

# Ensuring a successful migration from legacy CCM to modern CCM/CXM



**Maria Stridh Salomon**  
Senior Account Executive at Metaforce



**Carina Waldenström**  
Head of Professional Services at Metaforce

Businesses are increasingly transitioning from outdated systems to modern Customer Communication Management (CCM) and Customer Experience Management (CXM) solutions. This shift is driven by the need to reduce costs, streamline data management, comply with regulations, enhance data security, and engage customers digitally. Often, it involves migrating from in-house setups to online services. At Metaforce, we specialize in guiding companies through this evolving CCM landscape.

Our white paper details vital considerations, challenges, and strategies for a successful migration.

## 1 Key considerations before migration

**Before embarking on the migration journey, organizations must evaluate their readiness for the transition. This includes assessing the organization's overall preparedness for the migration and ensuring the commitment of key stakeholders.**

### ■ Comprehensive assessment of the CCM infrastructure

Conducting a comprehensive assessment of the existing CCM infrastructure involves a detailed analysis of the current state of the systems, understanding the dependencies, and identifying potential bottlenecks. The goal is to have a clear understanding of the starting point to develop an effective migration strategy.

This pre-study phase involves project planning, analysis, and design to define customer requirements - including gathering information on environments, integration needs, distribution channels, archiving, reporting/statistics, processes, document templates, data mapping, and acceptance criteria.

### ■ Identifying potential roadblocks

To mitigate challenges during migration you should proactively try to identify potential roadblocks. This includes recognizing any legacy systems that may resist integration, understanding the limitations of the existing infrastructure, and identifying any regulatory hurdles that may impact the migration process.

### ■ **Define your cloud strategy**

If your road ahead includes moving to SaaS, then a crucial aspect of the pre-migration phase is having a general Cloud strategy in place. Organizations need to evaluate their existing cloud infrastructure or develop a strategy if one is not already established. The cloud strategy will guide decisions related to data storage, security protocols, and the overall architecture of the new CCM/CXM solution.

## 2 **Developing a migration strategy**

The next step is to define a migration strategy tailored to your business needs. This means you must align the migration plan with the organization's specific goals. Considerations include the scope of the migration, the timeline, and the impact on daily operations.

Addressing specific challenges related to data migration, integration, and downtime should also be a part of the migration strategy. Organizations need to develop a detailed plan for migrating data from legacy systems to the new CCM/CXM solution while minimizing disruptions to ongoing business processes.

By involving key stakeholders in the planning process, you pave the way for success of the migration. This includes representatives from IT, business operations, and end-users. Collaboration ensures that diverse perspectives are considered, and potential challenges are identified early in the process.



## 3 **Mitigating risks and challenges**

**Understanding common risks associated with migration is important in developing effective mitigation strategies. Risks may include data loss, system incompatibility, and disruptions to customer communication. Identifying these risks allows organizations to proactively address them in the migration plan.**

### ■ **Clear roles and responsibilities**

When working with a vendor the starting point for a successful project and set up is a clear and explicit agreement on roles and responsibilities, governing all the items that are of concern – from IT security to data protection. This includes agreements on IT security, data protection, and detailed plans for project phases such as setup, testing, and integration.

### ■ **Strategies for ensuring data integrity**

You also need to ensure data integrity throughout the migration process. Strategies may include data validation processes, regular backups, and thorough testing procedures. By implementing robust data integrity measures, organizations can minimize the risk of data corruption during migration.

#### ■ **Building contingency plans**

Building contingency plans for unforeseen challenges is considered a best practice in migration planning. This involves developing alternative courses of action to address unexpected issues that may arise during the migration process. Contingency plans provide a safety net and ensure a smoother transition.

#### ■ **Compliance considerations and best practices**

Meeting compliance requirements is essential for businesses, especially in regulated industries. Organizations must adhere to relevant data protection regulations and industry standards. Best practices include conducting regular compliance audits and ensuring that the migration plan aligns with regulatory requirements.

Strategies for safeguarding customer data include encryption protocols, secure transmission channels, and access controls. By implementing these strategies, organizations can protect sensitive customer information throughout the migration.

### 4 **The important role of document templates and data converters**

The development of document templates and data converters plays a pivotal role in ensuring a seamless transition and accurate representation of information in the new CCM/CXM solution. This part of a migration should be informed by specifications meticulously determined during the pre-study, reflecting the unique requirements and visual identity of the organization across communication channels.

#### ■ **Testing and approval process**

Once document templates are developed, a rigorous testing process follows where you are generating sample documents using customer-provided data to simulate real-world scenarios. The goal is to identify any potential formatting issues, data discrepancies, or other anomalies that may arise during actual usage.

Testing is an iterative process, allowing for refinement based on feedback and identified issues. This ensures that the final document templates meet both functional and aesthetic requirements, providing a seamless and error-free experience for end-users.

#### ■ **Ensuring data accuracy and consistency**

In tandem with document template development, data converters play an important role in ensuring seamless integration of customer-provided data into the new CCM/CXM solution. These converters are designed to translate data from legacy formats to the compatible format of the modern system.

Well-designed data converters mitigate challenges associated with data migration, including discrepancies in data structure, format variations, and potential loss of information. Their role is to facilitate a smooth transition of data, maintaining accuracy and consistency.

The specifications outlined during the pre-study phase serve as a guide for developing data converters. This alignment ensures that the converters are tailored to handle the specific data intricacies identified within the organization's existing systems.

### ■ Collaborative approach

The development of document templates and data converters is a collaborative effort involving key stakeholders. Close collaboration with IT teams, business operations, and end-users is required to ensure that the final output meets both technical requirements and user expectations.

An agile approach should be adopted throughout the development process, allowing for iterative refinement based on feedback and evolving requirements. This flexibility ensures that the document templates and data converters evolve in sync with the organization's dynamic needs.

## 5 Best practices for post-migration success

After the migration you should plan for optimizing processes for maximizing the benefits of the new CCM/CXM solution. This may involve refining workflows, addressing user feedback, and optimizing system configurations for improved performance.

### ■ Ongoing support, training, and continuous improvement

Providing ongoing support, training, and focusing on continuous improvement are essential elements of post-migration success. Ensuring that end-users are well-trained on the new system and addressing any issues promptly contributes to a smooth transition.

### ■ Measuring success through key performance indicators

Measuring the success of migration through key performance indicators (KPIs) provides organizations with valuable insights into the effectiveness of the new CCM/CXM solution. KPIs may include improved communication efficiency, customer satisfaction metrics, and cost savings.

## Conclusion

In conclusion, a successful migration from legacy CCM to modern CCM/CXM requires meticulous planning, strategic execution, and a commitment to ongoing improvement. Organizations embracing these principles will not only adapt to the evolving landscape of customer communication but will thrive in it.



## How can we at Metaforce help?

Count on us for a seamless, efficient, and transformative transition from legacy CCM to modern CCM/CXM solutions. With our specialized expertise, proven methodology, standardized solutions, and client-centric approach, we serve as your strategic ally in ensuring the success of your migration journey and driving the ongoing evolution of your organization.

Here's why Metaforce is your ideal migration partner:

### ■ **CCM migration expertise**

- **Standardized custom solutions:**

- Metaforce uses standardized technology crafting customized solutions for the unique challenges of CCM migrations.

- **Best practice approach:**

- Our proven methodology ensures systematic planning and execution, aligning migrations with your organization's specific needs.

### ■ **Comprehensive implementation support**

- **End-to-end services:**

- From project planning to execution, Metaforce provides comprehensive consulting services for a successful migration aligned with your goals.

- **Agile project management:**

- Our dedicated project team embraces agility, responding to evolving requirements throughout the implementation.

### ■ **On-prem to cloud expertise**

- **Seamless transition:**

- Metaforce's expertise in On-prem to Cloud setups ensures a smooth transition, addressing security considerations and compliance requirements.

### ■ **Client-centric approach**

- **Client satisfaction in regulated industries:**

- Metaforce's track record in regulated industries showcases our ability to navigate unique challenges and compliance requirements.

- **Ongoing support and continuous improvement:**

- Beyond migration, Metaforce provides ongoing support, training, and continuous improvement, contributing to your organization's sustained growth.

Find out more about how we can support your customer communication strategy – contact us at [hello@metaforce.se](mailto:hello@metaforce.se) or visit [metaforce.se](https://metaforce.se).