



CHECKLIST

Plan your cloud migration roadmap

Whether you've developed a business case for migration and secured stakeholder buy-in - or you're working on it - assess your readiness and identify critical areas that need attention.

✓ Set overall objectives and priorities

Base your priorities on business benefits that will give you a competitive edge and greater profitability. Your plan should cover multiple years of innovation adoption, with continual improvement as your adoption matures and crosses more streams of work.

○ Develop a strategy for migration testing

Stress test and optimise workloads to check for performance and failure conditions, integration with other systems and redundant systems - before and after you move to the cloud.

○ Establish cloud KPI's

Existing KPI's for an application or service might not be enough. KPI's should reveal:

- How your in-progress migration is doing
- Any potential problems within your application for migration
- When the migration is complete and successful
- Acceleration of contact center performance

○ Create a timeline

Consider major milestones, including retiring old technology or deploying new releases — plus any dependencies related to migration. Then, identify quick wins. For example, moving applications with fewer dependencies will make these first steps of your migration faster and simpler to execute.

○ Build skills before you start

Consider the teams who need training and how much - from call center staff to security and IT. For example, less support will be required for hardware but more for data performance, usage and stability. Your vendor should offer these courses or refer you to a training partner.

○ Include these KPI categories

- User experience, including response time
- Application and component performance, such as availability
- Infrastructure performance
- Business management, including conversions

○ Discover and assess on-premises applications

Inventory all on-premises servers and assess dependencies. Look for vendors with an inventory mechanism to help you move into subsequent steps. These vendors help you understand VM and application dependencies on-premises, along with readiness, estimated costs and recommended sizing.

○ Perform any necessary refactoring

For more efficiency in the cloud, consider working on your applications and services before migrating them. In addition to potential savings from better resource utilisation, this can make it easier to move individual services to the cloud. During this process, you also might find applications to retire.

○ Understand the shared responsibility model for cloud

This includes security, failover, new functionality releases and testing. It establishes rules and structures around governance, access management and monitoring - from data and apps to the cloud platform itself. By defining areas of responsibility for you and your cloud vendor, it frees resources for higher impact projects.

○ Prioritise migration components

Create a list of applications, services and their underlying server infrastructures for migration. Use tools to generate a dependency diagram that helps determine what to migrate and in what order. Starting with services that have the fewest dependencies usually means migrating internal services before those closest to your customers.

○ Pilot your migration with a few workloads

Assess and migrate less complex workloads to show initial success and learn from less-impactful mistakes. To minimise the number of tools required, start with your cloud platform's native toolset. First, run a test migration without impacting on-premises machines. Then, migrate groups of virtual or physical servers at scale.

○ Replicate the process for additional workloads

When you have your first successful migration, document what you've learned. Then you can decide which criteria to follow, including timelines and deployment options - and share your plans with stakeholders.

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