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1. Service Introduction

1.1. What Does Our Service Do?

We believe passionately in public service and enabling the public sector to deliver great citizen-centric digital services.

In our 20+ years, we have built a track record of trust across the public sector. Over 100 Councils and 75% of NHS Trusts/Boards currently use our products as well as many more customers across the wider public sector.

We believe that the right solutions will help the public sector unleash its potential to deliver exceptional citizen and staff experiences every day. We're committed to enabling the public sector to drive digital transformation, how and when they want to, by giving them tools that support their digital autonomy. Find out more about our commitment in our Manifesto: https://www.netcall.com/resources/local-gov-manifesto/

Introducing Liberty Converse, Netcall's next-generation AI-powered cloud contact centre solution, that redefines how organisations engage with their customers. Our cloud-native platform extends its robust contact centre software capabilities to harness the power of intelligent automation and rapid application development, setting us apart in the competitive landscape.

1.2. Service Highlights

- Fast, Robust Deployment: Achieve a quick, efficient and sustainable deployment that is built to last and future-proofed, enhancing the effectiveness of your contact centre.
- Elevate Scalability: Seamlessly scale your contact centre operations to meet dynamic business demands without the hassle of traditional infrastructure constraints.
- Unmatched Flexibility: Embrace the freedom of a cloud-native approach, empowering your team to deliver exceptional service from anywhere, at any time, with the agility to adapt to evolving customer needs.
- Cost Efficiency at Its Best: Maximise your return on investment by optimising resource allocation and reducing operational costs.
- Omnichannel Excellence: Connect with customers effortlessly across various channels, including voice, email, chat, social media and video. Provide a consistent and personalised experience that aligns with modern communication preferences. Enable customers to shift channels effortlessly without losing the context of their case or enquiry.
- Intelligent CRM and system Integration: Seamlessly integrates with CRM systems enabling a unified view of customer data and interactions. Equip your contact centre team with the insights they need to deliver personalised and efficient support.
- Enhanced AI-Powered Engagement Leverage advanced AI-powered features for analytics, automation and summarisation. Streamline operations, reduce wait times, optimise handling times without compromising quality and ensure swift issue resolution for unparalleled customer satisfaction.
- Customer Experience Optimisation: Deliver consistent and personalised customer experiences by eliminating siloed systems and disjointed processes. Exceed customer expectations and drive loyalty with advanced analytics, automation capabilities, and customisation options.
- Innovation and Adaptability: Fostering innovation and adaptability, our technology agnostic solution provides flexible tools for prototyping customer journeys and experimenting with new technologies. With additional low-code development and rapid application deployment, organisations can stay ahead of market trends without technical hurdles.

- Unmatched Efficiency with Process Automation Integration: Automating repetitive and time-consuming tasks allows your team to focus on higher-value interactions, reduces response times and enhances overall productivity and experience.
- Adaptability and Speed with Workflow Process Optimisation: Automates repetitive tasks and streamline workflows, allowing contact centre teams to focus on high-value customer interactions. With process optimisation tools, organisations can enhance productivity and responsiveness.
- Unified Agent Desktop: A single browser-based interface that provides agents with access to customer information, interaction history, knowledge bases, and communication channels. Team members can handle real-time customer interactions across multiple channels, including voice calls, email, chat, SMS, social media, and messaging apps, all from within the same interface.
- Proactive Customer Self-Service: Advanced speech recognition and Natural Language understanding technologies empower customers to find answers to their enquiries and resolve issues independently without the need for agent assistance. They can achieve this through IVR, Chatbot and Virtual Assistants
- Connect Field Service and Helpdesk Operations: Breaks down internal data silos and integrate seamlessly with field service and helpdesk operations. Fostering collaboration across customer-facing operations, to optimise efficiency and deliver superior service.

Liberty Converse offers a holistic approach to address the challenges of transitioning from traditional to modern customer service operations. By providing speed, scalability, flexibility, cost efficiency, and enhanced customer experiences, we empower organisations to thrive in today's rapidly changing world.

1.3. Why Cinos?

Cinos Limited is an agile and innovative technology provider, and specialist within the UK Public Sector market.

We are a ‘collaboration first’ business, meaning everything we do is focused around collaborative technology, with enterprise networking and security as a supporting focus.

Cinos constantly strives to leverage collaborative technology in innovative ways, pushing boundaries of what commercial-off-the-shelf services and solutions deliver on a day to day basis. We achieve this through fully and thoroughly understanding the exact business need and drawing upon customisation and the partner ecosystem.

Key benefits that our services bring:

- An established service transition process from a specialist Cisco and Microsoft partner with extensive experience, delivering and managing similar upgrades in healthcare environments.
- A simple, centralised, scalable solution which meets all collaborative requirements.
- Support services from a partner which specialises in supporting complex telephony, unified communications, and video conferencing environments in healthcare.
- A partnership with an organisation able to bring additional benefits both in terms of getting the very best out of the solution as installed, as well as through our value-add NHS-focused solutions and services.
- We are the first organisation ever to be awarded with the Partner Industry Expertise – Healthcare authorisation by Cisco, globally.

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1.3.1. A Broad Range of Service Options

Packages range from a simple voice queueing to full multimedia (email, web chat and social media chat) agent interactions plus unrivalled interoperability with open standards CRM systems and databases.

Our range of bolt-on services include wallboards, real time and historical reporting, automated attendants and self-service, agent desktop gadgets and URL integration, CRM integration and customer details screen-popping, PCI compliant call recording, and attendant console services.

A wide range of handsets, soft clients (compatible with smartphone, tablet, desktop and laptop devices) and video devices are supported by the service to deliver telephony to the agents.

1.3.2. Connectivity

Cinos operates cloud connectivity with the Netcall Cloud, allowing our customers to securely to connect to the cloud communications suite from Netcall via Cinos Cloud. To that end we are able to support customers on their transition from Netcall premise solutions to the cloud.

Customer can choose how they connect to the Cinos Contact Centre service. With our Public Cloud offer this is as simple as agents connecting from any location over the Internet. With our Private Cloud agents can connect via the Internet, and the service can also delivered directly into private networks, such as the Health and Social Care Network (HSCN) which allows NHS organisations to consume the service both on-net and via the Internet.

The service can also be customised for the UK Public Sector to utilise secure hosting classified above OFFICIAL, for e.g. workloads up to SECRET Tier2, ensuring privacy of communications and data.

1.3.3. Device and Location Independence

Our service provides a seamless experience for end users regardless of location or the device of choice used to access the service. Agents may share telephony numbers and can even work from home using their home phone number as the primary agent extension. Agents can access the service from anywhere, meaning they are always able to be contacted on a single number, and your business has a reliable DR strategy for the contact centre.

1.3.4. Value for Money

Our service is unique in that it offers Private Cloud, Community Cloud or Hybrid Cloud deployment models, while your organisation retains all rights to any software license procured to access the service, as opposed to a traditional cloud seat rental. Furthermore, if your organisation has existing investment in Cisco Unified Communications software licensing and hardware, this investment may be protected and fully migrated to our service.

1.3.5. Fully Supported

Our packages come with full technical vendor and supplier support as standard. Based on your chosen deployment model, Service Level Agreements of up to 99.9% are available.

1.3.6. A service solution than spans the life cycle of your project

The service has been designed to be easily procured: volumetrically or as commodity. Furthermore, Cinos will provide free-of-charge consultancy to engage the buyer’s key stakeholders and identify any bespoke requirements.

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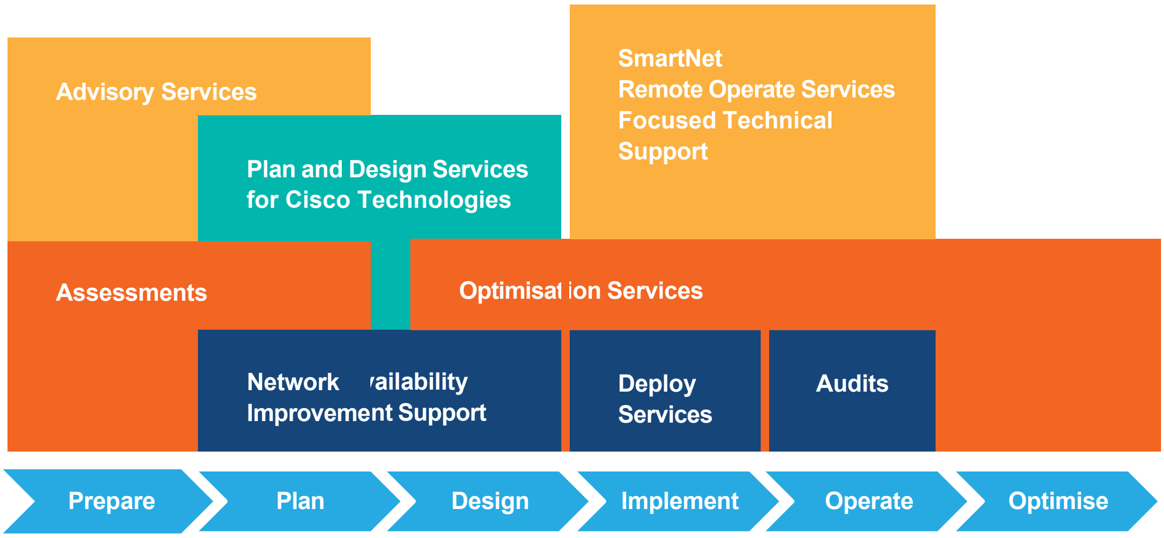
In order to deliver our solutions, Cinos follows a closely aligned PRINCE2 methodology. This is delivered by qualified PRINCE2 Project Managers, with an additional consideration of service optimisation and user adoption throughout the project.



Our suite of services has been closely aligned with vendor best-practice. Namely the Cisco PPDIOO model (Prepare, Plan, Design Implement, Operate, Optimise). This ensures consistency and quality in everything we do, and that the services we provide correlate precisely to the way in which the Cisco technology is designed to be deployed.

2. Service Features and Benefits - Netcall

Liberty Converse offers advanced features and capabilities to help enhance customer interactions, streamline operations, and improve overall efficiency and cost reduction:

- Self-Service Options: Enhanced self-service capabilities, allowing customers to resolve issues independently through intuitive IVR and messaging channels.
- AI-Powered Virtual Assistants and Chatbots: AI-driven virtual assistants and chatbots to handle complex queries, provide instant responses, look up information and assist customers 24/7. Using speech recognition and natural language processing, our automated assistants free up human team members for more complex tasks.
- Intelligent Routing: Algorithms that dynamically direct incoming calls and digital interactions to the most appropriate team member based on skills and issue complexity.
- Omnichannel Communication: Orchestrating multiple communication channels (including voice, email, SMS, chat, social media, video and integrated call-backs) into a unified platform, providing a seamless and consistent experience for customers and customer service teams.
- Integration with CRM Systems: Seamless integration with existing systems such as ticketing or Customer Relationship Management (CRM) systems to provide teams with a comprehensive view of customer information, enabling personalised interactions.
- Seamless Data Flow and Unified Customer View: Integrate rapid application development, RPA, and process-mapped workflows for a smooth data flow, providing a unified view of customer interactions for informed decision-making.
- Payments Security: Ensure the secure handling of customer payment information over the phone/IVR in compliance with PCI DSS requirements.
- Co-browsing and Screen Sharing: Collaboration tools such as co-browsing and screen sharing assist customers visually, guiding them through processes and troubleshooting in real-time.
- Generative AI Summarisation1: Generate contact summaries to support team members during and after customer interactions, enhancing the customer experience and streamlining post-call wrap-up. Managers can leverage AI-generated summaries to analyse trends and address issues, enabling targeted coaching across the contact centre.
- Multi-lingual translation: Enable seamless multi-lingual communication across your chatbot and team assisted webchat channels, with the ability to translate into over XX languages.
- Speech Analytics: Analysis of customer-employee interactions, using speech recognition and transcription to monitor sentiment, identify keywords, and offer immediate feedback to team members for improved performance.
- Workforce Engagement and Optimisation: Workforce management tools help optimise scheduling and forecasting, ensuring that your contact centre is staffed adequately during the day.
- Quality Management and Monitoring: Tools for monitoring and evaluating the quality of customer interactions, allowing supervisors to provide real-time feedback coaching, and ensuring compliance with service standards.
- Advanced Reporting and Custom Dashboards: Customisable reporting and dashboards with real-time metrics, allowing organisations to pass data in and out of third-party systems (through APIs), monitor key performance indicators and make informed decisions.
- Compliance and Security Features: Robust security measures and compliance tools to ensure the protection of customer data and adherence to industry regulations (e.g. GDPR, Single sign-on and easy onboarding tools).
- Robot Process Automation (RPA): Automate routine tasks that slow down your teams, reduce workload and minimise errors for greater accuracy.

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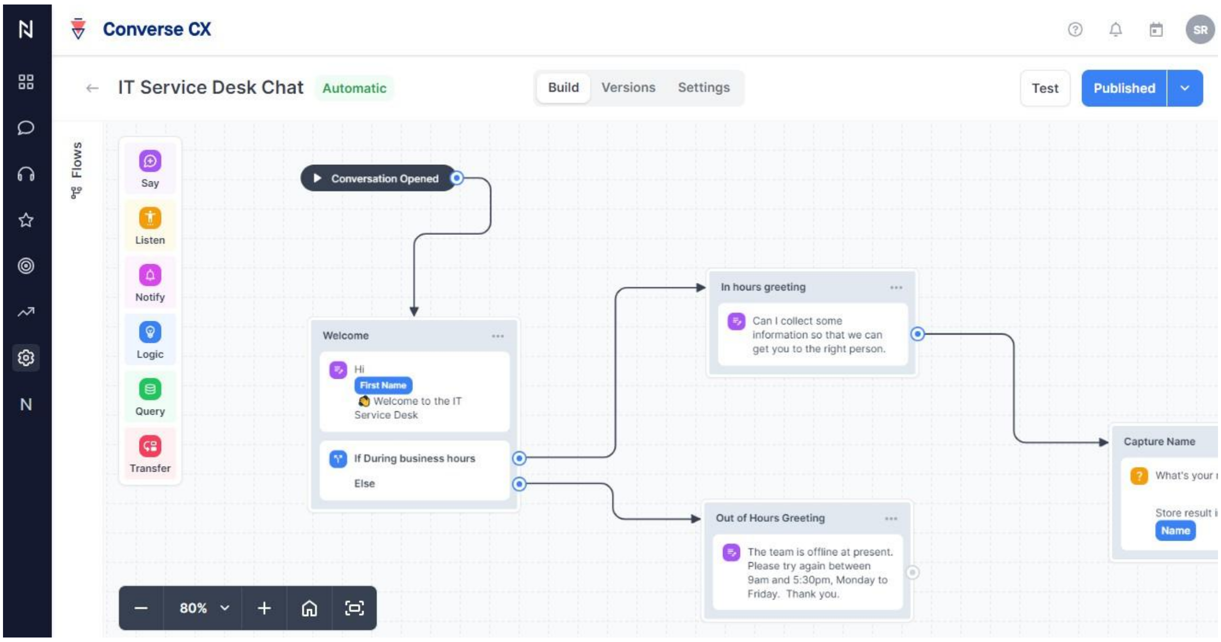
2.1. Virtual Agents

The Virtual Assistant is there to respond and route all queries on every channel. You use the visual flow designer to build your flows which define what messages to say/type or what responses to gather.



2.1.1. Virtual Agent Features

- **Build multiple Virtual Agents** – Virtual Agents are either digital or voice. Channels are routed to the required Virtual Agent.
- **Drag and drop designer** – Drag steps onto the canvas, connect them together, zoom in, fit to screen.
- **Triggers** – Triggers define what behaviours cause the flow to be executed, whether it be a new conversation, a message received or a web page visited.
- **Steps** – Steps represent the different types of interactions with customers:
- **Say** - Say or type a message; send an App.
- **Listen** - Ask a free-form question or make a choice from a list of options; supports both quick replies and natural language.
- **Notify** - Send ad hoc SMS to the customer or other number.
- **Logic** - Use conditional decision step, set variables, write JavaScript for more advanced capabilities.
- **Query** - Get stats such as longest wait and number of customers in the queue or query an external REST web service for external information.
- **Transfer** - To a Queue, an Agent, a Virtual Agent, or phone number.
- **Audio** – Play an audio file from URL or uploaded file.
- **DTMF Menu** – Simple IVR menu for calls only.
- **Test and Preview** – Users can preview flows in the browser.
- **Auto-save** – Flows are automatically saved so work is not lost if a user closes the browser.
- **Versioning** – Tag flows with a version number or name so you revert to it later.
- **Import / Export** – Individual flows can be exported and imported.

- **In-Queue Flows** - In-Queue Flows can be used when a customer is waiting in a queue to speak to a live agent. They are typically used to play comfort messages and music-on-hold. In-flow queues are only available to Calls.
- **Natural sounding Text to Speech (TTS)** – Natural sounding TTS, with a choice of English-speaking voices.
- **Intent Recognition and Natural Language** – When users configure an intent, they supply example phrases e.g. "order a burger", "I would like to order a burger please", that help train the natural language engine so that it can cope with the different ways that a customer might ask. Intent can be global for example, the customer may ask to speak to someone at any point during the conversation, or local to the question being asked.
- **Intent Training** - When an intent is recognised with low confidence the administrator can train the system by confirming which intent a phrase should match. This helps improve the confidence of future intent recognitions.
- **Proactive Triggers** - Flows can be configured to automatically trigger messages on Web Assistant when a webpage is visited – this is known as a proactive trigger. As there is a potential cost to the customer for each proactive trigger, the customer can limit the maximum number of triggers to fire per month.

2.2. Channels

Converse is omnichannel and can handle conversations across calls, emails, webchat, SMS and social messaging.

2.2.1. Calls

Converse can manage telephony on the customer's behalf (i.e. the customer purchases DDIs and SIP channels from Netcall), or it can be connected to the customer's own PBX or Session Border Controller (SBC).

- **Liberty Voice** - Customers choose to purchase their telephony (SIP channels, minutes and DDIs) from Netcall.
- **Inclusive Outbound Minutes** – Inclusive minutes to UK landlines and mobiles (subject to licence).
- **DDIs** – Add UK National DDIs, tollfree, non-geographic and golden numbers.
- **Number Porting** – Port your existing number into Liberty Voice.
- **Bring Your Own Carrier (BYOC)** - Or customers choose to connect Converse to their own SBC, PBX or carrier.
- **Fraud Prevention** – Calls to premium and international numbers are blocked by default.
- **Caller Presentation Numbers** – Present a different calling number per queue.
- **Embedded Agent softphone** – Agents answer calls directly in their browser using WebRTC.
- **Virtual Agents and IVR** - Route calls into Virtual Agents to provide both DTMF and Speech IVRs with Natural Language support.
- **Comfort messaging** – Design an in-queue Virtual Agent to provide an in-queue experience to callers – includes support for comfort prompts, time in queue, call back offers, SMS, as well as other advanced features.
- **Standard Call Control features** – Hold, mute, DTMF, cold and warm transfers to agents, queues and external contacts, supervisor monitoring and assist, three-way conference call.
- **QueueBuster / CallBack** - Offer callers the option to be called back if the queue length is long. The caller's place is held in the queue and when the agent answers, a call is made back to the original caller. If the original caller is not available, then the agent can reschedule for later.
- **Video Assist** – when the customer is talking or chatting with an agent, the agent can invite the customer to share video with them. For phone calls, this means that the customer can show video from their mobile phone

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to the agent (e.g. to show a problem with the boiler); for chats, this means a two-way video call between the customer and the agent.

- **Call Transcriptions** - automatic transcription of calls in historic reports and for agent evaluation.

2.2.2. Email

Converse allows you to manage your email queues and route them to the most appropriate agent.

- **Email Forwarding** – Forward emails arriving at your email inboxes (support@netcall.com) into Converse, then choose the queue to route them on it.
- **Verified Domains** – Send outbound emails from your own domain by verifying it using DKIM.
- **Auto Replies** – Emails can be acknowledged with auto-responses.
- **Email Templates** – Add your branding and signatures to all emails sent to customers.
- **Email SLA** – Choose whether to take account of opening times when calculating adherence to SLA.
- **Text Editor** – Comprehensive text editor to make it easy for agents to add formatting to their message.
- **Attachment Support** – Add attachments and images to emails.
- **Snippets** – Quickly insert snippets of pre-canned response into replies.

2.2.3. Web Assistant

Web Assistant is your website's virtual assistant. It makes it easy for customers to get what they need, with or without agent assistance.

- **Simple deployment** – Copy and paste small code snippet into your web pages.
- **Branding** – Choose your own brand logo and colours.
- **Custom launcher** – Provide your own launcher button, or choose the default.
- **Homescreen** – Add articles, links and apps to the chat home screen.
- **Liberty AI-Powered Chatbot** - A smarter chatbot that is simpler to setup and automatically trained on your data – websites, FAQs, PDFs.
- **Chatbot** – Connect visitors to a Virtual Agent and route to agents when required.
- **Attach documents and images** – Visitors and agents can share images and other attachments to the chat. All uploads are scanned for malware and automatically quarantined.
- **Queue updates** – Tell customers where they are in the queue whilst waiting for an agent.
- **Emoji Support** – Customers, bots and agents can use emojis in their messages.
- **Download transcripts** – Customers can download a transcript of any conversation to their device.
- **Proactive chats** – Target customers with messages dependant on the page they are on and the time of day.
- **Direct Chat** – Embed a link or QR code in an email or printed material to allow customers to quickly open a chat.
- **Security** – Specify the domains that Web Assistant can be deployed on via an 'allow list'.
- **Multiple Web Assistant support** – Allows you to support multiple brands or different services.
- **Video Assist** – When the customer is talking or chatting with an agent, the agent can invite the customer to share video with them. For phone calls, this means that the customer can show video from their mobile phone to the agent (e.g. to show a problem with the boiler); for chats, this means a 2-way video call between the customer and the agent.

2.2.4. Social Messaging and Conversational SMS

Connect Converse to SMS and social messaging channels to provide conversation messaging on your customer's channel of choice.

- **SMS** – Supports connecting your own SMS accounts on Gov.Notify, BT Smart Messaging and Twilio.
- **Facebook Messenger and Instagram** – Connect one or more Facebook Messenger accounts or Instagram Pages to Converse.
- **WhatsApp** – Connect your existing WhatsApp Business Account to Converse. Allows agents to respond to incoming customer messages within 24 hours .
- **Multi-service support** – Connect to different Facebook pages or different SMS accounts from the same provider and link to different Virtual Agents. Allows you to support multiple brands or different services.
- **Attachment and Image Support** – Support attachments and images and across all social channels (excludes SMS).

2.3. Routing and Queueing

- **Skills-based routing** - Route interactions to agents based on media, skills and agent proficiency.
- **Unified omnichannel routing and queuing** - Single scalable queue that matches all interactions and tasks to the most appropriate agents.
- **Channel prioritisation** - Configure which channels interrupt other channels. For example, should calls interrupt emails in progress?
- **Media prioritisation** - Configure which medias take priority over others. For example, should calls always be presented to agents before emails that were already queueing?
- **Interaction concurrency** - Configure how many interactions of each channel can be worked on at the same time by each agent.
- **Skill templates** - Group skills into templates and assign to agents.
- **Service Level Targets** – Configure target answer times per queue and report in real-time via the dashboards and in historical reporting e.g. the target for Queue A is to answer 80% of calls in 20 seconds, or 90% of emails within 2 hours.

2.4. Agent Productivity

- **Busy Codes** – Agents can put themselves into a Busy Code to signify that they are not available to handle interactions. Busy codes can be optionally configured to expire after X minutes.
- **Configurable Wrap Time** – Managers can configure max wrap time per queue.
- **Activity codes** - Agents can record an outcome against any interaction. Managers can report on volumes by activity code. Activity codes can be optional or mandatory.
- **Optional mandatory Activity Codes** – Agents are forced to record the activity code
- **Outbound interactions** - Agents can make outbound phone calls, outbound emails and follow up on social interactions, all of which are logged against a contact centre queue.
- **Supervised and blind transfers** - Agents can supervise or blindly transfer calls to other agents or back-office contacts.
- **Interaction management** - Allows agents to pull up related interactions from the same contact.

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- **Live queue search** - Search in real-time for other interactions from the same contact - means that multiple contacts can be handled in one go, by a single agent.
- **Click-to-dial** - Agents can click on a number to call it - no need to type in the number.
- **Multichannel interaction alerting** - Agents are alerted of new interactions.
- **Agent not responding** - If agents do not answer an interaction, then they are automatically marked as not responding. Interactions can then be routed to a more suitable agent.
- **Snippets** – Provide canned responses that agents can easily include in chat responses.
- **AI Chat Assist** – Uses AI to recommend responses to agents, improve their response (e.g. expand a brief response into a well written formal response), and translate into their language.
- **Payments** - Agent assisted and IVR self-service payments.
- **Native Co-Browse** - Native co-browse to allow the agent to help the customer browse/use your website.
- **Links and Buttons** – Create custom links to external web applications (such as a CRM) that the agent can click on in the agent details panel to access relevant info from third-party systems.
- **Interaction Tabs** – Add a tab to the agent interaction panel that can host an external web app (such as a CRM) in an iframe.
- **Workspaces** – External web applications (such as CRMs) can be embedded into the user app via an iframe so that agents do not have to tab into different applications to do their work.

2.5. Integrated Call Recording and Monitoring

- **Integrated Call Recording** – All calls can be automatically recorded. This is configurable per queue.
- **Listen to call recordings in the browser** – A waveform display allows users to quickly move through the recording (including fast forward/rewind) and see on the waveform when the customer or agent is speaking. Only authorised users can listen to call recordings. This can include Agents be able to listen back to recordings of calls they have handled.
- **Call Transcriptions** - automatic transcription of calls in historic reports and for agent evaluation.
- **Sentiment analysis** - Identify interactions that contain positive or negative sentiment.
- **Pause/resume call recordings** – Agents can pause call recording during sensitive parts of the call; this can also be initiated via API.
- **Agent assistance** - Agents can request assistance from a supervisor.
- **Call Monitoring** – Real-time monitoring – Supervisors can listen-in live, on any call in progress, via the browser.
- **Call Monitoring** – Agent Camp On – Supervisors can choose to automatically listen in on every call that an agent receives without having to click on every individual call.
- **Supervisor barge in** - Supervisors can join the call to assist the agent.

2.6. User Management, Authentication and Roles

Converse supports authentication via a Netcall One account, or by setting up SSO against an Identify Provider (IdP). The Netcall One account is used for initial onboarding, but we recommend that organisations configure and enable SSO to their own Identity Provider for production use as this allows you to implement your own security policies, such as 2FA and enhanced auditing within your own IdP platform

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2.6.1. Capabilities Include:

- **Authentication via Netcall One Account** – Users with a Netcall One Account (also known as the Netcall Community Account) can be invited to join a tenant. Users are emailed and asked to click on a link to securely register and/or logging using their Netcall One account.
- **Authentication via Single Sign On (SSO)** - Converse can integrate with any provider that supports Open ID Connect, including Microsoft Entra ID (previously known as Azure AD).
- **Automatic User Provisioning via SCIM** - SCIM is a protocol to allow the exchange of user information between remote systems. Converse can be configured to integrate with any IdP that supports SCIM such as Azure AD and Okta. Once setup, any user configured in the IdP is automatically synchronised with Converse i.e., they are added, updated or deleted as required.
- **Fine-grained permission control** – There are an extensive set of permissions that control every aspect of the platform for both administrators, users and agents.
- **Customisable Roles** – Roles can be created with 1 or more permissions that can be assigned to users and agents.
- **Support for Multiple Roles** – Users can be assigned one or more roles, and the permissions within those roles are combined to make management simpler.
- **Group Roles** – Users can have different roles (permissions) in each group that they are member of. For example, a user may be an agent in Group A, but a Manager in Group B.

2.7. Workforce Management

2.7.1. Shifts and Rotas

- **Plan Schedules** - Allows managers to plan agent schedules and breaks, eliminating the need for spreadsheets or other tools.
- **Multi-week rotas** –Create multi-week rotas that can be assigned to agents to speed up the process of creating the schedule. For example, you may want a group of agents to work a week of early shifts followed by a week of late shifts.
- **Minimum Skill requirements** - Configure agent headcounts for each skill per 15-minute interval, per day of the week. Multiple skill requirements per group can be configured.
- **Ad hoc Shifts** - Quickly create new ad hoc shifts with the drag and drop shift designer.
- **View by day or by week** - Filter by group, agent, skill and media.
- **Breaks and Activities** - Add breaks and activities using existing busy codes.
- **Absence Planning** - Add absences such holiday and sickness.
- **Shift Publishing** - Publish shifts so that agents can only see them when they are finalised.
- **Realtime Dashboard Widgets** – View upcoming changes to the schedule on the dashboard/wallboard; view the numbers of staff that will be staffing each queue/skill over the next few hours.
- **Schedule Summary Report** – Breakdown of time spent working and in each busy code and absence type, so managers can account for agent activity.
- **Next Schedule Change Widget** - Shows the expected changes to the schedule in the coming hours.

2.7.2. Shift Adherence and Conformance

- **Realtime and historic Adherence monitoring** – Real-time dashboards and historic reports that allow managers to check whether agents are adhering to their schedule so they can monitor whether agents arrive on time and whether they take their breaks at the scheduled time.

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- **Realtime and historic Shift Conformance monitoring** - Real-time dashboards and historic reports that allow managers to check whether agents working the number of hours in a shift that they are scheduled, even if they are not strictly adhering to shift times.
- **Adherence ranking** – Real-time dashboard that ranks agents on their adherence and conformance stats today.
- **Adherence heatmap** – Heatmap that provides an at-a-glance view and makes it easy to see good and bad performance across the team.
- **Agent Self Service** – Agents are alerted to issues with their adherence to the schedule to help them improve their behaviour.

2.8. Agent Evaluation

Agent Evaluation is the process of recording and scoring contact centre interactions to improve the customer experience. By evaluating and scoring conversations, a quality team can identify top performers for positive feedback, agents who need more training or coaching, and situations that merit modification of call scripts or snippets.

- **Scorecard Designer** - Scorecards are used to assess agents against interaction quality requirements. Multiple scorecards can be created to assess different media, queue or skill types.
- **Scorecard Sections** - Scorecards are configured into multiple sections to help identify key areas of agent performance and group questions together.
- **Screen Recording** - Record the agent's screen alongside the call recording for both quality monitoring and governance.
- **Matrix Question** - Multiple questions with the same answer options. A comments box can be added if required.
- **Multiple-Choice Question** - Allow for single questions with differing answers. Comments can be added if required.
- **Critical Question** - Multiple-choice questions can be made Critical Questions which will score the entire section or scorecard zero if the question failed.
- **Evaluation Score** – Each question and section can be assigned a user-configurable score to allow higher weight to be given to the most important questions.
- **Evaluation Profiles** – Evaluation Profiles are used to select the interactions to be evaluated. These can be configured for specific groups, queues, skills, agents, media types, activity code or interaction result. Evaluation Profiles can be configured so that they must include a customer survey or a screen recording if required.
- **Evaluation Workflow**:
    - The evaluator pulls the number of required interactions to evaluate, based on the evaluation profile.
    - The evaluator reviews and scores the interactions, using the scorecard assigned to the evaluation profile. If screen or call recordings are available, these can be reviewed by the evaluator.
    - The evaluated scorecard is sent to the agent to review.
    - The agent reviews the evaluation and adds comments.
    - The evaluator reviews the comments and either discusses these further or marks the evaluation complete.
- **Evaluating specific interactions** – Managers can evaluate specific interactions from historic call reports.
- **Extensive Reporting and Realtime Dashboards** – including:
- **Agent Performance Report** - Number of interactions evaluated and average score.
- **Evaluation Performance Report** - Breakdown of evaluation performances by several criteria.
- **Evaluation Scorecard Heatmap Report** - Analysis of trends in scorecard question scores over time.
- **Evaluation Summary Report** - Evaluation summary including score, evaluator, scorecard and interaction details.

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- **Evaluation Breakdown Dashboard Widget** - Displays a table showing the number of evaluations, the average score, the highest score and the lowest score.
- **Evaluation Count Dashboard Tile** - Displays the evaluation count based on the configured criteria.
- **Evaluation Performance Dashboard Widget** - Displays a bar chart on the dashboard showing the number of evaluations completed and a line chart of the average score for the evaluations. Hover the mouse over the bar to reveal a pop up showing the data for average score and number of evaluations.
- **Evaluation Ranking Dashboard Widget** - Displays a table of agents on the dashboard ranked by their average evaluation score. The widget will update once an evaluation has been marked as Completed by a supervisor.
- **Evaluation Score Dashboard Tile** – Shows the average evaluation score on the dashboard based on the configured criteria.

2.9. Customer Surveys

Customer Surveys allows customers to provide feedback after an interaction to give you real-time insight into how your customers rate the service they received.

- **Digital and Telephone Customer Survey Designer** – Design multiple surveys across every channel. Question types include:
  - **Customer Satisfaction (CSAT)** - e.g. “How satisfied are you with the overall experience of our service?” This is measured using a 0-10 scale.
  - **Customer Advocacy Score (CAS)** - e.g. “Would you recommend our service to your family or friends?” This is measured using thumbs, smileys, stars or text with options for 2, 3, 5 or 7 responses depending on the rating type selected.
  - **Customer Effort Score (CES)** - e.g. “How easy was it for you to solve your problem today?” This is measured using smileys, stars or text with a 5-level response rating.
  - **Rating** - e.g. for agent performance, “How do you rate how the agent handled your call?” This is measured using thumbs, smileys or stars with options for 2, 3 or 5 responses depending on the rating type selected.
  - **Single Answer** - e.g. “Was the issue resolved at the first call?” This is a text answer with options for 2 to 7 responses.
  - **Free Text** - this allows the respondent to provide more information about why they have given a particular score in a free text box (or recordings for post call surveys).
- **Web Assistant Surveys** – Survey customers at the end of every chat, embedded into the Web Assistant interface.
- **SMS and Social Messaging Surveys** – Sends a link to the customer that they can open to complete the survey.
- **Telephone Survey by IVR** – Customers can stay on the line after speaking to the agent and complete the survey in IVR.
- **Telephone survey by SMS** – Customers calling on their mobile phone can be sent an SMS at the end of the call that invites them to click on a link to complete a digital survey;
- **Survey Transcription** – For telephone surveys, free-form customer responses can be transcribed (subject to licensing).
- **Option to opt-out of telephone phone surveys** – Customers can be told about the survey in the upfront IVR and given the option to opt out.
- **Email Surveys** – Add a link to a digital survey in the email footer.
- **Target surveys on particular queues or channels** – Choose the queues, channels that you want to run surveys on.
- **Random Selection** – Configure whether to survey all customers, or just a proportion;

- **Extensive Reporting and Realtime Dashboards** - including:
  - **Customer Advocacy Score** – Shows percentage of Detractors, Passives and Promotors, and the overall CAS rating.
  - **Customer Effort Score** – Shows percentage of High Effort, Medium Effort and Low Effort responses, and the overall CES rating.
  - **Customer Satisfaction Score** – Shows percentage of Negative, Neutral and Positive responses. The line graph shows the CSAT percentage.
  - **Survey Question Breakdown** - Report focuses on an individual survey question showing the number of responses. The bar chart displays the percentage of responses to each of the survey options.
  - **Survey Responses report** - Shows the raw response information, with a row per survey recipient, and columns for the Contact Centre Interaction details and each question answered. Selecting a row allows you to view the transcript of the interaction, view the survey or create an evaluation.
  - **Survey Response Feed** – Shows a real-time view on the dashboard of the free text responses that are coming in from customers.

2.10. Dashboards

Dashboards display real-time and historical information and statistics on interactions, queues, channels and agents.

- **Drag and drop dashboard designer** – Create multiple dashboards and drag on widgets and tiles to show what matters to you.
- **Dashboard Widgets** - Extensive library of widgets (graphs and tables) and tiles (metrics) that can be displayed on any dashboards.
- **Build new dashboards** – Design from scratch or install from a template.
- **Share Dashboards** – Share dashboards with other users and roles.
- **Import/export dashboards** – Import/export to make it easier to share your dashboards with others.
- **Full screen mode** – Show in a full screen so it can be used as a softboard.
- **Configurable Alerts** – Alerts can be configured based on a number of factors, including the number of available agents, agents logged in, queue length and longest wait times. Alerts are displayed in the browser app to user based on their role and/or skill.

2.11. Reporting

Reports provide information on the historic performance of your Virtual Agents and Contact Centre.

- **Customisable** – Columns can be shown, hidden and reordered.
- **Save reports** – Reports can be saved for quick access later.
- **Share reports** – Share saved reports with other users or roles.
- **Schedule reports** – Schedule saved reports to be delivered by email as a .csv attachment, daily, weekly or monthly to other users.
- **Report API** – Saved reports can be accessed via REST API for import into tools such as Excel and PowerBI.

2.11.1. Agent Reports

- **Agent Status Breakdown** - Time spent in each status type.
- **Agent Summary** - Time spent in transactional and status management activity.

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- **Audit Log** - All transaction changes for each agent with date and time stamp.
- **Busy Codes** - Time spent in each busy code.
- **Concurrent Agents** - The number of concurrent and unique agent logins over time.
- **Skill Requirements** - Breakdown of skills against inbound interactions for the skill.
- **Working Time** - Breakdown of time spent on statuses such as ready, active and busy

2.11.2. Agent Evaluation Reports

- **Call Transcriptions** - Automatic transcription of calls in historic reports and for agent evaluation.
- **Agent Performance** - Number of interactions evaluated and average score.
- **Evaluation Performance** - Breakdown of evaluation performances by several criteria.
- **Evaluation Scorecard Heatmap -** Analysis of trends in scorecard question scores over time.
- **Evaluations** - Evaluation summary including score, evaluator, scorecard and interaction details.
- **Screen Recording** - Record the agent's screen alongside the call recording for both quality monitoring and governance.

2.11.3. Interaction Reports

- **Interaction Forecasting** – Forecast the volume of interactions you should expect tomorrow, next week, next month in order to help plan staffing requirements.
- **Activity Codes** - Activity codes logged by agents.
- **Answered vs. Abandoned** - Calls that have been answered, abandoned or redirected.
- **Interaction Volume** - Number of interactions (by type).
- **Interactions** - Individual interaction detail.
- **Queue Summary** - Interaction data for all queues.
- **Queue Time Analysis** - Number of interactions and wait time in the respective queue.
- **Queued vs. Completed** - Change between queued and completed email or messaging interactions.
- **Service Level** - Interaction response times against pre-configured SLA.

2.11.4. Survey Reports

- **Customer Advocacy Score** - Analysis of CAS survey question.
- **Customer Effort Score** - Analysis of CES survey question.
- **Customer Satisfaction Score** - Analysis of CSAT survey question.
- **Survey Question Breakdown** - Breakdown of responses to an individual survey question.
- **Survey Responses** - Table of raw data from survey responses.

2.11.5. Workforce Management Reports

- **Agent Adherence** - Comparison of working time vs scheduled activities.
- **Agent Adherence Heatmap** - Heatmap visualisation of agent adherence over time, graded from best to worst.
- **Forecast vs Actual Interactions** - Displays the forecast number of inbound interactions vs the actual number queued by selected time filter.
- **Schedule Events** - Displays a list of scheduled working, busy and absent events, in the past, present or future.
- **Schedule Summary** - Comparison of scheduled time working, busy and absent in the past, present or future.

2.12. Integrations

2.12.1. Working with the Liberty Platform – Rapid Application Development and RPA

Converse can integrate with our rapid application development product for advanced process automation (Liberty Create) and our robotic process automation product to accelerate manual tasks (Liberty RPA). We can do this in a variety of ways:

- **Workspaces** – Embed a Create app into CX via a Workspace tab.
- **Quick Links** - Add custom links to Create Apps, Create pages and RPA Bots on the Interaction Details panel, pass in interaction data such as the caller's telephone number to help contextualise the integration.
- **Webhooks and APIs** – Build a fully-featured CRM integration using webhooks and the REST API.
- **Transcript Iframe** – Embed interaction transcripts into a Create app.
- **Direct JavaScript Integration** – Create Apps running inside Converse can communicate over JavaScript to provide a richer experience.

2.13. Working with Microsoft Teams

Integrating Converse with Microsoft Teams enables unparalled teamwork and collaboration across your contact centre and service functions:

- See the Teams presence of colleagues when you are making or transferring calls so you know whether they are busy or on another call.
- Synchronise your Converse status with Teams, so that colleagues using the Microsoft Teams App can see when you are working in the Contact Centre.
- Synchronise your Teams status with CX, so that CX does not push calls through to you if you're on a direct call in Teams.
- Quickly launch a chat with a colleague in the Microsoft Teams app.

2.14. APIs and Webhooks

Converse has extensive open APIs that can be used by customers and third parties to integrate with and extend the platform.

Supported APIs:

- **Recordings** – Use to pause/resume call recording for active contact centre interactions.
- **Groups** – Used to get configuration information about groups, agents, skills, activity codes.
- **Agent Events** – Used to retrieve a list of agent events including login, logout and busy codes.
- **Interaction Summary** – Retrieve real-time interaction counts for groups or queues.
- **Tenants** – Create or update tenants.
- **Interaction** – Add a new task interaction.
- **Report** – Get an interaction or audit log report.
- **Saved Report** – Gets the data from a saved report.
- **Get Survey Response** – Gets all responses for a survey.

Supported Webhooks:

- **Interaction Queued** – A new interaction has joined the queue.
- **Interaction Accepted** – Called when an interaction is accepted by an agent.
- **Interaction Ended** – Called when an interaction is completed by an agent, abandoned or discarded.

2.15. Security

APIs are secured by granular API Tokens.

2.16. Brownfield – Bring Your Own Hardware and Licensing

Customers that have already invested in Netcall or standards-based Unified Communications equipment can still consume services from the Cinos platform without having to refresh hardware. The platform supports the common protocol registrations which allows most voice and video hardware from the likes of Cisco, Polycom and Lifesize to register to the service. Our service profiles align just as well to your existing users and workspaces as they do to any new kit provided. Similarly, any licensing already owned by the customer can be migrated to the service.

2.17. Greenfield – Standard New Deployment

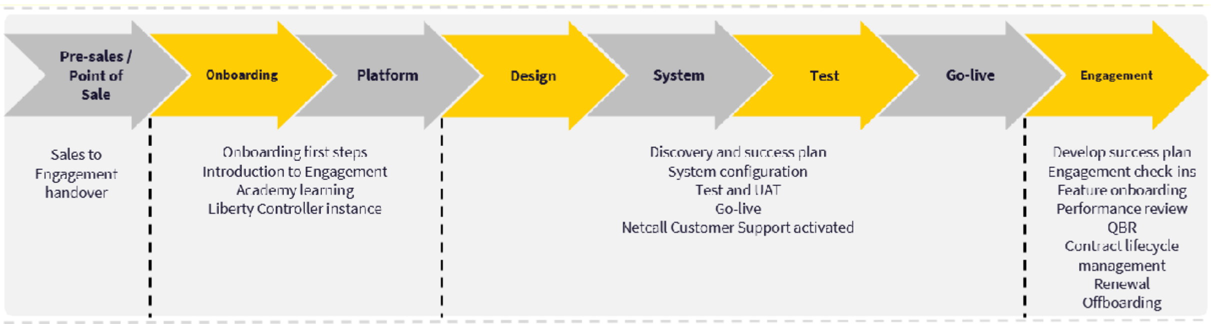
We have many years of experience deploying unified communications to customers across the country. Using our knowledge and understanding of these, we have produced a number of “cookie cutter” profile types which are designed to quickly and easily enable users from basic voice only, to full Unified Communications knowledge workers. We can work with your team to help align the profiles to your users and from there the best endpoint to help them do their job

3. Delivering the Solution

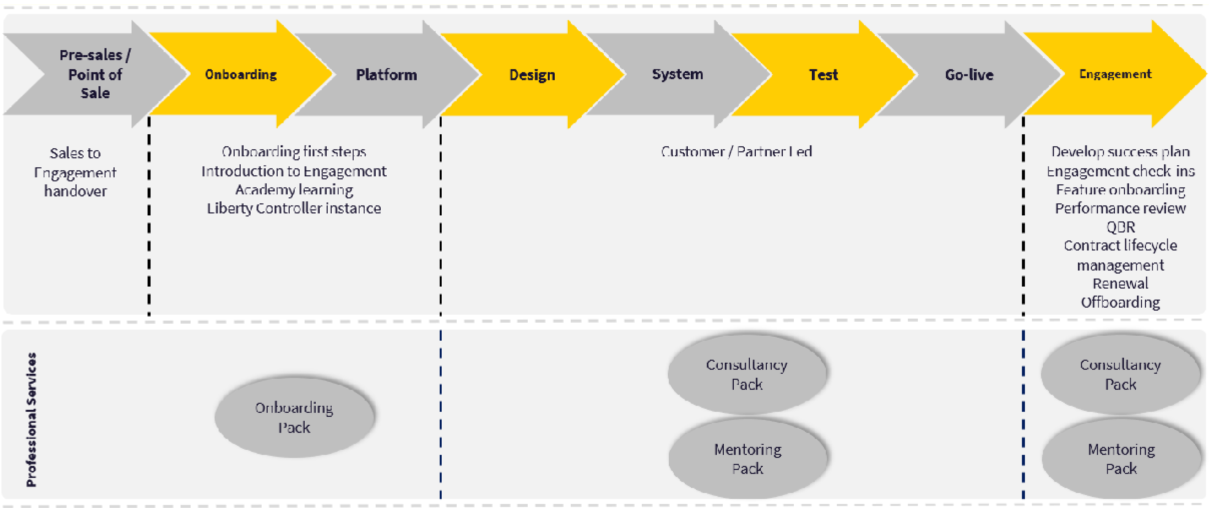
3.1. Delivery Model Overview

All Converse delivery follows the same core methodology. Adjustments are made should the customer follow an Engagement-led or Project Management-led model.

The model follows a number of key phases from Sales through to contract lifecycle.

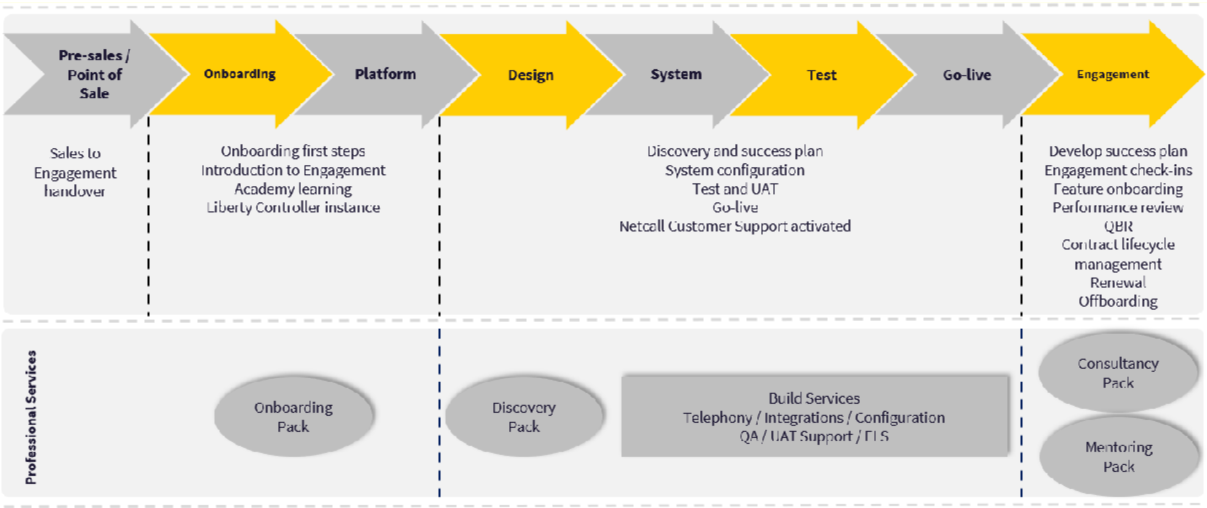


3.2. Engagement Led



The end-to-end experience is managed by the Customer Engagement Manager and as a general approach the customer is expected to complete Design, System, Test and Go-live phases with no consultancy or technical mentorship input from Netcall unless associated packs are purchased.

3.3. Project Management Led



The end-to-end experience is managed by the Customer Engagement Manager and the Project Manager during specific stages. As a general approach the customer should expect the Design, System, Test and Go-live phases to be scoped, managed and fulfilled by Netcall.

3.4. Governance to Go Live

Converse includes the following governance:

What	Why	Phase
Statement of Works / Project Initiation Document	Formal description of the project's requirements, defining the project scope, contractual obligations, project-specific activities, deliverables and timelines. Initiation Governance is completed with PMO.	Design
Technical Architecture	Confirmation that all technical interoperability requirements have been installed, configured, tested and are ready for use.	Design
Configuration and Integration Quality Assurance	Confirmation that all configuration and integration requirements have been configured, tested and are ready for service.	System
UAT and Ready for Service	Signed confirmation document from the customer stipulating all required Converse services are tested and ready to commence.	Test
Change Advisory Board approval	Confirmation from Netcall Customer Support that the Converse services are ready to commence and are supportable. Deployment Governance is completed with PMO.	Go-live
Project Closure certificate	Signed confirmation document to formally complete and close the project delivery.	Closure > Engagement
Engagement Handover certificate	Signed confirmation document that a Netcall Engagement Manager will continue your success planning, rollout / expansion and help you move into operational business as usual.	Closure > Engagement
Risks and Issue Register	To log, track and manage all risks and issues requested and/or identified in the delivery of the project.	End to End
Change Control Form	To log, track and manage when a change to the project is required or requested and to track associated costs and impact to the project.	End to End

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3.5. Project Checkpoints

To ensure your project is progressing as expected regular checkpoint reviews are performed, the cadence of which is agreed during your project initiation. The review will track the project's progress and identify and manage any risks and/or dependencies that may impact a successful project completion. Project budget also is also regularly reviewed and included in Project Checkpoints to assess resourcing budget and contractual obligations.

3.6. Programme or Project Board

The Project Board represents the most senior level of management within the Converse project delivery and Netcall recommend the board meet periodically to provide a unified goal and direction, commit resources to the project, delegate tasks, support the delivery team, act as a point of project escalation and provide effective decision making. Netcall will provide resource to attend the project board.

3.7. Support and Managed Services

Cinos provides support and maintenance services that cover the standard Liberty SaaS platform, and its standard features and functions. This includes Liberty Converse.

3.8. Support Services

We work with our customers to deploy an end-to-end Service Management framework and ITIL 4 aligned processes to manage the delivery of the in-scope services. Our solution is designed to ensure successful service delivery and achieve high levels of client satisfaction. It includes:

- **Incident Management** - Defined process for logging, investigating, and resolving incidents within the defined SLA. We endeavour to minimise the impact of the incident through the deployment of a workaround or temporary fix. Full restoration activities follow, will adherence to Change and Release processes throughout.
- **Major Incident Process** - For all Priority 1 and 2 incidents, a major incident report is produced after the critical incident has been resolved. The contents of the major incident report include a root cause analysis, any lessons learned, recommendations and actions required. These actions are undertaken to mitigate the risk of further re-occurrence or impact to the customer's service. The Service Manager will ensure that any outstanding actions are progressed through to completion.
- **Problem Management** - Detection of the underlying causes of reoccurring incidents and the best resolution and prevention implemented, often because of a major incident.
- **Event Management** - Continuous monitoring of the availability and performance of the infrastructure to identify potential complex faults and implement preventative remedial actions to prevent any impact to service
- **Service Management** - Integrated ITIL service management provides transparent service management for incidents, service requests and changes. This service is quality controlled via monthly service reviews

Vendor support for the Cinos Omnichannel Contact Centre Service is typically based on Standard Service Hours: 9am–5.30pm (UK time) Monday to Friday, excluding those days that are public/bank holidays in all parts of the UK.

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Enhancement of support to suit the customer requirements, up to full comprehensive service hours of 24 hours a day, 365 days a year, is available.

3.8.1. Managed Services

Our Managed Services Offerings build upon our standard support and maintenance services and are made up of service elements which can be bundled together to deliver a valued experience for our end customers. These include:

- **Change Management** - Management and implementation of Changes required to ensure the availability, stability, and enhanced functionality of the Stellaris platform.

  All Changes are managed through a Change Advisory Board process with deployment activities completed within the advised bi-weekly window (where possible). Emergency changes are implemented through a governed / expedited process, within an appropriately communicated Emergency Change window.

- **Patch Management** - Provides identification, testing, packaging and deployment of required security updates, patches and other updates associated with the customer infrastructure

- **Proactive Monitoring & Alerting** - Monitoring tools that proactively detect, correlate, analyse, escalate, and resolve infrastructure issues with standardised tools and services within the cloud infrastructure.

- **Capacity Management** - Proactive identification and measurement of key metrics to determine when and what additional capacity is required. Capacity bottlenecks are forecasted and flagged in a proactive manner that prevents service impacting performance issues

- **Backup and Recovery** - Provides backup and recovery services for infrastructure configuration files through recommended tools

- **Administration and Maintenance Tasks** - Daily operations, moves, adds, changes and deletions (MACD). The service includes receipt and resolution of ‘non-simple’ issues and tasks related to the management and maintenance of the solution

- **Dedicated Onsite Resource** - An onsite technical team will be provided that has the capability to represent the customer through from presales stage through to delivery, handover, and support. Following go-live, an onsite operational support team will also be provided to manage and support the provided technology estate via the customer’s existing call queues and ticketing system. The size of the team will be calculated based on the number of handsets and / or video endpoints deployed.

As the provider of infrastructure and communications solutions, our promise is to deliver the following benefits:

- A confidence that events will be resolved, prior to becoming service affecting

- A confidence that compliance of systems will be achieved

- A guaranteed SLA backed up by industry experts

3.8.2. Customer Success and User Adoption

Cinos places a large focus on our Customer Success Practice. A named Customer Success Manager is assigned to all customers and is responsible for the continual delivery of:

- Training of key stakeholders and representatives to ensure new staff are trained or when new features, functionality or ways of working can be introduced.

- Roadmap and horizon scanning workshops with key customer representatives to inform on new technology or capabilities which may be aligned to existing or new business requirements.

- Continual benefits identification and realisation, supported by workshops with key stakeholders on the art of the possible, with full support to adopt and embrace new ways of working, where benefits may be realised and measured

Customer Success Manager: Your Stellaris Customer Success Manager will be tasked with helping you get the very best out of your service. They will assist you with driving video collaboration into your organisation to save cost, improve efficiencies and drive organisation digital transformation.

User Adoption Consulting: Our bespoke adoption program combines unique communications with training strategies. Focussing on the "why should I do this" rather than "how do I do this" user adoption service ensures that users are culturally 'bought into' the technology being deployed. This means two things, first that your users will be able to carry out their duties more easily and second, that the business can be sure that the new technology will actually be used by as many users in the business as possible, thus achieving the best possible ROI. This is the core of digital transformation and using collaboration as a vehicle to bring users, teams, and organisations together in an increasingly dispersed workplace.

This is an iterative process, with key steps and learning that can help to reshape and refine your strategy as you move through each phase of video rollout. For each phase we design and implement the technology with the focus of driving end-user adoption. Results are measured against expected outcomes and the information used to inform the next phase of optimisation.

The aim of the Optimising a customer service is to ensure that the customer continues to get the very best out of the service, in line with evolving customer operating models and user workflows.

The Optimise phase is cyclic and takes two forms:

From a technical perspective, proactive management, maintenance, and optimisation of the solution identifies and resolves issues before they affect the service delivered to end users.

From a user and customer experience perspective, Cinos places a large focus on our Customer Success Practice. A named Customer Success Manager is assigned to all customers and is responsible for the continual delivery of:

- Training of key stakeholders and train the trainer representatives. Delivered as required by the customer to ensure new staff are trained for example, or when new features, functionality or ways of working are (or can be) introduced

- Roadmap and horizon scanning workshops with key customer representatives to inform on new technology or capabilities which may be aligned to existing or new business requirements

- Continual benefits identification and realisation, supported by workshops with key stakeholders on the art of the possible, with full support to adopt and embrace new ways of working, where benefits may be realised and measured

A key component of any contact centre delivery is training. Today's modern omni-channel systems are becoming increasingly complex. Without correct training and education, it is difficult to achieve the full capability of any system.

Cinos regards itself as a complete service provider and as a result has developed a best practice four-phase methodology:

- Training Analysis

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- Education Plan
- Delivery
- Review

Once training has been completed Cinos typically provides day one floor-walking by the same person who delivered the training. This ensures that users feel comfortable with and successfully adopt the technology on the very first day.

Training is an iterative process which we constantly hone with the customer. This passes to our Customer Success Manager to assess in line with business goals and changes to ensure customers get the very best from our service.

3.9. Extend your Liberty Solution

Liberty Converse is part of the wider Liberty platform. The Liberty platform extends beyond robotic process automation by incorporating options such as:

- Rapid application development with Liberty Create – an enterprise low-code application development platform that enables transformation of processes, deployment of case management workflows and delivery of digital experiences that make lives better for employees and customers.
- With intelligent AI powered Liberty RPA (Robotic Process Automation), you can streamline your processes and boost efficiency. Liberate your people to use their talents better by releasing them from time-consuming, mundane, repetitive tasks.
- Automate intelligently with high-impact AI (the Liberty platform is infused with business-ready AI) – putting safe and simple-to-use capabilities in your hands to accelerate workflow and energise engagement.
- Analyse, understand and manage business processes with Liberty Spark – the effective and connected way to rapidly document, analyse and continuously improve business processes at scale. Accessible and understood by everyone in an organisation.