

The definitive cloud migration playbook

A blueprint for ripping out legacy PBX
and launching a modern, AI-powered
communications stack.



The moment to modernize was yesterday. Time to catch up

PBX is a security risk: Confront the liability

Over **70%** of small and midsize businesses are ditching the desk phone and heading to the cloud by 2026. If you're not moving, you're not just falling behind—you're getting buried. The only catch? **Most don't know where to start.**



The problem:

Your legacy system is a dead weight

It's not just a bottleneck—it actively cripples your ability to scale, pivot, and stay secure. And for IT and CX leaders, the anxiety of ripping out the old system is a weapon that keeps innovation locked down. **That fear is expensive.**



The solution:

Follow the cloud migration blueprint

This *isn't* a guide—it's a playbook. It's the battle-tested, step-by-step master plan for tearing out that on-prem relic and launching your team into the future of cloud communications. Inside, you'll find expert checklists, and the hard-won intelligence forged from thousands of successful **Dialpad Connect** deployments.



How to use this guide:

Don't just read it. Act on it.

Each chapter is a mission brief, walking you through the critical stages of migration—from defining your kill-list goals to the moment you confidently go live. Use the **non-negotiable checklist**, and Dialpad's pro tips to stay locked on target and obliterate risk.

Chapter 1:

Why modernize now?

What's changed

- PBX systems are expensive to maintain and nearly impossible to scale.
- Remote and hybrid work demand flexibility and mobile-first tools.
- Customer experience now depends heavily on speed, visibility, and data-driven insights. With Agentic AI turning up the speed, anything less will result in instant irrelevance.

30%

lower TCO and major reliability gains — that's what companies achieve when they move to the cloud.



Dialpad pro tip

With Dialpad Connect, everything—voice, video, and messaging—is unified in one platform, powered by real-time AI and backed by a 100% uptime SLA.

Chapter 2:

Why modernize now?

Cloud isn't just hosting. It's the engine modern business runs on. You're not buying a service—you're gaining an unfair, competitive advantage.

With Dialpad Connect, you get:

- **Unified Communications as a Service (UCaaS):** Calls, messages, and meetings in one workspace.
- **Cloud-native architecture:** Always updated, no hardware or downtime.
- **AI-enabled insights:** Real-time transcription, call summaries, and analytics.
- **Security by design:** Dual-cloud global infrastructure and enterprise-grade encryption.
- **Seamless integrations:** Works with Google Workspace, Microsoft 365, Salesforce, and more.

The 5 pillars of cloud migration success

-  **Simplicity**
-  **Security**
-  **Scalability**
-  **Support**
-  **Savings**

Chapter 3:

Build your migration roadmap



Step 1: Define the “why”

Set clear goals—reduce IT overhead, improve CX, and enable flexibility.



Step 2: Map your environment

Audit users, devices, call flows, and integrations to uncover dependencies.



Step 3: Align stakeholders

Involve IT, CX, operations, and finance early to ensure buy-in and avoid late-stage blockers.



Dialpad pro tip

Book a consultation to confirm your setup can handle cloud performance before rollout.

Chapter 4:

Execute your migration plan



Step 4: Pilot, train, deploy

Start with a pilot group, refine, and expand in phases. Train users on adoption best practices and leverage AI recaps for faster onboarding.



Step 5: Optimize live operations

Track call quality, monitor analytics, and fine-tune user provisioning—all from one admin portal.

40%

reduction in IT workload after migrating 400 users to Dialpad Connect in under six weeks.



Dialpad pro tip

Dialpad's admin console automates provisioning, number porting, and scaling —no servers or manual setup required.

Chapter 5: Overcoming common migration challenges

| Challenge | Solution |
|-------------------------------|---|
| Resistance to change | Communicate value early. Use self-serve training via Dialpad Academy. |
| Integration with legacy tools | Use Dialpad's open APIs and prebuilt integrations. |
| Data migration & compliance | Work with Dialpad's migration experts for secure transfers. |



Dialpad pro tip

A mid-market retailer migrated 400 users to Dialpad Connect in under six weeks—cutting IT workload by 40% while improving uptime.

Your next steps



Key takeaways

- Legacy systems slow growth and customer experience.
- Cloud communications deliver flexibility, security, and measurable ROI.
- With the right roadmap, migration is smooth and disruption-free.



Dialpad pro tip

You don't have to do it alone. With **Dialpad Connect**, you get a partner that's helped 30,000+ businesses modernize their communications and accelerate performance, and a platform that updates automatically, scales instantly, and connects every customer and employee—anywhere.



Keep going

- eBook:** [Cloud migration myths vs. reality](#) ↗
- Checklist:** [Cloud migration risk assessment](#) ↗
- White paper:** [Modern communications for the modern CIO](#) ↗
- Demo:** [Schedule time to see Dialpad Connect in action](#) ↗