

Should We Move Off On-Prem?

A CCaaS Readiness Checklist for Executive Teams

This checklist isn't about features or vendors.

It's about whether your current contact center platform is quietly limiting cost control, CX, or future flexibility.

If you answer "yes" to several of these, it's worth taking a closer look.

Section 1: Platform Constraints

- ☐ Making changes to routing, IVR, or workflows requires IT involvement or vendor support
- ☐ Platform upgrades feel risky, disruptive, or overdue
- ☐ Supporting remote or hybrid agents required workarounds
- ☐ Scaling capacity up or down takes longer than the business needs
- ☐ You're carrying infrastructure or licenses "just in case".

If this section feels familiar:

Your platform may be optimized for stability rather than adaptability.

Section 2: Cost Visibility & Control

- ☐ Contact center costs feel fixed even when volumes fluctuate
- ☐ It's hard to model cost impact when volumes spike or drop
- ☐ Reducing cost per contact hasn't reduced total cost
- ☐ You rely on manual effort to reconcile operational and financial data
- ☐ Platform costs are disconnected from CX outcomes

If this section resonates:

Your cost structure may be working against you.

Section 3: CX & Customer Effort

- ☐ Customers contact you multiple times for the same issue
- ☐ Friction shows up as repeat calls, escalations, or channel hopping
- ☐ CX metrics look acceptable, but customer behavior tells a different story
- ☐ Channel strategy is driven by platform limits, not customer preference
- ☐ Improvements in CX take longer than expected to implement

If you checked several here:

Technology may be shaping the experience more than intended.

Section 4: Workforce & EX Impact

- ☐ Agent workflows feel fragmented across systems
- ☐ Supervisors rely on multiple tools to manage performance
- ☐ Attrition or burnout feels higher than it should be
- ☐ Training new agents takes longer than expected
- ☐ Frontline teams absorb customer frustration caused by system limits

If this hits close to home:

Operational friction is likely being pushed onto people.

Section 5: AI & Future Readiness

- ☐ AI initiatives feel stalled or limited by data access
- ☐ Interaction data is fragmented across systems
- ☐ Analytics lag behind real-time decision needs
- ☐ Automation feels bolted on rather than built in
- ☐ You're unsure whether your current platform can support future AI use cases

If this section raises questions:

Your platform may be limiting optionality rather than enabling it.

Interpreting Your Results

- **0–5 checkmarks:**
On-prem may still be working for now, but pressure points are likely emerging.
- **6–12 checkmarks:**
You're compensating for platform limitations in ways that add hidden cost and complexity.
- **13+ checkmarks:**
Your platform is shaping decisions more than it should. A CCaaS model is worth serious consideration.

Want to Talk Through What This Means for Your Environment?

This checklist is designed to surface tradeoffs, not prescribe a solution.

If you'd like to discuss what your results suggest for your contact center, cost structure, or CCaaS readiness, I'm happy to compare notes in a short conversation.

Book a 20-minute CCaaS readiness call:

<https://calendly.com/brian-orion7solutions/20-minute-strategy-call-clone>