

Service Description for G-Cloud 14

Verint Engagement Data Management

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G-Cloud 14

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Verint Engagement Data Management Service Description

Service Overview

Government and industry regulations, liability issues, risk management practices, and a need to review and evaluate the quality of engagements with customers, have prompted many organisations to record the engagements between their customers and employees. But capturing a record of engagements is only one part of the challenge. Storing securely long-term, easily retrieving and leveraging the information for verification, business intelligence, and optimising customer engagement are equally important.

Many organisations are awash with data – from voice calls, digital interactions and customer feedback surveys. But the volume of interactions, the proliferation of communication channels, and the data silos they create, make it difficult to gain cohesive and meaningful insights into why, where and how performance can be improved.

Verint Engagement Data Management (EDM) is a platform that has been specifically designed to address such challenges. EDM sits at the heart of the Verint cloud platform, providing the foundation upon which many of Verint's advanced customer engagement capabilities are built.

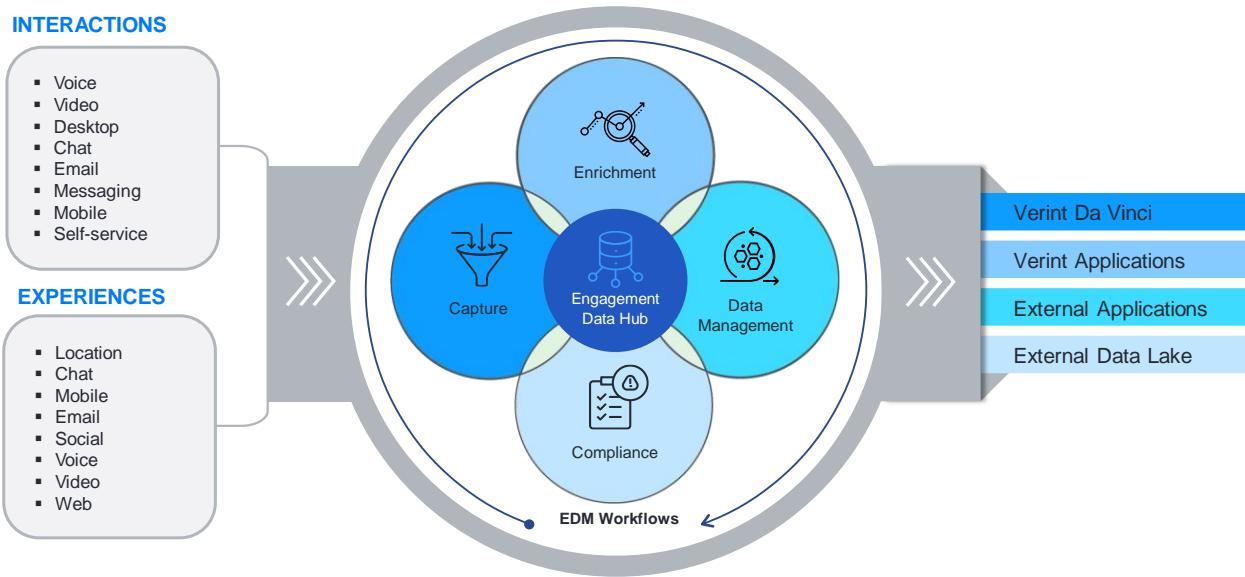
Furthermore, EDM provides a platform on which many organisations are basing their entire engagement data management strategy, leveraging EDM's unified and normalised view of all engagements across all channels to make sound, data-driven decisions that drive success.

Engagement Data Hub

Central to EDM is the *Engagement Data Hub* – an open data hub for the storage and management of customer engagements, including both *Interactions* and *Experiences*. Interactions are recordings of direct conversations between your organisation and customers, such as calls, chats, emails, instant messages, social media exchanges etc. Whereas Experiences are records of indirect communications such as survey and digital feedback results.

Verint EDM is the industry's first offering designed to help make this task easy and affordable. Not only is the Engagement Data Hub leveraged by many of the Verint products, with EDM you can now also build an interaction data hub to feed your analytics tools and enterprise data lake. You can eliminate data silos, bring structure to unstructured engagement data across all voice and digital channels, while reducing data management costs. And you can enrich your data to drive even deeper insights from it.

Verint Engagement Data Management makes it easy for you to leverage an Engagement Data Hub that brings together all your interaction and experience data in one place. Data from billions of engagements, captured across many different channels, is harmonised to make it much easier to analyse and work with.



Engagement Data Management Capabilities

In addition to the Engagement Data Hub, Verint EDM also provides a range of sophisticated capabilities for the capture, enrichment, and management of interactions and experiences, as well as a range of advanced facilities allowing your compliance requirements to be addressed:

- **EDM Capture** provides full omnichannel ingestion and/or live capture for voice, video, text-based interactions, and experiences across multiple channels, including:

- TDM
- VoIP
- PBX / ACD
- Audio and video
- Chat
- Digital collaboration
- Email
- Face-to-face
- Mobile voice/SMS
- Trading turrets

The solution can also capture the corresponding activities taking place at employees' desktops, such as keystrokes, data entry, screen navigation, and after-call wrap-up, which allows an interaction with a customer to be correlated with the corresponding actions taken on a user's desktop.

- **EDM Enrichment** provides a menu of options allowing interactions and experiences to be enriched with additional data. You can use your choice of analytics tools to generate additional enrichment data via EDM's APIs, and/or you can also select from a range of optional pre-built enrichment capabilities within the EDM platform:

- CTI Integrations — Add IVR and call-related data including customer identity, customer profile, product and service details, call holds, transfers, and duration.
- Speech Transcription and Enhanced Speech Transcription — Transcribe speech to text.
- Audio Quality Statistics — Identify gaps or audio quality issues for quality assurance and compliance.

- **EDM Data Management** takes the hard work out of managing data lifecycles and enforcing data access with granular controls. Configurable workflows are included to audit data access and manage data retention. Your policies are applied and monitored across all interaction and experience data, while comprehensive APIs and adapters allow free export to your data lake and other applications.

All data within the Engagement Data Hub is fully encrypted at the point of capture using advanced encryption and remains encrypted both in transit and at rest throughout its life cycle, providing total security for your sensitive data. Only appropriately privileged users are provided with the ability to securely access engagements via encrypted HTTPS browser connections.

- **EDM Compliance** capabilities allow you to improve compliance and reduce risk with unified data management, governance, and security. Support compliance with data regulations such as PCI, GDPR, HIPAA, CCPA, MiFID II and others.

It's much easier to enforce common compliance standards when you do so in one place. By bringing all your customer engagement data together, Engagement Data Management does just that. It provides configurable workflows to manage data storage and retention, data access, and preserve data for litigation hold, investigations and regulatory audits.

Additional optional compliance modules are also available for:

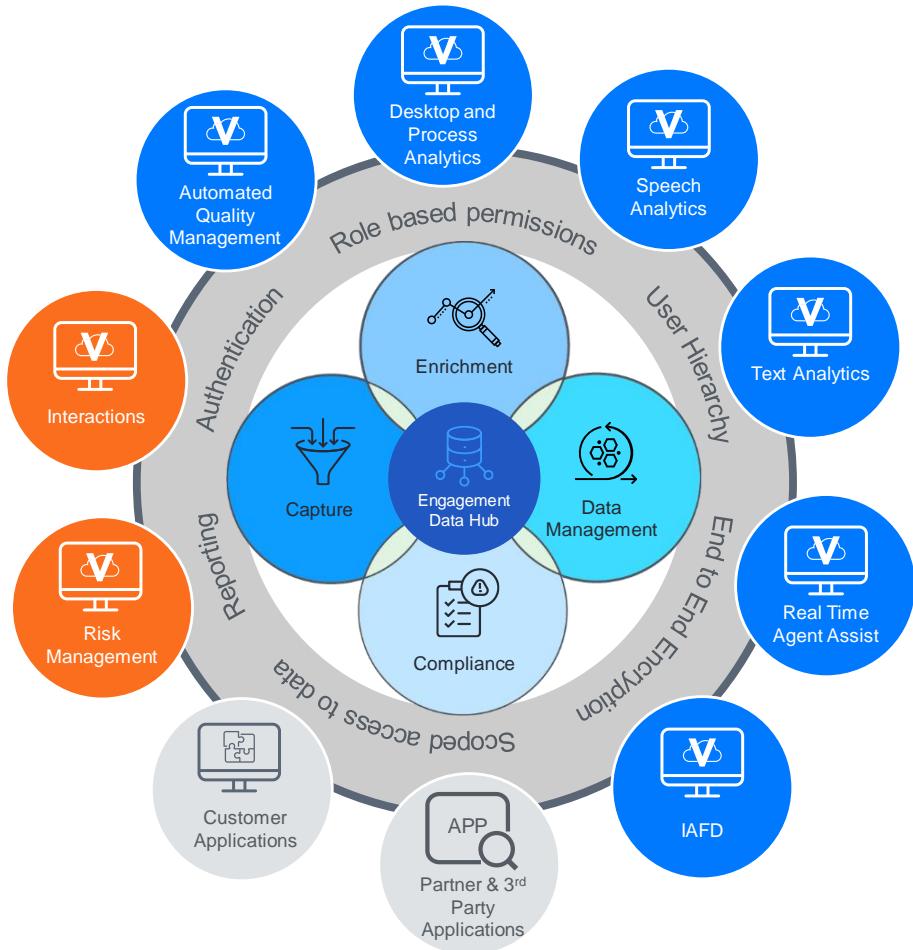
- Speaker authentication
- Automated recording verification
- Automated quality management
- Speech and text analytics
- Control of interaction real time capture start, stop, pause, and resume

EDM Applications

EDM includes two pre-built end user applications, *Interactions* and *Risk Management*, which provide end users with all of the functions they need to access the Interactions stored within the Engagement Data Hub. Customer and partner applications can be readily developed using Verint's rich APIs.

An optional Face to Face Capture application can also be deployed where such interactions need to be captured.

Many other applications that make up the Verint Customer Engagement Platform also leverage the power of Engagement Data Management. Please refer to the separate listings for these other capabilities for more details on the benefits they deliver.



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Users access the solution via a modern and intuitive browser-based portal, which includes functions to easily search and replay recorded interactions, and view all associated metadata, regardless of how and where they were recorded in your enterprise. This allows the entire customer journey through all channels to be accessed and viewed in the same place, providing levels of insight, consistency, and oversight not possible when records are locked in disparate systems. What's more, you can share these interactions throughout your organisation, providing understanding of customer and staff behaviours, and to help drive decision making.

Team of Agent Bots and Enterprise Bots

Additionally, AI and Automation are at the very heart of Verint EDM. Multiple Bots are available to help reduce operating costs, whilst elevating Customer and Agent experience and improving efficiency. Each Bot is embedded within Customer Experience workflows and focuses on providing one specific function by working seamlessly in the background without disruption to deliver improved business outcomes. Each Bot is designed to work in harmony with other Bots, to further enhance the experience.

Agent Bots	Increase Agent Capacity								
Enterprise Bots	Increase Capacity of Other Roles in CX Workforce								
									
Advanced Containment	Wrap-up Voice	Wrap-up Digital	Performance Coaching	Knowledge Suggestion	Sentiment Coaching	Agent Virtual Assistant	Agent Transfer	Self-service Transfer	
									
Workload Forecasting	Compliance Scoring	CX Scoring	Extended Workload Forecasting	Intent Discovery	Knowledge Creation	Performance Scoring	Quality Template	Transcription Tuning	

Verint Customer Engagement Platform

All of this advanced functionality is delivered through the Verint Cloud Platform - a single unified Customer Engagement Platform. EDM can be used in tandem with other optional components of the suite, such as Verint Quality Management, Automated Quality Management, Speech and Text Analytics, Real Time Agent Assist, Workforce Management, Performance Management, Identity Authentication & Fraud Detection, Experience Management, and much more. Please refer to the separate listings for these other capabilities for more details on the benefits they deliver.

Verint Compliance Archive Service

One challenge of migrating to new systems and technology is what to do with the data collected by previous systems. This challenge is especially important in the contact centre, where customer interaction recording data is not only valuable, but can also be impacted by compliance regulations that require it to be archived and retrievable for extended periods.

At Verint, we understand the challenges associated with version upgrades and new implementations of recording and contact centre software. We also understand the importance of maintaining valuable data collected by existing and previous platforms. That is why we offer Verint Compliance Archive, an optional set of standalone services based upon Verint Engagement Data Management, that can extract older interaction recordings, place them in a secure cloud repository and enable them to be queried using their metadata. Using a simple, web-based user interface, you can access the data, and play back and export when needed.

With Verint Compliance Archive, Verint Customers can benefit from a solution that is:

- **Economical** – Customers save money and time by fully decommissioning older recording systems. Once calls are migrated to Verint Compliance Archive, there is no need to maintain the hardware and associated software licenses, maintenance contracts, training, and knowledge of those systems.
- **Practical** – The solution provides a cloud-based platform that enables customers to access interaction recordings from anywhere using a simple, uncluttered user interface.
- **Simple** – Customers can access older data instantly and retain it according to company policies and regulatory compliance mandates.
- **Secure** – Verint Compliance Archive provides enterprise-grade security, from initial data extraction to long-term storage using AWS and Amazon S3 storage.
- **Familiar** – Verint Compliance Archive is based on Verint EDM, ensuring that users are presented with a known interface and experience, minimising training, and internal support costs.

Verint Compliance Archive helps customers isolate their archived data which can contain compliance violations such as PCI, HIPAA, and GDPR. It also provides advanced access control to allow only authorised users access to this archived data.



Key Features and Benefits

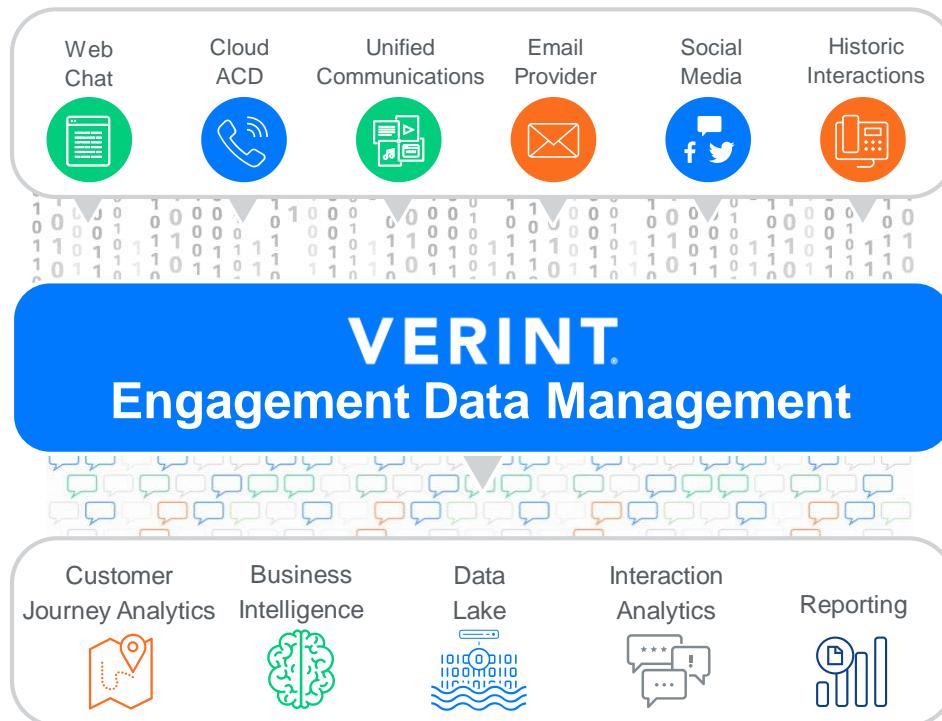
Engagement Data Hub

Central to EDM is the *Engagement Data Hub* – an open data hub for the storage and management of customer engagements, including both *Interactions* and *Experiences*. Interactions are recordings of direct conversations between your organisation and customers, such as calls, chats, emails, instant messages, social media exchanges etc. Whereas Experiences are records of indirect communications such as survey and digital feedback results.

Verint EDM is the industry's first offering designed to help make this task easy and affordable. Not only is the Engagement Data Hub leveraged by many of the Verint products, with EDM you can now also build an interaction data hub to feed your analytics tools and enterprise data lake. You can eliminate data silos, bring structure to unstructured engagement data across all voice and digital channels, while reducing data management costs. And you can enrich your data to drive even deeper insights from it.

Verint Engagement Data Management makes it easy for you to leverage an Engagement Data Hub that brings together all your interaction and experience data in one place. Data from billions of engagements, captured across many different channels, is harmonised to make it much easier to analyse and work with.

Here the data can be enriched to create cohesive, multi-channel engagements that can reveal insights which were previously hidden and make them available to managers, strategists and executives across your organisation.



Our open approach eliminates the hard work of managing your engagement data. APIs and adapters allow you to freely import and export data, so you can bring together, manage, and enrich interactions from a variety of channels and modalities:

- Brings all your interaction data, including from external sources, together in one place.
- Harmonises the diverse data types into a cohesive whole.
- Allows you to enrich this data to add more value.
- Supports data integration, management and compliance, out-of-the-box.
- Provides an open foundation for building new apps and workflows.
- Allows data export from your engagement data hub free-of-charge.

Capture

Capturing Interactions

Verint EDM Capture is a proven, reliable system for capturing interactions and associated metadata, and subsequent storage within the Engagement Data Hub.

The core EDM service includes the ability to ingest media interactions such as calls, videos, screen recordings, and text-based interactions such as chats, emails, social messaging etc. As an option, EDM also allows the real-time capture of media streams directly from your systems.

This ability to pull in interactions from wherever needed allows EDM to deliver a single harmonised Engagement Data Hub, with all the many benefits this brings, irrespective of whether the EDM solution itself is capturing interactions directly or they are being ingested from third party systems.

EDM can support thousands of channels and multiple sites across your enterprise, with a single point of administration and open standards storage. This helps free your organisation from the costs, constraints, and complexity posed by multiple proprietary systems.

- Business Driven Control of capture
- Extensible interaction Context (includes Free and Fixed seating)
- Monitor Interactions in Real Time
- Real Time Block/Delete
- Multimedia Support (includes Multichannel)
- Gathering of Associated Interactions

Ingestion

EDM includes a range of APIs and ingestion capabilities that allow interactions and their associated metadata to be ingested into the platform as needed. These can be used directly by customers as needed to ingest interactions into the EDM Interaction Data Hub, or if preferred Verint professional services can assist in the integration setup.

Real Time Media Capture

EDM can as an option also deliver a complete end-to-end enterprise interaction recording solution, by directly capturing real time media streams from your systems. This eliminates the need for separate recording systems, minimising both cost and complexity.

Verint EDM provides pre-built ready to use integrations with all leading telephony, unified communications, CCaaS or UCaaS platforms, including Avaya, Cisco, Genesys, Amazon, Twilio, Alcatel, Aspect, Mitel, NEC, Unify and others. And in many cases capture of video calls is possible should these be needed. Integrations with less common providers can be readily supported if needed using Verint's extensive integration toolkit. Please contact Verint for the most up to date list of options.

Through computer-telephony integration (CTI), the solution provides real-time control over capture and indexing within the Interaction Data Hub and collects available data that is associated with interaction recordings to make search and retrieval as simple as possible, as well as providing a rich set of information about each interaction.

Screen Capture

Screen Capture can be used in capturing the user's desktop session whilst they are handling an interaction. This can be used in conjunction with all real time media capture deployments, as well as many ingestion-based integrations. This allows desktop usage whilst an interaction is taking place to be captured and played back at the same time as the interaction recording, which allows desktop application usage to be assessed to ensure compliance with procedures and surface areas for improvement.

This can be invaluable in coaching advisers in best practice, as well as evidencing procedural improvements that could be used to save time and/or improve customer satisfaction and compliance.

Face to Face Interactions

Although organisations have captured and monitored customer interactions in their contact centres for many years, few possess capabilities for doing the same with live interactions in branch and off-premises venues, such as retail outlets or field offices.

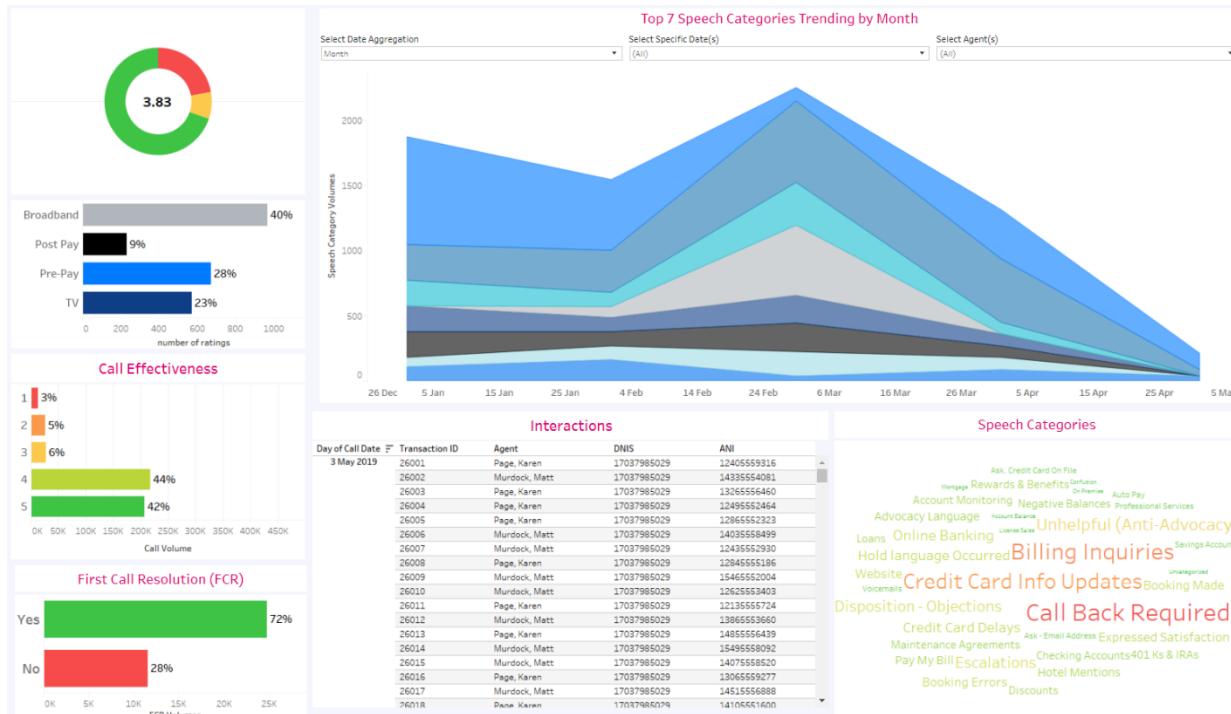
Verint Face-to-Face Interaction Capture is an optional, scalable, robust and secure solution that can capture face-to-face interactions between employees and customers at distributed locations, helping your organisation ensure quality and meet regulatory compliance requirements, while avoiding costly fines and protecting your reputation.

Capturing Experiences

Verint Engagement Data Management is part of the Verint Customer Engagement Platform, where it can operate independently or in tandem with Verint's Experience Management solutions. Together, Engagement Data Management and Experience Management create a unified Customer Engagement Data Hub within the Verint Cloud Platform.

EDM includes a range of both API and file-based mechanisms that allow experiences such as survey and digital feedback results from third party systems to be ingested into the Engagement Data Hub.

- For organisations leveraging Verint Experience Management, results are published into the Engagement Data Hub automatically.
- Experience data in the Engagement Data Hub can be exported whenever needed (e.g. for use in a data lake).
- Experiences can include identifiers (e.g. customer IDs) that can be cross correlated with identifiers associated with Interactions, allowing the complete end to end view of all customer engagements to be modelled within the Engagement Data Hub. Where experiences are associated with interactions (e.g. post call surveys) then these can also be correlated to allow experience data provided by customers to be tied back to the interactions that drove those outcomes.
- Experience Management includes a rich Analytics and Business Intelligence capability allowing a wide range of both standard and custom reports and dashboards to be produced to provide insight into all the rich data held within the Engagement Data Hub. This allows, for example, drillable dashboards to be produced that provide a holistic view of all customer engagements, including both interactions and experiences and associated enrichment data, providing unparalleled visibility and insight into the complete end-to-end customer journey and experience.



Please refer to the separate listing for more details on Verint Experience Management.

Enrichment

EDM allows you to enhance the value of captured interactions and experiences by enriching with additional engagement data. Interactions all contain a common set of standard metadata, which EDM normalises across vendors using our pre-built adaptors. Similarly, EDM normalises metadata across channels (where relevant – e.g. there is no concept of hold in emails), providing a single harmonised view of all engagements.

Interactions can be enriched as part of the capture process, allowing both interactions and all associated metadata to be ingested into the Engagement Data Hub. In addition, EDM includes a set of Enrichment APIs, which can be used to associate additional data with engagements already in the Engagement Data Hub as needed, for example:

- Add customer ID to enable reconstructing customer contact history / journeys.
- Add metadata for deeper analytics / slicing groups of customers - products, customer value, outcome of interaction (order/no order), spend history etc.

As well as allowing you to ingest standard enrichment data as part of the capture process, and use your choice of analytics tools to generate additional enrichment data, you can also select from a menu of standard Verint enrichment options, including:

- CTI Integrations – add IVR and call-related data including customer identity, call holds, transfers, and duration.
- Speech Transcription – transcribe speech to text.
- Audio Quality Statistics – identify gaps or audio quality issues for quality assurance and compliance.

Data Management

EDM includes a broad range of data management capabilities developed on the back of Verint's 25 years+ of heritage in delivering enterprise recording solutions. EDM data management is the difference between simply capturing an interaction or experience compared to providing full lifecycle management of engagement data safely and reliably, and in accordance with compliance rules.

EDM provides a comprehensive set of facilities for managing many different data types and sources – for data access, retention, security, and export:

- Interactions and Risk Management applications
- Archive Management
- Flexible Retention Rules
- Comprehensive Access Controls
- Audit of Access
- Interaction Export
- Interaction Delete
- Redact (mask) sensitive data on replay
- Morph voice interactions to hide caller identity

EDM takes the hard work out of data management by managing data lifecycles and enforcing data access with granular controls. EDM provides configurable workflows to audit data access and manage data retention. Your policies are applied and monitored across all interaction and experience data, while comprehensive APIs and adapters allow free export to your data lake and other applications and systems.

EDM includes a range of data management APIs:

- Interaction Player API
- Interaction Workspace API
- Interaction Search API
- Interaction Data Export API

EDM also provides an optional Interaction Export with Processing capability that allows exported interactions to be processed during export, for example allowing transcoding media interaction recordings to a portable format.

Storage

Storage within the service is provided using secure AWS S3 object storage. Verint can provide the customer with this S3 storage container, or customers can procure their own directly from AWS. If the latter, customers can select either Standard storage or Infrequent Access storage, and then provide the Verint Professional Services implementation team the necessary access information.

Roles and permissions

The Verint Cloud Platform, of which EDM is a central part, includes multi-level permissions that allow control of each users' scope (i.e. what data users can see) and roles (i.e. what users can do). Furthermore, scope assignments can be automatically managed so that users see subsets of filtered information based on their positions in the solution's user hierarchy. For example, a team leader and his/her team members can be assigned to a hierachal group, with the team leader at a higher level. This enables the team leader to be granted access to interactions for the members of their team.

Users can also be assigned very specific rights from an extensive list of functions, such as the right to play back an interaction, the right to download interaction recordings, and much more. This flexibility allows organisations to set the system up in a manner that reflects their own organisational structure, with access provided to only data and functions each user specifically requires.

Exporting Interactions

EDM includes standard functions that allow interactions in the Engagement Data Hub to be exported as needed, without additional charges. These facilities include setting up export of historic interactions by date, as well as an ongoing automatic export of all interactions as they are captured. In addition, API facilities allow interactions to be accessed and exported by your own systems and applications as needed.

As an option, a separately licensed EDM Export with Processing option can be leveraged to:

- Configure multiple targeted export campaigns that allow specific interactions to be targeted for export, for example where only limited samples are required, where interactions of specific types are needed, or when interactions for only a subset of the estate need to be exported.
- Transcode media recordings to a range of portable formats, allowing interactions to be replayed in the media player of your choice.

Interaction Deletion

EDM includes dedicated interaction deletion capabilities that allow all data associated with selected interaction recordings to be entirely removed from the solution. This capability allows a search to be issued and for the results to be validated prior to interaction recordings being deleted in bulk.

These facilities provide the tools necessary to allow GDPR deletion requests to be addressed, by removing all record of given customer interactions to be permanently purged from the solution.

End to End Encryption

End to end encryption is provided as an integral part of all Verint cloud solutions and ensures that all data is always secured. Verint EDM uses AES-256 encryption or better, which protects data as it's captured, moved to the Engagement Data Hub, and accessed.

Since engagement data remains encrypted through its entire lifecycle, this provides the additional assurance needed in many regulated environments by making sure that sensitive customer and employee data is always protected.

Reporting

The solution includes a full suite of built in reporting functions, which allow management information on all aspects of the EDM solution to be produced, and these reports can be run on demand, scheduled, emailed, and even used as the basis for dashboards.



Compliance

EDM allows you to improve compliance and reduce risk with unified data management, governance, and security. Support compliance with data regulations such as PCI, GDPR, HIPAA, CCPA, MiFID II and others.

It's much easier to enforce common compliance standards when you do so in one place. By bringing all your customer engagement data together, Engagement Data Management does just that. It provides configurable workflows to manage data storage and retention, data access, and preserve data for litigation hold, investigations and regulatory audits.

Compliance capabilities included with EDM:

- Per-call encryption and fingerprinting.
- Legal/litigation hold, allowing selected interactions of importance to be locked, preventing them being purged or deleted whilst investigations are taking place.
- Regional - keep interaction recordings in a specific geography.
- Interactions / Risk Management (role/org scoped access controls, legal hold, replay redaction, replay approval, interaction delete).
- Control of interaction recording start, stop, pause, resume, and block.
- AIM – interactive agent drive control of interaction recording start, stop, pause, resume, block.
- Delete for GDPR, CCPA, LGPD (Brazil), POPI (South Africa), etc.

Optional compliance modules are also available for:

- Speaker authentication
- Automated recording capture verification
- Automated quality management
- Speech and text analytics

Please refer to the separate listings for these capabilities for more details on their capabilities and the benefits they deliver.

EDM Applications

Interactions Application

All users who need to access the solution do so via a simple, modern, and intuitive browser-based portal, which allows users to search and replay interactions as needed. A range of workflow capabilities enable users to collaborate and manage cases/investigations with ease. All access to the system is role and privilege based via organisational hierarchy, allowing admin users to fully control which employees have access to which interactions and data, as well as the functions of the solution they are permitted to access.

Search & Replay

Central to these capabilities are functions for searching and replaying interactions, and the solution provides a range of advanced capabilities for this purpose, including any combination of:

- Searching for interactions by organisational hierarchy (e.g. targeting interactions for individuals, teams, departments etc.)
- Searching for interactions handled in the previous n days or in specific date & time ranges.
- Searching for specific types of interactions (e.g. just audio calls with associated screen recordings, or just chat sessions etc.)

- Searching for interactions with given characteristics, such as ranges of duration, and for call recordings with specific dialled numbers, direction, hold time, number of transfers, number of holds, number of conferences etc.
- Searching for interactions that are tagged with specific custom data, such as customer references, account balances etc.
- Searching for interactions that have been marked with specific flags.

Advanced Search

Search For: Interactions

SEARCH CRITERIA

- Employees
- Date Range
- Interactions**
- Contacts
- Custom Data
- Recorders
- Switches
- Categories
- Text

INTERACTIONS DATA

Interaction Type

Desktop Email Feedback
 Instant Messaging Phone Real Time Monitoring
 Social Media Chat

Select All Clear All

Media Type

	Must Include	Must Exclude	Optional
Audio:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Screen:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Attachment:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Text:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Video:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Share:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Include All Exclude All All Optional

Duration: Select

Search For: Interactions Interaction Date Range: Last 7 days Language: English (UK)

Clear All Parameters Search Save Save As Cancel

Example Search

Users can also create saved searches to allow common requests to be invoked in a single click, for example a team leader could create a saved search for chat interactions associated with the new starters in their team, or for all calls that arrived on a given number that are more than 20 minutes in duration. The possibilities are endless.

When a search is executed, within seconds users are presented with a scrollable list of matching interactions to choose from, again via a simple click. Results can be further refined using a panel of dynamic filters that users can select as needed to focus in on the interactions of most interest. This can further reduce the length of time needed to locate the right interactions for review.

VERINT Workforce Optimization

Interactions Administration Form Designer Real Time Folders Analysis Reports Search Evaluate

SEARCH RESULTS

REFINE RESULTS

Start Time: 03/04/2024 10:04:24 10/04/2024 10:04:24

Interaction Duration: 00:12 1:00:44

Employee: Rutherford, Adam (71) Fisher, Olivia (56) King, Amelia (53) Mathis, Jake (51) Rand, Dannv (49)

SEARCH RESULTS Retrieved 507 items

Start Time	Interaction D...	Employee	Contact F...	Dialed From ...	Dialed To (D...	Extension	Data	Media Type	Deleted	Interaction T...	Interaction T...	Rema
09/04/2024 16:01:47	00:20	Cage, Luke	1836964222	420009	420009					0.00	0.00	
09/04/2024 16:00:48	00:59	Cage, Luke	1836964222	420009	420009					0.00	0.00	
09/04/2024 15:55:07	00:45	King, Amelia	4445657357	421007	421007					0.00	0.00	
09/04/2024 15:52:47	00:18	Rutherford, Ada	1591453274	421008	421008					0.00	0.00	
09/04/2024 15:52:35	01:26	Rutherford, Ada	1949204295	421008	421008					0.00	0.00	
09/04/2024 15:52:35	00:12	Rutherford, Ada	1591453274	421008	421008					0.00	0.00	
09/04/2024 15:49:58	08:33	Hodges, Lily	dcampbell@b...	420008	420008					0.00	0.00	
09/04/2024 15:46:52	1:00:31	Rutherford, Ada	hzucker@b...	420008	420008					0.00	0.00	
09/04/2024 15:45:46	02:40	Murdock, Matt	9864455757	420007	420007					0.00	0.00	
09/04/2024 15:41:01	03:46	Hodges, Lily	8496154963	420011	420011					0.00	0.00	
09/04/2024 15:41:01	02:41	Hodges, Lily	6720361196	420011	420011					0.00	0.00	
09/04/2024 15:40:30	04:16	Cage, Luke	lmorgan@b...	420008	420008					0.00	0.00	
09/04/2024 15:35:20	01:24	Jones, Jessica	2451028535	420008	420008					0.00	0.00	

Example search results

After selecting an individual interaction for playback from the list screen, the user is presented with a dedicated workspace that renders the chat, voice or email interaction and where relevant any associated screen recording. All are rendered in a clean and simple manner making navigation and replay quick and easy for all modalities allowing visibility of the full customer journey across all channels in a single uniform interface.

INTERACTION REVIEW

INTERACTION 1 / 1 Date/Time: 08/04/2024 16:27:23 Murdock, Matt

Search Interactions and Forms > Search Results

TRANSCRIPTION | TAGS | SCREEN

Legend: Call Tagged Term 00:03:00

00:03:00 Thank you for calling thank you for calling overall bank this is adam speaking how can I help you today

00:10:00 Hello my name is robert and credit cards you have today and I find that I like I like and I'd like to submit an application

00:10:05 Well that's wonderful I can definitely help you with that and mister smith before we process with the process of the credit card application I would like to let you know that I will need to submit a credit check and get your verbal consent is that okay with you

00:15:00 Well that's great

00:15:05 Okay mister smith thank you very much here is the first disclosure that I need to read it has to do with the actual credit check on here it gives I authorize well what bank to obtain personal and credit information about me from any source I sure - certified all the information is true in correct I have no underscore financial obligations - no they're going will be used determine my credit where the - do you consent

01:05:00 I do

02:05:00 mister smith I need you to say yes I can -

02:10:00 Okay yes I can

02:15:00 Perfect I will submit a check now okay that is done now I hate to reach you a second disclosure asking you to acknowledge that it's credit card that you have selected is the right one for you

02:40:00 Okay

02:45:00 Okay so here it goes mister smith you acknowledge that it's a benefits and risks that you had been informed of your selection is appropriate for you given your financial needs circumstances involves you acknowledge

12:49 10/04/2024

Example synchronised call and screen interaction recording replay

TRANSCRIPTION | TAGS | TEXT

Start: 08/04/2024 13:11:23 End: 08/04/2024 13:22:33 Handle Time: 00:11:00 Attachments: 0

Matt Murdock Messages: 10 Robot: 0 Jamie Braddock Messages: 7

08/04/2024

I'd like to get a credit card 13:11:23

Hello Jamie Braddock 13:12:11

How to Apply for a New Credit Card

Orbital offers a variety of credit card programs to meet your financial profile and credit needs. Once you apply we can provide you with the best options and value for your situation.

In order to apply for a credit card you must provide the following information:

- 1. Proof of identity. Valid Drivers' License, Passport, State Issued ID
- 2. Proof of income. Recent paystub from last 6 weeks
- 3. Declaration of current liabilities. Mortgage, car, any other hard assets
- 4. Credit score. Orbital Bank will pull credit for a \$10 fee

Click here to apply for one of these credit cards online.

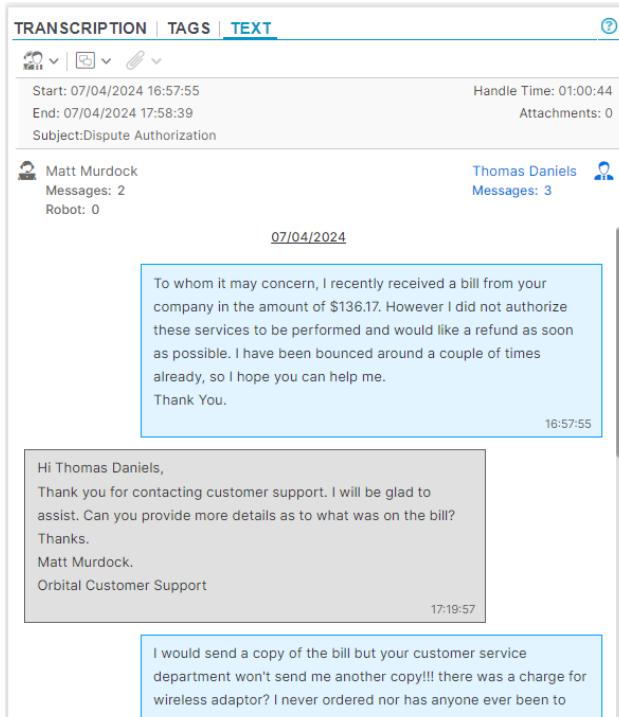
I see you are interested in one of our credit cards, correct? 13:12:19

Yes, I received an email stating I was eligible for one of your cards. 13:13:21

Great! We have several to choose from. Do you know which card you would like to apply for today? 13:13:57

I think it was an offer for 0% balance transfer. 13:14:27

Example replay of recorded chat session



Example replay of recorded email conversation

All of these facilities combine to allow the right interactions to be located more quickly and with less sifting through results, which saves time, improves productivity, and ensures that critical issues aren't missed.

Flags & Workflow

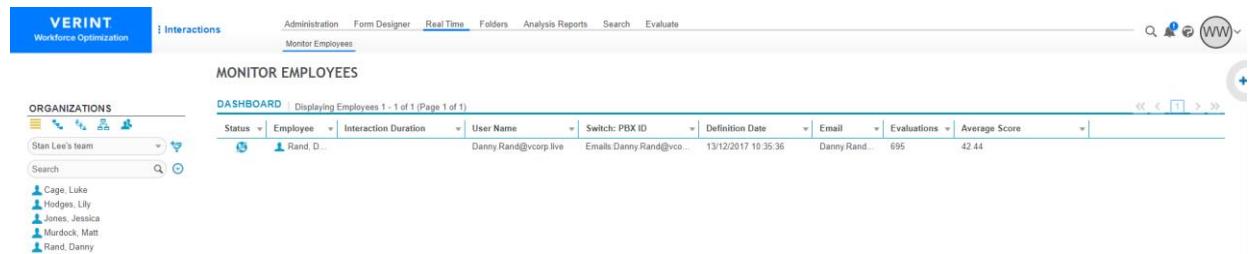
The application allows configurable flags and folders to be used to track important interactions. When a user locates an interaction of interest, these can be tagged using any of the flags you have set up in the solution. These flags remain associated with the interaction going forwards, which makes locating these interactions at a later time quick and simple.

Workflow facilities can automatically direct flagged interactions to other users as needed, presenting them in dedicated folders for review and action. For example, users could flag interactions as 'compliance breach,' and these interactions would then be automatically delivered to a 'compliance breach' folder available to users in a risk and compliance team. This quick and simple workflow makes sharing interactions of interest very straightforward and removes the need for users to use email or other manual processes to share intelligence.

EVALUATION FLAGS		CONTACT FLAGS	
<input type="checkbox"/> Show hidden flags		Add Flag	
Name	Description	Owning Organization	Status
Appeal Accepted	Mindray demo	Orbital Enterprise	Visible
Appeal Evaluation	Mindray demo	Orbital Enterprise	Visible
Appeal Rejected	Mindray demo	Orbital Enterprise	Visible
Calibration Process		Orbital Enterprise	Visible
Coach Immediately		Enterprise Users	Visible
Covid	Material Impact on customer	Enterprise Users - EMEA	Visible
Critical Error		Orbital Enterprise	Visible
Customer Kudos		Orbital Enterprise	Visible
Dispute Accepted	Demo	Orbital Enterprise	Visible
Dispute Rejected	Demo	Orbital Enterprise	Visible
Disputed Evaluation		Orbital Enterprise	Visible

Real time call monitoring

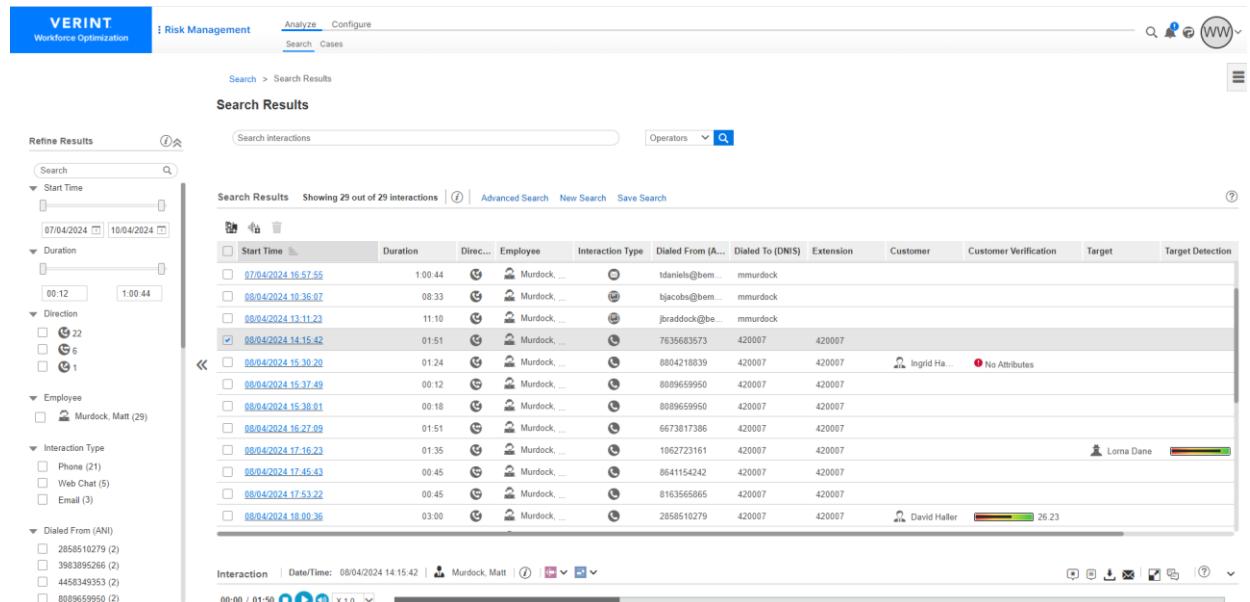
Where interactions are being captured in real-time, appropriately privileged users can use the solution's real-time-monitoring function to view the calls and/or screens being handled by other users in real time. Unlike similar facilities provided by some traditional telephony systems, the Verint real time monitoring is not limited to just audio, and the ability to view what the user is doing on their desktop can prove invaluable in understanding and driving changes in behaviour.



The screenshot shows the 'Monitor Employees' section of the Verint Interactions application. The dashboard includes a search bar and a table with columns for Status, Employee, Interaction Duration, User Name, Switch, Definition Date, Email, Evaluations, and Average Score. The employee 'Rand, D...' is selected, showing details like PBX ID, Email, and a recent interaction record.

Risk Management Application

In addition to the Interactions application described above, a separate Risk Management application can be provided to the users who need it. This provides many of the same rich capabilities as the Interactions application, plus specialist functionality geared towards the needs of risk and compliance officers investigating complaints, risk, compliance breaches etc.



The screenshot shows the 'Search Results' page of the Verint Risk Management application. It features a search bar and a table with columns for Start Time, Duration, Direction, Employee, Interaction Type, Dialed From (ANI), Dialed To (DNIS), Extension, Customer, Customer Verification, Target, and Target Detection. The table lists 29 interactions from 07/04/2024 to 08/04/2024, with various details like duration, employee names, and target detection status.

In addition to the same search functions provided by the Interactions application, Risk Management also provides users with the ability to:

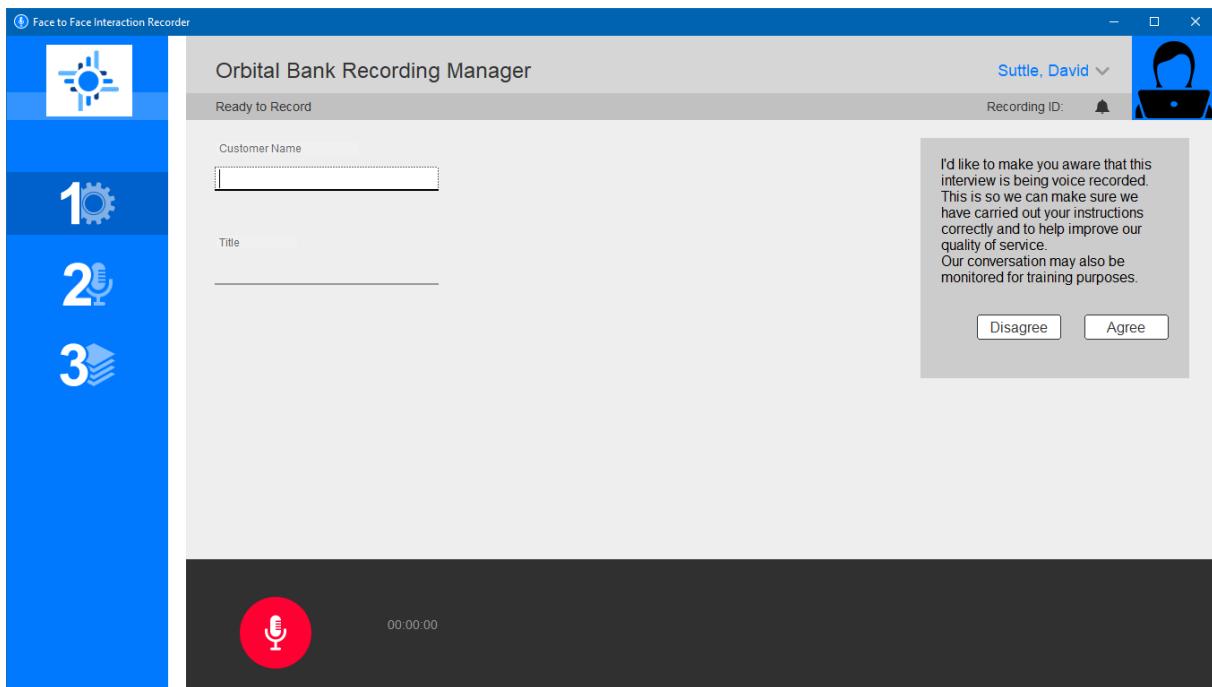
- Create folders/cases where interactions of importance or under investigation are kept, allowing cases and work to be organised directly within the Verint portal in line with your processes and each user's preferences.
- Tag interactions for custom treatment, for example allowing their archive retention policies to be influenced, targeting specific calls for later deletion, or marking interactions to make them easier to find by other users at a later time.
- Bulk export interactions and/or associated meta-data, for example allowing interactions that are under investigation to be passed to law enforcement or regulators.
- Authorise replay of interactions in situations where you need to prevent all users from having direct access to sensitive recordings of interaction.

Face to Face Capture Application

Verint's optional EDM Face-to-Face Interaction Capture application can help you ensure that employees in branch and field situations comply with regulations and policies while offering deeper insight into how effectively they handle sales opportunities and other interactions with customers. It can also provide you with a convenient way to verify in-person conversations in the event of a dispute or misunderstanding.

- Capture sales and/or advisory conversations in branch, retail, remote office, and field environments.
- Enables retrieval and review of conversations for quality and compliance.
- Centralises and archives interactions for retrieval as needed to help verify compliance, resolve disputes, protect brand reputation, and more.
- Facilitates compliance with regulatory requirements.
- Can operate standalone whilst disconnected from the network, allowing face-to-face interactions to be captured in environments where network access may be unavailable – all interactions are auto-uploaded the next time network access is available.

Installed on a Windows desktop, laptop, or tablet computer equipped with a microphone, the EDM Face-to-Face Interaction Capture can be activated either manually or through a desktop-based API to capture conversations between employees and customers as they occur. Capture can be stopped, started, paused, and tagged for easy search and retrieval. If needed, screens can also be captured alongside the conversation, allowing later review of agent desktop usage whilst conversations are taking place.



The application is highly configurable, enabling data entry and functionality to be customised and branded based upon organisation, branch/location, or individual basis.

You can even embed voice capture into iOS-based mobile applications using a software development kit that manages the capture, encryption, and ingestion of recordings taken from the built-in microphone on the device into the Verint Engagement Data Hub. This allows users equipped with iPhones or iPads to capture recordings of interactions whilst on the go or in environments where access to Windows devices is impractical.

SDK and APIs

Verint Engagement Data Management includes a complete set of APIs, with a dedicated online developer portal providing developers with the assets and support needed during any development that may be necessary. These APIs, which allows a wide range of integrations with your own systems. Examples of such integrations include:

EDM Capture

Standard:

- Interaction Player API
- Interaction Workspace API
- Interaction Search API
- Interaction Data Export API

Optional:

- Face to Face Capture

EDM Enrichment

Standard:

- Multimedia Ingestion APIs
- Capture Module APIs
- Software Desktop Recorder
- Sensitive Data Masking

Optional:

- Interaction Export with Processing

EDM Data management APIs

Standard:

- Audit API
- Interaction Player API
- Interaction Workspace API
- Interaction Search API
- Add customer ID to enable reconstructing customer contact history / journey
- Add metadata for deeper analytics / slicing groups of customers - products, customer value, outcome of interaction (order/no order), spend history etc.

Optional:

- Speech Transcription
- Audio quality statistics
- Application or Compliance Triggers (DPA)

EDM Compliance

Standard:

- Control of interaction capture - start, stop, pause, resume, block
- Transcription redaction API
- Delete API

Optional:

- Speaker Authentication (EDM module)
- Capture Verification (EDM module)
- AQM, Speech Analytics, Text Analytics (Verint applications)
- Compliance Triggers - control of interaction capture - start, stop, pause, resume, block (Verint application)
- RTAA

Verint Compliance Archive Service

One challenge of migrating to new systems and technology is what to do with the data collected by previous systems. This challenge is especially important in the contact centre, where customer interaction recording data is not only valuable, but can also be impacted by compliance regulations that require it to be archived and retrievable for extended periods.

At Verint, we understand the challenges associated with version upgrades and new implementations of recording and contact centre software. We also understand the importance of maintaining valuable data collected by existing and previous platforms. That is why we offer Verint Compliance Archive, an optional set of standalone services based upon Verint Engagement Data Management, which can extract older interaction recordings, place them in a secure cloud repository and enable them to be queried using their metadata. Using a simple, web-based user interface, you can access the data, and play back and export when needed.

With Verint Compliance Archive, Verint Customers can benefit from a solution that is:

- **Economical** – Customers save money and time by fully decommissioning older recording systems. Once calls are migrated to Verint Compliance Archive, there is no need to maintain the hardware and associated software licenses, maintenance contracts, training, and knowledge of those systems.
- **Practical** – The solution provides a cloud-based platform that enables customers to access interaction recordings from anywhere using a simple, uncluttered user interface.
- **Simple** – Customers can access older data instantly and retain it according to company policies and regulatory compliance mandates.
- **Secure** – Verint Compliance Archive provides enterprise-grade security, from initial data extraction to long-term storage using AWS and Amazon S3 storage.
- **Familiar** – Verint Compliance Archive is based on Verint EDM, ensuring that users are presented with a known interface and experience, minimising training, and internal support costs.

Verint Compliance Archive helps customers isolate their archived data which can contain compliance violations such as PCI, HIPAA, and GDPR. It also provides advanced access control to allow only authorised users access to this archived data.

Capabilities

Verint Compliance Archive is a packaged service based upon Verint Engagement Data Management, which provides all expected security and compliance measures. No complex connectivity is required, just simple search and replay services controlled by fine-grained privilege access.

Capabilities provided by the Compliance Archive service include:

- The Engagement Data Hub, as the repository of historic interaction recordings and associated metadata.
- The web-based Interactions and Risk Management Applications, allowing end users to search for and replay interactions as needed.
- EDM's Data Management functions, to allow ongoing management of the interactions stored within the Engagement Data Hub, for example providing security controls, and allowing retention to be managed.
- EDM's Compliance functions, such as end-to-end encryption, legal hold, interaction delete etc., provide the capabilities needed to manage the compliance process.

Due to the static nature of the data held, several EDM functions are excluded from the Compliance Archive service:

- Ongoing capture and enrichment of interactions is not available – Compliance Archive is bulk loaded with all necessary historic interactions as part of service provisioning.
- Reporting functions are disabled – due to the static nature of the information stored within Compliance Archive, normal reporting functions such as interactions captured per day etc. are not relevant.

Data Migration

For Verint Compliance Archive, data is migrated from customer premise locations to a secure AWS Region. The AWS Region is selected based on customer requirements and premises location proximity. Depending on the amount of data to be migrated and the source system, there are a few simple approaches available to customers.

Verint supports migration of archived data from previous Verint solutions (Verint 11.1 or later versions of Verint on-premises systems) to Verint Compliance Archive. Verint also supports the migration of archived data from non-Verint solutions; however, certain restrictions or limitations can exist. Details of these restrictions and limitations by your Verint representative.

Data Transport

To migrate customer data securely to storage in the Verint Cloud, Verint currently supports two transport mechanisms: Secure Internet Transport and Secure Physical Device Transport. The mechanism used depends on the amount of data to be transferred and the speed of the network connection available to transport that data. If a customer opts to use their own cloud storage (AWS S3 only), then they are responsible for migrating the data to their elected storage destination.



Service Deployment

Verint Open CCaaS Platform

The problem has changed. The solution needs to change too. Organizations are in a tough place. They need to accommodate the shift to digital engagement, but they don't have unlimited resources. These organisations want to elevate customer experience without additional labour cost — and in the contact centre this is particularly challenging.

The CX challenges facing contact centre leaders across the world have changed; top of the list is answering two pressing questions:

- How do you do more with less?
- How can you maximize workforce efficiency?

The Verint Open CCaaS Platform elevates every experience with an open approach to customer engagement. The Verint Customer Engagement Cloud Platform underpins our award-winning applications for Digital-First Engagement, Workforce Engagement, and Experience Management—and it's architected to integrate into enterprise ecosystems.

Verint Cloud Platform closes powers better customer engagement for some of the world's most recognizable brands. Our years of experience have made our solutions extensible across industries and use cases. Here are some of the industries where Verint Cloud Platform is currently in use:

- Financial Services
- eCommerce
- Government
- Healthcare
- Retail
- Travel

Open CCaaS: A next-gen platform

At Verint, openness is not a feature, it's a strategy. This gives you the freedom to choose the right path for your contact centre now and in the future so you can elevate customer experience and evolve into best-in-class operations.

With limited budget and resources, hiring more workers is not a sustainable solution, and rip and replace projects for new technology are expensive and time consuming. With Verint, you can realize quick AI outcomes without disrupting your existing technology. Our open platform helps you create a new workforce of humans and bots to deliver CX automation.

Moving your entire contact centre to the cloud may seem daunting. With Verint, you don't have to move everything at once. Verint Open CCaaS Platform makes it easy to start taking advantage of cloud capabilities while keeping some of your technology, including your telephony, on-premises. You can even start by simply adding AI-powered bots to your existing on-premises deployment to begin seeing the benefits of the cloud.

The concept of CCaaS is promising – a single application to consistently and efficiently manage all of your contact center conversations. But in reality, these applications lacked the openness and flexibility required to truly help you succeed. Different regions or business units may use different vendors for voice or digital channels, emerging social and messaging channels may not be supported at all.

Open CCaaS was built to solve today's challenges, with a new set of capabilities including:

- Open Platform delivering CX Automation
- Open Engagement Data Hub
- Specialised Bots powered by Open Da Vinci AI
- Open Best of Breed Applications
- Open Ecosystem
- Open Enterprise

Verint Open Platform delivers CX automation

CX automation is the ability to elevate the customer experience while simultaneously lowering costs. Brands today are challenged to deliver elevated CX while facing limited budgets and resources. Verint's team of AI-powered bots on the Open Platform augment your human workforce by injecting AI directly into the workflows. This new workforce of humans and bots allows Organisations to create additional capacity and significant cost savings.

Open Engagement Data Hub – your data working for you 24/7

Data is at the core of the Verint Platform. Every time a customer interacts with your brand, new behavioural data is created, including interaction data, experience data, and workforce performance data. This data is typically stuck in silos and inaccessible to your contact center. But this data is tremendously valuable to understand what is happening across your enterprise at a deeper level to drive outcomes for your business. With Verint Open Engagement Data Hub, you can:

- Gain a deep understanding of the behaviours of your customers, employees, and bots.
- Continuously train Verint bots for the highest accuracy and effectiveness.
- Freely access and export behavioural data for use in your broader enterprise data strategy.

Verint Specialized Bots Powered by Open Da Vinci AI

Verint helps you achieve CX automation with a team of intelligent bots powered by Verint Da Vinci AI. We use our 20+ years of experience and billions of interactions to continually train our AI models to be faster and more accurate. What's more, since our approach to AI is open, you can take advantage of the rapid advancements in both Verint models as well as commercial AI models.

Verint Da Vinci AI is at the core of Verint Platform. By injecting AI into business workflows, we put AI at the fingertips of your agents and supervisors through specialized bots. Each bot specializes in one specific task, like summarizing an interaction or auto-scoring a quality form. When these bots augmenting your teams, Organisations can save millions through CX automation.

Open best of breed applications – don't settle for 'almost good enough'

Contact centres are evolving and need best-of-breed applications to optimise processes. It's not enough to just tick a box in your feature list. Organisations need breadth and depth of capabilities to provide efficient, accurate, and compliant customer engagement, including:

- Workforce Management
- Quality
- Knowledge
- Interaction Analytics
- Channel Automation

Open Best of Breed Applications means you can choose the solutions you need to solve business problems. We are confident Verint's applications are best of breed and believe in freedom of choice, so you aren't locked in.

Open Ecosystem – innovation without disruption

Verint Open Platform was built to seamlessly fit into your enterprise ecosystem and support your AI journey at your own pace. Large rip and replace projects are disruptive, and don't deliver results quickly.

With Verint, you can quickly achieve innovation without disruption to your current business. You can continue to use your existing technology investments, including your telephony, while still taking advantage of Verint innovations.

You can start where you want, adding a single bot to address your most pressing need and expand over time. Bots are fast and easy to take advantage of and allow you to take incremental steps that align with your priorities. This open approach provides freedom of choice and flexibility to future-proof your investment.

Open Enterprise – CX beyond the contact center

Modern customer engagement extends beyond the contact center to the back office, the branch or store, and the self-service experience. With Verint, contact center agents and supervisors have visibility into these other activities to optimize the customer experience.

By creating these connected customer journeys, you can:

- More accurately forecast incoming work
- Continue the customer journey from wherever it started
- Connect workflows with the rest of the enterprise

Verint Platform provides a connected experience across all customer engagement use cases.

Close The Engagement Capacity Gap

As consumers shift to digital channels, brands are facing an increasing number of interactions and skyrocketing expectations. Most businesses have a limited set of resources to engage with customers. This widening gap between expectations and results is the Engagement Capacity Gap™. Verint Cloud Platform closes the Engagement Capacity Gap by enabling Organisations to quickly adopt automated, best-in-class solutions that can delight customers throughout their journey and on their terms—when and where they want to purchase, interact, and receive service. It connects your data across the enterprise to provide much-needed clarity into your performance on how you're engaging with customers and finding ways to put your employees' talents to best use.

With Verint Cloud Platform, you can:

- Drive personalized, proactive connections
- Seamlessly combine humans and bots
- Create a CX-focused culture across your business
- Harness data to drive insights and action

Cloud Solutions from Verint

Verint Cloud is a global service delivery fabric providing resilience and dynamic capacity for customers consuming Verint SaaS solutions. Verint Cloud delivers global reach with ubiquitous, secured access and data resilience that enables customers to operate their businesses 24 hours a day with the assurance that services will be accessible, performant, and available.

Geographical Regions

Verint Cloud is deployed in multiple locations across three key regions (AMER, EMEA, and APAC) to support customers around the globe. Verint Cloud services are deployed in any of the following locations:

- United States
- Canada
- United Kingdom
- Germany
- France
- Ireland
- Australia
- Brazil
- Japan
- India
- Singapore

Cloud Operations and Security

Verint's Cloud Operations is responsible for the management and availability of our SaaS Verint Cloud infrastructure and solutions. Cloud Operations' role is to enable platform performance and solution availability. Our 24x7x365 Network Operations Centre (NOC) and Security Operations Centre (SOC) monitor the SaaS infrastructure, network, application, and security components. Verint Cloud Operations uses ITILv3 (Information Technology Infrastructure Library version 3) standards and operating procedures.

Business Continuity and Disaster Recovery

Verint Cloud is deployed across multiple locations and layered service delivery sites to provide system continuity in the event of infrastructure or network disruptions within regions. Data recovery is considered in the design and backed up to alternate availability zones to ensure quick and timely recovery of systems during an event. The prime focus is to ensure our customers can operate their business irrespective of natural disasters, environmental or infrastructure incidents, and human error.

High Availability

High availability is at the core of Verint SaaS Cloud system architecture and deployment model. Our core systems are redundant within a single location, and our global footprint gives Verint the flexibility to serve global customers while adhering to regional and geographic requirements.

Service Level Agreement

Verint Cloud offers an availability guarantee of 99.99%, excluding scheduled and emergency downtimes, which is underwritten by service credits. Businesses depend on these systems, so reliability and system availability are key to day-to-day operations. Verint builds applications that are designed to handle both routine interruptions and unplanned failures of components and infrastructure.

Maintenance

Verint executes maintenance on a regularly published schedule, so customers have advanced notice of events and can coordinate their operations. Maintenance is executed with a goal of reducing service impact during maintenance cycles. Verint also reserves the right to perform emergency maintenance required to mitigate risk associated with an imminent threat to data integrity or to remediate a security vulnerability.

Customer Notifications

Customers are notified of maintenance windows seven days and three days ahead of any scheduled maintenance and at the start and stop of the actual maintenance window. Maintenance is carried out during the weekend outside of peak business hours, depending on the region in which the customer is located.

Identity and Access Management

Verint's Identity Platform is a cloud-based identity and access management service that provides a unified identity experience to customers across all Verint products. It is used to manage and authenticate access to Verint products and provides single sign-on (SSO) and other identity-management features to our customers. Additionally, it provides APIs for developers to integrate with their own applications.

Security and Compliance

The National Institute of Standards and Technology (NIST) is a federal agency within the U.S. Department of Commerce that develops and issues standards, guidelines, and other publications to assist federal agencies in implementing the Federal Information Security Management Act of 2002. NIST Special Publication 800-53 provides a catalog of security controls for U.S. federal information systems, and Verint systems have been configured to a MODERATE impact level according to NIST standards.

To provide a solid reference model for information security management, Verint has designed and architected its security framework based on NIST 800-53 Rev 5.1 standards, leveraging best practices for data security including (but not limited to):

- **Defense in Depth** – Verint has built multiple layers of independent security controls throughout its information technology system to help prevent threats, detect and isolate vulnerabilities, and mitigate consequences should a suspected breach occur.
- **Least Privilege** – Verint leverages the principle of least privilege to help ensure that users, programs, and processes can access only the information and systems that are required to complete a legitimate task. This enhances the integrity of data by allowing access to those who need it while inhibiting accidental errors and malicious behavior.
- **Business Continuity and Disaster Recovery** – Verint has set up numerous system redundancies and automated failovers to provide continued operations in the event of a disaster. Several other policies and procedures have been designed to increase the dependability of the information technology system, and to help ensure the protection and confidentiality of customer data.

Verint also follows other industry best practices and regulations to help ensure the availability, integrity, and confidentiality of internal and external data. Mapping of like controls to the Verint security framework allows for improved understanding of industry standards and ideas on best security practices across multiple disciplines.

Information Security

As part of our commitment to our clients' expectations and data security needs, our information security framework is designed to meet industry standards. This includes the functions required to provide protections to confidentiality, integrity, and availability of data and systems. With a mindset of security by design, all components of the framework are applied from product and application development throughout the lifecycle of the product. In-depth strategies are employed to drive a high resilience in security measures throughout the product and enforcement of security boundaries in processing environments. Through continuous monitoring, we obtain assurance of adherence to our designed framework.

While Verint has a strong stance and operational excellence in platform data security, keeping information secure is a joint responsibility between us and our clients. Clients are responsible for identifying individual contacts within their organization who can work with or receive notification of security-based events, should the need arise. Examples of areas of customer responsibility include:

- Identification of security-related maintenance or integration with client services which may cause issues to the platform.
- Maintenance of integrated access controls through the use of single sign-on technologies to ensure that least privilege is applied.
- Advance notification of activities which involve penetration testing of our environments, outlining the efforts and scope to help ensure that the activities are not identified as malicious in nature.
- Accuracy of the data entered into the applications and assurance that only scoped information is ingested into the application.

Secure Software Development

Security by design is involved throughout the software development processes. This takes the form of static application security testing (SAST), dynamic application security testing (DAST), and software composition analysis (SCA). As each product is developed, careful attention is paid to leading organizations for standards development, such as the Open Worldwide Application Security Project (OWASP) and SANS Institute, who have defined top issues faced by software development. In addition, our code is scanned for known exploited vulnerabilities and measured against the MITRE ATT&CK methodology.

Vulnerability Scanning

Vulnerability scanning is an integral part of a secure platform and, as such, Verint has taken an approach that involves both dynamic live scanning and static deployment scans. The dynamic scans are performed live in the environment to provide assurance of current and future identification of any vulnerabilities to our platform, applications, or code. These scan results are sent directly to security team members for event correlation and investigation in our security information and event management (SIEM). The analysis is performed with leading threat feeds to ensure we are staying up to date on the latest threats and applying this knowledge to our scanning processes.

Penetration Testing

Penetration testing is performed on a continuous basis by Verint security staff and third-party testing firms with a trust but verify methodology. This takes the form of automated identification scanning and manual efforts to establish a designed defense against outside adversary attacks and insider threats. Results of testing are returned to our security operations team for policy and identification refinement to improve vulnerability identification processes and methodologies. In addition, feedback is given to the teams for their efforts in automated mitigation techniques.

Security Operations

Security Operations at Verint is the central gathering point for analysis and immediate response to identified events. This team operates 24 hours a day, 7 days a week and pulls information in from all logs and systems in the environment. Security event response begins with identification of the automated scanning for issues and log aggregations identified in our SIEM.

Data Sovereignty

Verint believes that data sovereignty—the concept that data is subject to the laws and governance of the location in which it is stored—is as important as processing integrity. As a global leader, we recognize this impacts our clients to varied degrees, and we work to ensure that compliance with federal or national requirements is identified and adhered to during the contract negotiations process. Our global processing presence allows us to accommodate sovereignty requirements across the globe with controls to help ensure enforcement of the requirements.

Like other application providers, Verint has implemented a global data retention policy to standardize data retention periods for the applications in our cloud systems, starting with our workforce engagement (WFE) applications. Cloud customer data (historical temporary and transactional data) in the applications noted within the policy are purged in accordance with the timelines set forth in the policy.

Information Security Incident Management

Incident Response

As a part of the overall security framework, an incident begins with identification, which is performed through automated events and analysis of incoming SIEM events. Upon identification of an event or possible incident, the team has defined steps to evaluate and escalate the event to an incident, which triggers a protective response. During the protect phase, an incident manager is assigned to coordinate the response as well as ensure that containment activities are established. Digital forensic specialists will ensure that all relevant data is copied to a secure location which disallows access or corruption of evidence to preserve chain of custody. Response to the incident is performed with the goal of limiting its impact and eradicating malicious activities. Once the response is complete and there is no longer a risk to client data or platform systems, recovery of systems to a known good state is performed.

Vulnerability Response

Verint has multiple avenues for identification of vulnerabilities to help ensure we can respond and mitigate vulnerabilities immediately. Verint categorizes its vulnerability response into two separate phases: mitigation and full remediation.

Mitigation is defined as the process of risk reduction to an acceptable level. This is based on industry security expertise, vendor, client expectations, and data sensitivity. During this phase, we deploy features such as IP isolation, web application firewall (WAF) policies designed to prohibit exploitation, deployment of security updates as released, or, in extreme cases, blocking traffic ingress/egress.

Full remediation of a vulnerability is defined as complete removal of known risk regardless of exploitability. This phase can be applying final approved patches from vendors which demonstrate a removal of the vulnerability, replacement of a vulnerable component in our systems, or reconfiguration of systems to block or remove a vulnerable service.

Reporting Security Issues

Verint believes that having open communication with our partners, both internal and external, is important for a strong information-security design. Internally, security staff are constantly available for discussions and review of application design and function. This has developed a security champion culture within the products, where staff feel comfortable bringing issues to the team so we can collaborate on a solution to security issues. Any security risks identified by a customer or partner should be brought to the attention of their Verint project manager or contact.

Compliance

Verint's security framework provides a solid foundation for data integrity, confidentiality, and availability. Additionally, supported clients often fall within regulated industries that require specific considerations. Verint environments are architected to comply with several of the industry certifications. Emphasis is put on SOC2 Type II, PCI-DSS, GDPR, CCPA, and NIST standards. It is important to note that complying entirely with any organization's security policy (e.g., access management and data integrity) is a shared responsibility between Verint (reflected in these standards) and the customer (its specific configuration, and security within its own environment). Compliance by Verint of its promised standards is verified by third-party audits on an annual basis, which take into account compliance over the 12-month period to various security principles. This is demonstrated in industry certifications, which can be found [here](#).

Additionally, Verint has implemented a robust AI Use Policy that applies to all Verint employees' use of AI models, and to the development practices applicable to the Verint offerings. Specifically, the Verint Responsible and Ethical AI Framework implements standardized engineering, research, and development processes. This includes risk assessments and ongoing monitoring of the Verint offerings as made available.



Customer Engagement Services

As Verint pioneers the development of technology, Artificial Intelligence and Bots in the CX industry, Verint Professional Services understands the importance of enabling customers to leverage these innovations to deliver sustainable benefits themselves. At its core, setting new standards in CX is achieved by combining leading technology with human creativity and Verint offers a three-stage program to its customers to achieve this.

Verint's Professional Services offerings are based on more than 30 years of experience working with customers across many areas of CX and industry sectors. Our consultative approach recognizes the needs of individual customers – understanding their start point and working with them to reach their CX goals, leveraging the Verint Open CCaaS Platform.

Verint's implementation and integration strength is a key differentiator. The Verint implementation methodology is a proven process divided into three distinct phases; Translate, Transition, Transform. It defines the resources required at each stage and clearly delineates key transition points during the project. Each phase has built in control mechanisms that require customer participation and sign off. The methodology synchronizes the readiness of the various resources on both sides at the appropriate times to deliver a successful implementation.

Who are we?

Our Professional Services Team are Verint platform implementation and customer enablement experts, specialising in delivering exceptional service to customers across all industries and sizes.

We provide:

- Client-side experienced implementation and application consultants
- Delivery in 12+ EMEA languages
- EMEA wide resource presence
- Experience of delivering in regulated environments
- Customer centric approach

Investing in Verint Professional Service can:

- Deliver up to 35% improvement in operational productivity
- Increase SLA achievement by 30%

98% of our customer recommend us, some of which are listed below.



Delivery Approach

Verint's approach to delivering projects is focused on a transformational partnership approach and is designed to provide rapid business benefits and Return on Investment (ROI) to our customers. This is central to everything that we do, and it underpins our recommended, proven approach to solution delivery which has, at its core, the following key aspects:

- Small, flexible, cross-functional teams
- A phased, incremental approach that reduces complexity, de-risks programme objectives and ultimately delivers early ROI and value realisation
- Focusing on transformational programme delivery
- Identification of customer's priorities with the goal minimising the time to value

Our approach is a symbiotic one, enabling our customers (or their selected Systems Integrator) to become self-sufficient in the most effective manner whilst delivering a production solution. These fundamental principles of phased delivery, managing change and a 'best fit' approach are encapsulated in our delivery methodology.

Professional Services Consulting

To maximize the potential of the Verint Platform, Verint and our partners provide technical and consulting services. On average our consultants have more than 10 years' experience providing detailed knowledge of Verint solutions, contact center and back-office operations best practices, as well as the processes associated with implementing the Verint customer engagement solutions into the unique environments of our customers.

We have helped iconic brands implement best practices, processes, and technology to deliver value faster and at scale. We can help customers gain valuable business insights and unlock the full potential of the Verint CCaaS solution.

Our service offerings include:

- **Onboarding Services** : We help you plan, implement, and integrate your solutions efficiently, and increase knowledge and best practices across your organization. Verint Starter Services Packages are available for most solutions. These packages enable you to get up and running quickly while minimizing services costs. You can then expand the use of features based on specific needs. When your environment or needs are more extensive than a standard configuration, Verint provides tailored services to meet your unique needs.
- **Consulting Services**: We offer strategic, operational, and analytics consulting services to help you adopt best practices and deepen your utilization of Verint solutions, improve processes to drive efficiencies, deliver insights to improve customer interactions and drive business outcomes.
- **Value Realization Services** : To help you mature and optimize the use of your Verint solutions, we offer Value Realization Services to help you regain focus on the desired business outcomes and promote standardized application usage, processes and governance needed to create a clear path to value and increased solution adoption.
- **Ongoing Education and Training** : Verint Academy, accessible through Verint Connect, houses a large library of self-paced training options available at no additional charge for SaaS customers. Customers and partners can access interactive learning experiences to support different types of learners and different levels of experience, with instructor-led classes and self-paced, on-demand learning available anytime, anywhere.
- **Technology Managed Services** : We can supplement your staff and bring our expertise to help you run, change, and adapt your operations in a matter of weeks – not months or years. Our Technical Managed Services provide robust governance processes that fuel cost savings, maximize system availability, accelerate time to value, and increase flexibility for your IT organizations.
- **Verint AdviceLine** : AdviceLine is an "ask the expert" service designed specifically to provide you with quick guidance on operational or business practice questions. It provides you with one-hour, one-on-one sessions with an experienced consultant on a wide range of operational topics.

Verint's Methodology

Our Triple T project approach is a product of our own, extensive delivery experience – in the form of principles, guidelines, checklists and templates – supported by industry standard techniques. We combine agile software delivery techniques with structured waterfall implementation and governance. The approach has evolved over many years of successful delivery of innovative customer service solutions in large-scale complex environments within a variety of industry verticals including Telecommunications and Media, Finance, Utilities and Retail sectors across five continents.

Experience has shown that every project – and client – is different, so every application of our implementation approach is different. In practice, we adapt our approach to suit our clients' requirements on a project-by-project basis – bringing the benefit of Verint experience to identify the optimum delivery model. What remains constant, however, with every engagement are the key principles outlined below.

There are a number of well-defined stages in our approach to delivering successful projects, each with its own, clear set of objectives, inputs and outputs. These break down into three distinct phases:



Translate

Verint Professional Services starts working with customers during the solution design phase to ensure that CCaaS needs are fully understood and reflected accurately in the detailed scoping and design of an engagement with Verint. Early engagement sets the project up for success by adding continuity to the overall process.

Translate ensures that our Customer's CCaaS needs are reflected in the detailed scoping and design of an engagement with Verint.

Verint's Solution Consulting team, supported by Professional Services, will tailor our technical design, onboarding services and value realisation services to the Customer's requirements.

From the Customer's business case and CCaaS requirements, Verint will produce an array of documents to underpin a successful delivery.

Transition

Moving to the Verint platform is the first stage of an innovative journey for our customers. Transition is focused on migrating data from existing platforms and providing access to Verint's applications in an optimum timeframe to attain level one benefits. This is achieved through a structured program of discovery, design and implementation to embed the solutions with minimal operational disruption. This stage lays the foundations for full leverage of the Verint platform.

This phase is all about HOW we successfully deliver the solution and provide the Customer with the maximum potential ROI and value. This phase is also known as 'the implementation phase', where Verint work with your technical team to implement the technology.

Transition is all about working in partnerships, internal and external. Focused and tailored to our Customer's business.

- We guide Customers through the process, working hand in hand to achieve their solution objectives and business vision
- All about business outcomes. Performed via workshops, using simple but flexible processes
- Our approach is customer centric, agile and adaptable approach, based on the priorities of the Customer's business
- All under the stewardship of our highly skilled onboarding experts

Transform

Once transitioned to the platform, clients can start to unlock the full value of Verint's best in class CX technology. Transformation combines technical innovation with unique skills and experience through Verint's Value Realization Services (VRS). VRS are packages of predefined services that differentiate Verint from other CX technology vendors as they focus on enabling clients to deliver specific outcomes and achieve level two benefits such as improving CX and EX without increasing labour costs.

Verint Professional Services supports customers as their culture for continuous improvement gains momentum and they seek to set new standards in the CX that they deliver. Verint will work with customers to identify new solutions to problems that can deliver tangible results with a strong ROI.

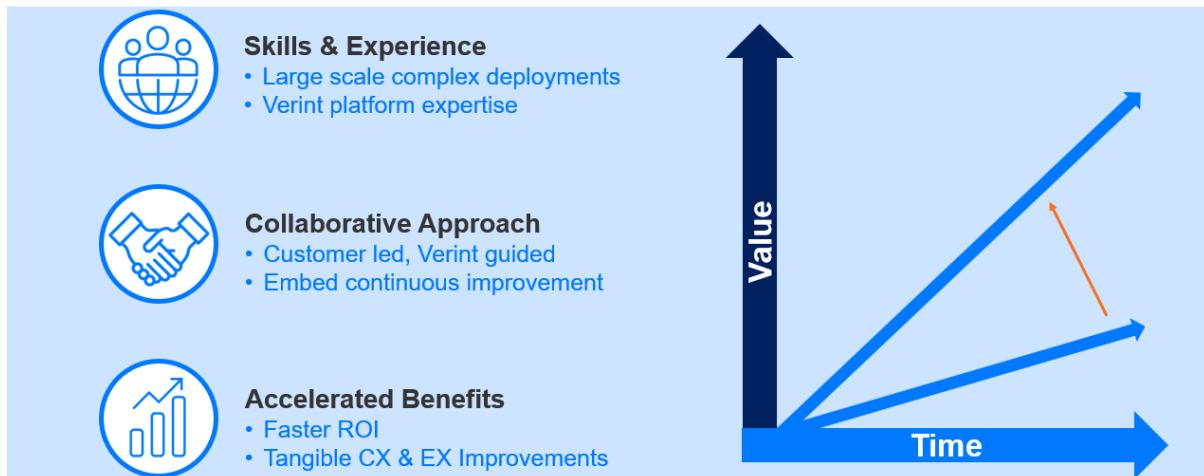
In the dynamic world of Contact Centre and Customer Service Automation, Verint Open CCaaS Professional Services programs stand as a testament to our commitment to excellence through customer enablement. Through a strong partnership we empower our clients to not only adapt but lead, in an ever-evolving world of technology and customer expectation. Verint isn't just a platform; it's a promise of partnership, innovation, and success. Together, we don't just meet expectations; we redefine them, setting new standards for what great CX truly means!

Accelerating the Time to Value with Value Realisation Services

The solution will deliver huge benefits on its own, but when combined with value realisation services and other solution optimisation offerings Customers are able to unlock the true and full potential .

Value Realisation Services are an array of sophisticated offerings (from embedded Resources to AdviceLine) that will drive the ROI of the solution and ensure the value Customers receive is maximised on an ongoing basis. Our Advanced Consulting is custom designed to your requirements so that each session is laser-focused on the areas that will add value to our Customers.

In the fast-paced world of customer engagement, receiving a return on any investment fast is crucial. As a result, Verint adopts an agile operating model by prioritising incremental value releases, adopting a different approach to prioritisation and focussing unwaveringly on customer value. Verint's Triple T Methodology is designed to maximise ROI and accelerate TTV.



Customer Success Management

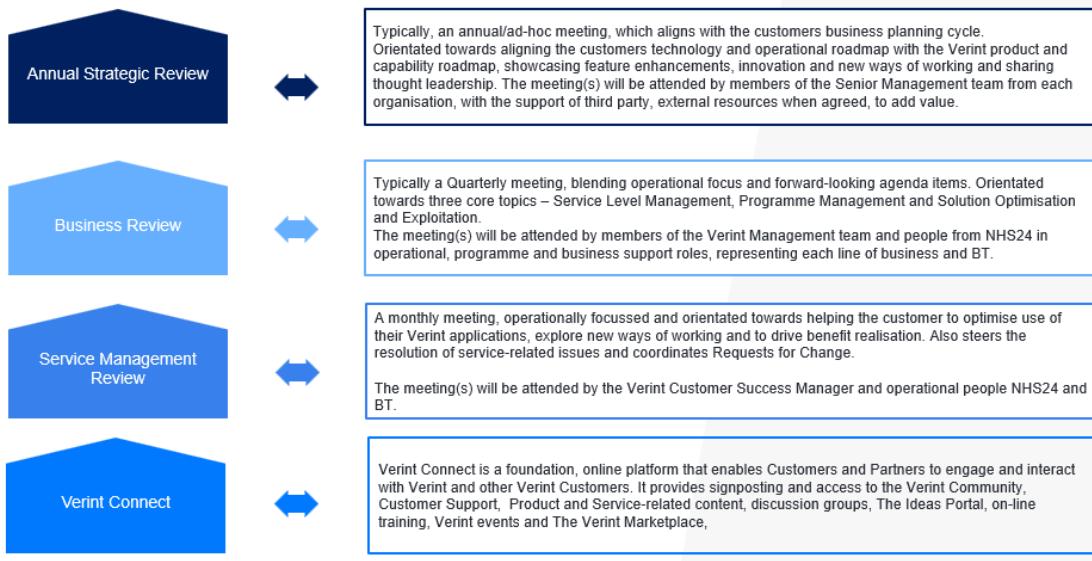
Verint CCaaS Customers are assigned a Customer Success Manager (CSM). The CSM is your single point of contact for everything relating to the CCaaS platform and trusted customer advisor. They will work closely with your business stakeholders to create a Success Plan to drive and achieve overall business objectives.

VERINT Customer Success Manager



During your onboarding, your CSM will work with you to deepen our understanding of your organisation, its processes, and key stakeholders. They will align the key people in your organization with the key people in the Verint organization and work out the touchpoints for the relationship, such as regular service management reviews, business review meetings and Strategic review. Your CSM will work with you to determine the appropriate participants, format, and set agenda for each of these meetings.

Engagement Model



Support

Customer Support Post Go-Live

Verint provides both self-service support options for customers and live product support. Our self-help and support offerings are delivered as part of Verint Connect, our interactive engagement portal built on Verint Community. Verint Connect gives customers and partners access to the information they need about Verint solutions, services and training all in one place:

- Knowledgebase: Verint Connect is also where customers can find solutions via the Verint knowledgebase, enter a support ticket, view its status, update in real-time.
- Resource Center: Product and services documentation are housed in the resource center with an easy-to-use search function as well as time-sensitive content, and potential solutions, relative to a known issue as you log in your incident on the customer support portal.
- Verint Academy: An online resource for training, including on-demand self-paced courses and regularly scheduled instructor-led courses

With our support offerings, you can:

- Benefit from product expertise as more than 30% of our product support specialists have 10+ years' experience with Verint products and services.
- Gain access to the Verint knowledgebase containing more than 25,000 Verint articles.
- Join peers who enjoy a 93.3% customer satisfaction rating.

Support will for the SaaS offering will be providing according to the terms of the [Verint Global Support and Maintenance Plan](#).

Our EMEA support team is available via telephone 24 x 7 for Priority Issues and 8am-6pm Monday to Friday for other requests. We include 24 x 7 access to the Verint web portal including access to Product documentation and web ticketing.



Contact Information

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About Verint



Verint CX Automation Leadership

	Strong Financials Over \$900m Revenue and 28% EBITDA		AI-Powered Platform 40 AI-Powered Bots
	Strong Customer Base ~85% of the Fortune 500		Extensive Experience Managing workflows for 4 million agents worldwide
	Global Leadership Selling in >100 countries		AI Business Outcomes Behavior Data and Verint DaVinci AI at Platform Core



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Verint helps brands increase Customer Experience ("CX") Automation across the enterprise so you can elevate the customer experience and reduce your operating costs. For more than two decades, the world's most iconic brands – including approximately 85 of the Fortune 100 companies – have trusted Verint to provide innovative solutions and domain expertise for their customer engagement operations.

Verint is uniquely positioned to help brands increase CX automation with our differentiated AI-powered Open Platform. Brands today are challenged to delight their customers while facing limited budgets and resources. As a result, organisations are turning to AI-powered platforms specifically designed for the customer engagement domain to increase the level of their CX automation rather than hire additional employees.

We were incorporated in Delaware in February 1994 and completed our initial public offering in May 2002. We are headquartered in Melville, New York, and have approximately 15 offices worldwide, in addition to a number of on demand, flexible coworking spaces. We have approximately 3,700 employees plus a few hundred contractors around the globe exclusively focused on helping brands increase CX automation.

Close the Engagement Capacity Gap

When it comes to creating enduring customer relationships, there's a gap between what Organisations need to do and the resources they have available to actually do it. We call this the "Engagement Capacity Gap."

With budgets and resources that tend to remain flat, brands are challenged to meet the rising expectations of customers. They are faced with ever expanding customer engagement channels, new workforce dynamics and staffing shortages, errors due to poor back-office processes, and exponentially more consumer interactions to name a few. In 2024, the global economic conditions are impacting budgets, workforce plans, and customer engagement strategies.

Verint helps brands strike the right balance between automation and the human touch. This allows you to scale your businesses with self-service and digital solutions while still providing informed employees to support consumers when needed. Our solutions can capture, enrich, and derive meaning from tremendous amounts of digital and conversational data, so brands can adapt and act quickly.

And since our solutions connect silos that exist across data, people, departments, and tools, Organisations can benefit from faster, more informed decision making. Verint empowers Organisations to close this gap, with Boundless Customer Engagement™—helping you build enduring relationships with customers and drive real business results.

The CX Automation Market

Today, the customer engagement industry employs a large workforce and is ripe for AI-powered CX automation. We estimate that there are approximately 50 million of people around the world involved in customer engagement, across contact centres, back-office and branches, and that brands' annual spend on labour is in the trillions of dollars.

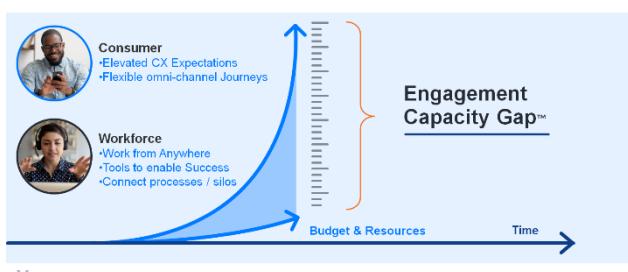
The customer engagement industry is facing continued growth in the number of customer interactions and higher customer expectations for elevated customer experiences. As a result of limited budgets and resources, brands realise that hiring more workers and increasing workforce expenses is not a sustainable solution and are looking at AI-powered platforms as a mechanism to drive more CX automation to achieve their strategic objectives and significant ROI. Increasing CX automation provides economic benefits to brands:

- The economic benefits of CX automation come from the increased productivity of their workforce and higher customer loyalty.
- Utilising Verint's AI-powered platform, brands can handle more interactions with better quality without increasing the size of their human workforce.

We are well-positioned to help brands with their CX automation due to our decades of focus on customer and workforce engagement software and our large base of enterprise customers across many industries and geographies. In addition, recent advancements in AI technology have enabled us to deliver a large team of AI-powered bots running in an open platform specifically designed to help brands increase CX automation.

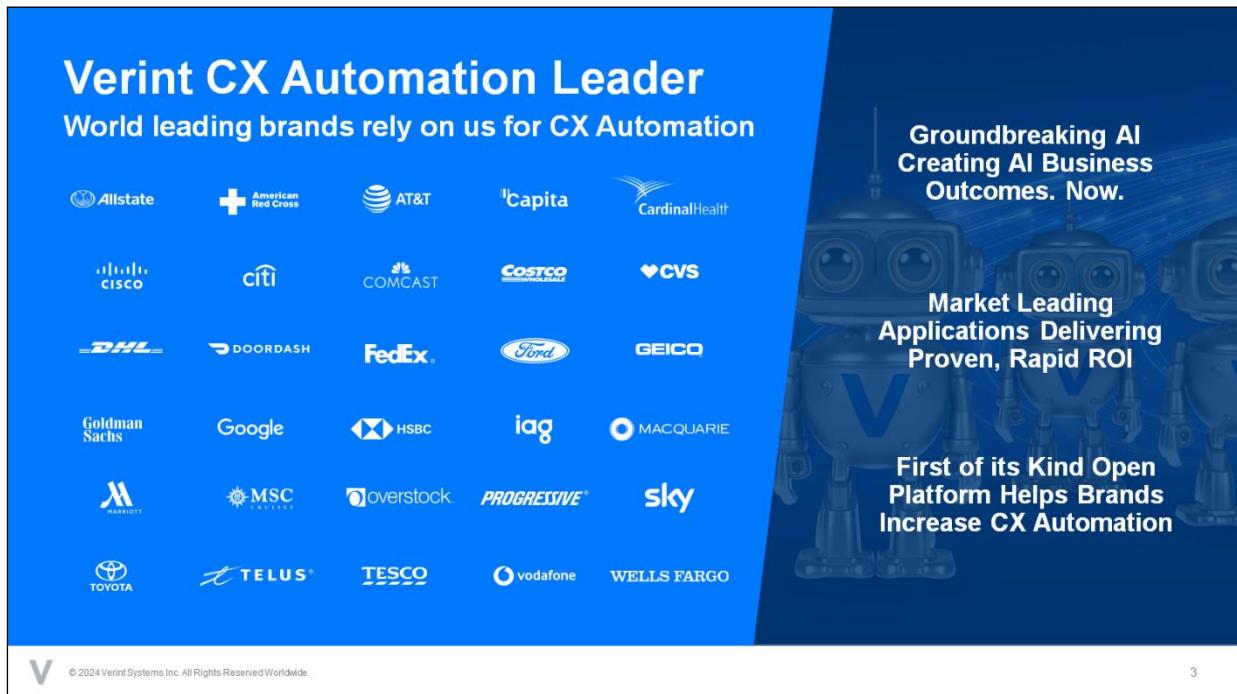
Our strategy is to drive adoption of our open platform within our large customer base, as well as with new logo customers, by enabling brands to deploy AI across their customer engagement workflows, at their own pace and with minimal operational disruption, to increase CX automation.

The Problem: Brands Need to Do More with Fewer Resources



Proven Market Leadership

Verint helps the world's most iconic brands—including over 85 of the Fortune 100 companies—continuously elevate the customer experience (CX) and reduce operating costs.



Verint CX Automation Leader
World leading brands rely on us for CX Automation

Allstate American Red Cross AT&T Capita Cardinal Health

cisco citi COMCAST COSTCO CVS

DHL DOORDASH FedEx Ford GEICO

Goldman Sachs Google HSBC iag MACQUARIE

MSC CRUISES Overstock PROGRESSIVE sky

TOYOTA TELUS TESCO vodafone WELLS FARGO

Groundbreaking AI Creating AI Business Outcomes. Now.

Market Leading Applications Delivering Proven, Rapid ROI

First of its Kind Open Platform Helps Brands Increase CX Automation

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Verint has been recognised by DMG Consulting, Forrester, Frost & Sullivan, Opus Research, TMC, and other leading firms:

- Winner of the **2023 Customer CCaaS Product of the Year Award** for Verint Open CCaaS Platform (TMC, CUSTOMER magazine, 2023)
- Verint was named **Winner for Customer Engagement Solution** in the UC Partner Awards (UC Today 2023)
- **Leader in End-to-End Customer Experience Platform Landscape** (Frost & Sullivan 2023)
- **Leader and Exemplary in Customer Experience Management Value Index** (Ventana Research 2023)
- Perfect Score for **Overall Vendor Satisfaction in New Workforce Optimization Market Report and Leader in Contact Centre WFO** for the 16th year (DMG 2023)
- Verint Platform named **Leader in Conversational Intelligence** (Opus Research 2023)
- Recognized as **Leader in Contact Centre Workforce, Workforce Management, Speech Analytics** (G2 Marketing Solutions, Winter 2024 Report)
- Verint Workforce Management chosen as **Best Value for Price** and **Best Feature Set** (TrustRadius 2023)
- “**Best Use of Artificial Intelligence (AI)**” category at the CX Today **2024 CX Awards**

VERINT.