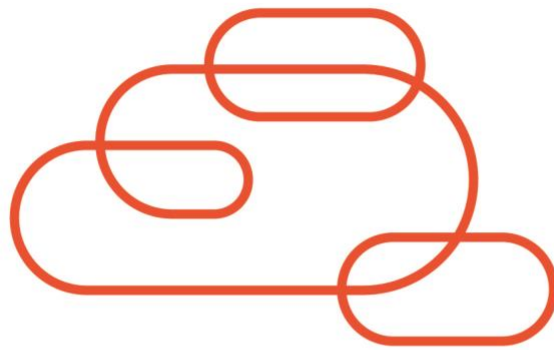


PureCloud Onboarding Checklist

Version 1.6
April 26, 2019



PureCloud

 GENESYS™

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.

Get Ready for a Cloud Contact Center

Complete	When	Who	What
	Day 1	Business Sponsor	Schedule your Kickoff Call with your CSM.
	Day 1	Business Sponsor	Review and agree upon <i>Getting Ready for a Cloud Contact Center</i> document.
	Day 1	Business Sponsor	Identify your onboarding as Genesys-led, Partner-led or Customer-led.
	Week 1	Business Sponsor	Identify and assign your <u>roles</u> . Tell your CSM or PSM. <ul style="list-style-type: none">• Business Sponsor• Project Manager• Contact Center Admin (Designated Support Contact)• IT and Network Admin (Designated Support Contact)• Contact Center Supervisor• Developer (if integrating via <u>APIs</u>)
	Week 1	Business Sponsor	Let your Customer Success Manager (CSM) know your <u>Designated Support Contacts</u>

	Week 1	Business Sponsor	Review ramp period and invoicing process with CSM or Genesys Advisor (GA).
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Create your Org and Users

Complete	When	Who	What
	Week 1	Contact Center Admin	<ul style="list-style-type: none"> • Ensure your PureCloud organization (org) is activated. See Get started administering PureCloud. • Watch the video PureCloud Self Start: Activating your org

Take Training

Complete	When	Who	What
	Week 2	Contact Center Admin	<ul style="list-style-type: none"> • PureCloud Customer Roles and Responsibilities (16 minutes) • PureCloud Core Learning Plan (10 hours). Take Certification Exam • Introduction to PureCloud for Supervisors (51 minutes) • Introduction to PureCloud for Agents (52 minutes)
	Week 2	IT and Network Admin	<ul style="list-style-type: none"> • PureCloud Customer Roles and Responsibilities (16 minutes) • PureCloud Core Learning Plan (10 hours). Take Certification Exam
	Week 2	Contact Center Supervisor	<ul style="list-style-type: none"> • PureCloud Core Learning Plan (10 hours). Take Certification Exam • Introduction to PureCloud for Supervisors (51 minutes) • Introduction to PureCloud for Agents (52 minutes)
	Week 3	Business Sponsor	Introduction to PureCloud for Agents (52 minutes)

Subscribe and Register

Complete	When	Who	What
	Week 3	Contact Center Admin	<ul style="list-style-type: none"> • Subscribe to PureCloud System Status Updates • Subscribe to PureCloud Release Notes • Register and create profile on Genesys Knowledge Network • Register and create profile on Genesys Community • Request a My Support Portal access account • Sign up for the Genesys Customer Advocacy Program (GCAP) • Bookmark the PureCloud Resource Center
	Week 3	IT and Network Admin	<ul style="list-style-type: none"> • Subscribe to PureCloud System Status Updates • Subscribe to PureCloud Release Notes • Register and create profile on Genesys Knowledge Network • Register and create profile on Genesys Community • Request a My Support Portal access account • Bookmark the PureCloud Resource Center

	Week 3	Contact Center Supervisor	<ul style="list-style-type: none"> Subscribe to PureCloud System Status Updates Sign up for the Genesys Customer Advocacy Program (GCAP) Bookmark the PureCloud Resource Center
	Week 3	Developer	<ul style="list-style-type: none"> Subscribe to PureCloud System Status Updates Subscribe to PureCloud Release Notes Sign up for the Developer Center Forum

Getting Ready to Go Live

Complete	When	Who	What
	Before Contract	IT and Network Admin	Download and complete Customer Network Readiness Checklist .
	Week 3	IT and Network Admin	Complete VoIP Readiness Network Assessment.
	Week 4	IT and Network Admin	<p>Complete your Technology & Environment “Map” (what will be connected to PureCloud). Provide map to CSM.</p> <ul style="list-style-type: none"> BYOC Telephony 3rd Party Integrations (CRM...)

			<ul style="list-style-type: none"> • Placement of Edges • Computer / Browser version / Work Stations
	Week 4	Project Manager	<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 onboarding, who from Genesys will be monitoring? If Partner-led onboarding, who from the Partner will be monitoring? • How will feedback from your end-customers and agents be brought to the person monitoring • What's your plan to process that feedback?

Working with Genesys

Complete	When	Who	What
	Week 4	Business Sponsor	Complete Initial "Customer Success Plan" with CSM
	Week 4	Business Sponsor	Review ramp period and invoicing process with CSM and GA.
	Week 5	Business Sponsor	<ul style="list-style-type: none"> • Watch the How to Read Your Bill video • Discuss How to Read Your Bill call with your CSM
	Week 5	Project Manager	Complete "Getting Ready to Go Live" with CSM and Technical Account Manager (TAM),

			Professional Services (PS), and Customer Care as appropriate.
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