



Migrating to Amazon Connect—A Blueprint for Business and IT Leaders



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Customers, and businesses, love the cloud

Cloud-based solutions are transforming the way businesses interact with customers, offering unmatched agility, scalability, and cost efficiency. Businesses that fail to adopt modern technologies put themselves at risk—soaring operational costs, the burden of managing outdated infrastructure, and inefficiencies that hinder growth are only some of the challenges caused by fragmented legacy platforms. They may also struggle to meet peak demand and deliver consistent, seamless customer experiences.

The economic and security impact of maintaining on-premises contact center technology is real:

- **\$3 million annually:** Average cost for businesses to maintain outdated systems.¹
- **\$1.8 trillion per year:** Productivity losses for US businesses caused by outdated technology.²
- **65% of businesses** with outdated technology have experienced data breaches, compared to **29%** with modern systems.¹

Migrating your contact center to the cloud can turn these challenges into opportunities. With a cloud-based contact center, you can:

- Scale dynamically to meet fluctuating demand without paying for idle infrastructure.
- Reduce time-to-market with quick setups compared to traditional on-premises solutions.
- Quickly adapt to market changes, new customer demands, and emerging technologies.
- Personalize customer interactions with data-driven insights.

Discover how Amazon Connect, the cloud-based contact center solution from Amazon Web Services (AWS), enables businesses of all sizes to seize new opportunities and enhance customer experience (CX) at scale. This whitepaper presents a proven blueprint designed to help you seamlessly transition your contact center to the cloud with AWS and Amazon Connect. By following these best practices, you can accelerate implementation and minimize delays.

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Average cost for businesses to maintain outdated systems.¹

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Productivity losses for US businesses caused by outdated technology.²

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¹ [How Much Is Outdated Tech Costing Your Business and How?](#), Innovation in Business, September 4, 2024.

² [Samanage. U.S. Businesses Wasting Up to \\$1.8 Trillion Annually on Repetitive Employee Tasks, Samanage Survey Says.](#) PR Newswire, February 23, 2016.

Amazon Connect, your cloud-based contact center

Amazon Connect makes it easy to deliver superior customer service at lower cost, stay ahead of customer expectations, and outpace the competition. Here's how:

- **Omnichannel support:** Seamlessly engage customers across voice, chat, email, SMS, social media, and more.
- **Pay for what you use:** Eliminate contracts, licenses, and commitments.
- **Effortless scalability:** Automatically adjust to handle peaks without paying for idle capacity.
- **Continuous innovation:** Benefit from frequent feature updates with no upgrades required, driven by customer feedback.
- **Built-In artificial intelligence (AI) and machine learning (ML):** Enhance customer interactions with automation, sentiment analysis, and self-service intelligent interactive voice response (IVR) or chatbots.

Amazon Connect delivers proven results

COST SAVINGS

241% return on investment (ROI) and 31% reduction in subscription and usage costs.

EFFICIENT CALL HANDLING

Up to 24% reduction in call routing.

ENHANCED VISIBILITY

20% less supervisor effort with improved reporting and dashboards.

SIMPLIFIED MANAGEMENT

60% reduction in system administration efforts.

IMPROVED CX

Up to 15% shorter average handle time (AHT).

SCALABLE AGILITY

Reliable and adaptable performance for businesses of all sizes.

Source: [The Total Economic Impact \(TEI\) of Amazon Connect](#), Forrester Research, June 2020.

The Amazon Connect blueprint for a successful cloud migration

Moving to Amazon Connect is more than deploying a new tool—it's an opportunity to align technology with business outcomes. Cloud migration succeeds when business objectives lead the way, supported by IT expertise. This requires aligning priorities and addressing critical considerations early. This whitepaper reflects that balance, offering insights that resonate with both decision-makers and implementers.

For many organizations, migrating from a legacy contact center to the cloud can feel overwhelming. Challenges like telephony porting, data migration, and stakeholder alignment can create roadblocks if not addressed upfront. Based on our extensive migration experience, we've identified common concerns and the solutions that lead to success. Whether you're in the early planning stages or preparing for go-live, you'll find detailed checklists and practical guidance tailored to business stakeholders, IT leaders, and developers in this whitepaper.

Success starts with alignment

The first step in a successful migration is ensuring alignment between business and IT. Both must work together to define and clarify roles and responsibilities in order to lay a strong foundation for subsequent phases of the project. Key steps include:

Business leaders

- ✓ Define clear migration goals and KPIs
- ✓ Align stakeholders early on vision and strategy to build organizational consensus
- ✓ Plan for change management to ensure adoption
- ✓ Evaluate cost projections and expected ROI

IT leaders and developers

- ✓ Validate telephony porting requirements and ensure data readiness
- ✓ Test network bandwidth, latency, and security configurations
- ✓ Identify integration points with backend and third-party systems to ensure seamless connectivity and efficient data flow
- ✓ Upskill and empower your team with [training](#)



A phased approach to migration

A smooth transition to Amazon Connect follows a structured process based on proven best practices, divided into key phases and milestones. The process begins with the **Design** phase, during which business and IT leaders collaborate to create a future-driven architecture tailored to business needs. Next, the **Pre-Go-Live** phase focuses on thorough preparation and planning, including testing, training, and documentation. On **Go-Live** day, the cutover happens, with rigorous verification to ensure stability. Finally, the **Post-Go-Live** phase is about monitoring and optimizing performance to ensure long-term success through continuous improvement. Each phase plays a critical role in achieving a seamless migration.

DESIGN

Create a robust, scalable architecture that seamlessly integrates business objectives with IT requirements

PRE-GO-LIVE

Finalize configurations, conduct thorough testing, and prepare users for the new platform through end-user training and documentation

GO-LIVE

Implement the cutover plan, monitor system performance, and document any initial concerns

POST-GO-LIVE

Monitor system performance through key metrics and user feedback, address any emerging issues, and fine-tune configurations



Build a future-driven architecture

Once business and IT are fully aligned, the design phase can begin. This phase focuses on developing a robust, scalable architecture that seamlessly integrates business objectives with IT requirements, ensuring adaptability and long-term efficiency.

During the design phase, business and IT leaders work together to:

- **Define objectives and success metrics:** Clearly articulate business goals, performance expectations, and desired outcomes to align the design with overarching strategic priorities.
- **Select core features and functionalities:** Decide on essential features (e.g., IVR, reporting, integrations) and configure Amazon Connect to meet specific business objectives.
- **Determine integration requirements:** Plan integrations with existing systems (CRM, ERP, databases, APIs, etc.) and ensure compatibility with current workflows and tools.
- **Establish security and compliance protocols:** Set clear guidelines for data protection, privacy, and compliance with industry regulations, ensuring the design addresses all security concerns.
- **Design user experience and interface:** Collaborate on designing an intuitive user interface for both agents and customers to enhance ease of use and overall satisfaction.
- **Define reporting and analytics needs:** Determine the KPIs, metrics, and reports that will provide insights into performance and support data-driven decisions.
- **Plan for scalability and flexibility:** Design the system to scale with growth, whether that's handling more agents, increasing call volumes, or adding new features.
- **Set governance and change management strategies:** Decide on roles, responsibilities, and processes for ongoing governance and system updates, including how to manage change throughout the lifecycle.
- **Determine budget and resource allocations:** Allocate resources for the design and implementation phases, making decisions on budgeting, timelines, and team involvement.
- **Evaluate telephony coverage:** Assess the telephony capabilities offered by Amazon Connect and align them to your business requirements.



Training is critical

While a well-designed architecture is essential, it is only one aspect of a successful migration. Equally important is training, which ensures a smooth transition. Amazon Connect provides structured resources and training paths to equip the project team with the necessary skills throughout the migration journey.

Begin with AWS

[Getting Started with AWS](#): AWS website for those ready to learn the fundamentals of AWS and start building.

Start your Amazon Connect journey

[Getting Started with Amazon Connect](#): AWS website designed to help you

- Assess your migration readiness
- Evaluate your cost savings
- Learn about migration best practices
- Start your migration journey

Explore Amazon Connect features and concepts

[Amazon Connect Enablement YouTube channel](#), featuring short videos to help you use the features of Amazon Connect effectively.

[Amazon Connect Hands-on Workshops](#): Hands-on events suitable for various roles and designed to teach or introduce practical skills, techniques, and concepts.

Discover role-based resources

[Amazon Connect Developer Learning & Badge Plan](#): A collection of learning resources created specifically for learners who have the role of Amazon Connect Developer in their organization.

[Amazon Connect Communications Specialist Learning & Badge Plan](#): A collection of learning resources created specifically for learners who have the role of Amazon Connect Communications Specialist in their organization.

Design phase checklist

Use this checklist as a step-by-step guide to completing critical tasks during the design phase. While these tasks are proven to help support a successful migration, there may be additional required tasks specific to your use case or organization. Be sure to verify and validate this list with your internal teams.

- ✓ Train your staff to ensure you are equipped with the knowledge and skills to effectively manage and use Amazon Connect
- ✓ [Gain a comprehensive understanding of which phone numbers are eligible for porting, the expected timeline, and any associated fees](#)
- ✓ [Learn the necessary steps for successfully porting your phone numbers to Amazon Connect](#)
- ✓ [Familiarize yourself with regional requirements for ordering and porting phone numbers](#)
- ✓ [Review the telecommunications coverage available in Amazon Connect](#)
- ✓ [Understand the process for setting up and testing your network](#)
- ✓ [Develop a plan for identity management within Amazon Connect](#)

Prepare and plan

The pre-go-live phase is critical for ensuring a smooth migration to Amazon Connect. During this stage, teams finalize configurations, conduct thorough testing, and prepare users for the new platform through end-user training and documentation. Clear planning and proactive issue resolution are key to minimizing disruptions and achieving a successful launch.

Follow this checklist as a structured guide to completing key tasks in the pre-go-live phase. While these steps are essential for a successful migration, your specific use case or organization may require additional actions. Confirm and validate this list with your internal teams.

Infrastructure and security

Ensure that technical, security, and user configurations are correctly set up, from network settings and identity management to data encryption and agent workstation requirements.

- ✓ Confirm that your identity management setup is correctly configured and functional for all users
- ✓ Ensure that access to the Amazon Connect instance URL works as expected
- ✓ Test network connectivity from all agent locations
- ✓ Verify that the firewall is correctly configured to allow Amazon Connect traffic
- ✓ Confirm that all service quotas support expected usage
- ✓ Test headset compatibility and audio quality
- ✓ Confirm that security profiles are created with appropriate combinations of permissions
- ✓ Add and configure all users, including agents, supervisors, and administrators
- ✓ Verify that data encryption is enabled for both data at rest and data in transit
- ✓ Ensure call recordings are managed in Amazon S3 with appropriate retention policies and access controls
- ✓ Check compliance (PII, HIPAA, GDPR, etc.) handling procedures
- ✓ Confirm that agent workstations meet the minimum system requirements
- ✓ Validate the functionality of the agent desktop across all supported browsers

Agent and supervisor experience

Validate that agent and supervisor capabilities are functioning properly, including call controls, monitoring features, communications channels, and reporting tools.

- ✓ Verify call control features, including mute, hold, transfer, and conferencing
- ✓ Test agent statuses to confirm they function as expected (Available, Busy, Offline, etc.)
- ✓ Confirm After Contact Work (ACW) timer configurations are correctly set
- ✓ Confirm supervisors can monitor and barge-in on live calls
- ✓ Check agent whisper announcements for accuracy
- ✓ Test hold music and on-hold messages
- ✓ Test outbound calling
- ✓ Test any custom agent desktop functionality
- ✓ Test agent scheduling, adherence, and reporting
- ✓ Test supervisor alerts and reporting
- ✓ Test agent evaluation process
- ✓ Verify agent experience across all in-scope channels (email, chat, voice, etc.)

Customer experience and IVR

Verify that contact flow components and routing logic are working as designed, from IVR menus and prompts to queue management and error handling.

- ✓ Test all primary and alternate paths in each contact flow
- ✓ Verify proper error handling and timeout configurations
- ✓ Validate dynamic attributes and contact flow variables
- ✓ Ensure IVR prompts and menus are set up correctly for the intended languages and regions
- ✓ Check text-to-speech pronunciation and SSML formatting
- ✓ Test queue transfer logic and callback functionality
- ✓ Verify IVR experience across all in-scope channels (email, chat, voice, etc.)

Reporting and analytics

Ensure that reporting, analytics, and data management features are properly configured and generating reliable data.

- ✓ Verify real-time metrics accuracy
- ✓ Test historical reporting functionality
- ✓ Verify that automated report scheduling is configured
- ✓ Check metric refresh rates and dashboard performance
- ✓ Test data export capabilities
- ✓ Ensure that contact trace records (CTRs) are being generated for each interaction and contain the required data
- ✓ Ensure that Contact Lens accurately transcribes customer interactions, properly redacts sensitive information, and performs sentiment analysis
- ✓ If using data streaming, verify proper configuration and data delivery to your analytics platform

Integration testing

Verify that all integrations and data exchanges are functioning as expected.

- ✓ Test integrations with backend or third-party systems
- ✓ Test screen pops, call logging, and data synchronization
- ✓ Test custom API integrations
- ✓ Validate data passing between systems
- ✓ Verify customer lookup functionality
- ✓ Validate that monitoring and alerting is working

Telephony and audio quality testing

Test all phone number configurations, capacity settings, and call routing assignments for both inbound and outbound communications.

- ✓ Ensure that the correct Direct Inward Dialing (DID) and toll-free numbers (TFN) are claimed or ported and accurately associated with the appropriate contact flows
- ✓ Test inbound and outbound calls, including calls to international locations if applicable
- ✓ Test automated outbound campaigns if applicable
- ✓ Verify caller id for each queue and phone number used
- ✓ Review and validate concurrent call capacity service quota

User training and communication

Ensure that agents are fully trained and stakeholders are aligned on deployment strategy, escalation procedures, and go-live readiness.

- ✓ Conduct end-user training sessions for agents and supervisors
- ✓ Provide quick reference guides for agents and supervisors
- ✓ Document all custom configurations and processes
- ✓ Perform a full end-to-end dry run of your cutover plan
- ✓ Evaluate and document all test outcomes
- ✓ Conduct AWS Well-Architected Review of contact center workload
- ✓ Complete Amazon Connect Operational Workshop to learn how to operate Amazon Connect workloads in production
- ✓ Secure approval from stakeholders for go-live readiness
- ✓ Communicate the migration plan to all key stakeholders
- ✓ Define escalation procedures
- ✓ Conduct a final go/no-go meeting with all key stakeholders to confirm go-live readiness



Cutover and verify

Go-live day marks the transition to Amazon Connect, where the system goes live and starts handling production traffic. This phase focuses on carrying out the cutover plan, monitoring system performance, and documenting any initial concerns. Quick issue resolution and clear communication will help ensure a seamless launch experience.

Use this go-live day checklist to execute launch activities and maintain control during the transition. While each step represents a proven deployment practice, your specific implementation may require additional actions. Work closely with stakeholders to refine and validate the sequence.

- ✓ Execute your cutover plan
- ✓ Make sure that all agents and supervisors are online and ready to take calls or chats
- ✓ Monitor system performance metrics
- ✓ Track call volume patterns
- ✓ Check agent adherence and schedule compliance
- ✓ Review first batch of call recordings
- ✓ Monitor integration performance
- ✓ Check all automated reports generation
- ✓ Review any system alerts or warnings
- ✓ Document any immediate issues or concerns



Monitor and optimize

The post-go-live phase focuses on ensuring the long-term success of Amazon Connect by continuing to monitor system performance through key metrics and user feedback. Teams address any emerging issues and fine-tune configurations based on real-world usage. Continuous improvement is key to maximizing the ability of Amazon Connect to elevate CX.

Follow this checklist as a guide through the post-go-live phase. While each step is based on proven best practices for stabilizing and optimizing your new environment, there may be additional required tasks specific to your use case or organization. Be sure to verify and validate this list with your internal teams.

- ✓ Closely monitor system performance and key metrics after go-live
 - CSAT, NPS, FCR, and AHT
 - System uptime, error rates, and call routing efficiency
 - Latency benchmarks and real-time voice/data synchronization
- ✓ Collect feedback from agents and customers to identify any areas for improvement
- ✓ Conduct a post-implementation review to assess the success of the migration and identify lessons learned
- ✓ Complete any pending phone number ports and optimize the portfolio on TFNs and DID numbers
- ✓ Develop and implement a continuous improvement plan based on insights gained during the post-go-live period
- ✓ Review emerging contact themes and take action to enhance the customer experience

Optimize performance post-migration by asking the right questions

Both business and IT play an important role in your organization's ability to refine and enhance Amazon Connect performance over the long term. Routinely ask these critical questions to drive continuous improvement and enhanced customer satisfaction.

Business leaders

- Are CSAT and NPS improving?
- Are projected ROI and cost-saving targets being met?
- Are employees adopting the new system, and what additional support might they need?
- Does the solution support long-term scalability and strategic business goals?

IT leaders and developers

- Are key performance metrics like uptime, latency, and call quality within expected thresholds?
- Are compliance measures such as HIPAA and GDPR being met and documented?
- Are monitoring tools detecting issues proactively and escalating them appropriately?
- Are integrations with CRMs, IVRs, and other tools operating seamlessly under real-world conditions?

Together

- Are business and IT teams aligned on monitoring goals and priorities?
- Is there a plan for continuous optimization based on monitoring insights?
- Does the system allow for scalability and new feature adoption to future-proof operations?

Ready to transform your contact center?

Join the tens of thousands of organizations across industries that use Amazon Connect to support 10 million contact center interactions every day.³ Here are just a few of the companies using Amazon Connect to improve CX, reduce costs, and boost contact center efficiency.



Capital One contact centers are able to innovate faster using Amazon Connect. Amazon Connect's ability to seamlessly integrate with other systems and support fast change processes makes it easier to continuously strengthen and fine-tune the contact center experience. After only a few months of using Amazon Connect, Capital One saw improvements in both customer outcomes and overall business agility.

[Learn more →](#)

INTUIT

Intuit uses Amazon Connect to power an integrated customer contact center providing voice, chat, and messaging services to millions of customers. With Amazon Connect, Intuit can scale from 6,000 agents to 11,000 agents in minutes and pay only for the services used. Customers now enjoy a seamless experience in which their data moves across business units and their questions are resolved promptly.

[Learn more →](#)



Citizens Advice migrated its contact center to Amazon Connect to improve accessibility and provide a reliable, scalable platform for innovation. Since moving to Amazon Connect, this UK-based charity has improved the client calling experience, reduced IT support costs, and gained valuable performance metrics.

[Learn more →](#)

priceline

Priceline counts on Amazon Connect to meet the needs of its global travel business. When call volumes suddenly increased by 3x at the start of the Covid-19 pandemic, Priceline shifted to meet demand by optimizing its menu options and automating callback queues to reduce wait times. The company also moved 1,000 agents to remote work without impacting their ability to efficiently address customers' needs—even with the spike in volume.

[Learn more →](#)

ANAX

ANA X lowered monthly operational contact center costs by 58 percent with Amazon Connect. The company also improved flexibility, scalability, and operational efficiency. These improvements continue to fuel new investments in innovations that drive customer value and address emerging business needs.

[Learn more →](#)



DOORDASH

DoorDash relies on Amazon Connect to meet the needs of consumers, merchants, and dashers as part of its generative AI contact center solution. Using Amazon Connect, DoorDash handles hundreds of thousands of calls per day, guiding users through a self-service IVR experience. As a result, agent transfers have been reduced by 49 percent and first contact resolution has increased by 12 percent.

[Learn more →](#)

³ [Amazon Connect Puts Generative AI to Work Improving End-to-End Customer Experiences](#), Amazon press release, December 1, 2024.