and due diligence to ensure a successful partnership that delivers long-term value and support for your organization's communication needs.

Data Migration Strategy

Now that you've assessed and planned, checked for security and compliance, and selected your vendor, it's crunch time: time to migrate your business phone system

While there's no "one size fits all" strategy for data migrations, most typically fall into one of two categories:

Lift and shift

Most organizations are ultimately looking to completely replace their on-premises PBX with a cloud PBX. In these scenarios, all users, locations, settings, and workflows are moved from the legacy on-premises system to the cloud PBX. During this process, CIOs should be aware of risks like data loss or corruption, downtime, and compatibility challenges. Many of these concerns can be mitigated during the assessment and planning phases, ensuring a smooth transition from on-premises to the cloud.

Hybrid cloud PBX

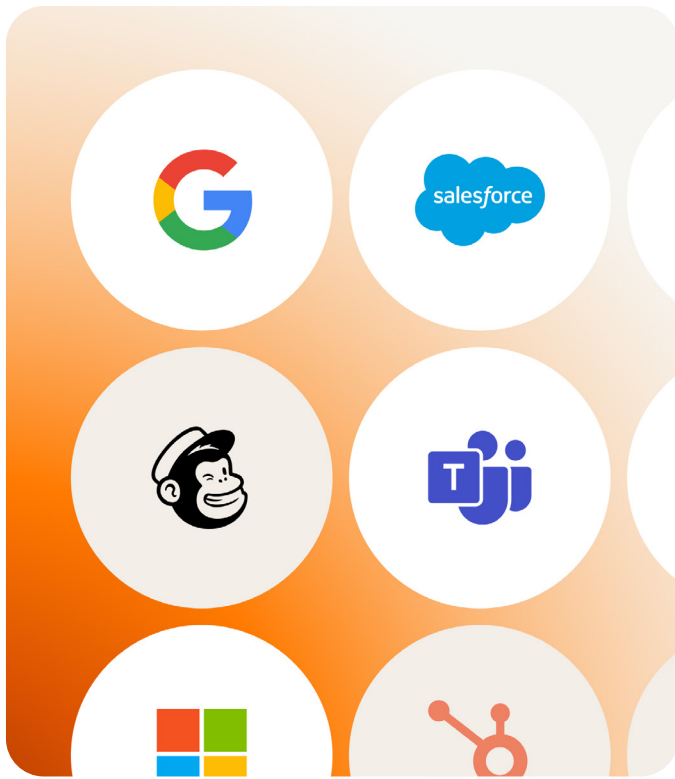
Modern, cutting-edge collaboration tools in the cloud appeal to most, but those heavily invested in their on-premises PBX might not be ready to throw out those investments just yet. That's where a hybrid cloud PBX comes in. A hybrid cloud PBX combines a company's on-premises PBX with a cloud-based phone system, allowing both infrastructures to run in an enterprise seamlessly. Enterprises can take full advantage of cloud PBX benefits—cost savings, modern telephony features, instant scalability and flexibility, support for remote work, cloud security economies of scale, business SMS, and eFax—while building on existing investments. Users in both environments can communicate with each other as if they were on a single unified platform.

Learn about [RingCentral Cloud Connector](#) for Hybrid PBX deployments

STEP 5

Testing and Validation

Before fully committing to the migration of your cloud PBX system, thorough testing and validation are essential to ensure a smooth transition.



Start by checking if all of your business-critical features, like call routing and voicemail, are working as expected. Next, conduct compatibility testing to ensure that the cloud PBX solution is compatible with your existing infrastructure, applications, and devices. Test compatibility with different operating systems, web browsers, mobile devices, and [third-party integrations](#) to identify any compatibility issues that may arise.

Once you've verified functionality and compatibility, it's time to assess performance. Load up the system with calls, messages, and other tasks to see how it handles different levels of activity. Security is also a top priority, so run some tests to identify and address any potential vulnerabilities.

Lastly, gather feedback from your team members who will be using the system daily. Their input is invaluable in identifying any usability issues or areas for improvement. By thoroughly testing and validating your cloud PBX system, you can ensure a smooth transition and minimize disruptions for your organization.

[See over 300 out-of-the-box integrations with RingCentral](#)

Training and Change Management

Transitioning to a new cloud PBX system isn't just about flipping a switch - it's about ensuring your team is equipped and ready for the change.

You can simplify the change by:

- **Comprehensive training sessions:** familiarize users with the new system's features, functionalities, and interfaces.
- **Customized training for specific roles:** Tailor training sessions to different user groups based on their roles and responsibilities, ensuring each team member receives the guidance they need to thrive in the new environment.
- **AI-specific enhancements:** AI capabilities may be new to users, so ensuring users know how to leverage them properly can create productivity gains and help adoption.
- **Overcommunication:** During times of change, transparency about the reasons for the transition and the benefits it brings are critical. Address any concerns or resistance from team members, and emphasize the positive impact the new system will have on productivity and collaboration.

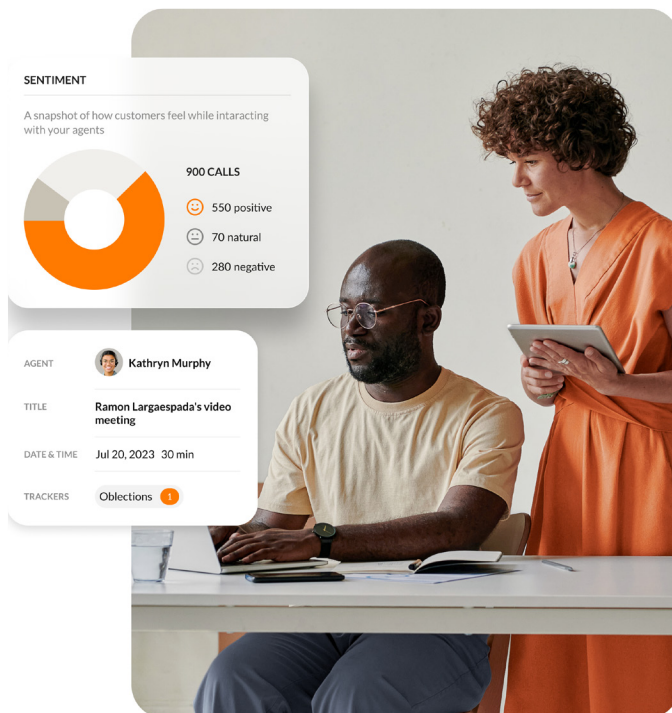
Change management strategies are essential for smoothing the transition and minimizing resistance. Develop a clear communication plan to keep everyone informed about the migration process, including timelines, milestones, and support channels. Encourage feedback from users throughout the transition process, and be prepared to address any issues or challenges that arise.

Finally, celebrate milestones and successes along the way to keep morale high and reinforce the benefits of the new system. By investing in training and change management, you can ensure a successful transition to your cloud PBX system and maximize its impact on your organization.

STEP 7

Continuous Monitoring and Optimization

Once your cloud PBX system is up and running, the journey doesn't end there - it's just the beginning. Continuous monitoring and optimization are essential to ensure your system operates at peak performance and continues to meet your organization's evolving needs.



Establish robust monitoring mechanisms to track key performance indicators (KPIs) such as call volume, call quality, system uptime, and user satisfaction. Leverage monitoring tools and [analytics dashboards](#) to gain insights into system performance and identify any areas for improvement or optimization.

Stay in the loop with what's happening in the world of cloud PBX systems. Keep an eye out for new features, tips, and tricks that could make your system even better. And always be open to feedback from your team - after all, they're the ones using the system every day.

Learn about [RingCentral Analytics](#)

Conclusion

The journey to a risk-free cloud migration for your organization's PBX system is not without its challenges, but with careful planning, thorough assessment, and strategic execution, it can be achieved successfully. By following the seven key steps outlined in this white paper - from initial assessment and planning to continuous monitoring and optimization - CIOs can navigate the complexities of cloud migration with confidence.

Embracing change, prioritizing user satisfaction, and staying proactive in addressing emerging needs are essential elements for realizing the full potential of a cloud PBX solution. With the right approach and commitment to ongoing improvement, organizations can unlock the benefits of cloud technology, drive innovation, and position themselves for success in the ever-evolving digital landscape.

For more information, please contact a sales representative. Visit ringcentral.com or call 855-774-2510.

RingCentral Inc. (NYSE: RNG) is a leading provider of AI-driven cloud business communications, contact center, video and hybrid event solutions. RingCentral empowers businesses with conversation intelligence, and unlocks rich customer and employee interactions to provide insights and improved business outcomes. With decades of expertise in reliable and secure cloud communications, RingCentral has earned the trust of millions of customers and thousands of partners worldwide. RingCentral is headquartered in Belmont, California, and has offices around the world.

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