



# Genesys to Amazon Connect Migration Checklist

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## CloudInteract Pre-Migration Assessment & Delivery Framework

Migrating from legacy Genesys (PureEngage / PureConnect) to an agile, modern AWS Amazon Connect architecture requires careful planning, risk mitigation, and technical precision. This checklist serves as a high-level guide to ensure you capture every critical dependency before and during your contact center transformation.

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## 1. Discovery & Estate Assessment

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**Objective:** Map out your existing contact center footprint, integrations, and logic dependencies before designing Target State.

- **Audit Existing Contact Flows:** Map out all top-level IVRs, routing queues, business hours, and holiday schedules inside Genesys Administrator.
- **Document Agent Skill Sets:** Extract routing logic maps matching agents/groups to queues and required proficiencies.

- **Identify Backend Integrations:** Audit all external REST/SOAP API calls, JDBC screen pops, CRM plugins (Salesforce, Zendesk, Dynamics), and custom data-dips operating inside the current IVR.
- **Review Call Recording / WFM:** Identify legacy call recording repositories and determine retention/compliance policies for historical interactions. Ensure WFO/WFM integration strategies are outlined.
- **Baseline Reporting Metrics:** Document critical historical reports, real-time supervisor views, and mandatory KPIs your business operations require.

## 2. Infrastructure & AWS Preparation

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**Objective:** Build out the secure AWS foundation tailored specifically around your data sovereignty and corporate networking guardrails.

- **Establish AWS Landing Zone:** Configure Amazon Connect instances in the appropriate region, aligning to internal security and compliance (PCI, HIPAA, SOC) frameworks.
- **Networking & Voice Infrastructure:** Design AWS Direct Connect or VPN tunnels for secure agent VDI access, and establish SIP logic with your carrier for toll-free number porting or BYOC requirements.
- **Identity & Access Management (SSO):** Configure SAML 2.0 Identity Providers (Entra ID, Okta) federated into Amazon Connect for seamless agent and supervisor logins.
- **Data Storage Strategy:** Configure Amazon S3 buckets with structured lifecycle policies for Call Recordings,

Transcripts, and Contact Trace Records (CTRs), ensuring long-term auditability.

### 3. Contact Flow & Bot Design

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**Objective:** Re-platform IVRs using Amazon Lex and Connect capabilities to build an optimized, natively intelligent conversational interface.

- **Target State Flow Architecture:** Diagram the Amazon Connect flow hierarchies (Main Menu -> Triage -> Agent Queue -> Voicemail), drastically simplifying legacy Genesys spaghetti logic.
- **Implement Lambda Dips:** Translate legacy data-dip integrations into serverless AWS Lambda functions.
- **Replace Legacy DTMF with Conversational AI:** Introduce Amazon Lex bots into triage flows, upgrading rigid "Press 1" IVRs to Natural Language Understanding (NLU).
- **Design Omnichannel Pathways:** Prepare routing parity for live chat, SMS, or WhatsApp channels if part of phase one migration.

### 4. Agent Workspace & CRM Integration

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**Objective:** Ensure agents have an intuitive, unified interface that reduces handle times and eliminates context switching.

- **Select Agent Desktop Strategy:** Determine whether agents will use the native Connect Contact Control Panel (CCP), the Unified Agent Workspace, or the embedded CRM widget (e.g., Salesforce CTI).

- **Configure Screen Pops:** Engineer inbound data-dips mapping customer CLI/ANI directly to CRM records to instantly display customer context.
- **Establish Softphone Networking Parity:** Validate 100kbps bandwidth availability per agent, QoS configurations locally, and unblock required AWS softphone UDP ports across VPNs or firewalls.

## 5. Testing & Validation

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**Objective:** Ensure the platform is operationally hardened and resilient before live traffic cutovers.

- **System Integration Testing (SIT):** Execute end-to-end traversal of every IVR branch, ensuring database lookups and routing variables fire successfully.
- **User Acceptance Testing (UAT):** Onboard key business users and supervisors to conduct live call simulations, focusing on audio quality, screen pops, and whisper/barge functionalities.
- **Performance & Load Testing:** Verify concurrent Lambda invocation limits and Service Quotas.
- **DR / Fallback Verification:** Validate fallback routing rules (e.g., if a queue is full, route to offshore or external voicemails) and outage messages. To fail back to Genesys if an unrecoverable incident occurs during dial-plan cutover.

## 6. Migration, Training & Go-Live

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**Objective:** Transition operations seamlessly, empowering agents and supporting supervisors efficiently from hour zero.

- **Agent & Admin Training:** Deliver localized, hands-on training to users focusing on the CCP, queue transfers, wrap-up codes, and accessing real-time metrics.
- **Phased Cutover Plan:** Shift live traffic over in tranches (e.g., a single small line of business first) rather than a high-risk globally instantaneous flash-cut.
- **Command Center Activation:** Establish a hypercare triage desk connecting engineers, ops managers, and business leaders with active war-room bridges.
- **Legacy Decommissioning:** Maintain historical read-access on Genesys instances for 30–90 days for SLA reconciliation before full decommissioning.