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1 Document control

1.1 Distribution List

Name	Role	Representing
Sandra Haworth	Marketing Director	Cirrus
Will Tonna	Head of Bid & Content	Cirrus

1.2 Change Control

The document and its associated procedures, templates and diagrams are created and maintained by the Cirrus Team. When a change must be made, the Cirrus team will record and agree the change with the team manager and a note will inform all in the distribution list that a change has occurred. The Cirrus team will periodically update this document to reflect agreed changes.

The issue level of this document is indicated by a 2-part issue number consisting of a major issue number and a minor revision number (m.n). Major revisions to the document are identified by a minor revision number zero (1.0, 2.0, etc.). Draft issues are indicated by an alphabetic revision level (e.g. 0a, 0b, etc. or 1.0a, 1.0b etc. or 1.1a, 1.1b etc.). The alphabetic revision level reflects the progress of the document through draft stages. Once a draft revision has been reviewed and approved for issue at a minor or major revision level, the document is created at that revision level and approvals recorded.

1.3 Amendment Record

Version	Date	Status	Comments
v0a	28/06/2023	Draft	First version
v0b	29/08/2023	Draft	Updated
v0c	06/09/2023	Draft	Updated
v0d	24/10/2023	Draft	Updated to reflect Commercials
V0e	20/11/2023	Draft	Updated to reflect PB comments
V0f	27/11/2023	Draft	Updated and checked by Marketing
V0g	10/01/2024	Draft	Revised with updated Service Offerings
V0h	15/01/2024	Draft	Revisions by Marketing
V1.0	19/01/2024	Released	First external version
V1.1	11/03/2024	Updates	Reflect updated bundles / naming

2 Cirrus Contact Centre Solutions

Redefine the contact centre experience with Cirrus, the AI-powered CCaaS platform purpose-built to deliver effortless customer journeys, empower agents and drive productivity through automation.

The Cirrus platform enables a seamless, single-platform experience by serving as a comprehensive hub that connects tools, technology, and channels.

- **All-in-one Contact Centre solution** – Providing the complete suite of integrated communication channels – voice, email, messaging and social media – as well as a robust CRM, Workforce Optimisation, and reporting capabilities in a single, easy-to-use interface.
- **Powered by AI** – Built-from the ground-up to utilise the incredible power of Generative AI, Cirrus Copilot is our game-changing engine that provides AI-powered insights and intelligent automation across the entire platform.
- **Modular Functionality** – Additional capabilities and channels are activated easily rather than added via costly, complex, and time-consuming integration projects.
- **Built to Connect** – The platform is open, allowing you to easily connect your most important third-party applications into the system to create seamless agent and manager workflows.
- **Scalable and Secure Cloud Infrastructure** – With a multi-tenant Virtual Private Cloud (VPC) infrastructure and adherence to internationally recognised compliance standards, Cirrus operates on a real-time basis with best-in-class flexibility, security, and reliability.
- **Dedicated CX Consultancy** – Your Success Manager ties the CCaaS technology stack together as a full Customer Experience consultancy service, leveraging our extensive range of experience across both public and private sectors.



3 Core Service Offering

Cirrus Connect delivers a complete Contact Centre solution in one seamless, AI-powered platform. Our core service offering is comprised of **three key stacks**:

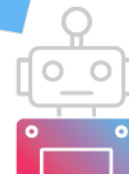


Meet **Cirrus Copilot.**

Introducing our cutting-edge Generative AI engine, underpinning the entire CCaaS platform to drive automation and improve the customer journey.

Whether you're looking to automate customer conversations or leverage Machine Learning to identify trends in your operations, our full stack of contact centre technologies – now re-designed and optimised by AI – gives you everything you need to achieve contact centre success in the age of automation:

- **Supercharge your team** - Empower agents by providing insight, suggestions and automated assistance in real-time.
- **Understand your customers** – Keep the focus on CX with live sentiment analysis and quality monitoring across every channel.
- **Integrate and Automate** – Spend less time on admin and more time on engagement, with auto-summarise, live transcription, CRM integration and much more.



4 Why Cirrus Connect?

4.1 Maximise your ROI

Experience quick improvements in crucial performance indicators while cutting costs. Our system essentially pays for itself by streamlining your operations, enabling you to reallocate staff to more impactful tasks. The end result is a more efficient operation that saves you both time and money.



4.2 Boost Agent Performance

Equip your agents with a detailed customer profile that goes beyond past interactions, including customer sentiment, previous outcomes, and AI-suggested next steps. Having all this information on one screen allows agents to provide more targeted and effective service, while also making their job simpler.



4.3 Enhance customer experience

With over a decade of CX experience, we'll help you design and implement self-service options to your customers across popular messaging channels like WhatsApp and Facebook. Deliver a truly tailored experience, whichever channel your customers prefer.



4.4 Empower your managers

Our system offers in-depth analytics and insights on both customer interactions and agent performance. Use our detailed reporting to clearly understand how well the contact centre is operating and where improvements can be made. Our platform eliminates the guesswork, making it easier for you to make data-driven decisions to continually refine your strategies.



5 Licencing Model

Our licensing model is tailor-made for the evolving needs of today's contact centres. Drawing on a wealth of experience in deploying solutions across diverse industries, we've designed a flexible agent licensing model aligned with your operation's natural growth trajectory.

5.1 Agent Licences

Our three-tiered approach to agent licencing – **Access, Manage, and Engage** – offers targeted capabilities to meet your operational requirements at every stage. Each agent licence draws from a mixture of our core technology stacks to provide a comprehensive set of features.

5.1.1 Access Licence

The Access Licence caters to basic contact centres and service desks moving to the cloud, providing **essential Voice, Email and SMS services along with CRM integrations**. It retains the current operation scale, blending cloud advantages with seamless system integration.

5.1.2 Manage Licence

Serving as the common choice for many customers, the Manage Licence encompasses the Access features and extends to **include advanced Workforce Management, Ticketing and Quality Management**.

5.1.3 Engage Licence

Designed for organisations seeking a comprehensive omnichannel approach from the beginning, the Engage Licence presents extensive digital channel support with significant long-term cost savings. The key omnichannel uplift is the addition of **Webchat**. Engage provides **Quality Analytics** for automated AI-powered interaction analysis. Additionally, it enhances agent development through the **eLearning Centre**, underpinning our commitment to continuous learning and improvement.

5.1.4 Feature Matrix

Each licence type includes the below functions as needed, with additional capabilities procured separately as needed:

Feature	Description	Access	Manage	Engage
Voice	Core contact centre module with intelligent routing, IVR, and all-in-one agent desktop.	✓	✓	✓
Email	Unified inbox for managing customer email interactions alongside other channels. Enables email campaigns.	✓	✓	✓
SMS	Supports 2-way SMS conversations, incl. high-volume outbound SMS campaigns.	✓	✓	✓

Feature	Description	Access	Manage	Engage
Call Recording (incl. 3 months storage)	Automatic call recording with metadata indexing and pausing capabilities. Additional encrypted storage available.	✓	✓	✓
BI Reporting	In-depth analytics across data sources - CSAT, quality, interactions etc.	✓	✓	✓
CSAT	Integrates and analyses CSAT data across channels for identifying issues and optimising customer experience.	✓	✓	✓
CRM Integration	Enables integration between Cirrus and external platforms like CRM.	✓	✓	✓
Agent Scripting	Tools for customising and managing call scripts/dialogues.	✓	✓	✓
Secure Payments (Link Pay +)	Enables secure payments via URLs across channels as an alternative to IVR payments.	✓	✓	✓
Cirrus Pulse	Real-time notification channel to update agents on relevant information.	✓	✓	✓
WFM	Solutions for forecasting, shift management, and monitoring adherence.	£	✓	✓
Quality Monitoring	Tools for quality monitoring including custom scorecards and compliance tracking.	£	✓	✓
Ticketing	Unified ticketing system linked across channels for tracking customer issues.	£	✓	✓
Quality Analytics	Advanced conversation analytics using LLMs for scoring calls and identifying training needs.	£	£	✓
Webchat	Facilitates real-time web-based chat between customers and agents.	£	£	✓
eLearning Centre	Integrated eLearning platform for agent training and development.	£	£	✓
Agent Assist	Real-time speech-to-text processing to provide agents with live information and guidance during customer interactions.	£	£	£
WhatsApp	Enables agents to send/receive WhatsApp messages alongside other channels.	£	£	£
Outbound Campaign Management	Tools for managing various types of outbound campaigns and dialling strategies alongside CRM integration.	£	£	£
Social Media (Meta) &	Integrates Facebook Messenger / Posts, Instagram, Google Play / Apple App Store and	£	£	£

Feature	Description	Access	Manage	Engage
Online Reviews	YouTube into the agent desktop alongside other channels.			
AI Models (incl. CAI & CAI+)	Advanced, generative AI-based models supporting customer conversations across voice and digital channels	£	£	£
Secure Payments (PCI Pro)	Secure, PCI-DSS compliant in-call payment processing solution.	£	£	£
Screen Recording	Records agent screens for quality, training and compliance purposes.	£	£	£
Cirrus CRM	Fully embedded contact centre focused CRM.	£	£	£

5.2 Supervisor Licences

They possess all the capabilities that an agent does but come with additional privileges. Supervisors can actively monitor, coach, and intervene in an agent's interaction when necessary. They are also empowered to manage an agent's status, adjust queues, assign skills, modify operational hours, and extract team-specific or department-specific reports from the system. Their primary role is to ensure seamless operation and quality assurance.

5.3 Admin Licences

The Cirrus solution provides role-based granular administration roles. Roles are assigned by client system administrators and controlled via GUI. These permissions control the ability to configure and manage services, configure applications, create workgroups across locations, change/audit security settings, customise routing strategies/file partition rules, edit dialling restrictions, DNC files or access reports.

The service offers eight role-based security categories including:

- SYSAdmin
- Super User
- Manager
- Auditor
- Report Viewer
- Client Auditor
- IT Users
- Alerts Only

5.4 Wallboard Licences

The service provides wallboard functionality, enabling you to configure dashboards that display key performance indicators related to your interaction volume (for inbound and outbound services) and agent or team productivity. The wallboard can display real-time metrics for the overall performance and progress of a contact centre (for example, average hold duration, average speed of answer, or call abandon rate). Wallboards can also highlight real-time problems that require the attention of a manager or supervisor (for example, when an agent has been in the same state for a long time, or when a service level agreement has been violated), through alerts.

A dashboard can be displayed on any screen such as a tablet, a desktop computer, or a widescreen office monitor, for private or public view, to enable you to monitor the activities related to your contact centre in real-time.

6 Omni-channel

6.1 Overview



The Cirrus Omni-channel stack unifies all customer conversations and interactions into one central portal, whilst supercharging your conversations with the latest in AI technology.

These services provide access across the entire range of voice and digital channels, connecting agents and customers, as well as providing a range of AI-powered chatbot models across all services.

6.1.1 Key Capabilities

- **True Omni-channel Management** – A single platform for voice, SMS, email, messaging apps, social media, and more to engage customers across their channel of choice.
- **Intelligent Interaction Routing** – Out-of-the-box functions including Skills-based ACD, multi-level IVR, customisable call flows and CRM-based routing.
- **AI-powered Chatbots and Automation** – Leverage a range of AI models to deliver convenient self-service and front-line assistance, with seamless handoff to agents where needed.

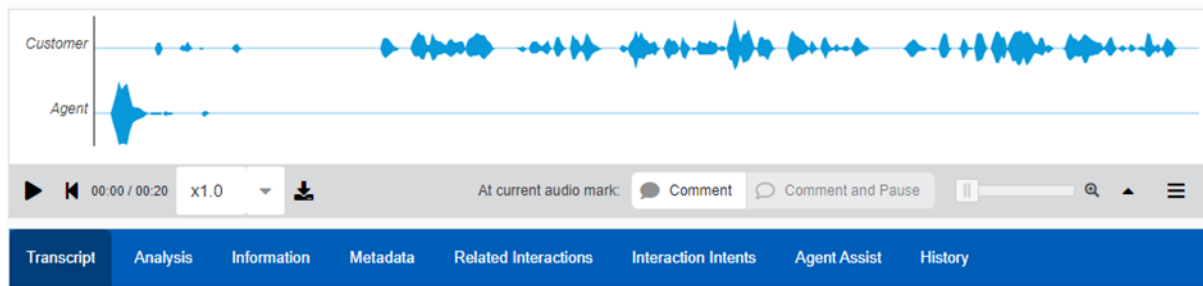
6.1.2 Key Benefits

- **Improve Customer Experience** – Meet customers wherever they choose to engage. Utilise automation, AI and data-driven intelligence to deliver a highly tailored, personalised customer experience regardless of channel
- **Boost Agent efficiency** – Omni-channel conversational history, AI-powered insights and all the tools your team needs in a single pane of glass. Integrated user interfaces and a total customer history deliver seamless omni-channel experiences.
- **Future-proof your operations** – Our commitment to supporting emerging channels means you're covered for now and the future. Our modular approach makes it easy to add channels and services in-life.

6.2 Call Recording



Cirrus Call Recording is a comprehensive feature designed to record all calls between agents and customers. All calls are automatically recorded from answer to end in high-quality mp3 format, with metadata indexing enabled to allow for detailed retrieval of calls. Agents can pause/resume recordings as needed. We can provide options advanced options including higher bitrates for Quality Analytics and external transfer recording as needed.



Note: Call recording comes with 3 months of storage as standard. For additional storage space, see [Call Recording Storage](#).

6.2.1 Comprehensive Call Archiving and Management

- **Full-Range Recording** — Cirrus Call Recording automatically records all calls between agents and customers, capturing the entire conversation from the moment the call is bridged to an agent until it concludes. This default setting ensures that every interaction is documented without the need to record automated messages.
- **Enhanced Audio Quality** — Recordings are captured in high-quality mp3 format, delivering clear audio that is crucial for detailed analysis and review. The standard compression rate is 16-bit, with the option to increase to 64-bit for advanced quality analytics applications, offering a greater depth of audio detail at the expense of increased storage requirements.
- **Flexible Agent Controls** — Agents can pause, resume, or stop recordings as needed, granting them control over the recording process and ensuring customer privacy when necessary.

6.2.2 Advanced Storage and Accessibility

- **Metadata Indexing** — Each call recording is accompanied by a CSV index file containing metadata, such as agent details and interaction outcomes. This indexing enables precise and efficient searching, facilitating quick retrieval of specific call recordings.
- **Accessible Storage** — Call recordings are accessible for 3 months, balancing the need for easy access with stringent data security measures. Recordings are provided in a ZIP file format at scheduled times for convenience and organised management.

6.2.3 Dynamic Recording Features

- **Variable Bitrate Options** — The system provides a range of bitrate options, including 16, 32, and 64 kilobits per second, catering to different quality requirements and storage capabilities.

Higher bitrates are particularly beneficial when integrated with Quality Analytics tools, providing richer data for analysis.

- **Comprehensive Interaction Coverage** — The Cirrus platform can be configured to continue recording even when calls are transferred to external parties, ensuring a complete record of the communication chain. This includes recording conversations between agents or between agents and customers during transfers.

6.2.4 Quality Assurance and Compliance

- **Metadata-Driven Insights** — The full metadata capture of recordings aids in compliance checks and quality assurance processes. Supervisors can search and replay interactions based on various criteria, such as call outcome and routing options, ensuring that every aspect of the call is documented and reviewable.
- **Annotated Recordings** — The platform allows supervisors to annotate recordings to provide targeted feedback to agents. This feature is key in identifying areas for performance improvement and delivering constructive coaching.
- **Risk Management** — By maintaining a comprehensive log of all voice interactions, Cirrus Call Recording ensures adherence to industry standards and legal requirements, minimising risk and safeguarding against potential compliance issues.

6.3 Call Recording Storage



Our Call Recording services can be augmented with additional encrypted storage that expands capacity beyond the standard 3-month retention. Storage is customisable at both client and service levels to meet business needs while balancing accessibility and security.

Note: must be purchased in conjunction with [Call Recording](#).

6.3.1 Enhanced Call Recording Retention and Security

- **Extended Storage Capacity** — Cirrus Call Recording Storage goes beyond the standard offering by providing additional encrypted storage space, extending the retention capacity beyond the typical three-month period. This service is customisable to meet the specific needs of businesses, ensuring that clients have the flexibility to retain call recordings for as long as required by their operational needs or compliance obligations.
- **Customisation Options** — Storage capacity and retention periods can be customised at both the client and service levels through the Cirrus portal, offering businesses the ability to tailor the service to their unique requirements.

6.3.2 Storage Format and Accessibility

- **Secure Storage Method** — Recordings are securely stored in password-protected zip files, with the audio encoded in mp3 format. This method ensures that the recordings are not only

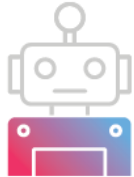
secure but also maintained in a format that is widely accessible and compatible with various media players.

- **Efficient Metadata Indexing** — Each stored recording includes a CSV index file containing pertinent metadata, such as agent results, which streamlines the process of searching for and retrieving specific call recordings.
- **Accessible Download Duration** — Recorded calls are available for download from a secure SFTP server for up to 3 months, striking an optimal balance between ease of access and the need to uphold stringent data security protocols.

6.3.3 Retention Period Customisation

- **Flexible Retention Settings** — The retention period for call recordings can be set according to the client's preferences, allowing for periods that may vary from the standard offering based on the client's business or compliance needs.
- **Standard and Extended Retention** — The standard retention period offered by Cirrus is three months, included at no additional cost. Clients can request adjustments to this period, with a minimum available retention period of three days, ensuring that the service can be tailored to various operational and regulatory requirements.

6.4 Conversational AI (CAI)



Our Conversational AI (CAI) service is a fully omni-channel chatbot solution, primarily aimed at automating FAQs and first-line support. Available across multiple digital channels, CAI ensures consistent customer service regardless of the platform used. A key feature is its access to an API, allowing it to pull information from various data sources for effective self-service. This enables CAI to deliver accurate, context-specific responses based on customer queries.

Search...

Rename

Delete

Create New Item

Start

Railcard

Railcard - Purchase

16 - 25

Age Confirmed

Correct Documents Confirmed

First Name Confirmed

Surname Confirmed

Email Confirmed

Password Created

Account Created

Issue with documents

Forward to agent

Already have card

Moved to Enquiry node

Ineligible Age

Disabled

Railcard - Enquiry

Unknown Input

Forward to agent

Update Step - Account Created

n_14 Active

Text

File Edit Insert View Format Table Tools

Font Family

Font Sizes

A A B I

Looks like we're good to go, <data.firstname>!

The team will have sent you an email to <data.email>. Click the link to finalise your application and you'll be well on your way to saving money with your 16 - 25 railcard.

Anything else I can help with?

Intents

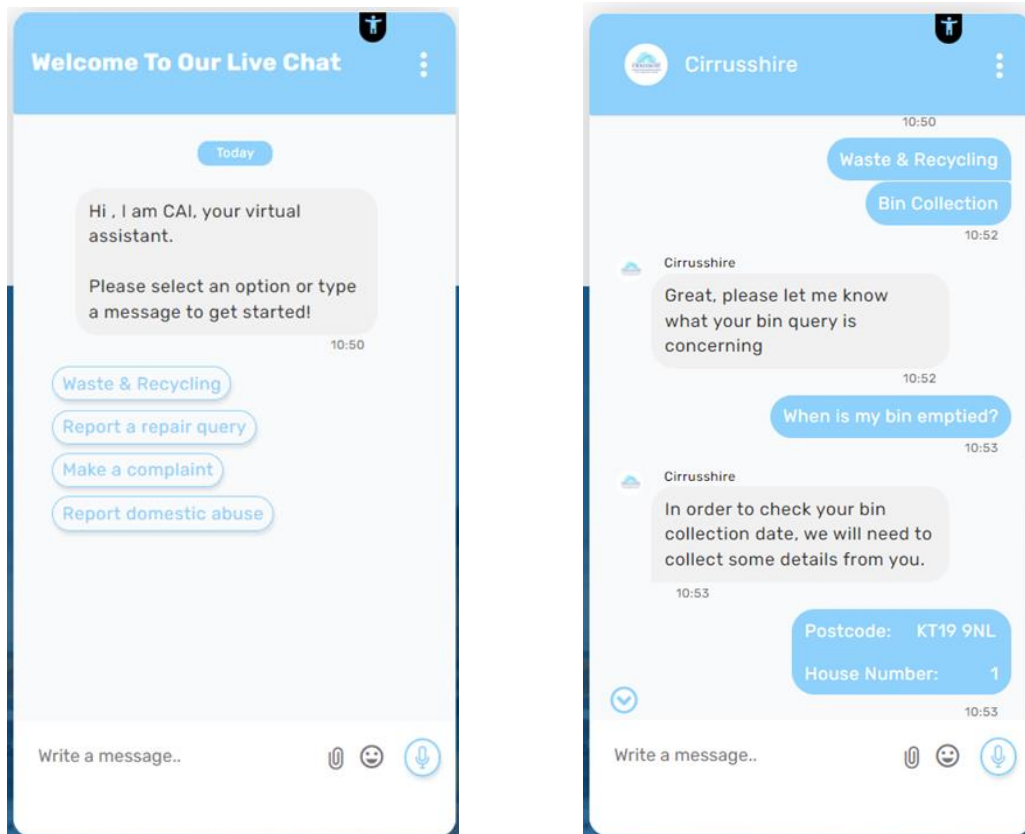
Select Intents

Key Words

+ Advanced

+ Design

Additionally, CAI boasts a flexible flow builder that requires no coding expertise, making it accessible for non-technical staff to create and manage conversation flows. A critical aspect of CAI is its seamless handoff capability. When a query surpasses the service’s scope, CAI seamlessly transitions the conversation to a human agent, ensuring the customer experience remains uninterrupted and efficient. This handoff includes transferring the full conversation context to the agent, allowing them to pick up precisely where CAI left off without requiring the customer to repeat information.



Note: For customers looking for a more sophisticated, generative LLM-powered AI service, see [CAI+](#).

6.4.1 Advanced Chatbot Capabilities

- **Automated FAQs and Support**— Automates frequently asked questions and first-line support, easing the workload on human agents.
- **Multi-Channel Availability** — Operates seamlessly across various digital channels, ensuring consistent customer service.
- **API Access for Self-Service** — Utilises APIs to read from and write to external data sources, enabling effective self-service options for customers.

6.4.2 Flow Builder and Customisation

- **No-Code Development** — Allows for the easy creation and implementation of chatbots without the need for coding, accessible to non-technical users.
- **Flexible Flow Building** — Provides a user-friendly interface for designing conversation flows, enhancing the chatbot’s interaction capabilities.

- **Real-Time Preview and Editing** — Offers immediate editing and live previewing of conversation flows for efficient strategy implementation.

6.4.3 Seamless Integration and Handover

- **Agent Handover Functionality** — Ensures seamless transition of conversations from CAI to human agents when necessary, maintaining continuity and efficiency.
- **Contextual Transition** — Passes full conversation context to agents during handovers, eliminating the need for customers to repeat information.
- **Consistent Experience Across Channels** — Maintains uniform handling of customer interactions across all channels, ensuring a consistent experience.

6.5 CAI+



CAI+ is our most powerful AI chatbot service and represents a new era in contact centre technology, fully integrated and optimised for Large Language Models. This advanced platform leverages generative AI to deliver unparalleled customer service across various communication channels.

By combining the power of OpenAI's ChatGPT engine with proprietary data, CAI+ transforms customer engagement, offering natural conversation experiences and intelligent issue resolution.

In most cases, the configuration of the CAI+ service requires a dedicated consultancy service to ensure customers understand the highly sophisticated processes involved and are making full use of the platform (see CAI+ Consultancy)

Note: For customers looking for a simple, FAQ-based Chatbot service, see [Conversational AI](#).

6.5.1 Generative AI and Multi-Channel Integration

- **Natural Conversations Across Channels** — Utilises advanced NLP for human-like interactions over voice, messaging, and digital channels, ensuring consistent and natural dialogues.
- **Data-Driven Experiences** — Seamlessly integrates proprietary data, such as CRM and transaction history, for personalised customer service.
- **Consistent AI-Powered Responses** — Ensures uniform experiences across multiple services, backed by the same advanced AI engine.

6.5.2 Knowledge Augmentation and Intelligent Responses

- **Augmented Knowledge Base** — Incorporates comprehensive data sources, including company knowledge bases, CRM data, and industry insights, to respond intelligently and contextually.
- **Automated Query Resolution** — Handles routine queries effectively, freeing human agents to focus on complex issues that require a higher level of emotional intelligence.

- **Context-Aware Service Delivery** — Employs generative AI for resolving customer issues by understanding the nuances of each interaction.

6.5.3 Seamless Human-Agent Collaboration

- **Intelligent Handoff Mechanism** — Automatically transitions interactions to human agents when CAI+’s capabilities are reached, ensuring a smooth handover.
- **Contextual Transition to Human Agents** — Provides agents with interaction context and insights, optimising the handover process and enhancing problem resolution efficiency.
- **Effortless Agent Integration** — Maintains seamless integration into the agent workflow, with CAI+’s advanced AI supporting agents in delivering high-quality customer service.

6.6 Customer Satisfaction (CSAT)



Cirrus Customer Satisfaction ensures that CSAT results are not viewed in isolation but as a part of the larger customer experience and service quality framework. It focuses on integrating and leveraging intraday CSAT data, allowing for the rapid identification of trends and addressing Customer concerns efficiently.

Happiness Index			LAST MODIFIED March 16, 2023 AT 3PM	
Contact ID			Last Name	
Happy	↗️ 😊		Larick	
Neutral	→ 😐		Smith	
Unhappy	↘️ 😞		Doe	
Very Unhappy	↙️ 😡		Ankrom	

The platform offers access to standard reports and the ability to create customised reports, as well as the option to add personalised dashboards for a comprehensive view of Customer Satisfaction metrics.

6.6.1 Integrated Customer Satisfaction Measurement

- **IVR Survey Capability** — Integrates directly into the Voice IVR service for conducting post-call surveys, giving callers the option to opt-in or decline participation. Surveys can be initiated automatically or through agent selection of termination codes.
- **Voice Entry Recording** — Captures voice entries during the IVR survey for detailed analysis, with results provided via a dashboard or detailed call reports for comprehensive review and analysis.

6.6.2 Unified Analytics Integration

- **Data Integration** — CSAT data is not isolated but integrated with the wider Quality Monitoring (QM) service, interaction analytics, and ticketing data for a more comprehensive view of the customer experience.
- **Intraday CSAT Data Utilisation** — Utilises intraday CSAT data for rapid trend identification and responsive issue resolution, addressing customer concerns efficiently.

6.6.3 Comprehensive Reporting and Personalisation

- **Standard and Custom Reporting** — Provides access to standard reports and the ability to create customised reports tailored to organisational needs.
- **Personalised Dashboards** — Offers tools for creating and managing custom dashboards, enhancing data visualisation and making CSAT data easier to act upon.

6.6.4 Voice CSAT and Omni-channel Functionality

- **Automated Voice Surveys** — Automates the distribution of voice channel surveys post-call, with customisable questions to gather specific insights.
- **Omni-channel CSAT** — Measures customer satisfaction across multiple channels, including voice, text, email, social media, and web chat, providing a unified view of CSAT scores and enabling segmented analysis.

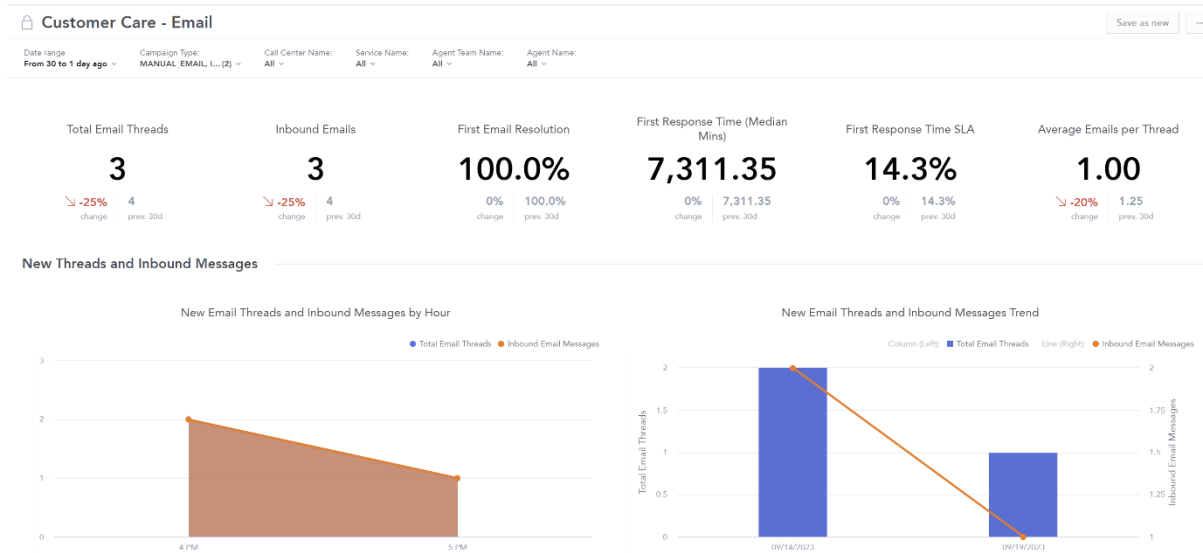
6.6.5 Real-time Reporting and Advanced Segmentation

- **Real-time Dashboards** — Provides dashboards that update in real time, allowing you to track Voice CSAT scores as they happen.
- **Segmentation and Filtering** — Breaks down survey responses by channel, issue type, or agent, enabling deeper analysis and targeted follow-ups for customers who provide low scores.

6.7 Email



Cirrus Email is designed to streamline the management of customer email interactions for enhanced digital relationships. The feature includes real-time monitoring and reporting capabilities, providing valuable insights into agent performance and customer engagement. The service offers a web-based interface for agents, equipped with email routing, automated responses, and template options, facilitating efficient handling and resolution of customer email inquiries.



This integration facilitates a blended interaction approach, where email, voice, SMS, webchat, WhatsApp and Social Media channels converge in a single interface, enhancing agent efficiency and customer experience. It enables the rapid creation and management of email campaigns using an HTML editor, allowing for personalised email experiences with custom sender names that better represent your brand.

6.7.1 Intelligent Email Management

- **Smart Mailbox Management** — Centralises and categorises incoming emails, ensuring they are routed to the most appropriate team or individual for action.
- **Keyword Prioritisation** — Implements intelligent keyword-based rules for the automatic sorting and routing of emails, reducing the need for manual intervention and accelerating response times.
- **Canned Responses and Templates** — Offers agents access to pre-written responses and templates for frequently asked questions, promoting faster and more uniform replies.
- **Advanced Reporting** — Provides supervisors and management with detailed metrics, like average conversation closure times and the number of replies until resolution, which are critical for ongoing performance optimisation and service quality improvement.

6.7.2 Real-Time Monitoring and Reporting

- **Performance Tracking** — Offers real-time monitoring of email interactions, delivering insights into agent performance and customer engagement.
- **Adjustment and Optimisation** — Enables data-driven adjustments to improve customer engagement and agent efficiency, ensuring responsive and effective communication strategies.

6.7.3 Blended Agent Interface

- **Email Routing** — Automatically directs emails to the correct agents based on predefined criteria, enhancing the efficiency of email handling.
- **Automated Responses** — Provides a set of pre-set responses for common inquiries, streamlining the communication process and ensuring consistency across customer interactions.
- **Email Templates** — Supplies a variety of templates, supporting agents in providing consistent and professional responses.

6.7.4 Efficient Inquiry Handling and Campaign Management

- **Streamlined Communication** — Guarantees efficient management of incoming customer emails, aiding agents in the swift resolution of issues.
- **Issue Resolution Tools** — Equips agents with the necessary tools to effectively address and resolve customer issues through email.
- **Rapid Campaign Creation** — Uses an HTML editor for the quick setup of email campaigns, enhancing the ability to communicate marketing messages promptly.
- **Brand Representation** — Allows for the use of custom sender names in email communications, reinforcing brand identity and personalising the customer experience.

6.8 Facebook Messenger



Facebook Messenger integration in Cirrus' omni-channel platform leverages APIs to provide seamless connectivity with one of the world's most popular messaging platforms. This integration offers agents a unified view of customer interactions, consolidating messages from Facebook Messenger directly into the agent desktop alongside voice, email, and webchat services.

Note: For one-to-many interactions via Facebook, see [Facebook Pages](#).

6.8.1 Unified Customer Communication

- **Single Interface for Messenger Interactions** — Integrates Facebook Messenger into the agent desktop, allowing agents to manage interactions through a single interface.
- **Consistent Customer Experience** — Ensures a continuous conversation history, providing agents with full context for each interaction.
- **Efficient Customer Service** — Enables efficient response to customer queries on Facebook Messenger, improving customer engagement and support.

6.8.2 Streamlined Interaction Management

- **API-Driven Connectivity** — Uses APIs for robust and reliable integration with Facebook Messenger.

- **Single Audit Trail** — Maintains a comprehensive audit trail of all interactions within the platform, enhancing accountability and service quality.

6.9 Facebook Pages



Facebook Pages integration with Cirrus' platform provides a comprehensive solution for managing customer interactions on Facebook Pages. This integration utilises APIs to ensure agents have a complete view of customer communications alongside other channels.

Note: For one-to-one conversations via Facebook, see [Facebook Messenger](#).

6.9.1 Centralised Facebook Page Management

- **Integrated Customer Interactions** — Allows agents to respond to customer comments and messages from Facebook Pages directly through the agent desktop.
- **Complete Interaction History** — Offers a unified view of customer interactions across channels, including Facebook Pages, for contextual customer service.
- **API Integration for Streamlined Operations** — Ensures seamless integration and real-time updates from Facebook Pages.

6.10 Instagram



Cirrus' Instagram integration harnesses API technology to incorporate Instagram interactions into the omni-channel contact centre platform. This allows agents to manage Instagram communications alongside other channels, providing a holistic view of customer interactions.

6.10.1 Integrated Instagram Communications

- **Seamless Instagram Interaction** — Directly manages customer messages and comments from Instagram within the agent desktop.
- **Robust API Integration** — Utilises APIs for a stable and consistent connection with Instagram.
- **Comprehensive Audit Trail** — Maintains an integrated record of all Instagram interactions within the platform, contributing to a unified audit trail.

6.11 Link Pay+



Link Pay+ offers a cloud-based, secure payment processing solution, enabling transactions via a Unique Reference Link (URL). This innovative service allows agents to send payment URLs through various channels like [SMS](#), QR codes, [emails](#), and [webchat](#), offering an alternative to [traditional phone-based payments](#).

Note: For customers looking for voice-only secure payment services, see [PCI Pro](#).

6.11.1 Flexible Payment URLs

- **Diverse Channel Distribution** — Agents can send payment URLs through SMS, emails, or webchat, providing customers with convenient payment options.
- **Customer-Friendly Web Interface** — Customers enter their card details in a web browser, similar to e-commerce transactions, ensuring a familiar and secure experience.
- **De-scoping Contact Centre** — This method prevents internal networks from handling card details, maintaining PCI compliance and enhancing security.

6.11.2 Modern PCI Compliance Approach

- **Innovative Compliance Solution** — A modern approach to PCI compliance, moving away from DTMF tones to URL-based payments, aligning with the preferences of a smartphone-driven customer demographic.
- **Multi-Provider Support** — Compatible with a range of Payment Service Providers, including pre-integrated options like Barclaycard and Stripe, and others available with a small development cost.

6.11.3 Advanced Features and Integration

- **Real-Time Monitoring Portal** — Provides a web-based portal for real-time tracking of payment request statuses sent to clients.
- **Customisable Link Features** — Offers configurable links with options like password protection, time limits, and geographical restrictions.
- **Seamless CRM Integration** — The agent interface integrates easily into existing CRM systems, offering a unified platform for handling customer enquiries and payments.

6.11.4 Cloud-Based Infrastructure and Cost-Efficiency

- **AWS-Powered Reliability** — Delivered via Amazon Web Services, ensuring high availability.
- **Pay-As-You-Go Model** — Excludes professional service costs, offering installation free-of-charge and charges only for generated links, providing a cost-effective usage model.

6.12 Online Reviews



Online Reviews integration in Cirrus' platform encompasses major platforms like Google Play Store, Apple App Store, YouTube, and Google My Business. This integration allows agents to view and respond to online reviews from within the same desktop used for other communication channels.

6.12.1 Comprehensive Review Management

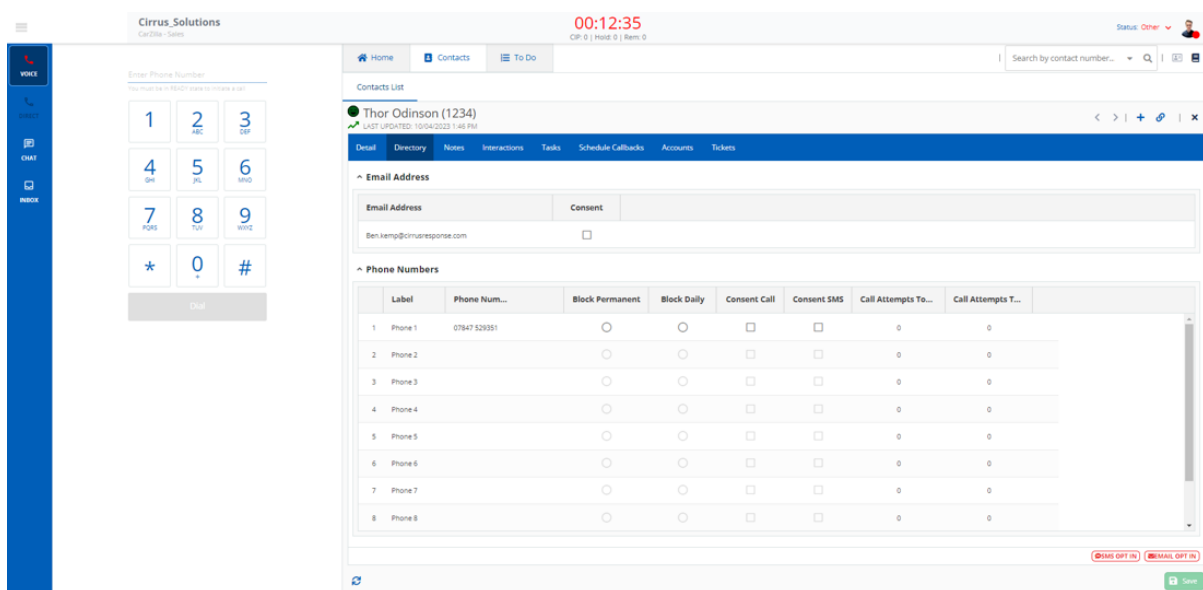
- **All-In-One Review Interface** — Manages reviews from various platforms, including app stores and Google My Business, directly through the agent desktop.

- **Complete Customer Interaction History** — Integrates reviews into the overall customer communication history for a comprehensive understanding of customer sentiment.
- **API-Driven Integration** — Facilitates a stable connection with multiple review platforms through API technology.

6.13 Outbound Campaign Management



Cirrus Outbound Campaign Management is our dedicated outbound dialler and mass contact service, available directly within the Cirrus platform, designed to facilitate efficient and effective management of outreach campaigns.



Label	Phone Num...	Block Permanent	Block Daily	Consent Call	Consent SMS	Call Attempts To...	Call Attempts T...
1 Phone 1	07947 529351	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
2 Phone 2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
3 Phone 3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
4 Phone 4		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
5 Phone 5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
6 Phone 6		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
7 Phone 7		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
8 Phone 8		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0

This feature offers robust capabilities for managing different types of dialling campaigns, including manual, preview, and progressive campaigns, alongside effective CRM integration and customisable call reasons.

Additionally, it allows for the creation, execution, and monitoring of various campaign types, including exclusive outbound and blended campaigns. It provides a comprehensive suite of tools for segmenting and targeting audiences, scheduling campaign activities, and analysing campaign performance.

6.13.1 Enhanced Campaign Management and Diverse Support

- **Easy Campaign Setup and Variety** — Simplifies campaign creation with user-friendly configuration options and supports multiple campaign types like voice, SMS, and email.
- **List Management and Dynamic Updates** — Offers advanced tools for precise contact list management and real-time updates, ensuring targeted and effective campaigns.

6.13.2 Strategic Scheduling and Execution Control

- **Flexible Scheduling and Execution** — Facilitates strategic campaign planning with flexible scheduling options and provides control over campaign start, pause, and stop functionalities.
- **Performance Monitoring with In-Depth Reporting** — Features real-time monitoring for immediate campaign performance tracking and includes detailed reporting tools for thorough analysis and refinement.

6.13.3 Compliance Integration and Targeted Segmentation

- **Adherence to Regulations and Best Practises** — Ensures campaigns are regulatory compliant and integrates industry best practises for responsible and effective campaign strategies.
- **Efficient Segmentation and Consent Management** — Enables precise audience categorisation and manages compliance and consent, balancing personalisation with regulatory requirements.

6.13.4 Automation and Unified Multi-Channel Outreach

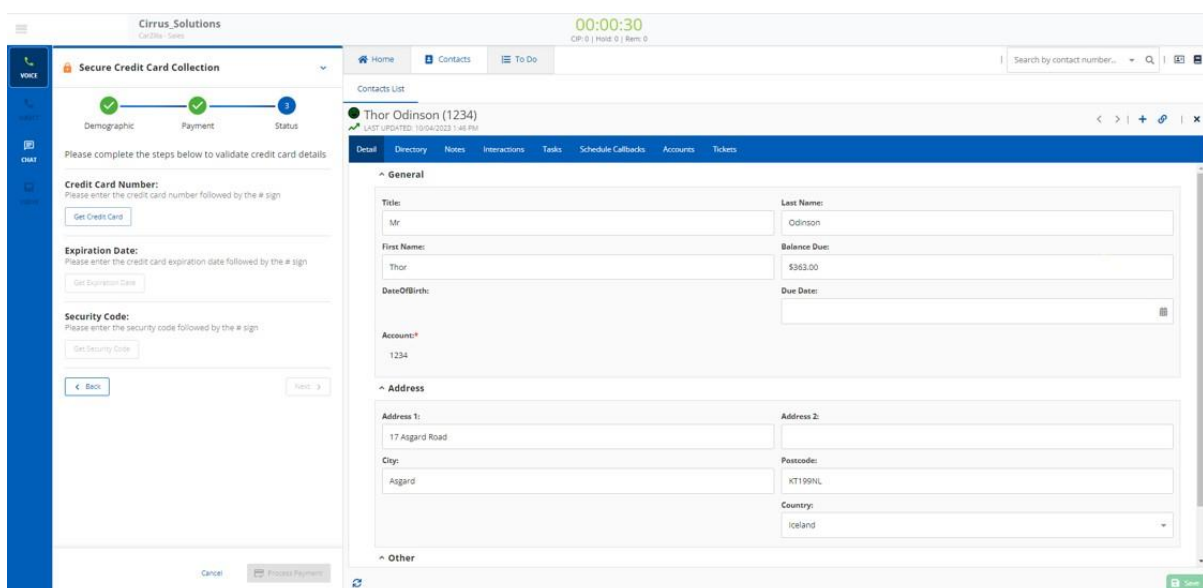
- **Intelligent Automation and Self-Service Options** — Incorporates intelligent bots and automated SMS for extended conversations and enhanced self-service.
- **Consistent Brand Experience Across Channels** — Ensures unified branding and messaging across all channels, crucial for complex, multi-touch outreach strategies.

6.14 PCI Pro



PCI Pro by Cirrus offers a comprehensive, Level 1 PCI-DSS compliant payment processing solution, seamlessly integrated within the contact centre environment. It ensures secure and efficient payment transactions while maintaining call recording compliance, suitable for both self-service and agent-assisted methods.

Note: For customers looking to provide URL-based payment services, see [Link Pay+](#).



The screenshot displays the Cirrus Solutions interface. On the left, a sidebar shows navigation options like VOICE, CHAT, and SMS. The main area is titled 'Secure Credit Card Collection' and shows a progress bar with steps: Demographic, Payment, and Status. Below this, there are fields for 'Credit Card Number', 'Expiration Date', and 'Security Code', each with a 'Get' button. A 'Back' button is also present. On the right, a 'Contacts List' shows a contact named 'Thor Odinson (1234)'. Below this, a 'Detail' view shows fields for 'General' information (Title, First Name, Last Name, Balance Due, Due Date, Accounts) and 'Address' (Address 1, Address 2, City, Postcode, Country). An 'Other' section is also visible at the bottom.

6.14.1 IVR-Driven PCI Compliance

- **Secure Self-Service IVR** — Provides a fully compliant IVR system for payment processing, de-scoping contact centres from PCI DSS requirements and mitigating risk by preventing agent exposure to sensitive card information.
- **Intuitive Payment IVRs** — Easy-to-develop IVR services with specific prompts for card details and transaction outcomes, ensuring seamless customer experiences.
- **Tokenisation and Payment Flexibility** — Offers tokenised storage of card details for repeat transactions and multiple card options, enhancing customer convenience.

6.14.2 Agent-Assisted PCI Compliance

- **DTMF Suppression for Agent Assistance** — Employs DTMF suppression in agent-assisted payments, keeping agents on call without exposing them to sensitive card details, and displaying only anonymised data.
- **Integrated Payment Tool** — Features an embedded payment tool within the agent interface, allowing agents to assist in the payment process while maintaining data security.
- **Transaction Auditing and Confirmation** — Generates authorisation codes and transaction IDs for each payment, which can be exported via API for a comprehensive audit trail.

6.14.3 Advanced API Integration

- **Seamless CRM Workflow Integration** — Allows integration with CRM systems, facilitating easy transition to payment processes with parameterised URLs for accurate payment amounts.
- **Real-time Transaction Guidance** — Provides agents with real-time prompts during the payment process, ensuring accurate and secure data entry by customers.

6.15 Screen Recording



Cirrus Screen Recording is an additional feature available within the Cirrus platform, offering enhanced capabilities for recording and analysing agent interactions. Screen Recording is crucial for quality assurance, training, and compliance purposes, enabling businesses to retain, review, and utilise recordings of agent activities.

The retention settings for screen recordings can be customised at the client level, allowing for flexibility and control over the recorded data. Note that this functionality requires the installation of the Agent Desktop Native application on agent systems and is available at an additional cost.

6.15.1 Comprehensive Recording

- **Desktop Environment Capture** — Provides a full view of the agent's desktop environment, including support for dual monitors, enabling a comprehensive assessment of agent workflows.

- **System Integration** — Requires the installation of the Agent Desktop Native application for seamless integration into the agent's workflow, ensuring efficient and uninterrupted recording.

6.15.2 Customisation and Storage

- **Client-Level Customisation** — Provides options to customise screen recording retention parameters at the client level, offering flexibility in data management.
- **Flexible Storage Options** — Allows for control over the duration and extent of stored recordings, with enhanced storage options available for an additional fee.

6.15.3 Quality Assurance and Compliance

- **Quality Monitoring Tool** — Acts as a crucial resource for quality assurance, allowing supervisors to monitor agent activities and interactions for adherence to quality standards.
- **Training and Development** — Serves as a valuable tool for agent training programs, offering insights into agent performance and areas for improvement.
- **Regulatory Compliance** — Assists in ensuring compliance with regulatory requirements, making it an essential feature for maintaining standard operational procedures.

6.16 Single Sign-On (SSO)



Cirrus Single Sign-On (SSO) is a security feature that simplifies the authentication process for users and agents within the Cirrus platform. After setting up user and agent accounts with valid emails, SSO can be enabled from the Cirrus portal's security settings. This feature utilises a flag to indicate when authentication should be handled by an external Identity Provider (IdP). SSO streamlines the login process, allowing users to access multiple applications and services with a

single set of credentials.

6.16.1 SSO Activation and User Management

- **User and Agent Account Configuration** — Requires the setting up of user and agent accounts with valid email addresses, ensuring secure and verified access.
- **Enable/Disable Control** — SSO functionality can be easily managed through a switch in the 'Client > Security' tab on the Cirrus platform, offering flexibility in activation and deactivation.

6.16.2 Integration with Identity Providers (IdPs)

- **External IdP Authentication** — Utilises external Identity Providers (IdPs) to manage the authentication process, centralising and securing login activities.
- **Support for OpenID Connect (OIDC)** — Implements OIDC as an authentication layer, which enhances the security and integration of the authentication process across different platforms and services.

6.16.3 Streamlined Authentication Process

- **Single Credential Access** — Allows users to access multiple applications and services using a single set of credentials, significantly simplifying the login process.
- **Efficient Login Management** — Reduces the complexity of managing multiple usernames and passwords, streamlining access to various applications within the Cirrus ecosystem.

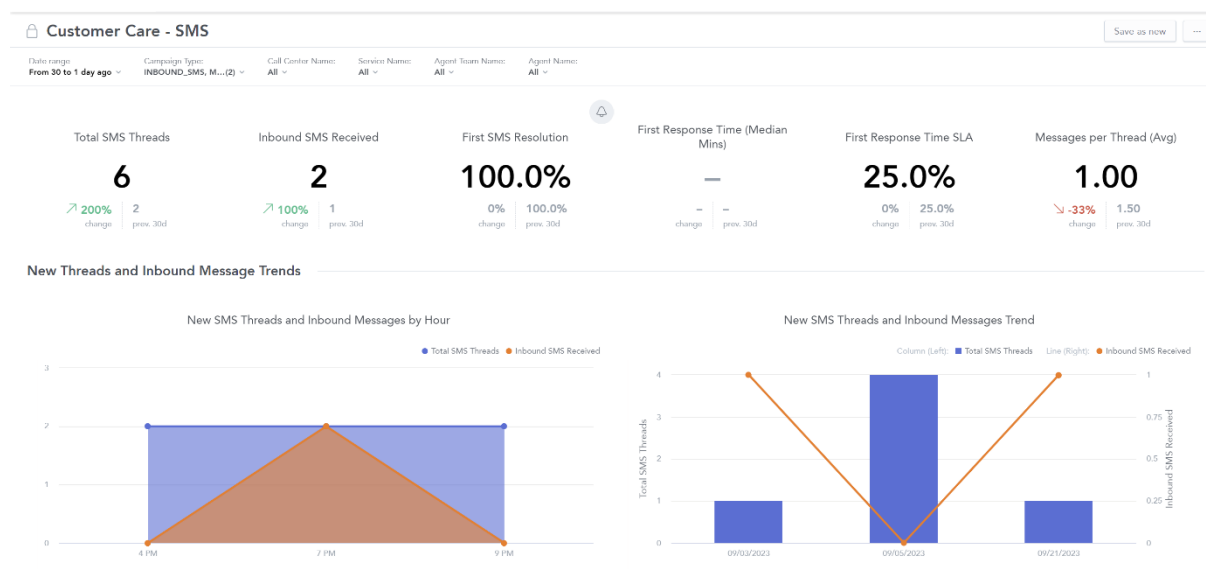
6.16.4 Enhanced Security and Compliance

- **Centralised Authentication Control** — Provides a secure and controlled environment for accessing multiple services, centralising authentication control and reducing the risk of unauthorised access.
- **Adherence to Security Standards** — Ensures compliance with established security protocols and frameworks, maintaining high standards of data protection and privacy.

6.17 SMS



Cirrus SMS is a comprehensive messaging feature within the Cirrus platform, designed for effective communication with customers through text messages. It supports both mass outbound and inbound SMS functionalities.



Mass SMS allows for messages to be automatically sent to a large customer group simultaneously, whilst the inbound SMS feature uses predefined templates that are automatically sent to customers in response to their messages, ensuring timely and relevant communication.

For efficient management, inbound SMS messages can be routed to specific services by assigning the associated SMS number to the service, thus integrating SMS communication seamlessly into customer service workflows.

6.17.1 Two-Way Communication and Time-Sensitive Messaging

- **Two-Way Interaction** — Facilitates both outbound notifications and inbound replies from customers, enabling a comprehensive two-way dialogue.
- **Timely Updates and Reminders** — Ideal for sending time-sensitive communications like appointment reminders and confirmations, providing immediate updates that are crucial for customers.

6.17.2 Mass SMS Campaigns

- **Broad Audience Reach** — Enables the automatic sending of SMS messages to a large group of customers simultaneously, making it ideal for widespread alerts, promotions, and general communications.
- **Efficient Campaign Management** — Facilitates the efficient management and execution of SMS campaigns, enhancing outreach and communication efficiency.

6.17.3 Inbound SMS and Automated Responses

- **Automated Response Templates** — Utilises predefined templates to provide instant, relevant responses to customer SMS replies, ensuring consistency in communication.
- **Service-Specific SMS Routing** — Allows for the routing of inbound SMS messages to specific services, ensuring that responses are handled by the appropriate team or department.

6.17.4 Customisable Templates and Service Integration

- **Template Customisation** — Offers the flexibility to create custom templates tailored to various customer interaction scenarios, enhancing personalisation and relevance.
- **Seamless Service Assignment** — Associates specific templates with particular services, streamlining responses and integrating SMS communication into the overall customer service strategy.

6.17.5 Compliance and Consent Management

- **Consent Management** — Ensures compliance with regulations by managing consent for the SMS channel and responding to standard CTIA keywords like START, STOP, and HELP, maintaining ethical communication practices.
- **Monitoring Opt-Out Rates** — Actively monitors the opt-out rate on SMS campaigns to maintain service quality and adhere to customer preferences, with mechanisms in place to address potential deliverability issues.

6.18 Video



The Cirrus Video Chat App enhances customer-agent interactions by enabling real-time video and audio communication directly from a web browser or mobile app. This innovative solution is designed to work across various devices without the need for installing additional plugins.

Our video service supports both synchronous and asynchronous conferencing, offering flexibility in communication. Additionally, the app includes functionalities for recording conversations and taking snapshots during video chats, adding a layer of utility for reference and quality assurance.

6.18.1 Key Features

- **Browser and Mobile App Compatibility** — Facilitates video and audio communication directly through web browsers and mobile apps, eliminating the need for extra plugins.
- **Device Agnostic** — Delivers consistent performance across a wide range of devices, ensuring accessibility for all users.
- **Synchronous and Asynchronous Conferencing** — Supports real-time (synchronous) and non-real-time (asynchronous) video conferencing, catering to diverse communication needs.

6.18.2 Recording and Snapshot Capabilities:

- **Recording** — Allows recording of video and audio calls for quality control, training, or documentation purposes.
- **Snapshots** — Enables taking snapshots during video chats for capturing important moments or information.

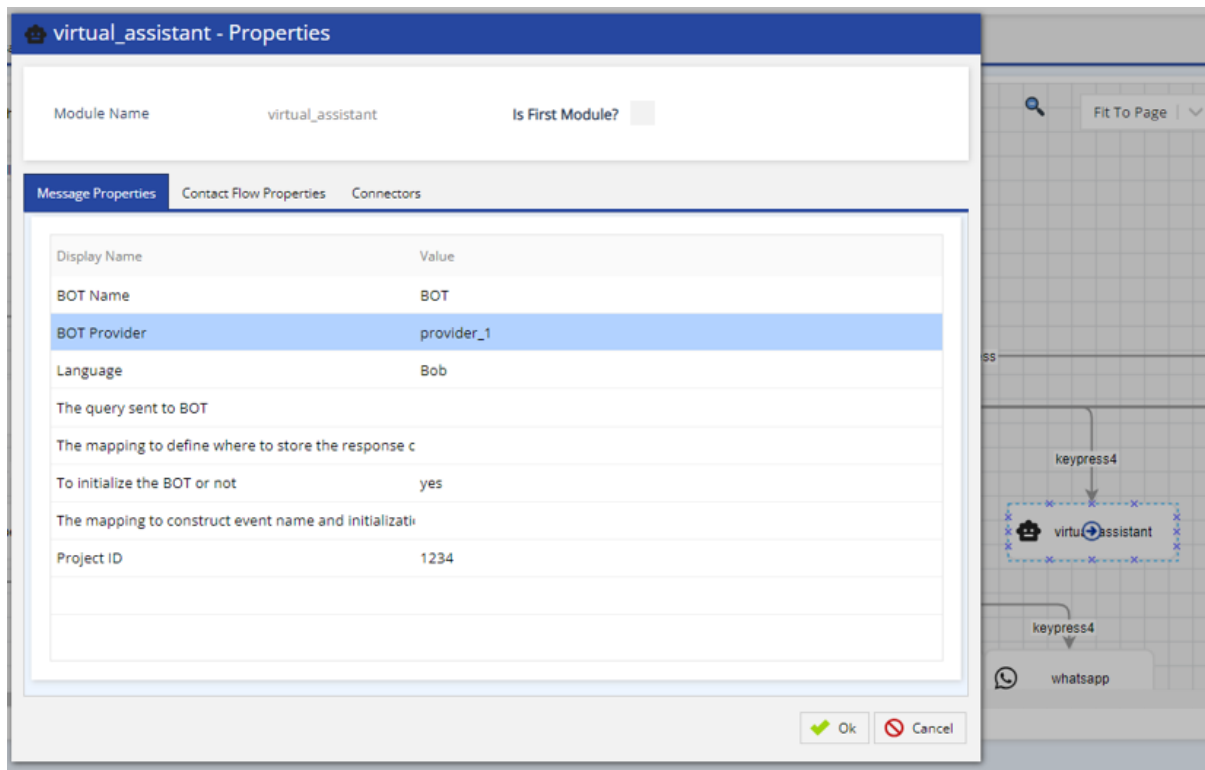
6.18.3 Enhanced Interaction Features

- **Web Calling** — Available to digital agents using the native agent interface for an integrated web chat experience.
- **Co-browsing** — Agents can visually guide customers to solutions through collaborative browsing, enhancing the support experience. This feature involves agents and customers simultaneously navigating web pages in real time.

6.19 Virtual Agent



The Cirrus Virtual Agent is an advanced AI-powered Voice solution designed to automate high-volume, low-complexity tasks using Natural Language Processing (NLP) technology. The Virtual Agent facilitates efficient customer service by handling routine inquiries such as data recording and frequently asked questions, allowing live agents to focus on more complex issues.



Equipped with customisable templates and a user-friendly interface, it significantly enhances the voice-based customer journey with personalised, targeted conversations.

Note: For digital chatbot style interactions, see [Conversational AI \(CAI\)](#) and [CAI+](#) services.

6.19.1 Key Functionality

- **Quick Setup** — Utilises a low-code, no-code graphical interface for swift and uncomplicated IVR workflow configurations.
- **Intelligent Learning** — Employs algorithms that enable the Virtual Agent to grow smarter after every customer interaction, paving the way for better issue resolution.
- **Seamless Escalation** — Features a built-in mechanism for smooth transition to human agents, ensuring comprehensive support for complex issues.
- **Advanced Interaction** — AI-driven voice application enhances customer service with conversation-based interactions to provide services and carry out tasks efficiently.
- **Personalisation** — Integrates with Cirrus CRM to access customer information, enabling personalised service and progressively smarter interactions through learning algorithms.
- **Continuous Learning** — Virtual Agents evolve with each interaction, gathering data to refine customer profiles and enhance the personalisation of services.

6.19.2 Seamless Integration and Data Management

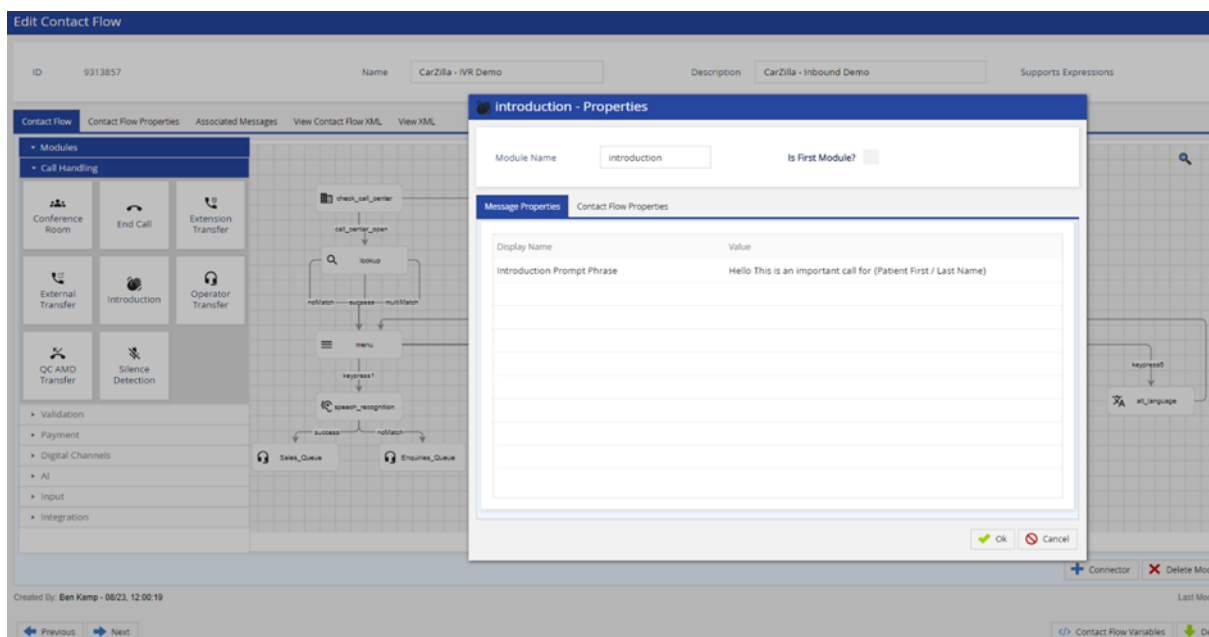
- **Data Integration** — Virtual Agents interact seamlessly with an organisation's database, ensuring that all conversation history and interaction data are captured and utilised effectively.
- **Third-Party Connectors** — Offers connectors to integrate third-party virtual agents, ensuring compatibility and extension of the service's capabilities.
- **Flexible Integration** — Supports a variety of voice-based AI providers with standard integrations, offering scalability and the capability to future-proof the customer service ecosystem.

6.20 Voice



Cirrus Voice is our core Contact Centre module, designed to simplify the complexity of voice-based contact centre communications. It combines intelligent routing and self-service features, utilising customer profile data to ensure effective service from the initial contact.

Our omni-channel approach allows customers to integrate Voice with digital channels like email, SMS, webchat, WhatsApp and social media in a single application. This provides agents with a unified view of the customer's journey by consolidating data and interaction histories.



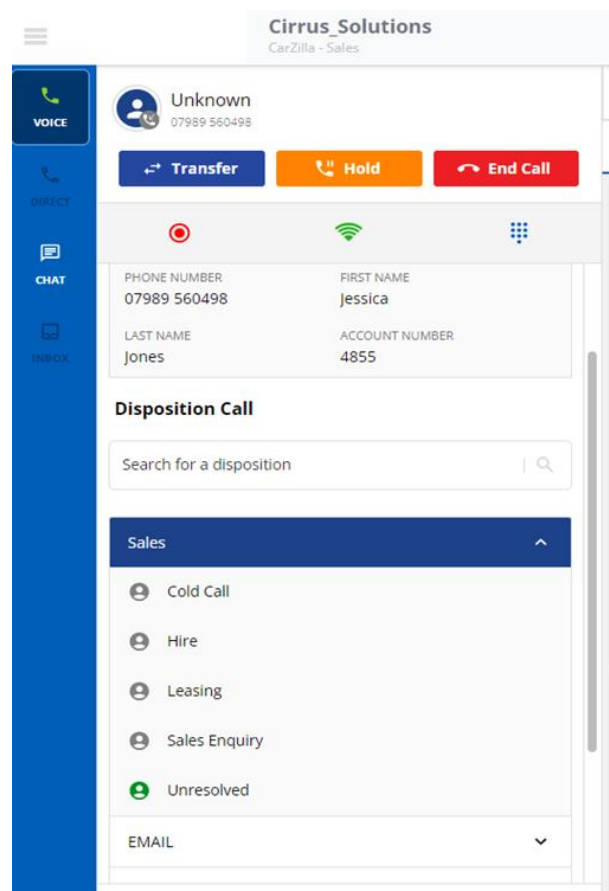
Key features include intelligent Automated Call Distribution (ACD) with skills-based routing, dynamic messaging, multi-level IVR, API integration for self-service, and unlimited queues and services, along with intuitive call flow functionality and queued call-back options, making Cirrus Voice a comprehensive solution for modern contact centres.

6.20.1 Intelligent Call Distribution and Routing

- **ACD with Skills-Based Routing** — Employs intelligent ACD systems that automatically route calls to the most qualified agents based on their skills and expertise, ensuring that customers are connected to the right agent for their specific needs.
- **Intuitive Call Flow Design** — Features user-friendly, drag-and-drop functionality for creating and modifying call flows in real time, simplifying the process of call management.
- **Queued Call-Back Options** — Provides customers with the option to receive a call back instead of waiting on hold, significantly improving the customer experience and reducing perceived wait times.

6.20.2 Enhanced Customer Experience

- **Dynamic Messaging & Queue Time Estimation** — Keeps customers informed about their estimated wait time with dynamic messaging while they are in the queue, enhancing the customer waiting experience.
- **Multi-Level IVR System** — Incorporates a sophisticated Interactive Voice Response (IVR) system that allows for streamlined customer self-service, reducing the need for direct agent interaction for common queries and requests.
- **API Integration for Enhanced Self-Service** — Integrates seamlessly with other platforms, expanding self-service options and enhancing the overall service capability.
- **Unlimited Queues and Services** — Offers the flexibility to manage an unlimited number of queues and services, catering to a wide range of operational needs and customer demands.



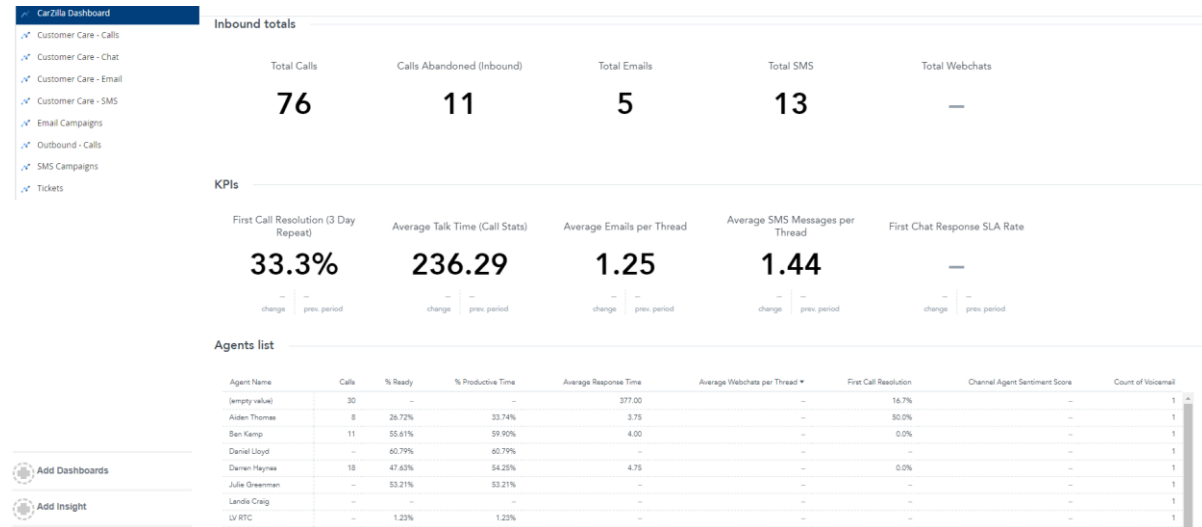
6.21 Wallboard



Cirrus Wallboards enable you to configure dashboards that display key performance indicators related to your interaction volume (for inbound and outbound services) and agent or team productivity. Wallboards offer a range of templates that can be customised to align with organisational needs and are capable of being displayed across multiple screens within the contact centre.

They provide valuable insights into overall performance and progress, such as average hold duration,

speed of answer, and call abandon rates



Wallboards enables managers to access detailed information regarding specific calls, interactions, and campaigns.

6.21.1 Dashboard Configuration and Customisation

- **Customisable Templates** — Provides a variety of templates that can be customised to display relevant Key Performance Indicators (KPIs) based on the organisation's specific requirements.
- **Versatile Display Options** — Dashboards can be exhibited on various devices, from tablets and desktop computers to widescreen office monitors, ensuring real-time monitoring is accessible in both private and public settings within the contact centre.
- **Multi-Screen Display Capability** — Designed to be displayed across multiple screens within the contact centre, offering widespread visibility and accessibility of performance data.

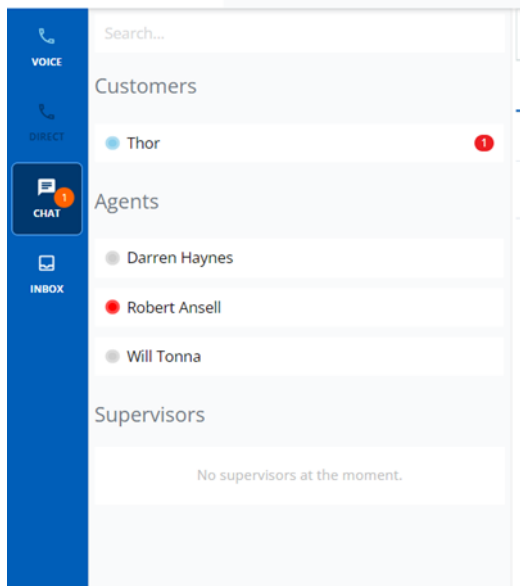
6.21.2 Real-Time Performance Metrics and Monitoring

- **Comprehensive KPI Display** — Showcases real-time metrics such as call volumes, agent productivity, and team performance, giving a holistic view of operational efficiency.
- **Critical Metrics Monitoring** — Includes monitoring of crucial metrics like average hold duration, average speed of answer, and call abandon rates, key for managing service quality and customer satisfaction.
- **Detailed Call and Interaction Analysis** — Allows managers to conduct a deep dive into specific calls, interactions, or campaign details, providing insights necessary for informed decision-making.

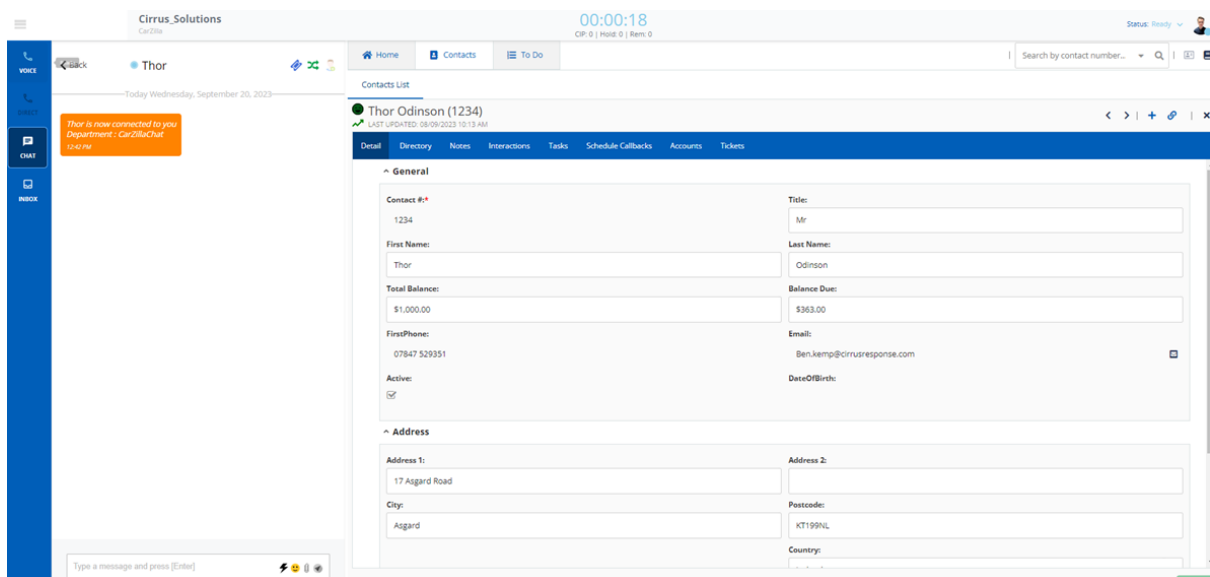
6.22 Webchat



Cirrus Webchat is a web-based chat tool integrated within the Cirrus platform, primarily designed to facilitate direct and immediate messaging between customers and agents. This function allows for the efficient handling of inbound customer queries in a live chat environment.



Key features include the ability to route incoming chat requests to appropriate agent groups, simultaneous handling of multiple chat sessions by agents, and real-time response capability. Additionally, webchat is integrated into all other channels, including voice, SMS, email, WhatsApp and social media services.



6.22.1 Chat Interface and Functionality

- **Rich Feature Set** — Incorporates advanced functionalities such as file sharing, CRM integrations, and keyword prioritisation, creating a robust and versatile tool for customer service.
- **Instant Chat Routing** — Automatically directs incoming customer chats to the appropriate agent groups for immediate response, enhancing the customer service experience.

- **Multi-Window Management** — Allows agents to handle multiple chat sessions at the same time, increasing the efficiency of customer interactions and the capacity to manage higher volumes of customer inquiries.

6.22.2 Monitoring and Analytics

- **Real-Time Chat Monitoring** — Features a dashboard for monitoring current chat queues and agent activity. This includes access to complete chat transcripts and associated customer profiles
- **Experience Rating System** — Includes a mechanism for customers to rate their chat interactions.

6.22.3 Integration and Accessibility

- **Web Widget Integration** — Offers seamless integration of the chat feature into company websites, enabling customers to start chat sessions and access information directly from the site.
- **CAI / CAI+ Integration** — Provides a simple plug-and-play integration to our range of AI-powered Chatbot services.

6.22.4 Customer Engagement and Operational Efficiency

- **Immediate Customer Engagement** — Facilitates real-time support and information delivery, significantly reducing resolution times and improving overall customer satisfaction.
- **Operational Efficiency** — The ability for agents to manage multiple chat sessions concurrently optimises resource allocation and reduces customer wait times.
- **Data-Driven Insights** — Utilises chat logs and performance metrics for operational analysis, strategy refinement, and enhanced customer service experiences.

6.23 WhatsApp



Cirrus' WhatsApp integration allows users to send and receive messages via WhatsApp, integrating seamlessly with other Cirrus channels including voice, webchat, email, SMS and social media.

Key aspects include the ability to handle inbound WhatsApp messages, use predefined message templates, and integrate with various contact flow components for a streamlined communication process.

6.23.1 Management

- **Inbound Message Management** — Cirrus ensures efficient handling of inbound WhatsApp messages, allowing for immediate responses using predefined templates that maintain brand consistency and compliance.

- **Campaign Management** — Seamlessly integrates WhatsApp within campaign management, permitting the application of specific templates to targeted campaigns, enhancing outreach and customer engagement.

6.23.2 Enhanced Customer Interaction

- **Document and Media Sharing** — Empowers agents and customers to exchange documents, images, and videos directly through WhatsApp, streamlining the resolution process and providing a fuller context for each interaction.
- **Real-time Location Sharing** — Customers can share their location, aiding services that rely on geographical data, thereby improving service delivery and customer satisfaction.

6.23.3 Integration with Digital Channels

- **CAI / CAI+ Integration** — Provides a simple plug-and-play integration to our range of AI-powered Chatbot services.
- **Contact Flow Engine Synergy** — Leverages the Interactive Voice Response system to launch WhatsApp messages, ensuring a cohesive journey throughout all digital channels within the contact flow.



6.23.4 Privacy and Compliance

- **Read Receipts Configuration** — Offers settings for read receipts, respecting the privacy preferences of customers and adhering to WhatsApp's and the organisation's privacy standards.
- **Template Consistency** — Guarantees that all outbound WhatsApp messages align with business standards, ensuring a consistent and professional communication style.

6.23.5 User Experience Enhancement

- **Multi-Format Support** — Accommodates various content types such as text, emojis, and multiple media formats, providing a versatile platform for dynamic customer interactions.
- **Platform Familiarity** — Utilises the widespread adoption and familiarity of WhatsApp to offer customers a comfortable and efficient communication channel.

6.24 Back Office Licence

Cirrus Back Office Licence offers a robust solution for back-office operations in Unified Communications and Contact Centre as a Service (CCaaS) environments. This licence includes the core functionalities of a standard voice licence, enhanced with integrated Ticketing systems.

It's tailored for back-office workers who have a lower utilisation of voice services, evident in the reduced minute bundle of 500 minutes. This setup ensures that back-office personnel have access to essential tools and data, supporting their role in managing customer relations and service requests.

6.24.1 Product Detail

- **Knowledge Worker Desktop** — an Agent Desktop layout that is optimised to cater to the specific needs of back-office workers by focusing on technical and account support functionalities.
- **Standard Voice Licence Features** — Includes basic voice calling capabilities, essential for real-time communication. Tailored for back-office workers with lower voice communication needs, ensuring cost-efficiency while still providing sufficient resources for essential calls.
- **Access to Ticketing Capabilities** — Facilitates access to create, manage, and track customer service requests or issues.

7 CRM

7.1 Overview



Our CRM stack focuses on providing a natively integrated CRM and related agent-focussed solutions, built and optimised exclusively for contact centres. These services empower agents to manage complete customer relationships beyond just data.

This stack delivers relationship-focused capabilities like integrated ticketing, knowledge management, and scripting to ensure conversations are tracked to resolution, knowledge is readily available and service is consistent.

7.1.1 Key capabilities

- **All-in-one Agent Toolkit** – CRM, knowledgebase, scripting and ticketing applications, consolidated to one single solution in a configurable desktop environment.
- **Optimised for Contact Centre** – Our range of applications are built from the ground-up to give your teams everything they need, exactly when they need it, with configurable workflows and interface options.
- **Connected to Your Data** – Make use of existing data and insights by connecting services to your 3rd-party applications. Leverage your existing data investments to personalise and configure scripts, workflows and much more.

7.1.2 Key Benefits

- **Boost First Contact Resolution** – Agents have all the tools and insights they need to resolve customer needs faster and more accurately in a single interaction.
- **Improve Agent Engagement** – Our integrated desktop reduces agent headaches. No more toggling between tools means agents can focus on better customer experiences.
- **Cost-effective Workflows** – Avoid expensive custom integrations, manual processes and multiple suppliers: your full Contact Centre eco-system, now in a single contract.

7.2 API Connector



The API Connector enables bidirectional data flow between the core CCaaS platform and external platforms. Users can build customised API calls to share data fields, trigger alerts based on API responses or chain API requests dynamically. The connector handles authentication and is crucial for integrating Cirrus with your CRM and other business systems. A trusted partner model allows controlled data sharing across sites.

Note: For customers looking to deploy a new natively-integrated CRM solution, see [Cirrus CRM](#).

7.2.1 Advanced API Integration and Customisation

- **Robust API Partner Access** — Offers comprehensive APIs for seamless integration with third-party applications, including CRM systems, enhancing Cirrus platform functionality.
- **Dynamic Configuration and Customisation** — Supports customisable API calls for data sharing, alert triggering, and API request chaining, increasing system flexibility and responsiveness.
- **Seamless RESTful Interface Integration** — Utilises a RESTful interface, catering to modern web service design for efficient creation of networked applications.

7.2.2 Enhanced Interconnectivity and Responsiveness

- **Bidirectional Data Flow** — Facilitates controlled data sharing and dynamic response integration, optimising the interconnectivity between Cirrus and external systems.
- **Efficient Request and Response Management** — Enables additional data transmission to external applications and seamless response integration with the Cirrus agent desktop.

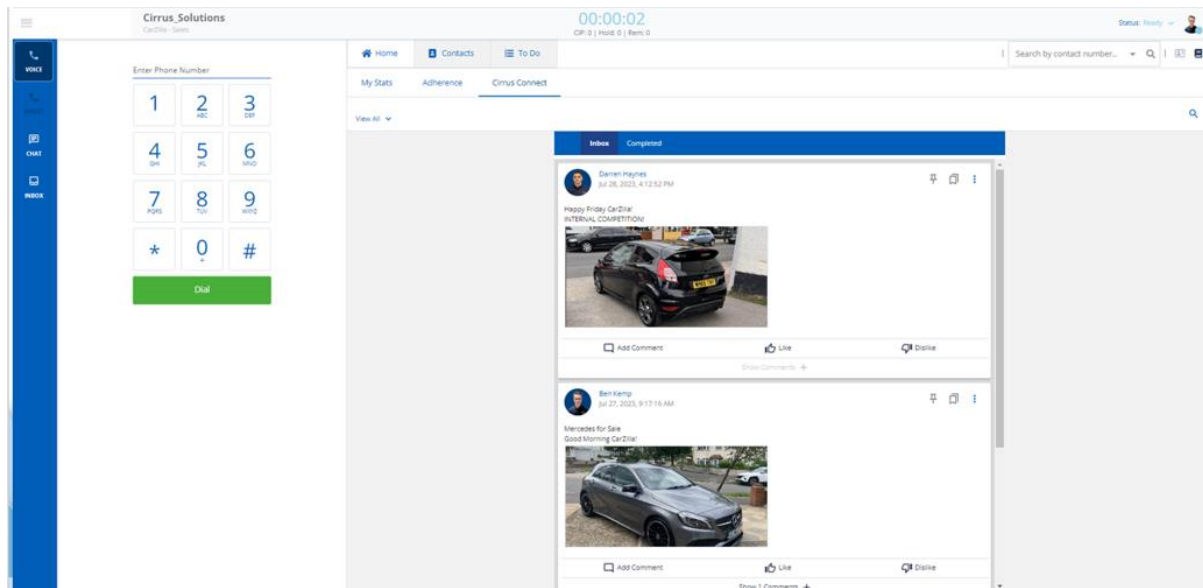
7.2.3 Streamlined Configuration and Secure Data Sharing

- **Easy API Configuration and Platform Integration** — Simplifies the API configuration process within Cirrus, allowing easy integration with third-party applications for custom solution development.
- **Data Sharing with Security** — Implements a Trusted Partner model for secure data sharing across multiple Cirrus sites, ensuring data safety and accessibility for organisations with multiple operational sites.

7.3 Cirrus Pulse



Cirrus Pulse serves as a dynamic notification and bulletin board channel, specifically designed to enhance communication within the agent desktop environment. This tool is crucial for keeping agents and managers informed with real-time updates and information relevant to their tasks and teams.



7.3.1 Real-Time Alerts and Notifications

- **Instant Information Updates** — Displays real-time alerts, posts, and notifications, ensuring agents and managers stay informed about critical updates and team tasks.
- **Centralised Posting Tool** — Acts as a centralised platform for managers to post updates, reminders, or messages to individual team members, specific teams, or the entire group.

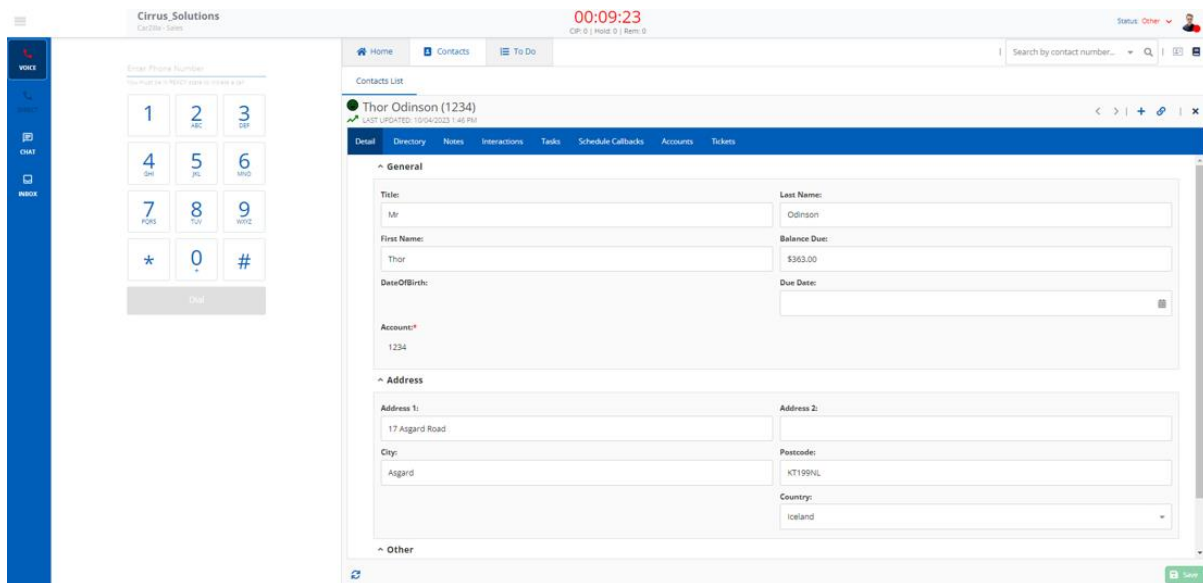
7.3.2 Easy Integration and Accessibility

- **Seamless Integration with Agent Desktop** — Can be added to the agent's Home Bar or as an Element within the desktop, facilitating easy access to notifications.
- **User-Friendly Interface** — Offers a simple and intuitive way for agents to view notifications with just a click.

7.4 Cirrus CRM



Cirrus CRM is a dedicated customer relationship management (CRM) database, explicitly tailored for contact centres. It enables the storage, organisation, strategy formulation, and maintenance of customer contact records across various channels. The system integrates contact information from diverse data sources, providing a unified view. This service addresses the historic challenge of CRM systems operating as standalone entities, separate from core business applications. This separation has been a drawback in an era where personalisation across multiple channels is increasingly complex.



Cirrus CRM is embedded directly into operational workflows, offering two main implementation options to adapt to unique organisational needs:

1. Firstly, it can serve as the **primary CRM** for organisations lacking a robust system, providing a fully integrated solution tailored for contact centre workflows.
2. Secondly, for those with an **existing CRM**, Cirrus CRM can integrate seamlessly, offering real-time synchronisation and eliminating the need for system toggling, thus enhancing agent experience while preserving current CRM investments.

7.4.1 Comprehensive CRM Solution for Contact Centres

- **Centralised CRM Database** — Cirrus CRM provides a centralised platform within the Cirrus Connect portal designed to store, organise, strategise and maintain customer contact records across various channels, offering a cohesive database regardless of the interaction channel.
- **Unification of Contact Data** — It allows for the unification of contact information from disparate data sources, providing agents with a complete view of customer data, which is pivotal for creating targeted campaigns and enhancing customer interaction performance.

7.4.2 Seamless Integration and Data Management

- **Primary CRM System** — Cirrus CRM can function as the primary CRM for organisations that do not have an existing robust system, offering a fully integrated solution that is embedded directly into contact centre workflows.
- **Real-time Synchronisation** — For organisations with an existing CRM, Cirrus CRM offers seamless integration and real-time data synchronisation, enhancing the agent experience by providing essential customer data directly on the agent desktop.

7.4.3 Enhanced Functionality and Usability

- **Consolidated Data Source** — Addresses the historical challenge of CRM systems operating as standalone entities by consolidating contact information from multiple channels into a single, accessible source.
- **Support for Extensive Databases** — Capable of handling up to 12 million contact records per client, making it suitable for organisations with large customer databases.

7.4.4 User Experience and Efficiency

- **Intuitive User Interface** — The user interface of Cirrus CRM is designed to be intuitive, simplifying the management of customer records and enhancing overall efficiency.
- **Data Import and Export Capabilities** — Supports a variety of data formats, including CSV and Excel, to facilitate efficient data management and ensure ease of access and export as required.

7.4.5 Real-time Data Access and Workflow Integration

- **Direct Operational Workflow Integration** — By embedding CRM functionality directly into operational workflows with a single click, Cirrus CRM ensures that customer data is always at hand, eliminating the need for agents to switch between systems.
- **Enhanced Customer Interaction** — Provides agents with comprehensive insights into customer interactions, thereby improving the quality and effectiveness of customer service.

7.5 Scripting



Cirrus Scripting is designed to enhance agent-customer interactions by providing customisable scripting capabilities. The Script section encompasses design, customisation, reporting and change management, allowing for a versatile and dynamic scripting environment. Key functions include adding data to manage scripts, mapping data fields with columns in the Report Config tab and viewing change history for tracking and analysis purposes.

7.5.1 Script Design and Customisation

- **Design Canvas** — Provides a flexible workspace for designing script pages using a variety of elements, enabling the creation of dynamic and interactive agent scripts.
- **Dynamic Scripting for Complex Interactions** — Simplifies complex customer interactions with trigger-based dynamic scripts, guiding agents through each conversation and minimising the need for screen toggling.
- **Customisation Options** — Offers drag-and-drop functionality for elements in the design area, with adjustable style and property settings to tailor scripts to specific interaction scenarios.
- **Page Management Tools** — Allows for the addition, deletion, cleaning, and copying of pages, facilitating efficient script development and management.

7.5.2 Specialised Script Functions

- **Text and Protected Fields** — Provides options for placing text fields and creating protected fields that hide sensitive data, such as passwords, ensuring data security and privacy.
- **Email and List Box Capabilities** — Facilitates the capture of email addresses and the creation of drop-down lists for streamlined data collection and customer interaction.
- **Diverse Elements** — Includes a range of controls, buttons, links, lists, and other essential options for script page creation, enhancing the script's interactivity and usability.

7.5.3 CRM Integration and Data Management

- **CRM Element Integration** — Enables the addition of Contact Centre CRM elements like Contacts, Accounts, and Tickets into scripts, ensuring seamless data integration.
- **Payment and Contact Lookup Integration** — Incorporates secure payment capture and efficient customer data management directly into the script.

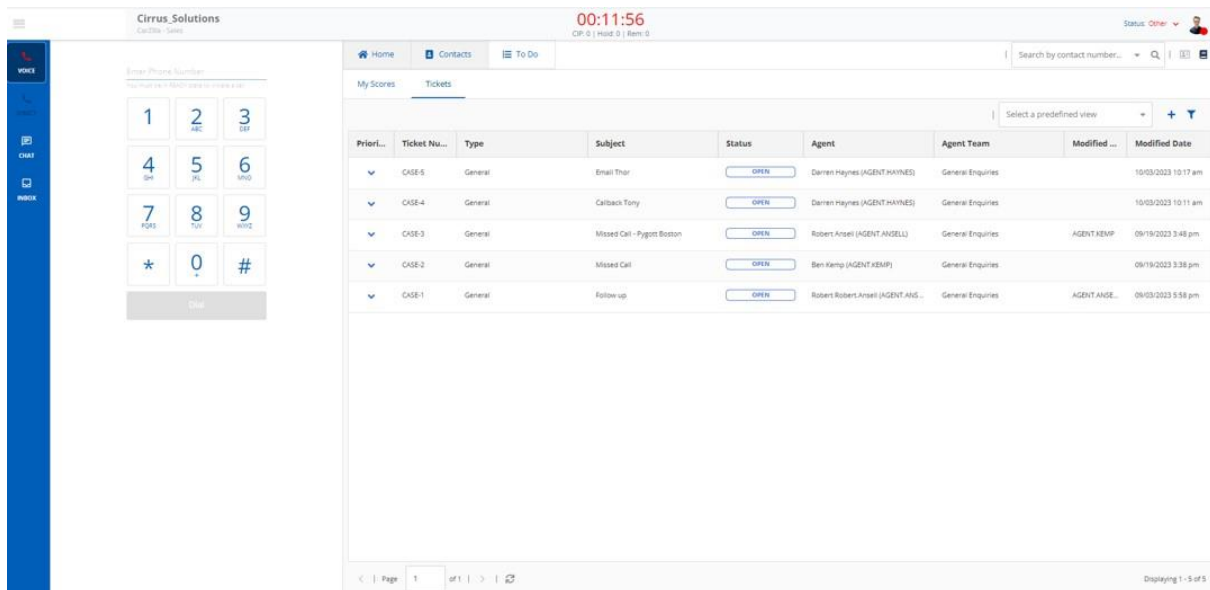
7.5.4 Regulation & Compliance

- **Integrated Consent Management** — Seamlessly incorporates consent management and secure payment transfers into scripts, facilitating compliance and enhancing customer service.
- **Regulatory Compliance and Consumer Preference Management** — Ensures adherence to regulations and respects consumer preferences by capturing consent during interactions across all communication channels, aiding in the maintenance of compliant and customer-centric campaign workflows.

7.6 Ticketing



Cirrus Ticketing allows contact centre agents to create, manage, and track tickets in a unified interface. Tickets are linked to customer interactions such as phone calls, emails, chats, and SMS, ensuring a comprehensive tracking and management approach. The ticketing system also empowers agents to assign, prioritise, and route tickets to appropriate team members, while enabling them to monitor progress and resolution. For managers, Cirrus Ticketing provides tools to view, analyse, and report on ticket activities, including open and closed tickets, response and resolution times, and agent performance, aiding in identifying trends and areas for improvement.



7.6.1 Streamlining Customer Service

- **Unified Customer Profiles** — Aggregates all ticketing activities, including communications across phone, email, chat, and SMS, into unified customer profiles for seamless support case management.
- **Automated Workflows and Forms** — Employs automated workflows and web-widget forms to facilitate a consistent and efficient customer service experience.
- **Tailored Service Level Agreements** — Allows for the creation of tailored SLAs to meet customer expectations and contractual obligations.

7.6.2 Ticket Configuration and Management

- **Comprehensive Management** — Integrates management of tickets with related customer accounts, contacts, and interaction notes for holistic tracking.
- **Customisable Configuration** — Offers versatile settings for ticket forms, including workflows, filters, and visual aspects to match specific business processes.

7.6.3 Ticket Forms and Workflow Customisation

- **Form Creation** — Facilitates the development of ticket forms using predefined fields and customisable templates, simplifying the ticket creation process.
- **Workflow Customisation** — Enables the creation of specific workflows to ensure efficient ticket resolution, tailored to different types of inquiries and issues.
- **Ticket Priorities and Statuses** — Allows the setting and management of ticket priorities and statuses, ensuring that urgent issues are addressed promptly.
- **Labelling and Categorisation** — Provides labelling and categorisation options for tickets, aiding in the organisation and retrieval of ticket information.

7.6.4 User Role-Based Access and Tracking

- **Access Control** — Ensures that system administrators, superusers and managers have appropriate permissions for ticket configuration and management.
- **Order and Issue Tracking** — Maintains a comprehensive log of all customer requests, work orders, and issues

7.6.5 Reporting and Dashboard Features

- **Action Review** — Permits detailed reviews of actions taken on tickets, supporting accountability and identifying opportunities for process improvement.
- **Configurable Dashboards** — Offers dashboards that can be customised to display real-time data on ticket activities, aiding managers in making informed decisions.

8 Workforce Optimisation (WFO)

8.1 Overview



Harness the full potential of your contact centre with Cirrus Connect's comprehensive **Workforce Optimisation (WFO)** stack. Our advanced suite offers more than just Workforce Management; it's a holistic solution designed to empower and develop your team, improve operational insights, and ensure compliance.

Equipped with state-of-the-art AI and Machine Learning capabilities, our WFO stack transforms data into actionable intelligence, optimising every aspect of your contact centre operations.

8.1.1 Key Capabilities

- **General Business Intelligence and Reporting** – This foundational layer offers a wealth of data-driven insights. With customisable reports and dynamic dashboards, you gain a real-time understanding of your operations. This intelligence covers everything from agent performance metrics to customer interaction trends, providing you with the necessary tools to make informed strategic decisions.
- **Native Workforce Management (WFM)** – A core component of our WFO stack, WFM provides comprehensive tools for forecasting, scheduling, real-time adherence, and intraday management.
- **Quality Monitoring and Analytics** – This advanced layer focuses on continuously enhancing service quality. Integrating both conversation analytics and quality management tools, it provides a granular view of customer-agent interactions. AI-driven analysis identifies trends and areas for improvement, ensuring high standards are maintained and evolved.

8.1.2 Key Benefits

- **Optimise Staffing** – Automated scheduling and intraday management reduce manual effort whilst data-driven forecasting and scheduling help match supply with demand
- **Drive Agent Performance** – See what's working and what needs improvement. Tools for recording, scoring, coaching and eLearning enhance skills.
- **Understand and Improve** – Identify and act on clear trends to streamline processes, improve service offerings and – most crucial of all – deliver better customer experiences

8.2 Agent Assist



Cirrus Agent Assist uses real-time speech-to-text processing to provide agents with live information and guidance during customer interactions. Agent Assist automates vital processes like call note taking, workflow automation, and call summarisation.

The tool allows managers to set up real-time guidance rules for agents and provides alerts when criteria are met. It is easily accessible via the agent desktop UI and covers topics like action rules, reporting, call categories and intent modelling for understanding customer needs.

8.2.1 Key Functionality

- **Real-Time Transcription** — Utilises AI-powered technology to transcribe voice conversations in real-time, creating searchable, speaker-separated call transcripts. This feature aids in clear documentation, record-keeping, and quality control of agent-customer interactions.
- **Helpful Articles and Mentions** — Provides agents with helpful articles and information based on administrator-created rules. These tools and resources assist agents during live conversations, enhancing their ability to address customer needs effectively.
- **Alerts for Key Mentions** — The system is designed to trigger alerts to notify different parts of the organisation regarding significant mentions within the contact centre, ensuring critical information is promptly acted upon.

8.2.2 Integration and Functionality

- **Auto-Summary with Machine Learning** — Employs machine learning algorithms to generate concise, accurate summaries of each interaction. This process improves the detail and accuracy of interaction records compared to manual note-taking.
- **Contact Manager Integration** — Summaries and transcripts are integrated with the Contact Manager, providing a comprehensive and easily accessible record of interactions. This integration ensures that all relevant information is at the agents' fingertips.
- **Action Rule Creation and Customisation** — Managers can create specific rules to assist agents in real-time. These rules, triggered based on criteria like keywords or interaction sentiment, offer customisable alerts to inform agents during crucial moments in customer interactions.
- **Access and Integration Ease** — Agent Assist includes comprehensive topics like Action Rules, Action Rules Report, Categories, and Intent Modelling. This broad spectrum of functionalities is designed to enhance agent performance seamlessly.
- **Intent Modelling** — Plays a crucial role in understanding and categorising customer interaction intents. It accurately analyses conversations to discern customer needs and expectations, guiding agents to respond more effectively and tailor their responses to the specific context of each interaction.

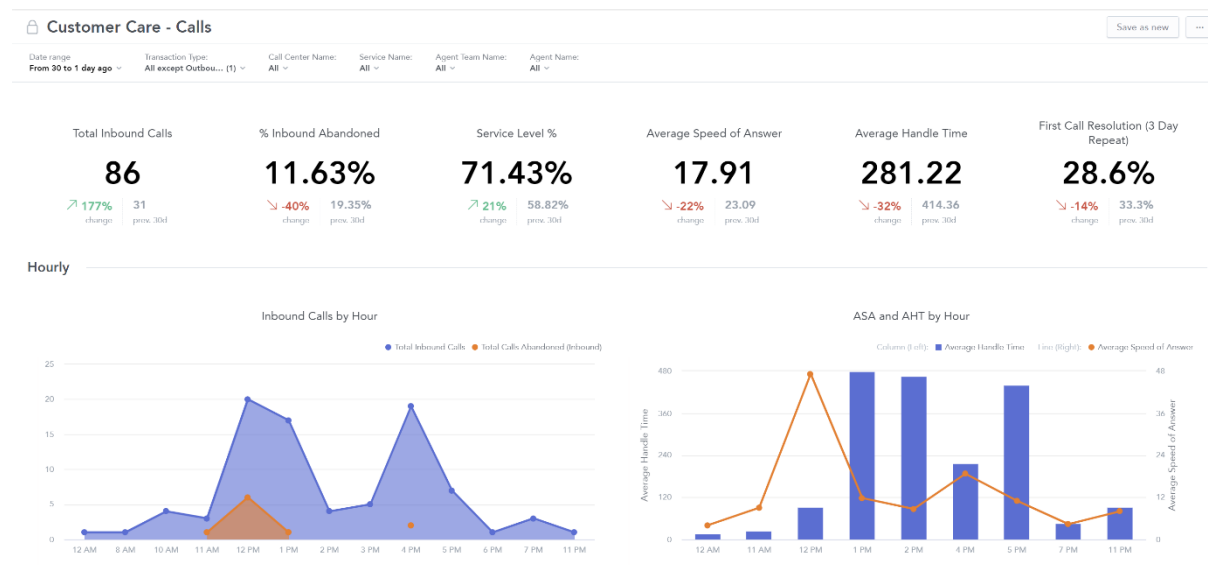
8.2.3 AI-Powered Guidance and Automation

- **Real-Time Speech-to-Text and Next-Best Action Recommendations** — Guides agents during interactions, providing increased efficiency through AI-powered insights.
- **Automated Note Generation** — Machine learning is used for auto-summarisation and note generation, reducing manual administrative tasks and enhancing customer profiles.
- **Intelligent Triggers** — Features customisable rules that leverage keywords, sentiment analysis, and APIs. These triggers automatically initiate relevant actions like creating support tickets or adding customers to campaigns, optimising contact centre operations and bolstering agent performance.

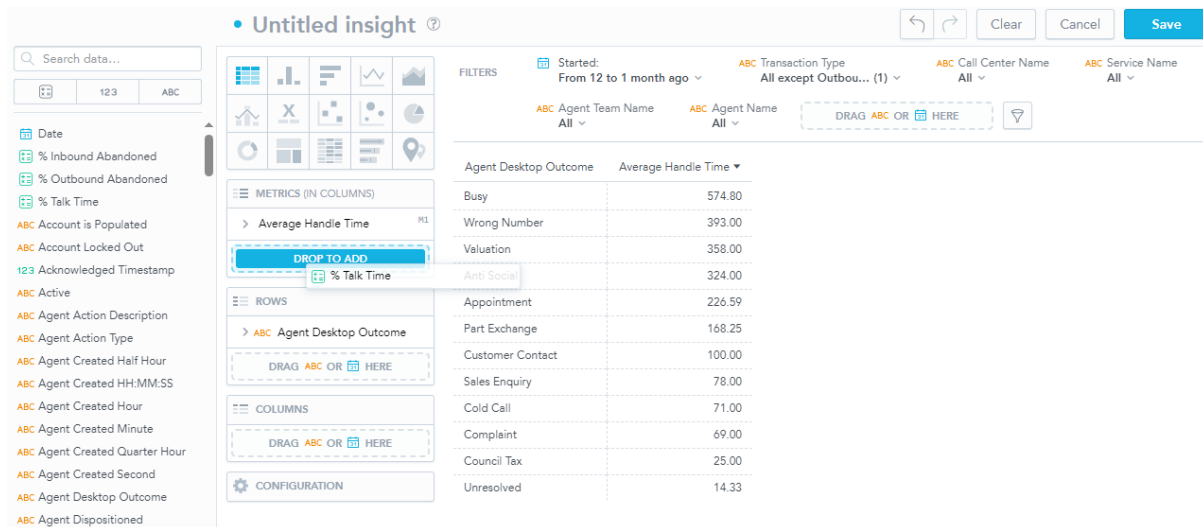
8.3 BI Reporting



Cirrus BI Reporting is a comprehensive data analytics module that facilitates the integration and analysis of diverse data sets including customer satisfaction (CSAT), Quality Analytics, Quality Monitoring, and Ticketing data.



The platform offers the ability to rapidly identify trends, address customer concerns, and optimise customer service operations through real-time and historical data analysis.



8.3.1 Comprehensive Data Integration and Analysis

- **Integrated Data Analysis** — Seamlessly combines customer satisfaction, Quality Analytics, Quality Monitoring, and Ticketing data for a holistic view.
- **Intraday Trend Identification** — Utilises real-time CSAT data to promptly detect and address emerging customer trends and concerns.
- **Custom Reporting and Dashboard Creation** — Features out-of-the-box reports and a drag-and-drop interface for custom report generation, allowing for personalised analytics dashboards.

8.3.2 Enhanced Reporting Capabilities

- **360-Degree Operational Insights** — Provides an expansive perspective with organised data points related to calls, chats, emails, and SMS, integrated into a unified platform.
- **User-Friendly Customisation** — Enables creation of personalised dashboards and reports to monitor performance, compliance, and business outcomes.
- **Interactive Trend Reports** — Offers interactive reports, like a 90-day trend analysis of agent performance, valuable for strategic planning and agent training.

8.3.3 Data Visualisation and Dashboard Personalisation

- **Intuitive Analytics Dashboard** — Consolidates and visualises key performance data for easy interpretation and strategic planning.
- **Personalised Insights** — Allows addition of personalised dashboards and insights for enhanced data-driven decision-making.
- **Partner Data Integration** — Supports adding trusted partners for a comprehensive view, consolidating data into a single Performance Analytics dashboard.

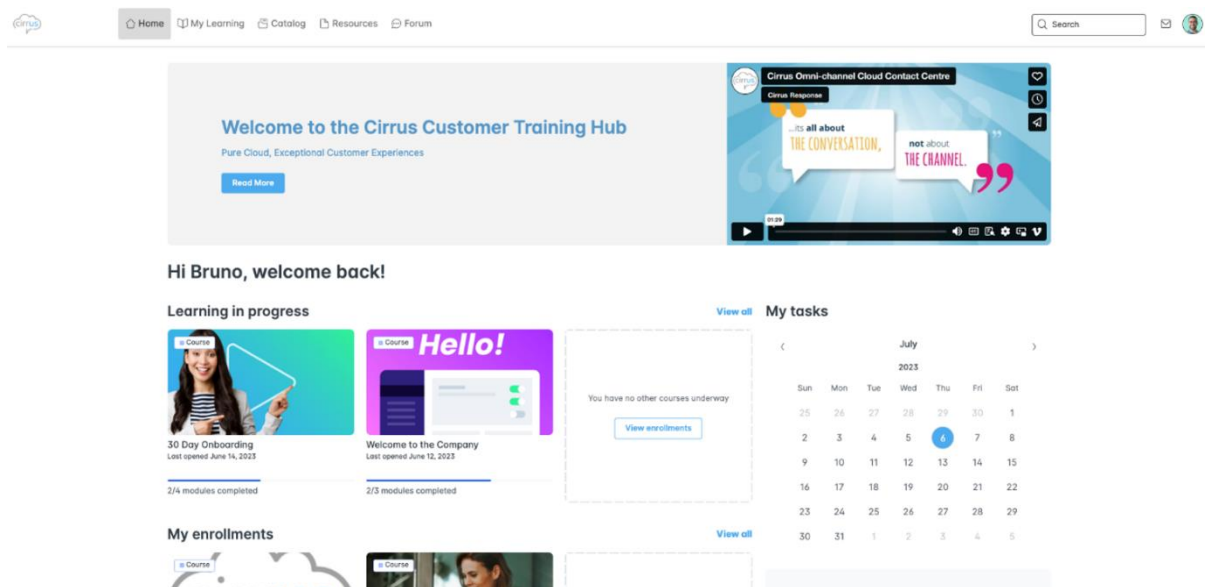
8.3.4 Operational Optimisation

- **Real-Time Performance Monitoring** — Enables immediate identification and response to trends and issues in customer service operations.
- **Administrator-Level Access Control** — Ensures data security and integrity by restricting access to administrative users with appropriate roles and permissions.

8.4 eLearning Centre



Cirrus eLearning Centre offers an integrated platform for agent training and development within the contact centre environment. It is designed to enhance agent skills and performance through accessible and structured learning modules.



8.4.1 Content Library and Creation

- **Diverse Content Formats** — Supports various content formats like PDF, CSV, PPT, and Word, along with links to external online content for comprehensive learning materials.
- **Custom Content Upload** — Enables users to upload and store educational materials in the Content Library, providing a central repository for all training resources.

8.4.2 eLearning Assignments and Management

- **Assignment Configuration** — Allows for the creation and assignment of eLearning tasks to agents, with options to set priorities and due dates, ensuring targeted and timely training.
- **Performance Enhancement** — The eLearning feature is designed to boost agent performance and productivity by providing relevant training tailored to individual requirements and skill levels.

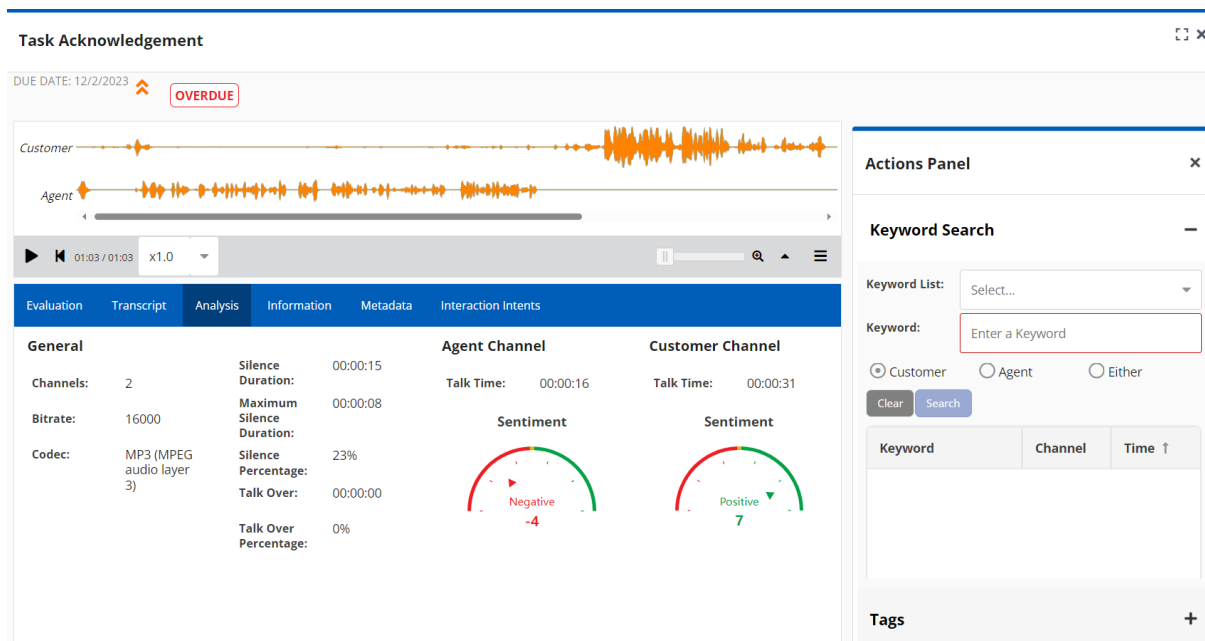
8.4.3 Agent-Focused Learning System

- **Agent Selection for Training** — Facilitates the selection of agents for specific training modules, enabling personalised development plans.
- **Skill Enhancement and Tracking** — Assists managers in tracking and enhancing agent skills through structured eLearning assignments, contributing to a skilled and efficient workforce.

8.5 Quality Analytics (QA)



Quality Analytics (QA) is an intelligent AI-driven conversation analytics service that leverages the power of LLMs (Large Language Models) to analyse customer-agent interactions. Used in conjunction with our [Quality Monitoring \(QM\)](#) service, it utilises key interaction data such as silence duration, talk time, keyword usage, and agent/customer sentiments, as well as script compliance, to assess agent performance. Additionally, it identifies sentiments and intents, transcribes voice calls, and compiles detailed reports.



This comprehensive tool enables a single-point view of all interaction data, facilitating accurate and consistent performance evaluations and identification of training opportunities. Quality Analytics process and score interactions automatically, utilising custom scorecards that focus on specific keywords and phrases.

8.5.1 Interaction Analysis and Automated Scoring

- **Data Utilisation** — Leverages critical metrics such as silence and talk duration, keyword occurrence, and sentiment analysis for a thorough understanding of agent-customer interactions.
- **Performance Evaluation** — Assesses agent performance by analysing metrics and pinpointing areas for improvement.

- **Customised Scorecards** — Employs scorecards tailored to target specific keywords and phrases, enhancing the precision of performance evaluations.
- **Efficient Evaluation** — Automates the scoring of all interactions, ensuring consistency and objectivity in performance assessment.

8.5.2 Sentiment and Intent Detection

- **Sentiment Analysis** — Analyses the emotional tone behind words exchanged during interactions, providing insight into both agent and customer sentiments.
- **Intent Recognition** — Deciphers the underlying intentions in conversations, which aids in comprehending customer needs and enhancing service delivery.

8.5.3 Voice Transcription and Reporting

- **Accurate Voice-to-Text Transcriptions** — Translates spoken language into written text, simplifying the analysis and review of voice calls.
- **Data Aggregation and Reporting** — Compiles interaction data into structured reports, offering actionable insights into agent performance, customer satisfaction, and operational efficiency.

8.5.4 Script Compliance and Training Enhancement

- **Script Compliance Monitoring** — Checks to ensure agents follow the predetermined scripts, maintaining a high standard of communication and quality in customer interactions.
- **Training and Development** — Identifies specific training needs and facilitates the continuous enhancement of agent skills, contributing to overall service quality.

8.5.5 Comprehensive Quality Management Integration

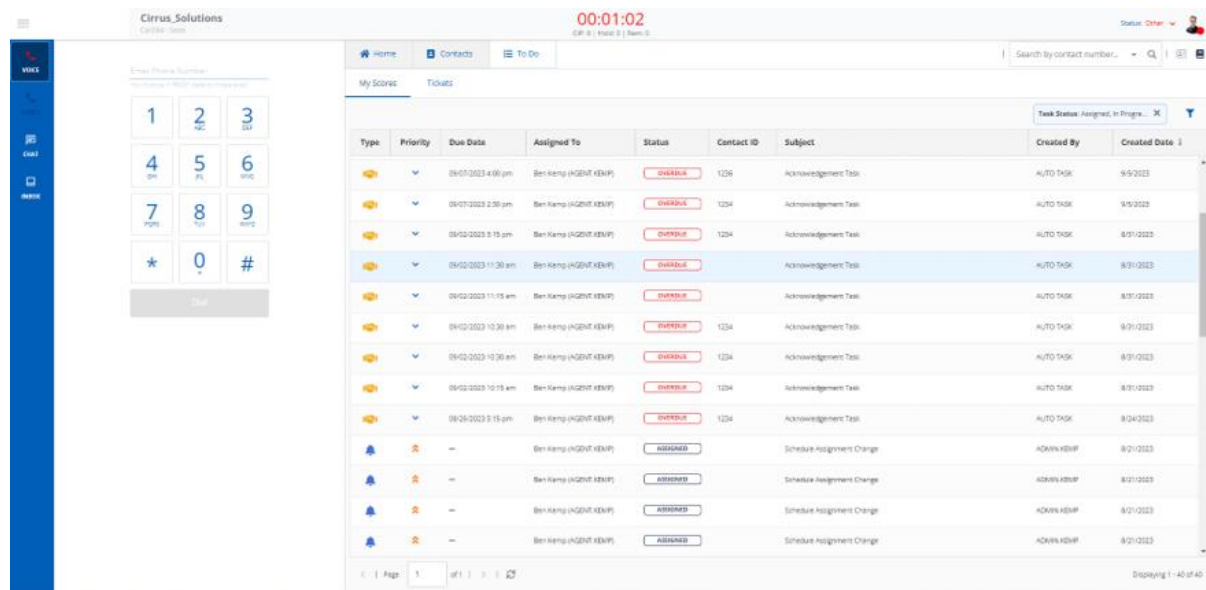
- **Streamlined Quality Management** — Integrates automated processes to offer insights from every interaction, saving quality managers' time and providing a comprehensive view of performance metrics.
- **Targeted Agent Performance Improvement** — Utilises data-driven eLearning and personalised coaching strategies to elevate agent performance.
- **Automated Quality Review** — Monitors, analyses, and scores all interactions with advanced AI, interpreting thousands of interactions across voice and digital platforms to provide a truly objective review process.

8.6 Quality Monitoring (QM)



Cirrus Quality Monitoring (QM) supports the creation of custom scorecards and setting specific scoring criteria for various interactions, allowing for a tailored evaluation and monitoring of agent performance. It facilitates the management of compliance and regulatory requirements through alerts, notifications and tracking of work queue tasks.

Additionally, the system assists in identifying skill gaps, training needs, and researching customer complaints, thereby aiding managers in improving agent performance.



Note: For even more sophisticated AI-powered analytics - including transcription and sentiment analysis - please see our [Quality Analytics \(QA\)](#) service.

8.6.1 Recording, Analysis, and Scoring of Interactions

- **Interaction Capture** — Records agent-customer interactions comprehensively, providing a substantial basis for analysis and quality assessment.
- **Performance Evaluation** — Utilises custom scorecards to evaluate and score agent performance, ensuring adherence to quality standards and operational expectations.

8.6.2 Custom Scorecards and Specific Scoring Criteria

- **Tailored Scorecard Creation** — Enables the creation of custom scorecards, allowing for a tailored approach to evaluate agent performance, aligning with specific organisational goals and customer service criteria.
- **Bespoke Scoring Criteria** — Sets unique scoring criteria for various interaction types, providing a nuanced understanding of agent performance across different customer service scenarios.
- **Alerts and Notifications** — Implements a system of alerts and notifications for a range of tasks, assisting in maintaining operational awareness and responsiveness.

8.6.3 Performance Improvement and Targeted Training

- **Skill Gap Analysis** — Identifies specific areas where agents may need improvement, enabling focused development initiatives.
- **Training and Development Support** — Offers tools and resources to facilitate targeted training and development programs, based on the identified needs and skill gaps of agents.

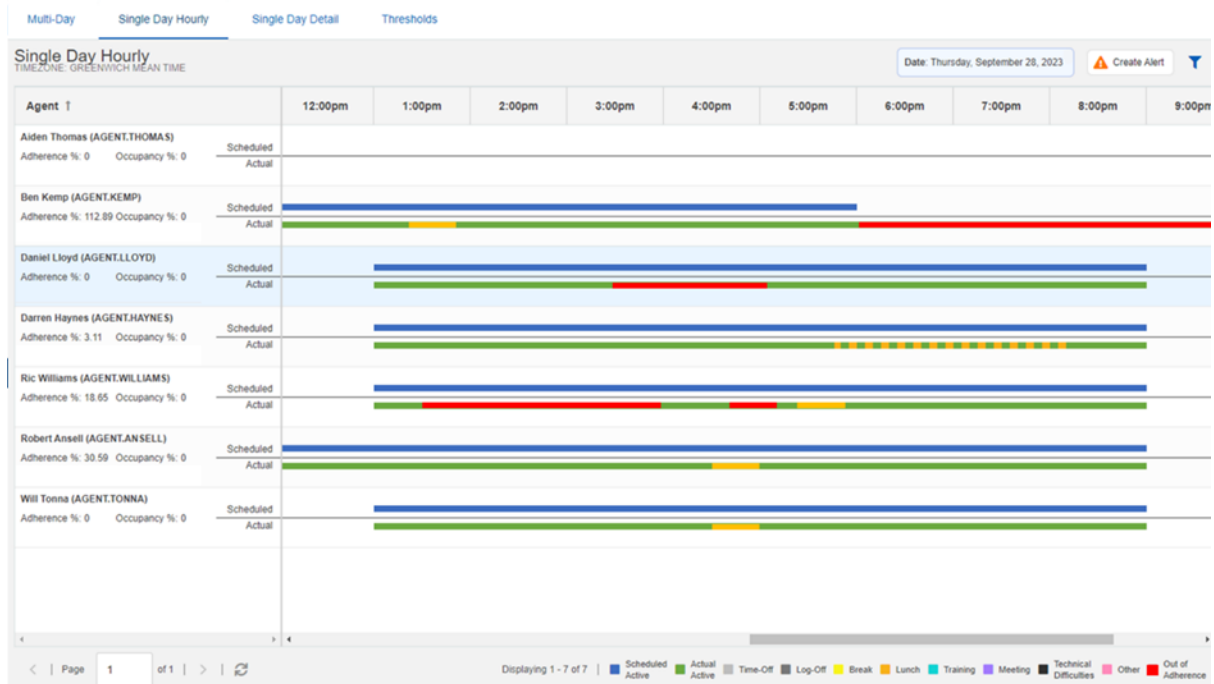
8.7 Workforce Management (WFM)



The Cirrus Workforce Management (WFM) solution is a robust system designed for the effective management of contact centre resources. WFM allows for the creation of shift calendars, the assignment of shifts based on forecasted work volumes and the generation of detailed shift reports. It also includes features for monitoring agent schedule adherence, ensuring optimal staffing levels and resource allocation.

Ben Kemp					
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	10 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	11 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	12 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	13 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	14
16 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	17 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	18 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	19 ● SMS ⌚ 9am - 10am 🛠 None ☀ Break 12-1 ⌚ 12pm - 1pm 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	20 ● SMS ⌚ 9am - 10am 🛠 None ● Voice Only ⌚ 1pm - 6pm 🛠 None	21
23 ● SMS ⌚ 9am - 10am 🛠 None ● Voice Only	24 ● SMS ⌚ 9am - 10am 🛠 None ● Voice Only	25 ● SMS ⌚ 9am - 10am 🛠 None ● Voice Only	26 ● SMS ⌚ 9am - 10am 🛠 None ● Voice Only	27 ● SMS ⌚ 9am - 10am 🛠 None ● Voice Only	28

This system is pivotal in maintaining the balance between customer demand and agent availability, ensuring that agents with the right skills are available at the right time for both inbound and outbound interactions.



Note: For customers looking to integrate their existing WFM services, see [WFM Connector](#).

8.7.1 Scheduling and Forecasting

- **Shift Management** — Enables the creation and management of agent schedules, including the mass assignment of shifts and generation of shift assignments.
- **Forecasting Tools** — Utilises the Forecasts tab to create staffing forecasts based on historical data or anticipated workload, allowing for informed scheduling decisions.

8.7.2 Monitoring and Compliance

- **Schedule Adherence** — Monitors agents' adherence to their schedules, essential for maintaining efficient operations and meeting service level agreements.
- **Compliance and Quality Management** — WFM aids in achieving operational efficiency and compliance goals. This includes quality management features for analysing agent-customer interactions and monitoring interaction quality.

8.7.3 Training and Skill Enhancement

- **eLearning Integration** — Enhances agent skills through regular training, ensuring that agents are well-equipped to handle various customer interactions.
- **Performance Tracking** — Allows for tracking the progress of different tasks and agent performance, contributing to continuous improvement and skill development.

8.7.4 Operational Efficiency

- **Work Queue Management** — Keeps track of various tasks assigned to agents and managers, ensuring that all work items are adequately addressed.

- **Resource Optimisation** — Assists in planning and managing the performance of staffing resources across all communication channels, aligning agent skills with customer needs.

8.8 WFM Connector



The Cirrus WFM Connector offers a straightforward solution for integrating Cirrus data with third-party Workforce Management (WFM) software. Hosted on AWS, it ensures efficient and secure data migration by combining the power of the Cirrus platform with the existing user interface and functionality of your current WFM system.

Note: For customers looking for native WFM capabilities, see [Workforce Management \(WFM\)](#).

8.8.1 Key Features

- **Seamless Integration** — Facilitates real-time, accurate data transfer from Cirrus to your WFM software, enhancing operational efficiency without altering the user experience.
- **AWS Hosting** — Reliably hosted on Amazon Web Services, providing a stable and secure conduit for data migration.
- **User Interface Consistency** — Integrates with various WFM systems while preserving their original interface, ensuring familiarity and ease of use.
- **Operational Efficiency** — Unifies workforce management in a single interface, simplifying scheduling, forecasting, and tracking activities.

9 Architecture & Security

9.1 Overview

Our robust, cutting-edge Virtual Private Cloud (VPC) infrastructure is designed to safeguard customer data and is backed up by our independently audited accreditations, including ISO 27001, PCI-DSS and Cyber Essentials Plus. This multi-layered security approach includes stringent measures such as advanced encryption, deep-dive auditing, comprehensive risk assessments and real-time monitoring.

Our proactive approach to potential vulnerabilities, evidenced by our regular independent CREST-accredited penetration tests, demonstrates our ongoing efforts to anticipate and mitigate any security risks. By prioritising data security, we provide our customers with the peace of mind they need to focus on what truly matters - their core business.

9.2 Availability & Scaling

Cirrus Connect's Virtual Private Cloud (VPC) architecture allows us to ensure high availability and gold standard reliability (99.999% uptime target). Our team is committed to maintaining compliance standards and proactive security protocols to minimise risks and safeguard your business. While our competitors only offer SLAs that cover individual components, our industry-leading SLA provides unmatched end-to-end coverage for everything under the Cirrus umbrella.

10 Open Integration

Our platform is designed with open APIs and RESTful architecture, enabling seamless integration with virtually any of your external systems or applications.

Key capabilities include:

- Access customer data to enable personalised, integrated workflows.
- Connect with solutions that have web-based APIs or browser interfaces.
- Integrate at the client-side, server-side, or database level.
- Trigger actions and exchange data bi-directionally.
- Leverage interaction attributes (CLI, wait times, etc.) throughout connected systems.
- Comprehensive documentation and support for all integration features.

The open architecture allows our platform to exchange data freely with CRM, BI tools, and other third-party systems—unlocking the ability to create tailored, omni-channel customer experiences.

10.1 Microsoft Teams Integration

Our proposed solution is embedded within the Microsoft Teams application, utilising the Microsoft App Store for easy deployment. The Contact Centre platform can take advantage of existing Teams services by presenting calls using the existing Teams softphone clients. Agents will be able to utilise call control options (mute, hold, transfer etc.) directly within Teams for contact centre calls. This provides the minimum of operational change for agents.

10.2 3rd-party UC / PBX Integration

The service can also be deployed as an overlay to your existing UC / PBX service. All that is required a successful UC overlay or integration is for each agent to own an assigned DDI (e.g. via Gamma Horizon, Mitel, Avaya, Cisco or any other 3rd-party service as appropriate) to provide the means to route calls to them. The Contact Centre platform uses its sophisticated algorithms to assign inbound calls to an agent profile and then re-terminates that call directly to the agent's DDI, regardless of location.

11 Implementation & Transition

By partnering with Cirrus, you'll have access to the tools and guidance that will help you redefine customer engagement for your business. Our goal is to ensure that your platform is up and running as quickly as possible, tailored to your business needs, and that your team has the knowledge necessary to maximise your solutions' value.

11.1 Overview

Our project management approach, based on the PRINCE2 methodology, is a cornerstone of our successful deployments. We follow a standardised framework to ensure a seamless transition from your current solution to our CCaaS solution. Your dedicated Contact Centre Project Manager will oversee the end-to-end implementation, ensuring efficiency and accuracy.

Our approach covers 4 key phases:

1. Initiation
2. Planning
3. Deployment
4. Closure

We manage potential risks effectively and address bespoke elements during the planning and design phases, documenting them in the Statement of Works. What sets us apart is our vast industry experience. We have honed our processes, developed efficient tools, and built a team of dedicated professionals to ensure a seamless transition to our Contact Centre solution. This commitment to professional excellence and customer satisfaction is reflected in our track record of successful deployments.

11.1.1 Initiation Phase

During the Initiation phase, a dedicated Contact Centre Project Manager is allocated to the customer. They serve as the main point of contact throughout the deployment, working closely with the customer and the Contact Centre Project Manager. They arrange a series of internal handovers from the CCaaS sales team. This step ensures a comprehensive understanding of the customer's requirements and allows for a thorough review of all provided documentation. This leads to a Kick-off meeting where our team discusses the delivery of the solution.

11.1.2 Planning Phase

Our Planning Phase is a meticulously designed process ensuring the efficient management and optimisation of your contact centre. Central to our approach is a dynamic call routing system that efficiently connects customers with the most appropriate customer agent based on skills, availability, and the complexity of queries. We collaborate closely with you to understand your specific customer interactions, thereby crafting routing strategies that dovetail with your business objectives and service benchmarks. Equally paramount is the user experience; we conduct in-depth analyses of your

customer's journey, from common queries to interaction hurdles. This allows us to curate an engaging and user-centric interaction model that mirrors your organisation's ethos and ensures ease of achieving desired outcomes. Finally, a bespoke deployment plan, tailored to your unique requirements, is then put together. This plan is designed to make the migration seamless and thoroughly assess all risks, with contingency measures in place for any potential issues

11.1.3 Deployment Phase

As part of our Deployment phase, we create agent profiles, which are detailed and encapsulate the individual skills, roles, and experience of each customer agent, providing the system with the requisite data to enhance operational efficiency during call routing and ensuring the system is tailored to highlight your team's strengths. The user interface configuration is adapted to the specific needs of different user roles, ensuring an environment that intuitively aids their workflows. This encompasses a broad spectrum from call-handling functions for agents, real-time performance metrics for supervisors, to overarching system management tools for administrators. The strategic formation of agent groups and the creation of a robust Business Continuity Plan (BCP) further solidify our commitment to offering an uninterrupted, efficient service.

Before Go-Live, we arrange a Test Plan document that details what is included and excluded in each test phase to ensure all aspects of the implementation are covered. As a multi-tenanted platform, testing can be carried out in parallel to the live Production service build of the platform. This is provided via a dedicated Sandbox instance of the service. Team member responsibilities are assigned to ensure there is an understanding of who is responsible for testing milestones, dependencies, System Acceptance, Quality Assurance, User Acceptance and final sign-off.

11.1.4 Closure Phase

After UAT is successfully completed, we set a mutually agreed "Go Live" date, marking the commencement of the service in a live state. Our experienced Contact Centre Project Manager and Solution Delivery Consultant are available throughout that day, providing a live support line to answer any queries. In the highly unlikely event of a significant issue, business continuity is preserved as customers can roll back to their previous provider. We recommend a brief cross-over period during which customers maintain access to their former services to cater for such eventualities or any potential project delays. While it's common to go live with all services, customers have the option to pilot a single queue or call flow in a live test before launching the full service. Our flexible approach to both builds and Go Live support makes this option possible.

After a successful Go Live, the Contact Centre transitions into a 'Hypercare' period. During this time, the customer will have daily interactions with the Delivery Team for the next five days. This is a proactive step, borne out of our extensive experience, to ensure smooth operations and immediate issue resolution. At the end of the Hypercare phase, we conduct a comprehensive project review and a 'Lessons Learned' session. This is an opportunity to reflect on the project, improve future implementations, and sign off on the current project. Following this, the customer is transitioned to our Service Desk for any ongoing support queries. With this move, our structured 30/60/90 day programme of support commences. This carefully designed programme, a product of our extensive experience in the industry, ensures our customers are fully comfortable with the self-service elements

of the platform. Our primary objective is to empower customers to manage their own CCaaS instance confidently, reducing the need for external involvement from suppliers. We believe in nurturing self-reliance, equipping customers with the skills and knowledge to operate the platform independently while still providing robust support when needed. This approach ensures our customers can leverage the full potential of our CCaaS solution in their daily operations.

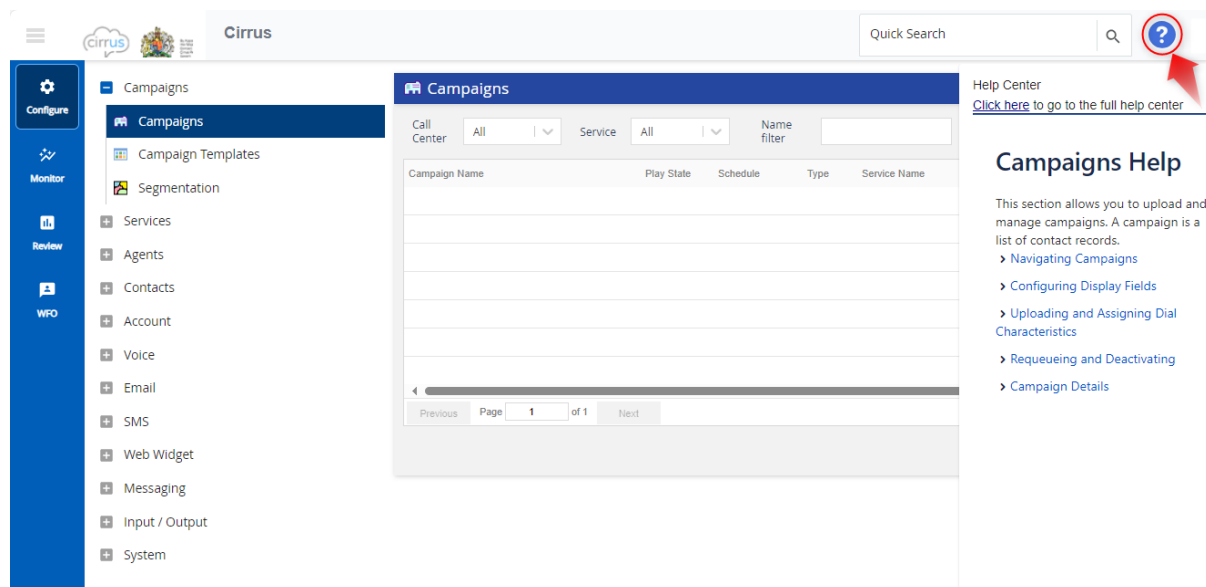
11.2 Training Approach (70/20/10)

Crucially, our education approach doesn't stop after Go-Live. Agents, Supervisors and Administrators will always have access to our online help centre which is constantly being improved with updated and new content. Cirrus Portal users also have the in-product Dynamic Help for specific and targeted help guides.

We equip your team for ongoing success with our robust 70/20/10 training approach. This proven framework fosters self-sufficiency while ensuring comprehensive support at every stage, from everyday tasks to advanced skill development.

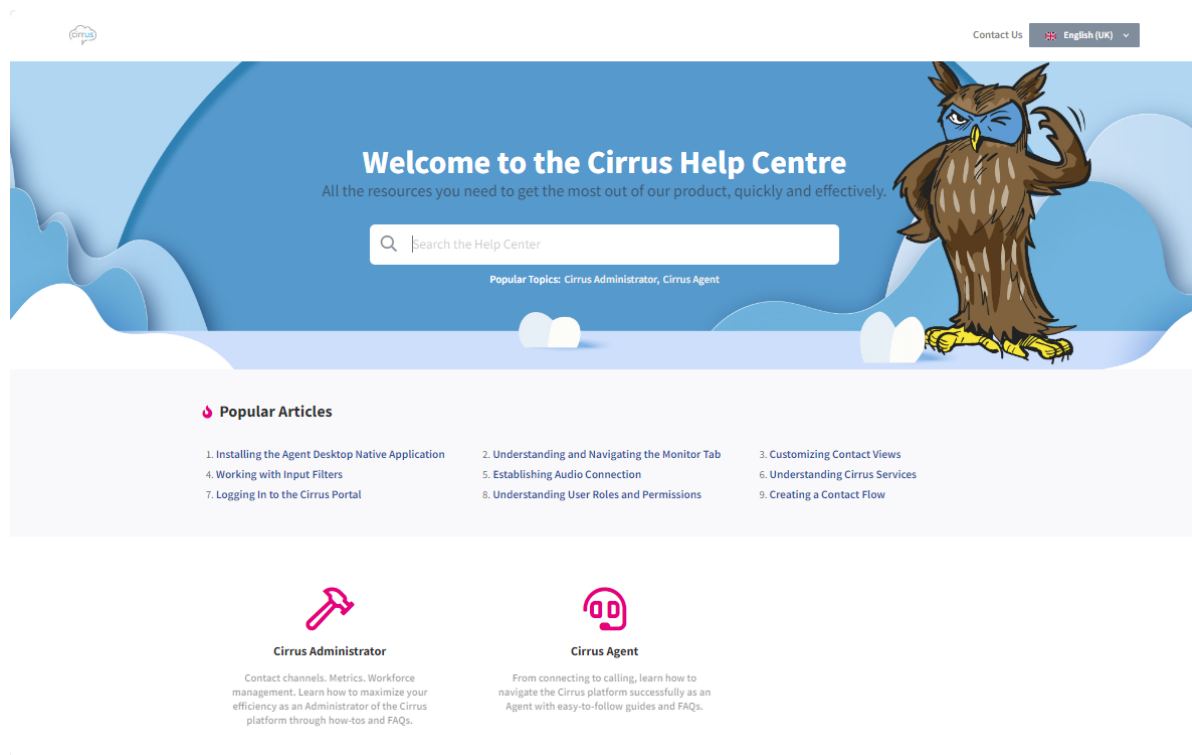
11.2.1 Dynamic Help - the 70%

When navigating throughout the Cirrus portal, our Dynamic Help tool is there at every step of the way to provide Supervisors and Administrators with hints, tips, and guides. We know that it can be a daunting concept to fully learn how to use the portal. That is why we built our Dynamic Help. Users don't need to navigate away to a separate help site or wait for the Support Desk to come back online to ask a question. All the answers are right there within the portal with minimal searching required. Trying to add a new agent desktop and can't remember how? Simply click the Dynamic Help question mark in the top right of the screen and portal users will be presented with specific information to help explain options, tabs, and settings.



11.2.2 The Cirrus Help Centre - the 20%

Not all questions can be covered by the Dynamic Help tool. For example, an agent may need to ask, “How do I log in?”. Enter the Cirrus Help Centre. Cirrus customers can navigate to our online help centre 24/7/365 to browse an extensive library of articles and videos providing both administrators and agents specific guides that are easy to follow and don’t require an endless scroll of reading. The centre includes a “Google-like” search function making it easy to find an applicable guide. The home page includes a ‘Popular Articles’ feature to speed up the question to resolution time dramatically. Just click on the link to get started: <https://help.cirrusconnects.com>



11.2.3 Live Classroom Training - the 10%

The final 10% of our education approach is covered by live sessions with our training team. Sessions are split up into useful bitesize chunks allowing users and administrators to avoid the feeling of being overwhelmed by the quantity of information covered. Cirrus product trainers structure the sessions to ensure attendees are equipped with the knowledge of both the concept of what they are learning and the procedure to back it up. To boost attendee participation, various polls, quizzes, and surveys are used. Questions are actively encouraged throughout the session by means of raising hands. There are no “silly” questions, but we know that sometimes, people don’t always want to speak up. That’s why we offer attendees the ability to type their questions anonymously. After every training session, a satisfaction survey is always shared and stored for future reference. These surveys are vital to improving our customer training sessions to ensure that no stone is unturned in the customer education journey.

12 Customer Success Management

12.1 Overview

We assign a dedicated Success Manager to you to guide you for the duration of your contract at no extra cost to you. Their primary objective is to help you get the best out of our solution by identifying opportunities to improve ROI. We know that our most successful partnerships almost always develop out of a close 2-way understanding between our teams.

12.2 Customer experience consultancy

Success Managers are an extension of your Operations team. They undertake regular meetings to understand your developing scenarios and any inherent risks, challenges and opportunities posed. Their recommendations are strategy-based, not product-based and they consider the motives of the wider customer team and align with senior management goals.

12.3 Aligning technology to results

Through collaborative consultation, Success Managers gain a deep understanding of your operations and provide expert guidance on how our solutions can adapt to your evolving needs and help shape any future project requirements. New innovations allow you to reduce agent-handled workload, improve consistency of information provided to customers, decrease the amount of time taken for a customer to access the support they require and provide valuable insight into customer interactions which would not have otherwise been available.

12.4 Supporting ongoing goals

Success Managers ensures the solution is fit not just for today's requirements, but also throughout the lifetime of your contract. They are dedicated to optimising every area of the service based on your developing requirements – which we know will look very different in 6 – 12 months compared to now.

13 SLA & Escalations

Priority	Description	Response Time	Resolution Time
Priority 1	Critical Business Impact - The customer, regardless of the environment or product usage, has a complete loss of service or resources for which no workaround exists, and the customer's work cannot reasonably continue. An example for the Customer to receive any calls.	30 Minutes	2 Hours
Priority 2	Serious Business Impact – The Customer is experiencing significant or degraded loss of service. An example of a Priority 2 issue would be a major service flaw with a workaround. The Intelligent Call Routing may not be working <u>across all services</u> , but calls can be routed to agent DDIs	1 Hour	3 Hours
Priority 3	Minor Business Impact – The Customer has experienced a minor loss of service. A minor service flaw with a workaround represents this type of issue. The Intelligent Call Routing may not be functioning on a <u>specific service</u> , but calls can be routed to agent DDIs.	3 Hours	3 Working Days
Priority 4	No Business Impact - product requests and improvement that are not critical or serious, but would still be beneficial to the Customer. It may be a request for a new feature, a change to an existing feature, or a fix for a minor bug.	3 Hours	7 Working Days

Our escalation process works in a very fluid manner, meaning escalating any issue or request is simple. The Service Desk always commits to having three contacts at any one time trained in dealing with escalation scenarios. The below table confirms each role and contact detail on the escalation path.

Level	Contact Name	Contact Role	Email
1	Jenny Harvey	Service Desk Manager	Jenny.Harvey@cirrusresponse.com
2	Bernard Ross	Operations Director	Bernard.Ross@cirrusresponse.com
3	Paul Barclay	COO	Paul.Barclay@cirrusresponse.com
4	Jason Roos	CEO	Jason.Roos@cirrusresponse.com