

Ceexo Robocall Migration Plan

Overview

This document outlines the plan to migrate existing robocall campaigns and infrastructure from the current platform to the new robocall provider. The goal is to minimize downtime, preserve compliance, and maintain message delivery integrity during the transition.

Migration Goals

- Ensure zero data loss across contacts, call flows, scripts, and opt-out databases
- Maintain TCPA and FCC robocall compliance
- Preserve call quality and deliverability
- Prevent call disruptions or false starts during the migration window
- Introduce improvements in analytics, scalability, or cost-efficiency

Migration Scope

Component	Included in Migration
Contact Lists	✔ Yes
Opt-out/Do Not Call Lists	✔ Yes
Pre-recorded Audio Files	✔ Yes
Call Scripting/IVRs	✔ Yes
Campaign Settings	✔ Yes
Phone Number Management	✔ Yes (Ported or Re-provisioned)
Call Logs & Reporting Data	✔ (If exportable)
API/Webhook Integrations	✔ Yes
Scheduling/Throttling Rules	✔ Yes

Migration Phases

Phase 1: Planning and Audit

- Inventory all existing robocall campaigns, numbers, recordings, opt-out lists, and call schedules
- Review current provider's features vs. target platform
- Confirm licensing, compliance, and consent documentation are up-to-date
- Notify internal stakeholders of expected migration timelines and impact

Phase 2: Platform Configuration

- Provision equivalent robocall platform
- Configure outbound calling routes and SIP trunks
- Upload contact databases and validate segmentation rules
- Set up DNC list import and filtering
- Create matching campaigns, IVRs, and audio recordings
- Implement call pacing/throttling and retry logic

Phase 3: Testing

- Perform internal QA test campaigns
- Validate recording playback, DNC compliance, and campaign logic
- Test webhook/API integrations
- Monitor answer rates and call quality
- Prepare rollback plan

Phase 4: Porting & Go-Live

- Port or provision numbers
- Schedule migration during low-traffic window
- Begin routing live traffic in stages
- Monitor real-time analytics for errors or delivery issues

Phase 5: Post-Migration & Optimization

- Validate campaign delivery reports and logs
- Notify users/agents of successful cutover

- Decommission legacy platform after 7–14 days of stability
- Review campaign metrics and performance improvements
- Optimize future campaigns based on analytics and feedback

Risk Mitigation & Contingency

Risk	Mitigation
Delivery drops	Perform live test calls and closely monitor logs
Porting delays	Pre-provision backup numbers if necessary
DNC violations	Ensure lists are fully synced and filtered
Script or logic errors	Test each scenario using internal numbers
API/Webhook failures	Use fallback scripts or schedule retries

Documentation Required

- Opt-in records and consent logs
- Call scripts and recording approval documentation
- Number porting forms and LOAs
- Campaign performance benchmarks
- Compliance verification checklist

Success Criteria

- No downtime or call drops during migration
- Compliance maintained throughout
- Call completion rate remains $\geq$ baseline
- Improved analytics or reduced cost-per-call post-migration