What about switching *between* UCaaS providers? 4 things you can't afford to overlook

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We've all heard "ditch your traditional PBX for cloud UC'' and "switch from on-prem UC to full blown UCaaS", but, despite the growing maturity of the market, we hear far less about the issues surrounding next gen platform-to-platform switching; be it hosted to cloud, UCaaS to UCaaS or combinations thereof.

Compared to transitioning from old to new, going "new to new" should be quicker and simpler, right? That's what you'd expect with cloud-based technology, but the reality can be quite different as technical difficulties, the challenge of user adoption and other human factors threaten to delay and compromise the intended benefits.

If you have UCaaS already, why would you want to switch?
First things first, not everyone shares the same definition of UCaaS. But there are some fundamentals for sure. Like there being no infrastructure that the customer needs to manage. And certainly none hosted on their premises. This is UC consumed as a service, almost certainly on a subscription basis.

Bickering over precise definitions is one of the catalysts for switching; to evolve to a purer 'true cloud' model from perhaps a third-party hosting affair. But there are many other points of difference noisily espoused between UCaaS providers. My point is that the customer is already UCaaS savvy, and their next move is logical to them for any number of reasons: lower cost, better features, superior customer support, added resilience, etc.

Think of it this way, we didn't always have bank accounts. Some people still don't. But assuming you've evolved to someone who doesn't keep all their money under the mattress, why stick with the same bank forever?

Of course the promise of UCaaS switching is much the same as with bank accounts. It's easy! Banks, like UCaaS providers, all speak the same 'language', and their 'products' all work in much the same way. Hence, unplugging from one and into the other is – in theory – very straightforward.

Now we've established the upsides for switching between UCaaS providers, here are 4 pitfalls to avoid.

Overestimating user flexibility and acceptance
It's easy to switch your bank account because the only 'user' to be mindful of is you. Ever switched a joint account? It's still easy', but with two of you you're doubling the risk of human

fallibility. The biggest mistake you'll make with UCaaS switching is believing it's so straightforward that you don't have to bother communicating it to users. Or you communicate minimally, or late in the day. Your users aren't stupid, but you can't risk assuming they will understand and accept a switch to your UCaaS provider if you don't explain it to them properly. Even if the switch ends up proceeding without a hitch, you'll have needlessly irritated your user base and made them feel disconnected from the latest chapter in your digital transformation.

Neglecting to handhold smaller sites
The pitfall of overestimating user flexibility and acceptance is especially pronounced at a time when most users are physically isolated, working from home. Fortunately there will soon be a return to office-based normality. It is in this context that it's worth being especially cognizant of the key issue when introducing any new UCaaS system: end user onboarding and training. The pitfall here is cutting corners by overlooking the needs of smaller branch/regional offices and focusing instead upon onsite sessions at head office. Covid-19 has encouraged UCaaS providers to increase their focus on video-based sessions for users and admins to learn new portals and features, helping democratise access to knowledge. This may or may not continue into the future. Regardless, you will undermine the success of your UCaaS switch if you fail to consider the needs of all users and sites and put in place adequate provision for remote support both before and after the switch.

Inadequate change and risk management
Another symptom of trusting too greatly in the simplicity of UCaaS switches is failing to apply the normal risk and change management principles associated with IT projects. For example, maintaining a risk register, following appropriate change control processes and (as discussed above) involving stakeholders. These are not onerous but essential because at stake is the seamless continuity of essential communications and collaboration functions; the lifeblood of business processes. This is particularly the case in large organisations that may elect to stage their switching migration in a series of phases. One example where failing to manage change and risk could have unintended consequences is around 'leavers' and 'joiners' who present between migration phases.

Unclear dependencies and third-party integrations
Change seldom happens in isolation. Migrating between UCaaS platforms/providers will often bring with it a series of dependencies such as integrations with third-party systems. These can vary enormously from simple APIs to more involved integrations that may demand middleware layers or bespoke coding. None are insurmountable but all should be understood and planned for. Once again, a complacent faith in the simplicity of the switching process is ill advised. More often than not, these considerations require little more than clear ownership and simple integration steps. But failing to plan adequately for them can store up significant problems, not least in respect of suboptimal process optimisation and impacting policies around DR, cybersecurity and even regulatory compliance. Another related issue is the prospect of introducing the UCaaS switch as part of a wider digital transformation – a frequent and logical occurrence. Such an undertaking should necessitate management of dependencies, timings and resources on a greater scale and require appropriate project management skills.