



bucher✦suter

Cloud migration

A practical guide for contact center

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Why cloud and why now?

Global tech leaders need what contact center teams need: the flexibility to meet changing business needs.

This is a critical capability, especially in an environment that, from the technological point of view, may look quite different in 3-5 years. Especially when it comes to AI services. Already, automation resolves more than **70% of tier-one support tasks** for leading enterprises.

By 2028, service leaders expect **70% of customers** service journey to begin and resolve on mobile devices, all via conversational third-party assistants.

At the same time, customer behavior is evolving. Yes, more and more of the tier-one support journey takes place in automated channels. But **64% of customers** still prefer that companies do not use AI in customer service at all.

Finally, let's not forget the service teams tasked with navigating all of this change. Nor should we overlook the other business units so closely intertwined with contact center operations, such as IT, compliance, and FinOps.

Taking all of this on using legacy systems, outdated workflows, and inefficient processes is a risk that fewer and fewer organizations want to take. But as viable as cloud migration may be, the process is fraught with potential obstacles.

90% of global tech leaders plan to change their cloud strategy in the next two years.

How to use this migration guide

These recommendations are based on Bucher + Suter's extensive experience with cloud migrations for contact centers. Though every environment is a little bit different, this guide provides a complete picture of what successful migration entails. By using this guide as reference, you'll be better positioned to achieve the core goals of cloud migration:

- 

Reduce operational costs and achieve predictable monthly operating figures
- 

Speed up time to value when introducing new technology to enhance service experiences
- 

Improve customer experience with better self-service and response times
- 

Be proactive instead of reactive when it comes to making changes
- 

Increase operational agility with demand-based scalability, rapid feature deployment, and fewer infrastructure constraints
- 

Be ready for the future with AI/powered innovations and advanced automation

Obstacles to contact center migration

- ### Technical complexity

Migration mean legacy system integrations meeting network requirements, and individual customizations. Not to mentions the intricacies of data migration.
- ### Business continuity

Contact center teams always keep an eye on uptime/downtime, disaster recovery planning, and potential risks for service interruption. One misstep here can significantly degrade brand loyalty.
- ### Migration timing & execution

Within enterprise environments, it can be difficult to coordinate migration windows, anticipate timeline pressures, and allocate necessary resources.
- ### Security, regulations & compliance

Within sensitive or heavily regulated spaces, migration plans must account for data protection and sovereignty, access control, and security concerns.
- ### Vendor selection

Decision-makers are rightfully weary of locking in vendor relationships, especially with respect to service reliability and support quality after migration.
- ### Skills gaps

Many contact centers lack the in-house expertise and resources needed for cloud management and user (agent) onboarding, training, and upskilling.

Phase 1: Migration readiness assessment

Conduct a cloud migration readiness assessment to reveal gaps in your current infrastructure, technology, processes, and culture. Your assessment should include:

✓ Security and compliance evaluation

EXAMPLE	ACTION ITEMS	DELIVERABLE
Healthcare provider needs HIPAA or BSI-C5 compliance, requiring end-to-end encryption for patient conversations and secure authentication for remote agents.	- Document current compliance requirements (HIPAA, BSI-C5, GDPR, PCI-DSS) - Identify data classification and protection needs - Map current security protocols and gaps	Security requirements documents

✓ Infrastructure and technical compatibility analysis

EXAMPLE	ACTION ITEMS	DELIVERABLE
A financial firm with a legacy CRM needs custom APIs to ensure seamless data transfer to the new cloud platform.	- Complete system inventory (hardware, software, integrations) - Assess legacy application dependencies	Technical architecture assessment

✓ Operational workflow documentation

EXAMPLE	ACTION ITEMS	DELIVERABLE
An e-commerce retailer preserves VIP escalation processes in the cloud, maintaining historical context across all channels.	- Map current agent workflows and processes - Document customer journey touchpoints - Identify critical operational dependencies	Current state process map

✓ Cost-benefit analysis & business-critical KPIs

EXAMPLE	ACTION ITEMS	DELIVERABLE
A telecom firm finds \$450k in hardware upgrades can be avoided and realizes 22% savings over 5 years with predictable cloud costs.	- Calculate total cost of ownership (current vs. cloud) - Identify business-critical KPIs (NPS, agent satisfaction, etc.) - Ensure KPIs calculated in Total Cost of Ownership - Project 5-year cost comparison (accounting for minor and major upgrade of premise systems to stay protected from vulnerabilities and enable new features) - Identify hidden costs like IT infrastructure, - IT personal costs and savings opportunities	Financial impact assessment

✓ Business continuity planning

EXAMPLE	ACTION ITEMS	DELIVERABLE
A utility provider in storm-prone regions leverages their cloud contact center's built-in geographic redundancy across multiple provider data centers, while maintaining additional disaster recovery sites in different regions to ensure uninterrupted customer service during major weather events.	- Define uptime requirements and SLAs - Assess disaster recovery needs - Plan for geographic redundancy	Business continuity requirements

Understanding your options

Public, Private, or Hybrid?

Public Cloud

Infrastructure owned by a third party and delivered over the internet on a shared, multi-tenant basis.

Advantages

- No capital expenditure required
- Pay-as-you-go pricing model
- Scale resources up/down fast
- Rapid deployment + time to market

Regulatory considerations

- Specialized environments available (GDPR, FedRAMP, for example)
- Requires careful configuration for PCI-DSS, SOX, HIPAA
- Shared responsibility model for security

Common platforms

- Webex (Contact Center, Connect, Calling, AI)
- Agentforce Contact Center

Best for

- Businesses of all sizes from start-ups to enterprise
- Organizations with variable workloads
- Companies prioritizing innovation and speed
- Businesses seeking minimal IT management

Hybrid Cloud

Integration of on-premises with public/private cloud in a unified environment.

Advantages

- Workload placement flexibility
- Cost optimization across environments
- Gradual migration capability
- Balance between compliance and innovation

Complexity factors

- Multiple security models
- Cross-environment governance
- Data synchronization needs
- Network connectivity requirements
- Diverse skill requirements

Common configurations

- Critical systems on-prem; variable workloads in public cloud
- Transaction processing local; analytics in cloud
- Store systems on-prem; e-commerce in cloud

Best for

- Enterprises with legacy systems, cost-optimization priorities
- Mixed stable/variable workloads
- Gradual cloud migration needs
- Low latency + scalability requirements

Private Cloud

Dedicated computing resources for a single organization, on-premises or hosted.

Advantages

- Complete control over data location and access
- Enhanced security configurations
- Full compliance management capability
- Data sovereignty assurance

Common platforms

- Webex Contact Center Enterprise
- Agentforce Contact Center (available through Hyperforce)

Industry examples

- Banks: Core systems
- Healthcare: Electronic health records
- Manufacturing: IP protection for designs

Common deployment models

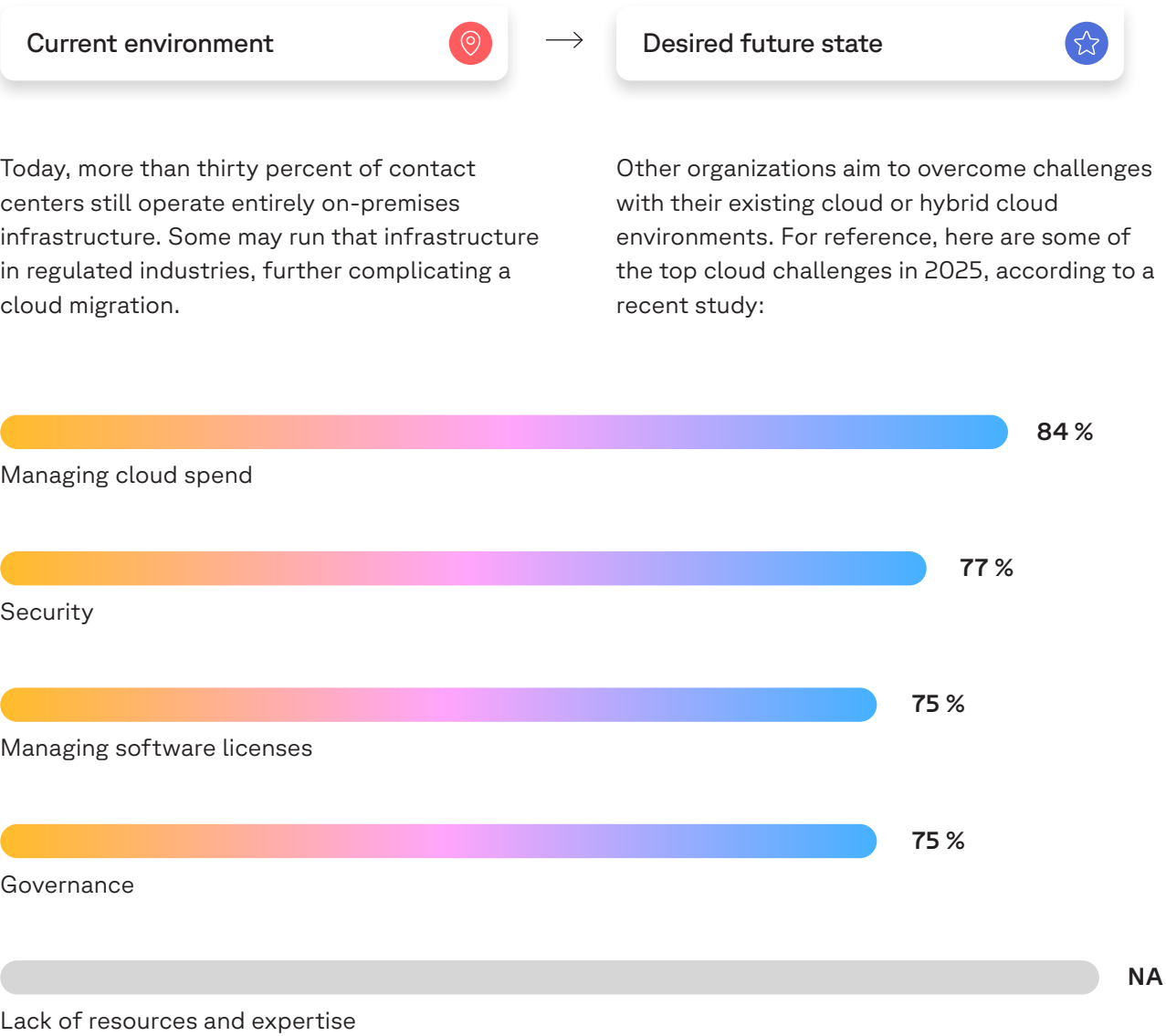
- On-premises: Maximum control, high investment
- Hosted: Managed by providers (e.g., b+s Cloud)
- Virtual Private Cloud: Isolated public cloud segments

Best for

- Enterprises with strict compliance requirements
- Government, financial, healthcare
- Companies requiring data sovereignty

Decision framework: Choosing your cloud strategy

The choice between public, private, and hybrid cloud will depend on two things:



73 %

of companies run hybrid cloud infrastructure

53 %

use multiple providers to get promos, specific features, or avoid vendor lock-in

Key considerations

	Public	Private	Hybrid	
Initial Capital & Professional Services	\$0–\$200k	\$500k–\$5M	\$250k–\$2M	Investment & cost
Monthly Operating	\$5k–\$100k+	\$20k–\$200k+	\$15k–\$150k+	
Staffing Needs	1–5 specialists	5–20+ specialists	3–15 specialists	
Migration Costs	\$50k–\$500k	\$200k–\$2M	\$150k–\$1M	
Network/Connectivity	included	\$5k–\$50k/month	\$10k–\$75k/month	
Deployment	Days-weeks	3–12 months	2–6 months	Time & efficiency
Scaling time	Minutes	Hours–days	Minutes–hours	
Time to ROI	3–6 months	18–36 months	12–24 months	
Maintenance	Minimal	Minimal	Moderate	
Cost predictability	Variable	Fixed	Mixed	Benefits
Scalability	Unlimited	Unlimited	Flexible	
Security	Shared	Complete	Selective	
Compliance ease	Moderate	High	High	
Innovation	Fastest	Moderate	Moderate	
Disaster recovery	Built-in	Flexible	Flexible	
Vendor lock-in risk	High	Moderate	Moderate	
Small Business: Named agents: 50–150 Monthly interactions: 50K–150K	\$350k–\$750k	\$2.2M–\$4.4M	\$1.9M–\$3.8M	5-Year total cost of benefit
Mid-Market Named agents: 300–1,000 Monthly interactions: 150K–2M	\$1.33M–\$2.75M	\$5.7M–\$12.5M	\$5.3M–\$11.2M	
Enterprise Named agents: 1,000+ Monthly interactions: 2M+	\$6.3M–\$15.7M	\$15.5M–\$22M	\$12.4M–\$16.5M	

Phase 2: Strategic migration planning

Assessment should be followed by the ever-important migration planning stage. Here is where organizations can tailor their migration strategy to unique requirements. During this phase, you should come away with the right methodology, an actionable roadmap, and clear timelines.

In addition, your teams should be aligned around responsibilities, as well as how success will be evaluated.

1. Choose your migration methodology

Here’s a brief overview of the three most common migration methodologies for the contact center:

Methodology	Advantages	Disadvantages	Timeline
Lift-and-shift	- Quick migration - Minimal changes - Minimal disruption - Lower initial costs	- Current applications can cost more to run in the cloud - Possible degraded performance or operational issues - Potential security vulnerabilities	3–6 months
Phased	- Good for complex environments and risk mitigation - Business continuity - Learning and optimization opportunities - Flexibility and adaptability	- Extended timeline and resource commitment - Dual system maintenance costs - Integration complexity - Potential for migration fatigue	6–12 months
Full replacement	- Legacy system replacement - Full modernization - Max. cloud-native benefits - Future-proof architecture - Optimal performance and cost efficiency - No legacy restraints	- Highest cost and resource requirements - Significant complexity and risk - Skills requirements - Business disruption - Risk of over-engineering	12–18 months

2. Create your migration roadmap

Your migration roadmap should clearly define migration phases and key milestones, including projected timelines and success criteria/KPIs. Critical success factors ought to include:

- Executive sponsorship and clear governance
- Dedicated migration team and cloud expertise
- Robust change management and communication
- Comprehensive testing for each phase
- Continuous monitoring and optimization

Phase	Milestones	Success Criteria
Discovery & assessment (months 1–2)	- Complete application portfolio inventory - Migration candidates and dependencies - Technical and business readiness assessment	100% of applications cataloged and categorized - Risk assessment completed for all critical systems - TCO analysis showing projected cost savings - Stakeholder alignment (>90% approval)
Strategy & planning (months 2–3)	- Migration approach per application (6 R’s) - Selection of cloud provider(s) and architecture - Detailed migration plan and sequence	- Leadership approval - Documented security and compliance requirements - Resource plan (team, budget, tools) - Pilot applications identified
Foundation setup (months 3–4)	- Establish cloud landing zone - Configure networking, security, and IAM - Set up CI/CD pipelines and monitoring	- Cloud environment provisioned per standards - Security baseline implemented - Connectivity established - Operational monitoring dashboard
Main migration waves (months 5-12)	- Wave 1: Non-critical applications (20%) - Wave 2: Business applications (40%) - Wave 3: Critical systems (40%)	<2 hours downtime per application - Zero data loss incidents 95% of migrations on schedule - Cost optimization achieving target savings
Optimization & modernization (months 12-18)	- Implement auto-scaling and cloud-native features - Refactor selected applications - Decommission legacy infrastructure	- Target reduction in operational overhead - Application response time improvement targets 100% of legacy systems retired - Cloud spend optimized per targets

3. Complete risk management and contingency planning

What are the potential risks inherent to your specific migration plan? How will you handle a rollback or emergency response, if necessary? Here's where a contingency planning checklist is critical. Here's what that checklist might include:

Risk assessment

Technical risks

- Backup & restore procedures tested (RTO < 4hrs)
- Application dependencies mapped & validated
- Performance baselines documented
- Security vulnerabilities assessed

Business risks

- Maintenance windows approved
- Customer communication plan ready
- Integration fallbacks identified
- Compliance requirements verified
- Training and readiness of staff

Rollback procedures

Rollback ready

- DNS reversion procedure documented
- Database rollback scripts tested
- Step-by-step runbook created
- Validation checkpoints defined
- PTSN rollback plan in place

Trigger points

- Data corruption
- Performance < 70% baseline
- Security breach
- Downtime > 2hrs

Emergency response

Response team

- Primary contacts identified (Cloud/ Security/DB/Business)
- Decision makers' availability confirmed
- Escalation matrix defined (L1: 0-30min | L2: 30-60min | L3: 60+min)
- War room bridge established
- Communication templates approved

Critical Safeguards

Data protection

- Parallel run period: 48hrs minimum
- Data validation scripts ready
- Reconciliation process documented

Cost controls

- Budget alerts at 80% threshold
- Auto-scaling limits configured
- Emergency shutdown procedures ready

Testing complete

- DR drill executed
- Rollback tested in non-prod
- Performance benchmarks set
- Security scan passed

4. Prepare your pre-migration checklist

Your pre-migration checklist will likely have three focus areas:

Team preparation and training

- ☐ Assemble migration team with defined roles
- ☐ Plan staff training programs
- ☐ Establish communication protocols

Application migration strategy

- ☐ Apply the 7 Rs framework
- ☐ Prioritize applications for migration
- ☐ Plan integration testing protocols

Data migration planning

- ☐ Map data sources and destinations
- ☐ Plan data cleansing and validation
- ☐ Establish backup and recovery procedures

Phase 3: Migration and go-live

The success and efficiency of the actual migration will depend heavily on the work done during the preceding phases. There are steps you can take during migration and go-live to analyze, improve, and refine while minimizing risk.

Reality check

Many contact center teams begin migration with a pilot phase. A pilot executes a limited migration in a controlled environment. Typically focused on specific pilot groups and use cases, pilot phases can help validate applications. They can also uncover:

Integration challenges
between cloud platforms and existing systems and applications.

Feature gaps & surprises
that may require workarounds or reveal non-essential legacy features.

Workflow disruptions
that qualify and quantify the effect on migrated workflows

Skills and training requirements
beyond initial assessments (e.g., supervisor dashboards and real-time coaching).

Customer experience effects
such as sentiment toward, or confusion about, migrated workflows and processes.

New requirements
unique to the new cloud environment, such as new authentication requirements or data residency issues.

Full rollout

Regardless of methodology, it pays to execute the migration in phases or waves. For example:

1. Low-risk departments (e.g., internal-facing teams or smaller offices)
2. Customer-facing teams/service tiers handling routine inquiries
3. High-value customer segments and complex workflows

Keep two critical success factors in mind: system performance and user adoption. The latter comes into sharp focus when cloud migration is a part of a broader AI-driven transformation. For instance, how are support agents responding to expanded automation of Tier 1?

What about customers?

Testing checklist: Must-haves

Many contact center teams begin migration with a pilot phase. A pilot executes a limited migration in a controlled environment. Typically focused on specific pilot groups and use cases, pilot phases can help validate applications. They can also uncover:

- ☐

Live-call testing

- First customer call successful
 - All queues receiving calls
 - No dropped calls
 - Voice quality confirmed
- ☐

Agent login verification

- All agents logged in successfully
 - Correct skills assigned
 - Schedules loaded
 - Tools accessible
- ☐

Real-time data flow

- Customer data populating
 - Queue stats updating
 - Dashboards displaying
 - No sync delays
- ☐

System performance

- Response times within SLA
 - CPU/memory stable
 - No error spikes
 - Bandwidth sufficient
- ☐

Integrations

- CRM connected and updating
 - WFM pulling data
 - Quality recording active
 - Payment processing live
- ☐

Routing

- Calls reaching correct agents
 - Priority routing working
 - Overflow functioning
 - After-hours active
- ☐

Reporting

- Today's data capturing
 - Historical reports accessible
 - No data gaps
 - Metrics calculating
- ☐

Communication

- Voice operational
 - Email flowing
 - Chat responsive
 - SMS delivering
 - Social connected
- ☐

Business continuity

- Supervisors can monitor
 - Recordings accessible
 - No customer complaints
 - SLAs being met
- ☐

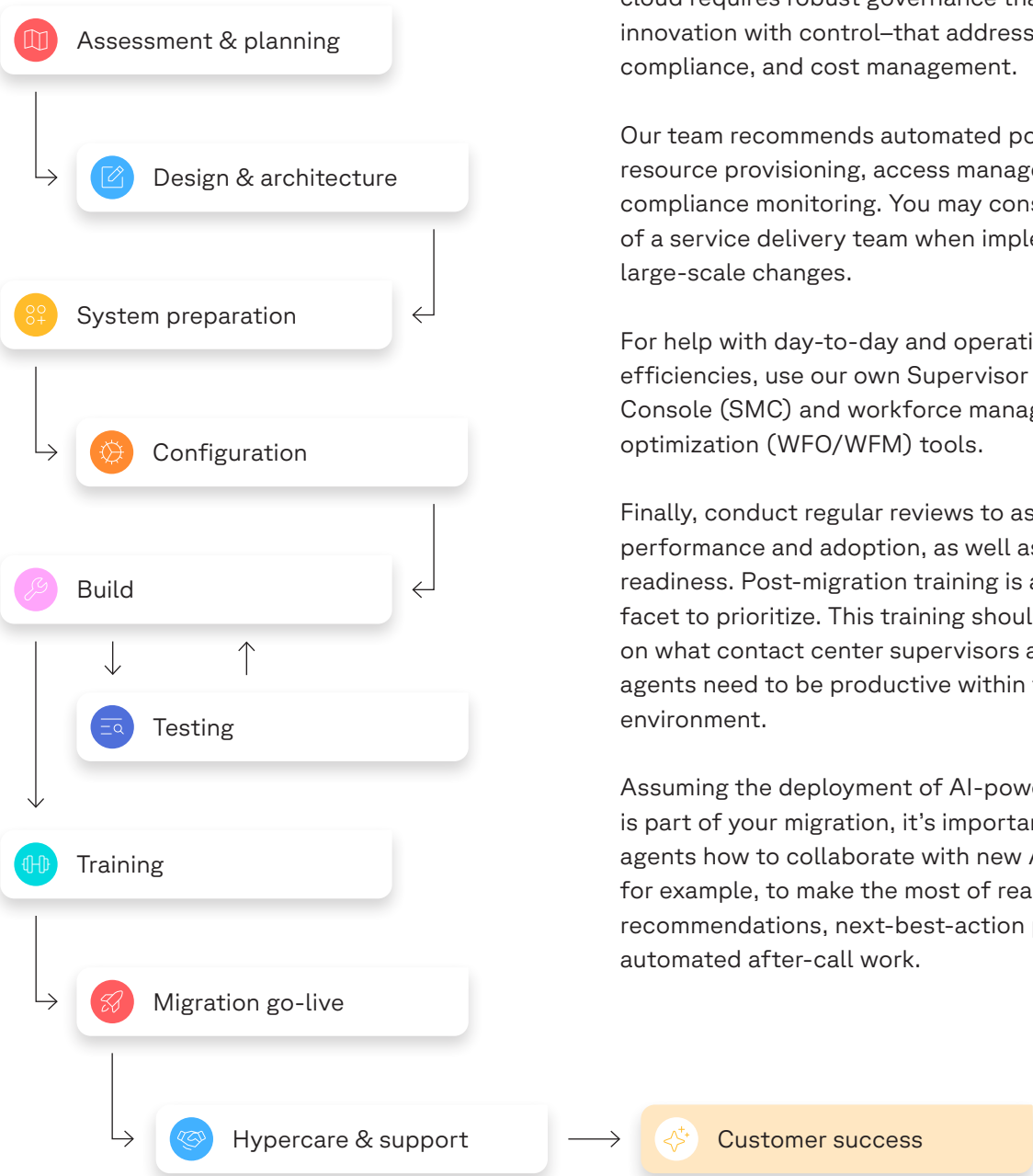
AI Bots

- Test the BOTs and their behavior

What happens after migration?

The first ninety days after migration are just the beginning. How you approach the post-migration phase will have a direct bearing on how well your cloud investment delivers its promised returns.

It's estimated that 21% of enterprise cloud infrastructure spend is wasted on underutilized resources.



At Bucher + Suter, we call this the Customer Success phase. It's a period of support that's focused on performance monitoring and optimization, user training and adoption, and governance.

Governance has become a particularly important facet, especially as enterprise IT spend continues to shift toward cloud-based models. Public cloud requires robust governance that balances innovation with control—that addresses security, compliance, and cost management.

Our team recommends automated policies for resource provisioning, access management, and compliance monitoring. You may consider the help of a service delivery team when implementing large-scale changes.

For help with day-to-day and operational efficiencies, use our own Supervisor Management Console (SMC) and workforce management/ optimization (WFO/WFM) tools.

Finally, conduct regular reviews to assess current performance and adoption, as well as future readiness. Post-migration training is another core facet to prioritize. This training should focus on what contact center supervisors and their agents need to be productive within the new environment.

Assuming the deployment of AI-powered tools is part of your migration, it's important to teach agents how to collaborate with new AI assistants, for example, to make the most of real-time recommendations, next-best-action prompts, and automated after-call work.

Common migration pitfalls

Cloud migrations sometimes go exactly as planned. Sometimes, they do not. Research into a cloud-based enterprise resource management tool found that transformations take 30% longer than planned on average. Variability in terms of budget, schedule, and results affects more than 60% of companies undergoing these transformations.

The same pitfalls threaten contact center migrations.

Cost overruns

The prevalence of cloud data storage issues is well documented and widespread. Data transfer alone can be more costly than anticipated, as are application migration and downtime.

Security issues

Improper configuration during migration can create vulnerabilities. Many organizations underestimate the shared responsibility model, assuming cloud providers handle security entirely.

Governance

Without a proper governance framework, cloud migration may give way to shadow IT, duplicated services, and difficulties tracking costs. Develop clear policies for resource provisioning, monitoring, and lifecycle management.

Skills gaps

Organizations often underestimate the learning curve and specialized knowledge needed to implement and make use of cloud architecture. Plan to invest in staff upskilling for better adoption, if not contracted cloud specialists.

Workers council approval

In European markets, obtaining Workers Council approval can create unexpected delays when personal-level data reporting or employee analytics capabilities are involved in the migration. Organizations often underestimate the time required to navigate these consultations and secure necessary approvals for data governance frameworks that affect individual worker information.

Real-world cloud success stories

Cloud migration can unlock significant benefits. It lays the groundwork for using cloudenabled AI services, for one, which can lead to an estimated **30% boost in operational efficiency**. These include voice AI and natural language processing, predictive analytics, generative AI (GenAI) and agentic AI.

Bluebeam



Challenge	Solution	Results
- Legacy on-premises Cisco CCX couldn't scale - System limitations impacting service quality - Need for flexibility and modern cloud capabilities	- Migrated from on-premises cloud solution in 6 months - Leveraged existing b+s Connects integration experience	- Time and resource savings - Enhanced agent productivity - Improved scalability for future growth - Seamless Salesforce integration

Bottom Line: Bluebeam's cloud migration positioned them for continued expansion into APAC markets and new construction tech innovations.

Wingo



Challenge	Solution	Results
- Unstable legacy system causing agent inefficiencies - Poor voice quality impacting customer satisfaction	- Complete migration to Webex Contact Center - Custom API integrations - Enhanced supervisor dashboards 6-month completion	10+ second reduction in average speed to answer - Eliminated voice quality complaints - Real-time supervisor oversight - AI-ready platform

Bottom Line: Wingo's transformation shows how cloud migration can immediately improve both agent experience and customer satisfaction metrics.

Helvetia



Challenge	Solution	Results
- Data center closure deadline by end of 2023 - Complex migration from Cisco UCCE to cloud - Microsoft Teams telephony integration requirements	- Phased hybrid approach - Maintained Swiss data center operations - Transitioned to Webex Contact Center with Teams integration	- Compliance with Swiss data regulations - Seamless Salesforce CTI integration - Deployed GPT-based bots for automation

Bottom Line: Helvetia's early adoption of Webex Contact Center demonstrates how regulated industries can successfully navigate cloud transitions while maintaining security.

Working with migration partners

Questions to ask a migration partner

- What's your company's track record with similar projects in our industry?
- Can you provide references, reviews, and results from past/current clients?
- What's your process for understanding our business needs and goals?
- What are the different integrations for this product with other existing systems?
- How do you drive value? What productivity and efficiency gains can we expect?
- How will your team communicate about performance and how often?
- How do you handle changes in project scope or requirements?
- Who will be assigned to our account to facilitate post-sale communication?
- What's your process for conducting regular check-ins and progress updates?
- Can you provide a detailed plan for the post-migration phase?
- Will your team participate in relevant strategy and planning sessions?
- What's your approach to continuous improvement and feedback loops?
- What's your response time for support requests?

Choosing the right cloud partner

What to look for—and what to run from

Red flags

- Overwhelming, fragmented experience**
tries to do it all but ends up being unreliable
- Limited scalability, basic functionality**
can't grow with business or handle complex needs
- High-maintenance, complicated setup**
requires constant effort and expertise to function
- Outdated systems, lacks innovation**
stuck in legacy technology and unable to evolve
- Overly expensive, high-maintenance**
drains resources with complex pricing and upkeep

Green flags

- Proven reliability with **99.99% uptime** and secure infrastructure
- Seamless integration** with business-critical enterprise applications, tailored to your workflows and scalable
- Personalized implementation** + training, ongoing customer success, support, and updates
- Future-ready with **AI and real-time insights**, committed to continuous improvement
- Cost-effective, low-maintenance, optimizes resources, **transparent pricing and easy upkeep**

Bucher + Suter's migration methodology

At Bucher + Suter, we've guided dozens of organizations through the migration journey. We offer versatile migration options suitable for even the most highly regulated industries, such as finance and healthcare.

Assessment & planning	Comprehensive discovery workshops that evaluate technical infrastructure, business objectives, and integration requirements to create tailored migration roadmaps.
Implementation framework	Phased rollouts starting with pilot groups, maintaining strong project governance through regular steering committees, and ensuring seamless integrations with existing systems like Salesforce and local payment processors.
Ongoing support & optimization	Managed services that include proactive monitoring, regular optimization reviews, and strategic guidance for adopting emerging capabilities like AI and advanced analytics.

Take a confident first step

At Bucher + Suter, we recognize the importance of going above and beyond for the customer. The data-driven evolution of contact center customer experiences, and a constant desire to improve are values that we live and preach.

About Bucher + Suter

More than 400 customers and over 200,000 contact center agents in over 60 countries benefit from our many years of Cisco and Salesforce expertise. With more than 120 contact center specialists, we implement and support smart, omnichannel cloud contact centers. We also develop market-leading CRM connectors for Salesforce Voice, Microsoft Dynamics, and ServiceNow and contact center business intelligence software that helps contact centers get every drop of value from their communication technology investments.

Technology partners

Our partnerships form an essential part of our business. Ranging from technology partners whose innovations shape our solutions, to channel partners and resellers who leverage our software to craft market-leading contact center solutions, each partnership enriches the very fabric of our organization.

CISCO PARTNER

Preferred Collaboration

serviceNow Partner

Premier

salesforce PARTNER

Microsoft Partner

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