



Sales Enablement Pack:   
Compliance Recording

Call recording and analytics to simplify compliance and optimise performance

# Compliance Recording

### Call recording and analytics to simplify compliance and optimise performance

EXPO.e’s Compliance Recording solution – powered by CallCabinet – addresses your customers’ key areas of concern related to compliance, training, agent performance, and quality monitoring purposes. Without a call recording solution, businesses are at risk of legal non-compliance, but this solution provides a single, fully centralised solution that allows organisations achieve and maintain full compliance with data collecting legislation, with no need to integrate and monitor multiple portals and platforms for different channels of communication. By supporting their ongoing compliance obligations, you will be able to establish yourself as a key technology partner, opening up numerous opportunities for future business.

# Market Conditions

* The global call recording market was $3.04B in 2022 and is still growing.
* Europe is the second largest call recording market next to North America, Adoption of regulations in healthcare, banking, and financial services.
* Primary growth driver: the potential of actionable data.
* 64% of companies are deploying call recording for legal discovery and compliance audits.
* 32% of companies expect to start capturing voice data in the next 2-5 years due to regulatory requirements.
* 62% of companies are archiving mobile communications for Government compliance and internal retention.

# Business Challenges

* Tracking and assessing customer interactions in real-time, pinpointing areas that need improvement in customer satisfaction, agent performance, and compliance adherence.
* Improving operational efficiencies by automating the analysis of massive amounts of spoken data, reducing human labour, streamlining workflows, and speeding up decision making.
* Reducing business risks by identifying and resolving problems such as consumer complaints, operational inefficiencies, compliance violations and securing intellectual property.
* Limitations of manual scoring for compliance, KPIs and performance, to improve call quality and establishing unbiased agent performance scores is increasingly complex
* The complexity of identifying and monitoring trends across call groups means issues often go unnoticed.
* Many organisations are still making use of outdated recording systems, and so struggle to manage the data generated in an efficient and secure way.

# Why EXPO.e for Compliance Recording?

* **A proven, Cloud-native solution** – powered by the industry-leading CallCabinet platform – delivers compliant call recording, seamless integration, and unlimited scalability.
* **Cross-platform Integration:** Seamless integration with all major Unified Communications (UC), IP-PBX, telephony, and third-party business systems, with hands-on support to support successful digital transformation strategies.
* **Security and encryption:** Best-of-breed security features include military-grade AES 256-bit rotating encryption methodology, for complete peace of mind.
* **Full data sovereignty**: All recordings are stored in the UK, in best-of-breed data centre environments.
* **Stress-free deployments:** With hands-on support from our own UC experts, our solution can be deployed in a matter of weeks, then scaled as needed.
* **Hands-on support from a UC leader.** With more than twenty years delivering UC innovations to organisations in some of the UK’s most heavily regulated industries, we will work closely with you to ensure your customers enjoy a Compliance Recording solution tailored to their specific goals and requirements.

# Benefits

**Regulatory Compliance:** Ensure full compliance with regulations such as GDPR, HIPAA, and PCI DSS by monitoring and enforcing adherence to legal and ethical guidelines during customer interactions.

**Risk Mitigation:** By monitoring and addressing issues such as regulatory violations, data breaches, and complaints proactively, your customers can minimise the risks of non-compliance and safeguard their reputations.

**Enhanced Customer Satisfaction:** By ensuring that every interaction meets or exceeds predefined quality standards, our solution contributes to higher levels of customer satisfaction, helping build trust and brand loyalty.

**Employee Engagement and Satisfaction:** Providing employees with feedback, recognition, and opportunities for growth through QA initiatives enhances employee engagement and satisfaction. Engaged employees are more motivated, productive, and committed to delivering exceptional service, leading to higher retention rates and lower turnover.

**Data-driven Decision Making:** Analysing call data and QA metrics provides valuable insights into customer behaviour, preferences, and trends. These insights enable businesses to make informed decisions, optimise strategies, and drive continuous improvement initiatives.

**Operational Efficiency:** By identifying inefficiencies, bottlenecks, and areas for improvement in call handling processes, customer can streamline workflows, optimise resource allocation, and reduce call handling times, resulting in tangible cost savings and improved productivity.

**Competitive Advantage:** Delivering superior customer service and maintaining high-quality interactions set organisations apart from competitors, offering the edge in competitive markets.

# Features

**Compliant Call Recording:** Securely and compliantly capture every conversation from across any communication platforms and have it readily available for analysis, with advanced audit and security logs, suitable for the most heavily regulated industries.

**Detailed Interaction Analysis:** Detailed analyses of each interaction are available in near real-time, including sentiment analysis, call summaries, key actions, and the ability to query the conversation data for in-depth exploration.

**PCI DSS Redaction:** AI-driven, API automatic call redaction, with multiple options for manual intervention.

**Legal Holds:** Quickly accessible for dispute resolution, audits, and training purposes.

**Automated Quality Assurance and Call Scoring:** Score every call according to the customer’s set criteria to proactively improve processes and ensure agents are fully supported.

**Manual and Automated QA Integration:** Quality assurance can be fully automated, with the optional of overriding any specific recording’s automated score, should the need arise, helping to maintain consistency in scoring and effectively address any discrepancies.

**Granular Search Features:** Set thresholds for clarity amounts of crosstalk or silence, and filter results to show only calls that exceed specified levels. Search criteria can be further cross-referenced by specific user, group, call type, sentiment, content, or any combination of these.

**Secure Call Sharing:** When a recording needs to be shared, this can be managed based user-level permissions, with time-bound encrypted links to the recording itself, ensuring only the intended recipient can access the recording in question.

**Screen/video Recording:** Gain a clear view of what agents have open on their screens when talking to customers in order to optimise performance, streamline procedures, quickly resolve customer conflicts, and identify best practices more accurately.

**Automated PCI DSS Redaction:** Seamlessly meet every mandate by leveraging automatic redaction capabilities for personally identifiable information (PII) and sensitive credit card data.

**Speech-to-Text Transcription:** A comprehensive and precise record of what was said and by whom during all recorded business conversations, including speaker identification.

**Multilingual Transcription:** Our solution offers airing of languages for multinational organisations that require accurate conversation data accommodating specific operational transcription requirements.

**Define Your Own Language:** Apply the customer’s own custom vocabulary libraries with business or industry-specific terms or jargon and incorporate them into the required search and evaluation metrics.

**Customisable Scorecard Phrase Editor:** Enable the customer to measure and interpret data in the way that’s right for them, ensuring all analytics are perfectly aligned with their long-term business objectives.

### Flexible Licensing Options

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| **Core Recording Licence** | Compliance for the customer that needs to record, store and playback calls. Includes advanced playback and tagging, unlimited audio recording retention, compliance sharing, selective AI Transcription, Call Summarisation, and Sentiment Analysis and Admin Licenses equal to the number of Core Recording Licences. |
| **Advanced Recording Licence** | Includes Core Recording features, manual PCI DSS redaction, screen capture or screen recording, QA and agent evaluation tools. Includes one QA Supervisor License per 10 Advanced Recording Licenses. |
| **Standard Analytics Licence** | Includes Advanced Recording features, plus screen capture or screen recording, detailed voice analysis, automated PCI redaction, transcription, sentiment and emotion analysis, and comprehensive out-of-the-box dashboard reports. |
| **Advanced Analytics Licence** | Includes Standard Analytics features, plus AI data analysis of multiple data sources (Email, Chat, and social media), expanded out-of-the-box business intelligence dashboard reporting, multi-language transcription, automated email summary reports and notifications, and a monthly consultation with a data scientist. |
| **Video Conference and Screen Share Recording** | Add-on licence to access and playback video conferences and shared screen views. Includes up to 6 months of storage per user. (Priced per video user, per month). |
| **Advanced Admin Licence** | Grants access to view enhanced call details, screen capture/recording, emotion and sentiment analysis, advanced reporting, enhanced compliance call sharing, call section and time-based call notes. Unlimited Advanced Admin licenses are included in the Core, Advanced and Analytics Recording plans. |
| **QA Supervisor Licence** | Bundles QA applications, including agent evaluation, agent scorecards, custom scorecard editor, QA Randomizer, enhanced call details, screen capture/recording, emotion/sentiment analysis, advanced reporting, enhanced compliance call sharing, call section, and time-based call notes. |
| **Combo Package – PCI DSS Redaction + AI and Audio Transcription** | An add-on that provides PCI DSS redaction through AI that automatically detects and redacts PCI DSS data. Plus, unlimited transcription, emotion, and sentiment. Transcriptions are displayed on the "Call Details" screen which will require an Advanced Admin License (if not included in plan). |
| **Standard Analytics Add-on Licence:** | An add-on that provides detailed voice analysis, automated PCI redaction, transcription, sentiment and emotion analysis, and comprehensive, out-of-the-box dashboard reports. |
| **Advanced Analytics Add-on Licence** | An add-on that delivers advanced business intelligence reports, automated notifications, and configuration. |
| **Audio Transcription** | An add-on that provides unlimited transcription, emotion and sentiment. Transcriptions are displayed on the "Call Details" screen. |

# Discovery questions to ask your customer

* Do you have an existing call recording solution?
* Do you audit these recordings?
* How many people review these recordings?
* Are you bound by regulatory requirements?
* If so, how long do you have to retain them for?
* Do you monitor users for training purposes?
* Is customer retention a key measure with your organisation?

# Qualification questions to ask your customer

* How do you address compliance within your existing call recording solution?
* Do you measure customer satisfaction?
* Do you look to improve team member performance?
* How do you measure employee engagement and satisfaction?
* Do you make decisions on data-driven metrics?
* Is operational efficiency important to your company?
* How do you manage risk?