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Approaches for a Successful CCaaS Implementation



Are you in charge of transitioning to a CCaaS platform? If you're approaching it like a typical technology or infrastructure upgrade, you might want to reconsider. This mindset could lead to an implementation that doesn't meet business goals or, worse, fails entirely.

Learn what sets "Contact Center as a Service" (CCaaS) apart from other platforms and why it requires specific strategies for a successful rollout.

Reasons for Companies to Transition to CCaaS

Competitive pressures, cost constraints, and advancements in technology are pushing businesses to demand more from their IT and technology stacks. Tools like CRM, marketing automation, social media, web platforms, video, and mobile are just a few examples. Companies that rely on inbound or multichannel capabilities to maintain competitive service levels and deliver unique client experiences are moving their call centers to CCaaS platforms to stay ahead in the market.

Key Digital Strategy Objectives



CCaaS provides an attractive value proposition. These cloud-based platforms offer flexibility, scalability, and cost management advantages that traditional on-premise contact centers cannot match. On-premise contact centers often operate on static assumptions about the number of agents, customer interaction volume, and the necessary features or channels for each agent. CCaaS allows for scaling agents as demand changes, provides better business insights, and adapts to business needs without requiring IT-supported infrastructure.

Leading companies have transitioned their call centers to the cloud to gain a first-mover advantage. Others have been driven to the cloud by executive mandates, digital transformation initiatives, forced hardware upgrades, competitive pressures, or significant cost-cutting measures. Some organizations resist cloud migration altogether. Understanding the motivation behind a migration is crucial, as it influences the initial strategic steps.

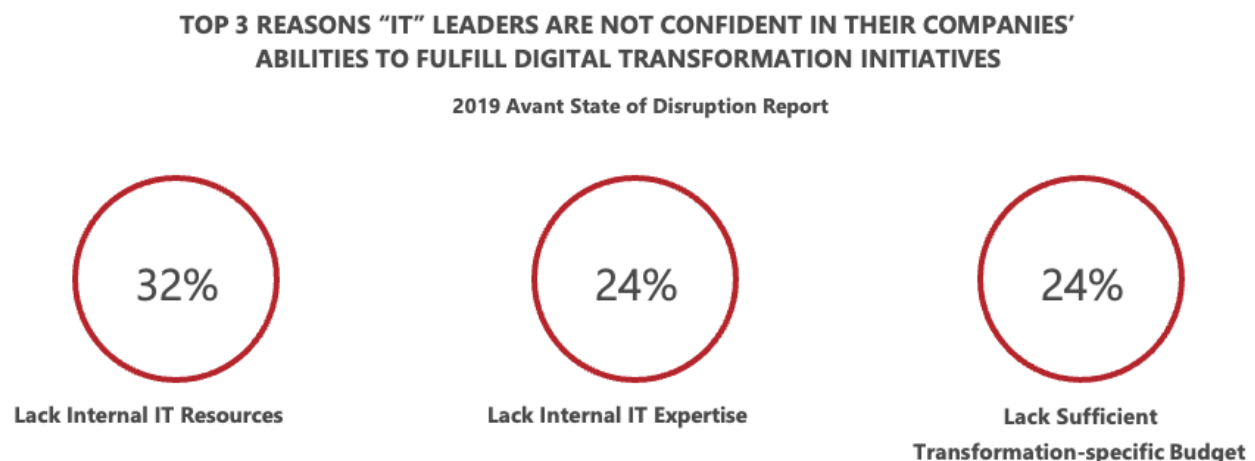
Typically, the catalyst for migration falls into two categories. First, IT-led events, such as mandatory hardware or software upgrades, top-down cloud-first strategies, or legacy customized software that has become too cumbersome. Second, business-led events, such as the need for greater control over key business drivers and performance metrics like workforce optimization, agent retention, or effectiveness. Other examples include integrating with a self-implemented Salesforce or ServiceNow system or a CMO's desire for a unified customer experience that requires rapid omni-channel functionality implementation.

Regardless of the catalyst, moving a call center to the cloud differs from migrating systems like email, CRM, marketing, or HR. It requires a distinct approach for success. Traditional thinking can lead to significant pitfalls that may result in CCaaS implementation failure, career setbacks, customer dissatisfaction, increased agent turnover, lost political capital, and a waste of time, money, and resources.

What Does a Failed CCaaS Implementation Look Like?

Before diving into strategies for CCaaS success, it's essential to understand what "failure" means.

Many CCaaS implementations don't outright fail but instead underperform, failing to deliver the expected benefits, such as higher customer satisfaction, improved agent effectiveness and retention, increased revenue, lower operating costs, and greater productivity. Synergies between well-aligned CCaaS vendors and clients are often replaced with blame-shifting, wasted time, misallocated resources, and legal disputes.

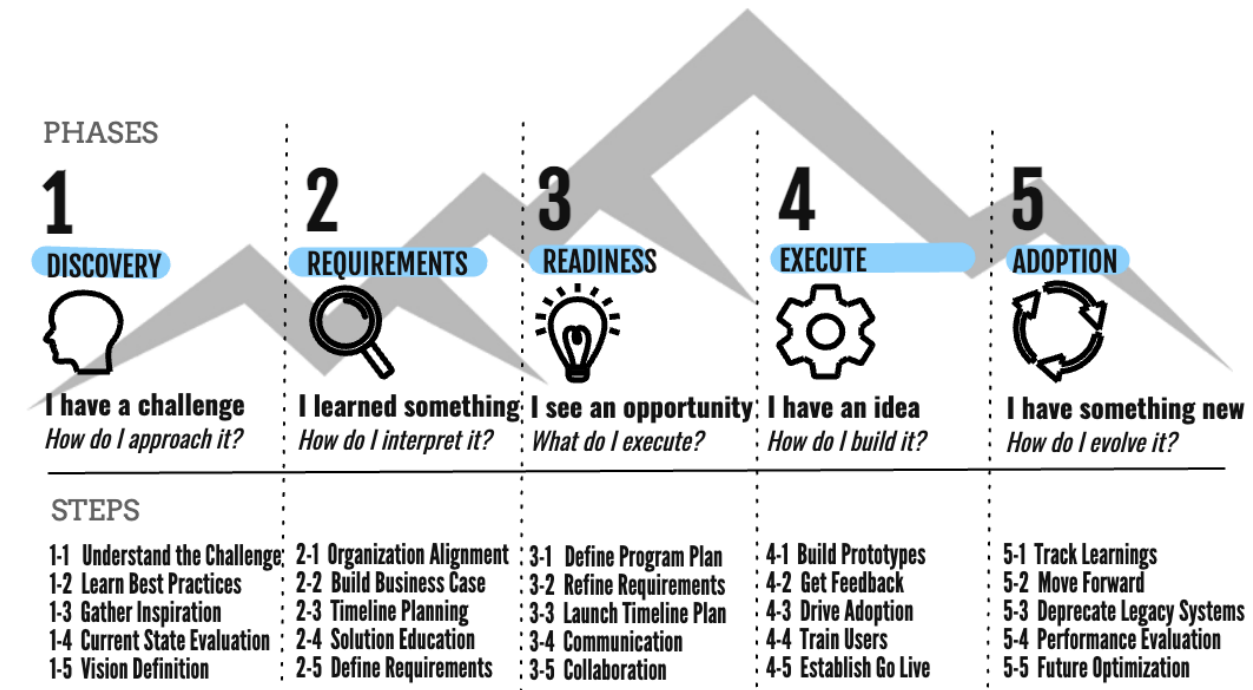


A failed CCaaS implementation can damage reputational capital and erode the trust between IT and business leaders. Customer experience suffers, business leaders feel powerless, revenue declines, agents quit, and people lose their jobs.

Ultimately, failure stems from not recognizing that CCaaS represents an operational model change, not just a technical one. Traditionally, technology purchases have been siloed, vendor-focused, inefficient processes filled with complexity, confusion, and stress, leading to IT-business turf wars over a vast gap between IT functionality and business needs.

What Makes a CCaaS Implementation Successful?

We have developed a **five-stage model** for successful CCaaS implementation, designed to address key friction points that can cause implementations to fail or underperform. We categorize these strategies into three groups: **Strategic Clarity**, **Vendor & Platform Evaluation**, and **Leadership Advocacy**.



Strategic Clarity

1. Develop a Comprehensive Customer Experience Strategy

A customer experience strategy outlines a vision for serving customers, details the desired experience, and specifies the processes for delivering that experience across the organization. If your organization hasn't documented or aligned on a specific strategy, you likely don't have one.

This often happens because customer service is perceived as a cost center rather than a differentiator. Moving the competitive needle may seem too expensive, the customer service function might be underdeveloped, competing priorities could exist, leadership support might be lacking, or the technological infrastructure may not be in place. The absence of a strategy often results in decentralized business units focusing solely on narrow business goals and their specific client interactions.

To execute CCaaS successfully, your organization needs a shared vision of the ideal customer experience. Develop a customer experience strategy that aligns with your company's brand

promise and details how to deliver that experience. This strategy should cover areas like integrating or expanding channels to meet customers where they are, reducing or eliminating hold times by enhancing self-service options, or creating a VIP pool by using CRM data to route interactions differently. Collaboration with business leaders is essential for developing this vision, and gaining buy-in across the organization is key to creating a winning strategy. The technology will enable this vision.

2. Eliminate the “Lift and Shift” Mentality

We’re all familiar with the "lift and shift" mentality—moving outdated technology, processes, and people into a new environment without addressing existing problems. This often happens when an upgrade schedule pressures an already time- and resource-constrained function. IT may not fully grasp the benefits of moving CCaaS to the cloud, or they might be hesitant to engage in meaningful business discussions. The lift-and-shift approach involves moving outdated infrastructure into a microservices cloud platform that releases new features every week.

When the primary reason for moving to the cloud is to avoid an impending upgrade, it’s natural to approach it with a similar mindset. Even if the goal is to maintain the status quo, moving to the cloud requires a different approach to thinking, configuring, and requirements to ensure a successful implementation. If the goal is to leap forward in functionality and agility to better support a differentiated customer experience, then dramatically different thinking is required. IT must engage with the business, understand its needs, look for opportunities to solve problems, simplify, and reap new benefits.

The ideal mindset when approaching a CCaaS transformation is to view it as a significant leap forward in customer engagement and the ability to adapt to their needs over time. This can be challenging if the company views its service centers only as cost centers. One client tests the organizational mindset by asking, “When interacting with a customer, you are closer to them than anyone else in the world—what will you do with that opportunity?” Raising awareness and excitement about “The Art of the Possible” is a good starting point. Change agents supporting CCaaS transformation can come from all parts of the organization, so be sure to engage a wide range of people, including:

- Business unit leaders
- Current contact center agents and managers
- IT Architecture
- IT Operations
- CRM/Case Management and Apps managers
- Sales and Customer Support leaders
- Business Intelligence leaders and managers

Engaging people throughout the business helps quantify the gap between the organization's current state and what is possible. Ideally, this process will also identify champions and strengthen alignment.

3. Build and Maintain Engagement from Both Business and IT Leaders

Successful CCaaS implementations involve both business and IT executive sponsors who remain actively involved and accountable for the project's success.

Unfortunately, catalysts for change can also lead to undesirable behaviors. If IT identifies the compelling event, it may believe it should solely drive the process. Conversely, if the business is driving the need for a new platform, it may think it should lead. Sometimes, these leaders initially work together but disengage before critical steps are completed or the project is driven to success.

When collaborative leadership engagement is lacking, it creates confusion, competing priorities, weak decision-making processes, a loose timeline, and unclear criteria for distinguishing between strategic business investments and traditional IT costs. In many post-implementation models, business unit leaders take on the budget, administration, and vendor relationship management. Without appropriate executive discussions, these decisions are unclear to other stakeholders, leading to performance issues. IT and the business must work together, get on the same page, and lead.

4. Build a Strong Business Case that Educates and Aligns Executives

Building a robust CCaaS business case is challenging because different business units, functions, teams, and individuals have vastly different priorities.

In a traditional IT "tech refresh" business case, there are often 15-30 individual components representing the total cost of operations. These components are a mix of traditional operating expenses (telecom, hardware/software maintenance, managed services), capital expenses (depreciating hardware, professional services), and "blurry" costs (BPO tech expenses, unused agent occupancy, abandoned calls, or interactions, risk of downtime). This legacy mix could be replaced by a single vendor software subscription with 8-10 line items, resulting in a significant jump in both business capability and operational simplicity.

Do the leaders of Finance, Procurement, IT, Customer Service, Sales, and other relevant parties understand how this project will impact them and why it should be prioritized? In addition to understanding it, do they agree and support it?

You cannot both educate and align the organization without fully understanding how IT and business units currently spend the organization's money to deliver a company-wide customer experience. You must have a shared understanding and a commitment to the way forward.

CCaaS implementations fail when teams don't answer key questions like: How are CAPEX and OPEX budgets changing? How will the operational model evolve? Whose responsibilities, budgets, and roles will change? What are the business benefits and risks? How long will it take?

By creating a business case and budget forecast that merges both IT and business objectives across the organization, you can mobilize others to support the project. Translating different cost models and nebulous current state costs into clear outcomes demonstrates that migrating to CCaaS benefits the entire organization, not just one business unit. For example, if the organization could reduce Average Handle Time by 45 seconds, the financial return and increased interaction capacity could be more impactful than comparing the legacy and future "tech costs."

Vendor & Platform Evaluation

5. Translate Business Requirements and Objectives into the Right Technical Solutions

The terms "requirements" and "objectives" (like "mission" and "vision") are often undefined and open to interpretation. Business requirements are the specific needs the system must meet (e.g., must integrate with Salesforce), while business objectives are the results the business wants the system to deliver (e.g., improved customer experience and agent performance). Failure to define both requirements and objectives can cripple a project from the start.

This pitfall frequently occurs when business requirements are not documented or are done without understanding the possibilities. Resource-constrained, problem-solving IT partners may quickly solve small problems rather than stepping back to see the bigger business picture. IT can become enamored with a solution rather than focusing on solving the business issue. Cool tech is not a cure-all.

For example, a buyer might ask a software vendor if its platform supports "integration." The vendor says, "Yes." IT moves on to the next requirement without understanding what the business wants from the integration. IT must understand the business's needs and what's involved in making the integration meet its objectives. Are team members looking to integrate with Sales Cloud or Service Cloud? Do they need custom objects to route interactions, or are they just looking for a CTI-enabled screen pop? Many subsequent questions can make a significant difference in creating a truly personalized business outcome.

Aligning two large organizations with different perspectives takes time. If the operating model hasn't changed significantly in decades, it will require effort. IT needs to lead by setting requirements for voice and network architecture, security, back-end system integration, and change management, and by being in a position to support troubleshooting during the cloud transition. Meanwhile, the business should focus on revenue generation, workforce utilization, occupancy rates, cultural change at the agent and supervisor levels, and enhancing the customer experience. When IT and the business clearly understand both requirements and objectives, they are better equipped for successful adoption.

6. Understand How CCaaS and UCaaS Providers Do or Do Not Work Together

Every Gartner-ranked UCaaS provider has a CCaaS product with at least IVR and basic ACD functionality. Some UCaaS providers own their CCaaS technology, while others white-label or resell a market leader's CCaaS product after adding their modifications. UCaaS providers can complicate things further by doing both—offering their product for basic functionality and white-labeling products for larger, more complex customers.

When CCaaS transformation is seen as a strategic change, the needs of non-contact center phone users may be overlooked— “out of sight, out of mind.” When agents have more customized expectations for service or communication, vendor selection becomes more complex, as not all employees require the same technology access. This means one must consider the entire organization's collaboration strategy (IM, web, video conferencing) on top of replacing the voice functionality as the PBX is phased out. Some clients have large and complex needs for inbound lead routing and distribution, while also needing to retain direct DIDs for agents to maintain one-to-one relationships with clients.

Understanding the business's needs and how those create differentiation within the vendor ecosystem is challenging, and the pace of change is accelerating. Creating clarity between leading UCaaS vendors, their CCaaS offerings, and pure-play CCaaS vendors pressures the decision-making process. If you have generic requirements, almost all vendors can say “yes” and be correct. But if you have more complex requirements, deeper questions arise, such as:

- Do direct calls need to be recorded and stored through the primary system, and are there any compliance requirements, like PCI, that must be met for both types of calls?
- Do agents need to retain handsets, only use a softphone, or both?
- What collaboration tools are required for agents to communicate with each other, with clients, and within the organization?

Based on business demands and requirements, more questions will arise to help refine what's important. Clarifying the organization's top priorities will make it easier to identify differentiation among vendors.

7. Choose a Vendor Based on Your Future Operating Model—Not Just on Technical Requirements

For over 20 years, contact center infrastructure manufacturers have differentiated themselves by customizing and configuring their technologies to support business use cases and requirements. Choosing a vendor was a risky decision because significant enhancements only occurred during upgrade and refresh cycles, which happened every three to five years. The stakes were high because the technology was static.

In today's XaaS world, where applications are developed with microservices architecture—a modular way to quickly develop applications—new features can be released weekly. While translating business requirements into technical requirements is still crucial, if it dominates the decision-making process, it can create a blind spot for how a CCaaS vendor fits into your new operating model (YES, you will have a NEW operating model).

Considerations that teams often overlook include:

- What level of support do we need from the CCaaS vendor? Are we clear about roles and responsibilities during implementation, Day-2, and beyond? What does the vendor own, and what do we own?
- Have we questioned all assumptions? Are we expecting a managed service, and if so, what does that really mean?
- Do we have the right internal resources to lead or support back-end system integrations, or do we expect the CCaaS vendor to handle that?
- Who will represent IT and the business in managing vendor relationships? Will these stakeholders be centralized or distributed to support the unique needs of the business?
- How much in-house CCaaS expertise do we need to succeed in administering, training, and maximizing the benefits of the chosen software?

Get clear on roles and responsibilities, and don't assume anything.

8. Use CCaaS to Build a Foundation for Business Intelligence

Agents, supervisors, and business leaders need data to serve customers effectively. Often, that data is spread across disparate platforms and technologies. Executives may overlook this issue or assume it can be solved by aggregating data with powerful tools like Tableau, PowerBI, or other analytics engines. However, the operating reality is much different. Not having a consolidated "source of truth" creates immense complexity for agents, CCaaS vendors, and IT organizations. Agents need to know where to find answers, and vendors require more customization to integrate appropriately. Making tactical changes to a system over time can quickly unravel call center effectiveness and customer experience. Small changes can also complicate the IT and architectural environment, making it harder to support and operate.

To be successful, organizations must understand their data and how it will evolve over time. Successful CCaaS implementations address essential questions like:

- Will all our disparate systems stay in place for the next three to five years?
- Will some be phased out? Which ones? When?

- Where is key data housed today? Where should it ideally reside?
- Is there a plan to simplify CRM, Case Management, or other legacy systems that contain customer information?

Consolidating data in analytics tools is a smart approach for executives but doesn't solve the issue for business unit leaders, contact center supervisors, agents, or IT architects. Leaders managing the architectural and usability complexities of disparate systems have a challenging role. CCaaS can improve this situation and make that role more strategic. For CCaaS and UCaaS platforms to deliver maximum value to the business, leaders must continually pursue and communicate the importance of simplification and the quest for a "single source of truth" to frontline agents and IT architects.

Leadership Advocacy

9. Understand That There Is No Steady State for Operating a CCaaS Platform

Businesses that assume they can configure a CCaaS platform once and then leave it as is are destined for obsolescence, competitive disadvantage, or career risk.

The operational support model for legacy infrastructure hasn't changed in over 15 years, and business expectations for changes and adjustments to those systems remain low. In the past, scripting changes could take weeks and require a Statement of Work (SOW). Today, those changes can be made in real time with the right administrative roles and training. Vendor sales reps, executives, and their top solution architects focus on getting you to contract signature and initial go-live, assuming you will treat this platform like any other SaaS platform and build and retain some app admin expertise.

Many enterprise organizations view CCaaS transformation like a legacy contact center project, but this is not the case. The business now has control over its activities and can implement changes immediately, not in a week.

The new operating model includes:

- New features, functions, and enhancements that can be configured and consumed on-demand.
- The business building capability for day-to-day administration and adjustments, as well as technical depth, for integration into other third-party SaaS applications.
- A transition to CCaaS and UCaaS can accelerate business intelligence, providing business leaders with better and more flexible reporting, plus the ability to adapt to customer demands and business objectives.

All this power, functionality, and configurability means the business unit is constantly learning and adapting. The days of a steady state are gone—prepare accordingly.

10. Set Clear Expectations About the Amount of Change a CCaaS Implementation Requires and the Pace at Which It Can Be Absorbed

The buzz around CCaaS reducing time to market and configuring a new call center quickly is true. We've helped clients implement CCaaS on tight, demanding timelines. ACD/IVR configuration usually isn't a constraint for a CCaaS rollout. The most common constraints aren't technological; they're organizational.

Regardless of what vendors say about “big bang” launches in sales pitches, the most successful CCaaS implementations stagger “go-live” dates for each business unit or call center to maintain focus, reduce risk, learn, and adjust approaches. Reverting to the old system may be a straightforward and important risk management strategy, but successful CCaaS implementers don't let it distract from the more important learning that comes with being the first unit to go live.

Organizations and vendors should gather, digest, and adjust feedback from all stakeholders who could be impacted by the launch—business unit leaders, supervisors, agents, and customers. Learning is as important as speed, if not more so. Well-executed implementations make small adjustments that can be easily incorporated into future “go-live” dates and identify additional training needs for agents on the new application and processes. Other important learning includes modifying reports or dashboards, tweaking application training, and adjusting IVR call flows or agent skills.

Variables to consider that impact the organization's implementation pace and migration plan include:

- Which business unit would benefit the most from the new features and technology? Some BUs may have obvious limitations that could be easily addressed. For example, implementing automated queue callbacks to drastically reduce hold times or increasing agent occupancy and success by creating new call flows and skilling.
- Which unit is most likely to embrace change and new technology?
- Which unit's stakeholders will be the best champions and take accountability?
- Which business units have the most significant financial opportunity or pressing need? This could relate to avoiding a forced upgrade for existing on-prem equipment, better workforce utilization, or future revenue opportunities with a more flexible platform.
- Are there business units tied to other digital transformation initiatives? Are there other strategic transformation projects like implementing Salesforce, a new case management system, or other channels currently viewed in silos?

Many factors go into a CCaaS implementation. Being the largest, loudest, or most underperforming BU should not drive the decision. Successful implementations manage the pace to ensure that the desired value can be realized.

11. Don't Assume the Organization Is Ready for a CCaaS Implementation Before It Actually Is

Often, IT believes it is fully prepared to move forward, but the business is not. Sometimes, the business is ready, but IT is not. Organizational alignment is crucial. Organizations that move before they're ready experience disastrous Day-2 operations. Premature movers lack clear roles and responsibilities, experience a lot of finger-pointing (especially at vendors), and have a business unit feeling that its needs have not been met—while also avoiding its new responsibilities. The result is poor service delivery and a brand-damaging customer experience.

Clients often think they're ready because they mistakenly believe they have purchased a managed service that takes care of everything. They misunderstand that moving to the cloud means platform support is eliminated because there are no more platform upgrades, application upgrades, maintenance contracts, etc., that are IT's responsibility. "SaaS" and "cloud" do not mean managed service!

What does "ready" mean? Ready means the entire organization understands what a "Contact Center as a Service" operating model really is.

While this pitfall may seem daunting, the good news is that readiness is achievable with the right program leadership and a few key people who have clear responsibilities after go-live. "Ready" means understanding what the Day-2 model looks like, including defining the new roles and responsibilities, clearly outlining change management processes, creating disciplined training protocols, establishing lines of support, and maintaining an ongoing understanding of changing business requirements, comprehensive vendor capabilities, and how to manage those vendors to meet the business's evolving needs.

Conclusion

Ultimately, CCaaS implementations fail due to a lack of strategic clarity, incomplete vendor evaluation, or insufficient advocacy. Most enterprise firms lack the coordinated resources and expertise needed to analyze, align, evaluate, and implement cloud-based technologies objectively and accurately. Additionally, they are burdened by legacy structures, outdated thinking, and weak cloud-focused skill sets.

Digital enterprises do not thrive in siloed, friction-plagued functional or budget structures. Top digital enterprises succeed in forward-looking, collaborative, client-centric teams that understand how technology allows them to move faster, with greater flexibility, and on a larger scale. Firms that waste time on IT-business turf battles will see their more collaborative digital competitors surpass them.

Do you want to get caught up in internal conflicts and be left behind, or do you want to collaborate and thrive?

The barriers to successful cloud migration extend beyond technical challenges and the inertia of complex architectures and IVRs. They are business challenges—issues that affect entire organizations. By identifying these business challenges, you have the power to lead your company to success. CCaaS implementation leaders must understand that by mobilizing both IT and business leadership, they can create a new contact center strategy that genuinely transforms how their business operates.

As you begin the CCaaS journey, the decision is yours. Don't let your CCaaS implementation fail by falling into old patterns. Instead, use these strategies for success to make it the most significant and valuable competitive change your company has made in decades.

Want to learn more about successful CCaaS implementations? [Contact TCS today.](#)

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Terry Howat is the CCaaS director of Total Communication Solutions (TCS), a New Jersey-based Zoom Platinum Sales and Implementation professional services firm that helps enterprise business leaders transform contact centers into cloud-connected, omni-channel platforms. Global enterprises, BPOs, and CCaaS & UCaaS vendors seek Terry's advice on network architecture, cloud, and managed services transformation. He leads TCS's CCaaS consulting team, translating business and technical requirements into intelligent vendor solutions that drive successful implementations and stronger vendor-client relationships.