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SEPTEMBER 22-24, 2025 | KANSAS CITY, MO
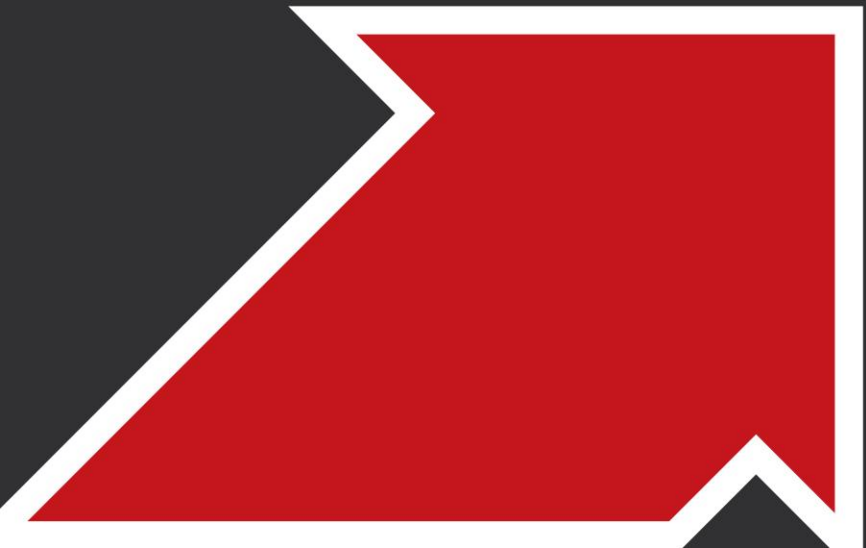
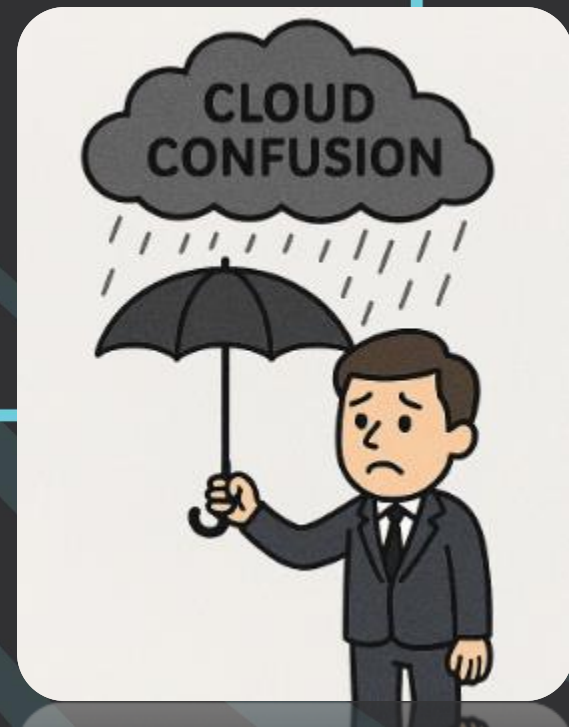## Agenda

- Why did we decide to go to the Cloud?

- What did we consider?

- What solution we chose (and why)

- What was our process

- What surprised us

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# 2018 – My Mindset

"Companies are not going to trust the cloud to handle their applications and data"

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# 2022 Strategic Planning Outcome

Amerisure will be a Cloud First organization
All platforms and servers will be out of the data center by 2027

# Public Hosted vs Private Hosted

*Amerisure AWS*

*Privately Hosted*

*Publicly Hosted*

Owning a home

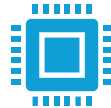Renting a home

Renting an apartment

# Cloud Advantages

Faster upgrade cycle

No upgrades for physical server or storage

Built-in redundancy

Auto scalability

Built-in security

Cert management

Focus on strategic growth*

Focus on user experience*

# Where do you start?

- Inventory essential telephony features and create matrix
- Analyze current call traffic and usage to determine sizing needs
- Extension audit and purge of unneeded extensions – start this early!!
- Capture current costs across all platform
- Create "Vendor Requirements document"
- Start inventory of your phone numbers, 800#'s, carrier accounts
    - Start requesting CSR (customer service records) from carriers
- Conduct POC trials if considering multiple solutions

# Feature Requirements & Enhancements

- Support multiline appearance functions with toggle capability
- Bridged appearance function for executive/admin support
- Operator console feature
- Ad-hoc capability to create coverage groups and routing
- Hunt groups (MIA, Circular)
- WebRTC, Desktop App, and mobile app functionality (with parity across devices)
- Admin portal, capability to assign role-based access
- Self-provisioning
- Ability to block numbers ad-hoc
- Per station class of service and class of restriction
- Adapter access for Paging
- Visual Voicemail
- Ad-hoc call recording
- Integrated into Teams client
- Text to DID (removal of ZipWhip)
- Fax to DID (potential removal of eFax) will be at additional cost

# Don't Forget the Peripherals

- E911

- Reporting and Analytics (we were currently using Microcall and N-Focus)

- Monitoring and alerts

- Knowledge Management

- eFax

- Paging

## Basic Feature Requirements

- Conference, Transfer, Hold
- Multiline appearance function with ability to toggle between calls
- Bridged appearance functions for executive/admin support
- Busy indicator
- One touch speed dial
- Operator console feature
- Hunt groups – capability to create ad-hoc
- Coverage groups – capability to create ad-hoc
- Hard phone capability
- Desktop softphone app with capability to operate inside a virtual desktop and mobile app functionality. WebRTC if available.
- Per station class of service and class of restriction
- Remote call forwarding
- Multiple coverage paths before voicemail capability
- Ability to block numbers ad-hoc
- Analog station for dial-up modem (or alternative)
- Unified messaging
- Visual Voicemail (speech-to-text)
- Ad-hoc call recording
- Text to DID
- Link into paging system at HQ office
- Support common area phones and conference Polycom phones
- Capability to self-provision
- Fax to DID

## Current Incoming Call Flow

- Calls arrive in 3 ways:
  - Via Toll-free number – routes to main greeting
  - Via main incoming DID – routes to main greeting
  - Via individual DID numbers – routes to individual
- Main Greeting Requirements – Currently utilize separate greeting schedule for all offices. (11) We can reduce this by time zone, requiring 3 main greeting schedules. Would like to keep the capability to add a main greeting at any time.
  - Capability for day, night, holiday, evacuation, drills
  - Capability to re-route operator coverage to local offices if HQ is not available
  - Capability to quickly activate evacuation greeting, currently we can do via web interface. Would like to add capability via mobile app and/or touch tone after leaving building.
- Current Main Greeting:

  Thank you for calling Amerisure Insurance Company. If you know your party's extension you may dial it at any time. For assistance with a claim press 1. To use our dial by name directory, press 9. Otherwise dial 0 and our operator will be right with you.

  0 = Attendant group (required capability)

  1= Routes to express claims call center (currently utilizing BCMS with N-Focus reporting, will move to CCaaS as part of this project)

  9= Routes to dial by name directory populated by users last name in voicemail box field.

# CPaaS/CCaaS Requirements

## Advanced Requirements

- E911 Compliance
  - Alerting capability via email or SMS if 911 dialed
- Service and quality monitoring with alert capability
- Usage reporting (currently using Microcall)
  - Per station, department, or company-wide
  - Dialed number report
  - Long call duration

## Vendor/Solution Requirements

- Soc 2, Type 11 Certification
- Geographical redundancy
- Private hosted in vendor/partner cloud preferred option
- Public hosted with partner engagement also considered
- Outbound Local and Domestic long distance included, prefer to not bring our own carrier
- Toll-free (prefer to port existing into solution, can consider keeping current carrier and use switched routing to local numbers)
- Potential consideration of survivability in HQ office
- Solution with attendant console capabilities
- In process of migrating to VeloCloud SD-WAN with MPLS and internet connections. Prefer MPLS or SD-WAN connectivity to cloud solution where possible
- Virtual desktop is part of our environment
- Local paging in HQ office, will need to interface

## Contact Center Requirements

- Capacity for 50 agents
- Capacity for 10 queues
- Unlimited announcements
- Strong integration with CPaaS (regular users) solution
  - Capability to transfer to non-CC extensions
  - Capability to reach queue from main auto attendant
  - Capability to dial between agents and non-agents
- Capability to adjust call flows ad-hoc
- Capability to adjust announcements ad-hoc
- Supervisor monitoring capability
- RONA (auto remove agent from available if ring no answer)
- Reporting: Detailed or summary by Agent or Split
  - Real-time stats dashboard accessible by all agents
  - Historical reporting
  - Average wait time
  - Agent availability
  - Agent talk time
- Desired feature enhancements:
  - Automatic call recording
  - Coaching score card capability
  - Workforce management
  - Screen transfer capability (if cost effective)
  - Omni-channel: webchat, text, email channels
  - Virtual customer assist – chat bot with capability to escalate to phone call.
  - Agent assist
  - Predictive Analytics (if cost effective)

# Cost Comparative

| | | | |
|---|---|---|---|
| Business Partner Maintenance | $$$ | Hosted Subscription Monthly | $$$$ |
| Avaya software Licensing | $$ | SD-WAN monthly fee | $$ |
| PBX Lease | $$$ | Parked DID charges | $ |
| N-focus | $ | | |
| Redsky e911 | $ | Year one non-recurring setup | $$ |
| Microcall | $ | | |
| CenturyLink Long distance | 78,400 | | |
| Local calling PRI services | 56,108 | | |
| Misc. Labor | 4000 | | |

Year 1 approx.  $44k less

Year 2+ approx. $100k less

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# Your Partner is CRUCIAL

No longer just a "vendor", but a trusted business partner



- Net Promoter Score: 80

- Full-service provider for Private cloud and Public cloud

- Long-term success providing Hosted cloud solutions

- Proactive monitoring

# Service and Support

No longer just a "vendor", but a trusted business partner

- Phone or portal support options
- A clear and transparent escalation process
- Prompt personal contact
- Access to subject matter experts
- Dedicated CSM
- Dedicated Solutions Engineer
- Include SLA's in your contract
- Localized representation
- Monthly operational reporting
- QBR
- Innovation mindset

# High level Timeline of Events

Signed Contract – Nov 2023

Began project meetings – Dec 2023

Cutover – June 2023

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# Questions, Questions, Questions

## Make sure you have all expectations set up front

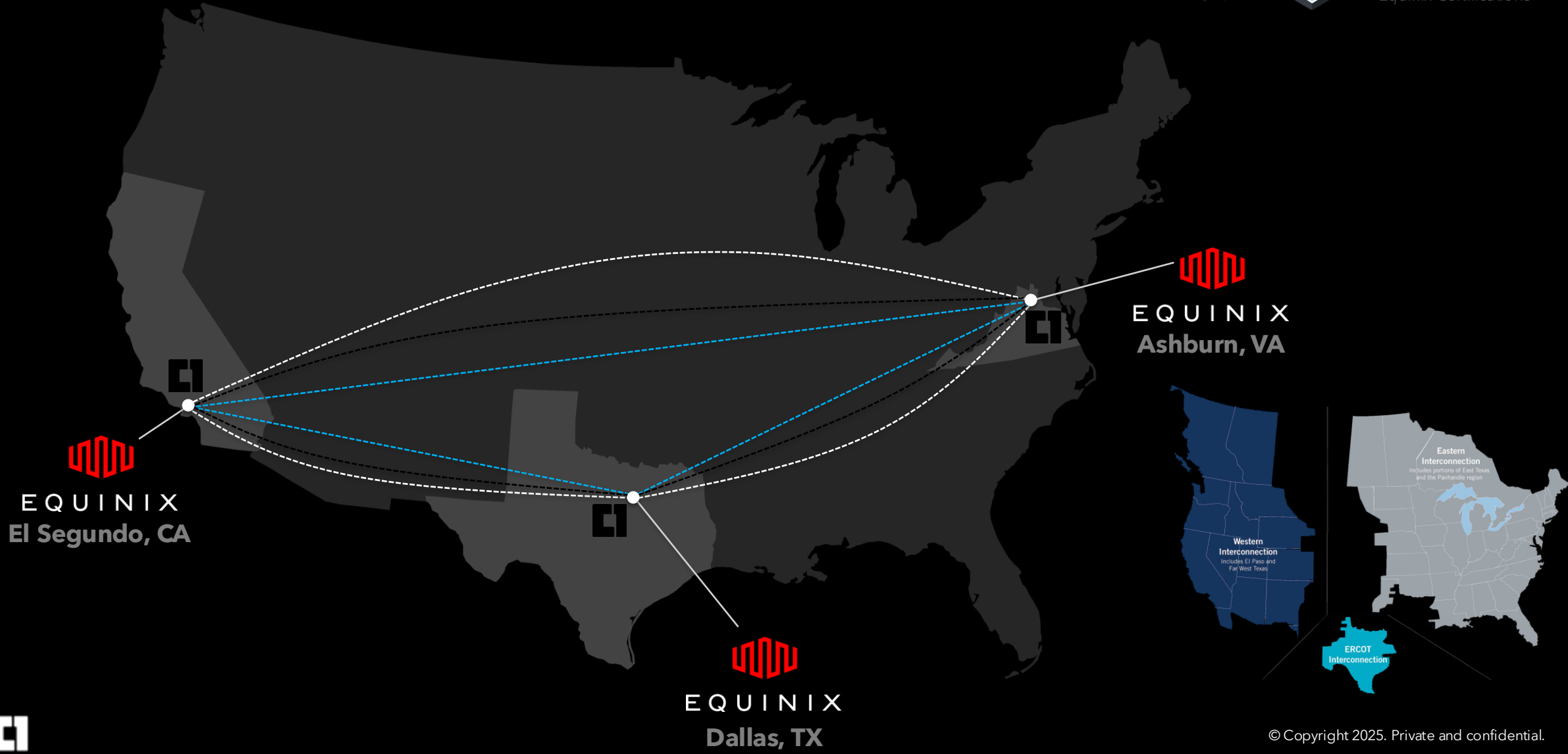| | | | |
|---|---|---|---|
| Inbound/Outbound calling usually included for Mobility User, tollfree inbound is not | If not including International, make sure you know cost per minute to budget accordingly | What is the monthly fee for a DID not assigned to a user license? | Do individual agents have capability to see the queue stats? |
| Can we still re-route 800#'s? | Get a rough idea of taxes and fees to budget properly | Understand all fees as they relate to e911 and if you are using ELINs | Confirm what level of programming you will have access to |
| If you are virtual desktop, make sure you test softphone applications in virtual desktop | Avaya Subscription overlap during migration? | ATA for paging | Do you need local survivability? |

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# How will you connect with your hosted provider?

Primary DC1: Ashburn, VA
Secondary DC2:  Dallas, TX



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# Data Centers

EQUINIX
Ashburn, VA

EQUINIX
El Segundo, CA

EQUINIX
Dallas, TX
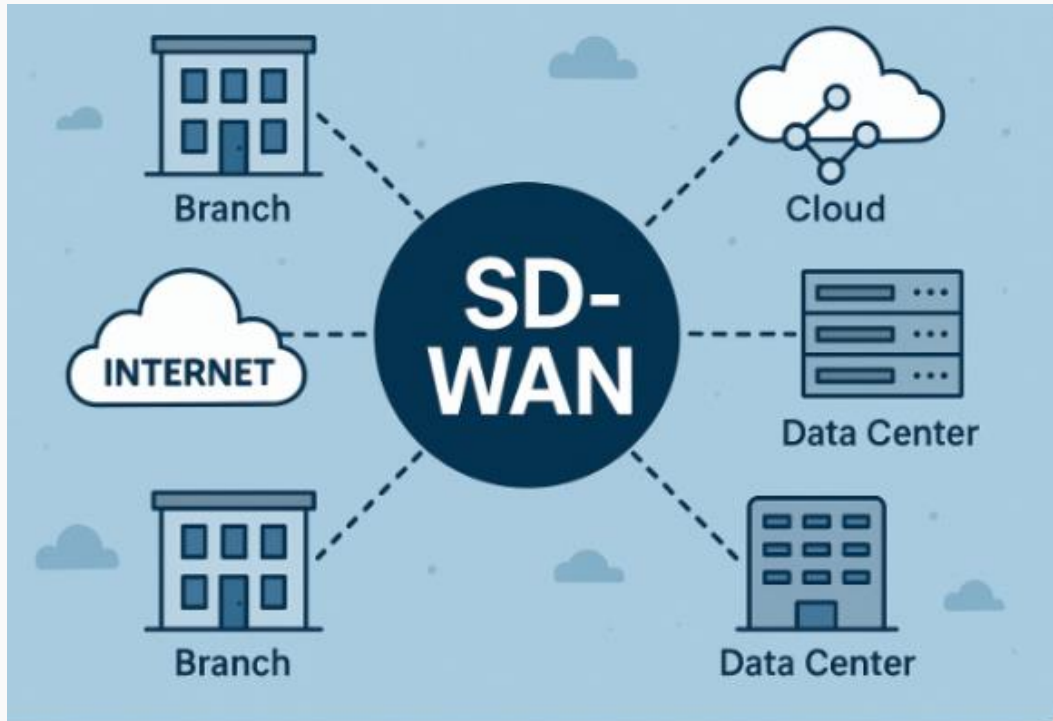
*Equinix Certifications

# C1CX Avaya UC Subscription Services

| Features | Subscription Plans | | | |
|---|---|---|---|---|
| | Essential Device | Essential User | Mobility User | Collaboration User |
| **Business Voice Features** | | | | |
| Local Direct Inward Dialing (DID) | ● | ● | ● | ● |
| Unlimited Local Calling | ● | ● | ● | ● |
| Unlimited Long Distance (US & Canada) | ● | ● | ● | ● |
| Number Porting | ● | ● | ● | ● |
| Caller ID (CNAM) | ● | ● | ● | ● |
| Directory Listing | ● | ● | ● | ● |
| E911 Services | ● | ● | ● | ● |
| **Cloud PBX and Call Management** | | | | |
| Registered Devices | 1 | 1 | 10 | 10 |
| Dial by Extension | ● | ● | ● | ● |
| Call Forwarding | ● | ● | ● | ● |
| Call Park | ● | ● | ● | ● |
| Call Transfer | ● | ● | ● | ● |
| Multiple Call/Call Waiting (2 lines) | ● | ● | ● | ● |
| Incoming Caller ID | ● | ● | ● | ● |
| Music on Hold | ● | ● | ● | ● |
| Hunt Groups | | ● | ● | ● |
| **Voicemail, Fax, and Unified Messaging** | | | | |
| Voicemail | | ● | ● | ● |
| Auto Attendant | | ● | ● | ● |
| Voicemail to Email | | | ● | ● |
| Voicemail to Text Transcription | | ŧ | ŧ | ŧ |
| Instant Messaging | | | ŧ | ŧ |
| Advanced Presence | | | ŧ | ŧ |
| File Sharing | | | ŧ | ŧ |
| Send & receive fax by email or internet browser (C1CX – XMFax Service) | | ● | ● | ● |
| **Mobility Features** | | | | |
| Avaya Workplace Client (PC or MAC) | | | ● | ● |
| Avaya Workplace Mobile (IOS or Android) | | | ● | ● |
| Personal Station Access | | | ● | ● |
| Single Number Reach | | | ● | ● |
| Adhoc Audio Conferencing | | | ● | ● |

# Keys to Success

Dedicated install team, weekly project meetings

- Project Manager
- CM Lead Engineer
- SMGR Lead Engineer
- Contact Center lead
- Voicemail solutions lead
- AADS Engineer (Okta/LDAP integrations)
- Redsky Lead

# Keys to Success

- Pulled translations from our existing switch
- QAR testing
- Avaya Workplace setup
- Handholding for going from H.323 to SIP 9608 devices
- Handholding for porting numbers
- Full e911 testing
- Detailed UAT testing workbook
- Weekly executive summary provided
- Handholding with our network team for firewall rule exceptions
- Built tie line between our on-prem and hosted platforms for calling between the two during porting transition

# Trainings

C1/CX Self Care Portal

CMS admin training for engineers

CMS supervisor training

CMS train the trainer for agents

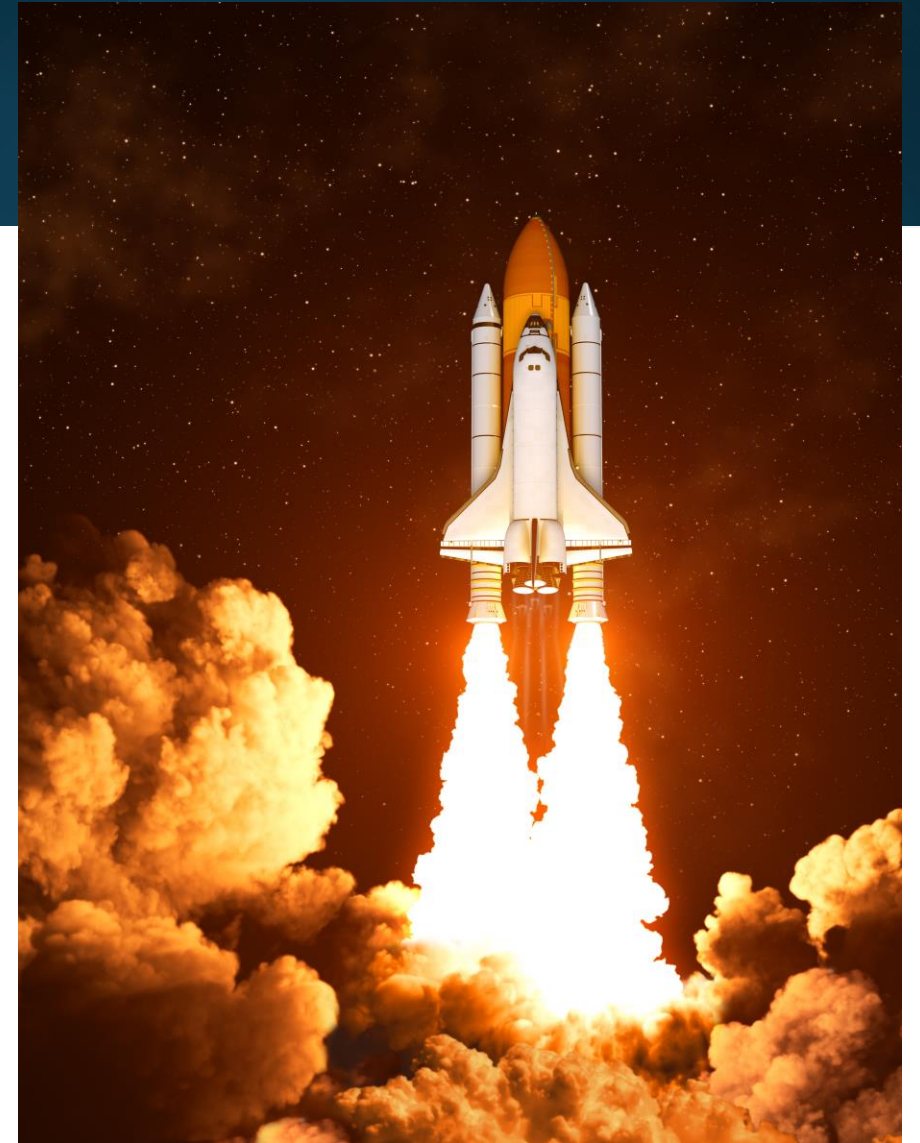Company Operator training

ISI reporting admin training

Redsky portal training

OnGuard IQ portal training

Avaya Workplace training
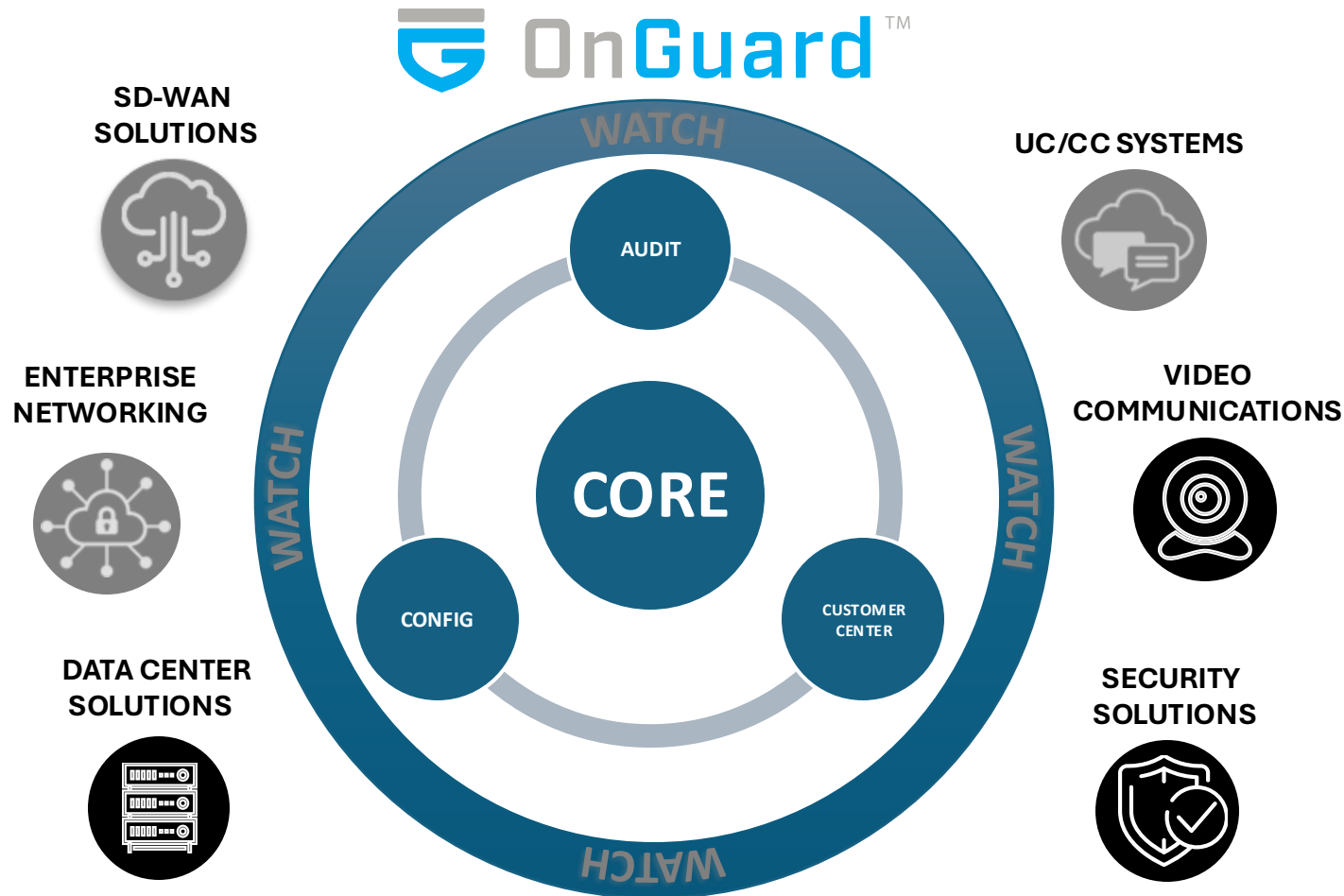
# First Day of Business Support

## Teams meeting bridge open all day

# What Surprised Us?

# modern IT Operations

OnGuard provides clean, contextualized, real-time actionable data that enables its proactive and preventative machine learning and automation services to resolve and predict problems faster.

**ConvergeOne Observability and AIOps Service Delivery Platform**

**CORE**: Automated incident management and resolution actions, API support, machine learning

**WATCH**: Dynamic real-time monitoring with actionable insights for modern infrastructure

**AUDIT**: AI Bots providing automated incident and problem management

**CONFIG**: automated device configuration backup and restore

**CUSTOMER CENTER**: Our portal with access to custom dashboards



SD-WAN SOLUTIONS

ENTERPRISE NETWORKING

DATA CENTER SOLUTIONS

UC/CC SYSTEMS

VIDEO COMMUNICATIONS

SECURITY SOLUTIONS

WATCH

CORE

AUDIT

CONFIG

CUSTOMER CENTER

# QUESTIONS?

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Scan to join the IAUG community!