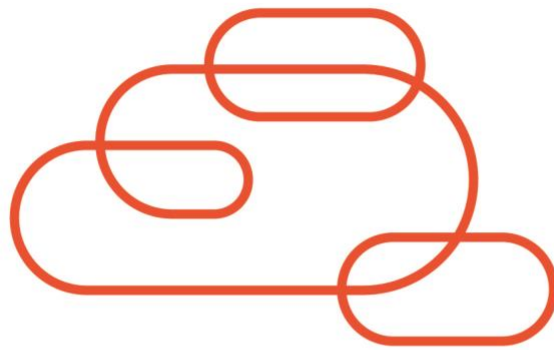


New PureCloud Organization Readiness Checklist

Version 1.3
September 27, 2018



PureCloud

New PureCloud Organization Readiness Checklist

Overview

PureCloud is an industry leading Platform that has the ability to bring an organization's customer experience to new levels of effectiveness and efficiencies. In order to achieve this outcome, it's important that organizations prioritize a set of activities and tasks that as veterans of hundreds of deployments of PureCloud, we know will make you successful. This readiness checklist is designed to give you a running list of those activities and tasks that an organization should plan to complete prior to going live.

Please read through this document, work to complete each activity and task, and if you have questions or need assistance don't hesitate to ask; Genesys and our global team is ready to assist.

Preparation for Cloud Readiness

Complete	Cloud Readiness Steps
	Review and agree upon <i>Getting Ready for a Cloud Contact Center</i> document
	Customer roles identified and assigned <ul style="list-style-type: none">• Contact Center Admin• IT / Network Admin• Supervisor• Business Sponsor• Project Manager• Developer (Integrations only)
	Let your Customer Success Manager (CSM) know your Designated Support Contacts

New PureCloud Organization Readiness Checklist

Training

Complete	Training Courses
	<p data-bbox="480 457 1057 527">Customer Roles and Responsibilities training (approx. 16 minutes to complete)</p> <ul data-bbox="529 569 862 653" style="list-style-type: none"><li data-bbox="529 569 862 600">• Contact Center Admin<li data-bbox="529 621 862 653">• IT/Network Admin
	<p data-bbox="480 730 873 800">PureCloud Core Learning Path (approx. 10 hours to complete)</p> <ul data-bbox="529 842 862 978" style="list-style-type: none"><li data-bbox="529 842 862 873">• Contact Center Admin<li data-bbox="529 894 862 926">• IT / Network Admin<li data-bbox="529 947 862 978">• Supervisor
	<p data-bbox="480 1056 1162 1125">PureCloud Product Certification (Designated roles should take the certification exam.)</p> <ul data-bbox="529 1167 862 1304" style="list-style-type: none"><li data-bbox="529 1167 862 1199">• Contact Center Admin<li data-bbox="529 1220 862 1251">• IT / Network Admin<li data-bbox="529 1272 862 1304">• Supervisor
	<p data-bbox="480 1381 951 1451">PureCloud Supervisor Learning Path (approx. 1 hour to complete)</p> <ul data-bbox="529 1493 862 1577" style="list-style-type: none"><li data-bbox="529 1493 862 1524">• Contact Center Admin<li data-bbox="529 1545 862 1577">• Supervisor

New PureCloud Organization Readiness Checklist

	<p>PureCloud Agent Learning Path (approx. 1 hour to complete)</p> <ul style="list-style-type: none">• Contact Center Admin• Supervisor• All Agents
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Subscribe and Register

Complete	Subscriptions and Registrations
	<p>Subscribe to PureCloud System Status Updates</p> <ul style="list-style-type: none">• Contact Center Admin• IT / Network Admin• (recommended) Supervisor• (recommended) Developer
	<p>Subscribe to PureCloud Release Notes</p> <ul style="list-style-type: none">• Contact Center Admin• IT / Network Admin• (recommended) Developer
	<p>Register and create profile on Genesys Knowledge Network</p> <ul style="list-style-type: none">• Contact Center Admin• IT / Network Admin
	<p>Register and create profile on Genesys Community</p> <ul style="list-style-type: none">• Contact Center Admin• IT / Network Admin

New PureCloud Organization Readiness Checklist

	<p>Register and create profile on Genesys MySupport Portal</p> <ul style="list-style-type: none">• Contact Center Admin• IT / Network Admin
	<p>Register and create profile in the Genesys Customer Advocacy Program (GCAP)</p> <ul style="list-style-type: none">• Contact Center Admin• Supervisor• Business Sponsor
	<p>Register and create profile on the Developer Center (for deployments with integrations)</p> <p>Developer</p>
	<p>Bookmark the PureCloud Resource Center</p> <ul style="list-style-type: none">• Contact Center Admin• Supervisor <p>IT / Network Admin</p>
	<p>Review Who to Contact When info</p>

New PureCloud Organization Readiness Checklist

Deployment Readiness

Complete	Cloud Readiness Steps
	Download and complete Customer Network Readiness Checklist
	VoIP Readiness Network Assessment completed (during onboarding)
	<p>Customer Technology & Environment “Map” completed</p> <ul style="list-style-type: none">• BYOC• Telephony• 3rd Party Integrations (CRM...)• Placement of Edges• Computer / Browser / Work Stations
	<p>Document Go-Live plan</p> <ul style="list-style-type: none">• When is Go-Live?• Who from your company will be monitoring?• If Genesys-led implementation, who from Genesys will be monitoring?• If Partner-led implementation, who from the Partner will be monitoring?• How will feedback from your end-customers and agents be brought to whomever is monitoring?• What's your plan to process that feedback?"

New PureCloud Organization Readiness Checklist

Working with Genesys

Complete	Communication Steps
	Initial “Customer Success Plan” with CSM completed
	Higher level conversations. Business Challenges / Technical solution, etc...
	Register and gain access to Customer Care Portal <ul style="list-style-type: none">• Contact Center Admin• IT Admin
	How to Read Your Bill video watched
	How to Read Your Bill call with CSM complete
	Where to find <ul style="list-style-type: none">• Release notes• Quarterly feature discussions on the PureCloud Community
	Production Readiness Call with CSM complete <ul style="list-style-type: none">• Attended by Genesys Representatives:<ul style="list-style-type: none">○ CSM○ Technical Account Manager (TAM), Professional Services (PS), Customer Care as appropriate