

Unified Communications Migration Checklist

A Step-by-Step Framework for
Transitioning from Legacy UC to
PanTerra Streams.AI



Executive Summary: Why Now?

Legacy on-premise UC platforms are no longer equipped to support the demands of a modern, digital-first workforce. Rising support costs, rigid infrastructure, and outdated feature sets limit IT agility and user experience.

Meanwhile, over 80% of enterprises are planning a shift to cloud-based communications in the next two years. A proactive migration to **PanTerra Streams.AI** positions your business to:

- Reduce operational costs
- Support hybrid and remote work
- Consolidate fragmented UC tools
- Elevate customer and employee experience with AI-driven workflows

This checklist is designed to help IT leaders plan and execute a frictionless, phased migration, ensuring full readiness across people, process, technology, and compliance.

*Source: BT Global Services / Synergy Research, "Collaborating in the Cloud"

Why PanTerra Streams.AI?

PanTerra Streams.AI is a fully integrated, cloud-native UCaaS + CCaaS platform built to modernize enterprise communications while minimizing risk and maximizing ROI.

✓ **Unified Platform**

Voice, video, chat, SMS, fax, file sync, AI assistance, IVR, analytics, and CRM integrations—all in one secure environment.

✓ **Enterprise-Grade Compliance & Security**

HIPAA, SOC 2, and GDPR certified. Supports MFA, SSO, role-based access, encryption, and full audit trails.

✓ **SmartAssist™ & AI-Powered CX**

Built-in virtual assistants, real-time coaching, call summarization, and resolution routing streamline support and improve FCR/NPS.

✓ **Flat-Rate, Predictable Pricing**

No hardware costs, no surprise add-ons—just simple, Opex-based pricing.

✓ **Global Scalability & High Availability**

Real-time failover, local number porting, and SLA-backed uptime deliver resilience across distributed teams.

✓ **Migration & Onboarding Support**

Dedicated migration experts provide white-glove onboarding, training kits, and change enablement resources.

Learn more at www.panterranetworks.com

BEFORE YOU BEGIN

Migrating to **PanTerra Streams.AI** doesn't have to be disruptive or risky. Use this checklist to avoid common pitfalls such as:

- Overlapping telecom and UCaaS contracts
- Missed integrations or app compatibility issues
- Gaps in IVR or routing logic
- Training delays or shadow IT resistance
- Post-launch quality or compliance gaps

This readiness checklist ensures a smooth, secure, and successful transition.



PHASE 1: ASSESSMENT & ALIGNMENT

Stakeholder Alignment

- Identify stakeholders: IT, CX, InfoSec, Legal, Finance
- Align migration goals with business outcomes (e.g., CSAT uplift, tech consolidation)
- Secure sign-off from data compliance and budget owners

UC Environment Inventory

- Catalog legacy UC tools (voice, voicemail, IVR, extensions, etc.)
- Review carrier/service contracts and license models
- Document current app integrations and CRMs
- Export usage metrics and call volume data
- Assess on-prem hardware dependency

Define Success Metrics

- Establish measurable KPIs (e.g., uptime, AHT, FCR, CX score)
- Benchmark current performance
- Confirm SLA and compliance requirements

PHASE 2: DESIGN & INTEGRATION

IVR & Routing Logic

- Map legacy call flows to SmartCall
- Rebuild flows with AI escalation paths using SmartAssist
- Validate all emergency routing rules

CRM & App Integration

- Identify integrated apps (Salesforce, HubSpot, MS Dynamics)
- Design contextual workflows (screen pops, data push/pull)
- Test SSO, MFA, and access control for all user roles

Data Migration Planning

- Define scope: call recordings, CDRs, contact databases
- Ensure retention rules align with HIPAA/SOC 2/GDPR
- Validate backup/restore and rollback processes

PHASE 3: CONFIGURATION & TRAINING

System Setup

- Create users, ring groups, IVR menus, queues
- Port all required DIDs and local/international numbers
- Activate real-time dashboards and notifications

Persona-Based Training

- Agents: AI workflows, summaries, CRM usage
- Supervisors: dashboards, quality monitoring, coaching
- Admins: IVR builder, alerts, permission structure

Change Management Readiness

- Finalize onboarding guides, LMS, and FAQ docs
- Set up comms templates for rollout updates
- Schedule demos and live walkthroughs

PHASE 4: GO-LIVE & MONITORING

Cutover Readiness

- Schedule go-live during low traffic window
- Run shadow mode or dual-system fallback
- Validate IVR, routing logic, CRM sync

Hypercare Monitoring

- Monitor call quality, resolution speed, FCR, and SLAs
- Track agent activity in real time
- Enable auto-alerting for dropped calls or SLA breaches

Risk Mitigation

- Prebuild backup IVR tree
- Confirm escalation and failover triggers
- Assign internal response leads

PHASE 5: OPTIMIZATION & OFFBOARDING

Feedback & Fine-Tuning

- Run weekly agent/supervisor surveys
- Refine call flows, scripts, escalation logic
- Monitor sentiment and AI assist performance

Post-Migration ROI Review

- Compare pre/post KPIs (e.g., CX spend, uptime, CSAT)
- Quantify OpEx savings and platform consolidation
- Document migration success for leadership

Legacy Offboarding

- Terminate Avaya or Mitel contracts
- Decommission hardware, SBCs, PBXs
- Archive historical recordings and logs

SAMPLE MIGRATION TIMELINE (30 DAYS)

 Week	Milestone
1	 Stakeholder kickoff, system audit
2–3	 Call flow rebuild, CRM integration
4–5	 Training and staging validation
6	 Go-live, monitoring, fallback testing
7+	 Optimization, feedback, legacy shutdown





YOU'RE READY IF...

- All integrations are mapped and tested
- Users are trained and actively using Streams.AI
- Real-time call monitoring and alerts are live
- Backups and fallback routes are in place
- SLA metrics are tracked and trending positive

Need Help?

PanTerra's migration team is ready to co-pilot your journey—so you can ditch legacy UC without the drama.

Learn more at www.panterranetworks.com