



G-Cloud 14 Services

Service Definition Document



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1 INTRODUCTION

1.1 Contacts

All enquiries relating to this document should in the first instance be directed to:

Name: David Morse, Bid Manager
Address: Exchange Communications, Exchange House, 11-17 Kerr St, Kirkintilloch, Glasgow, G66 1LF
Tel: +44 (0)141 776 8859
Mob: +44 (0)7585 770050
Email: bids@exchangecommunications.co.uk
Web: www.exchangecommunications.co.uk

1.2 Document History

Version	Author	Pages	Amendment Summary	Revision Date
1.0	DM	All	Document production	28/04/24

The contents of this document are strictly confidential and may not be reproduced in whole or in part without the prior written consent of Exchange Communications. Please ensure that a similar obligation of confidentiality is placed upon any third parties. All products and services described in this response are subject to written confirmation and Exchange Communications standard terms and conditions.

1.3 Introduction

Exchange Communications (Exchange) is delighted to be able to outline our Cloud Services for G-Cloud 14. The services are available under the terms and conditions of the Crown Commercial Services G-Cloud 14 Framework Agreement and Call Off contract. As the only company in the UK and Europe to be an Avaya Edge Diamond Enterprise Partner with Service Expert and Customer Excellence accreditations, as well as also being an accredited strategic partner of Content Guru, we are perfectly positioned to offer a variety of UCaaS and CCaaS solutions that meet the relevant requirements of Public Sector clients.

We have extensive experience in the provision of various Cloud services and have a dedicated account management team to deal directly with GCloud clients without the need for third party suppliers. The appointed team engages at multiple levels and offers a methodology that will address stakeholder involvement in a way that is pragmatic without becoming overly bureaucratic. Exchange will build a positive relationship with all GCloud clients from the very start. Typically public sector clients can expect to enjoy the following:

- **Quarterly or Bi-Annual account meetings:** To establish that everything is running smoothly.
- **Seminars:** As technology continues to change, Exchange will arrange seminars to keep clients in the picture.

- **Single Point of Contact:** From communications and hardware to network and telephone lines, our relationships with our Business Partners means that we are a true one stop shop.

This proven methodology has allowed Exchange to engage with many Central Government, Local Government and other Public Sector clients throughout the UK from our rapidly expanding business base in Scotland.

1.4 Summary

As will be further illustrated within this Service Description document we offer clients;

- **Experience** - Seasoned and stable management team skilled in the design, implementation and support of Cloud Services and solutions to Public Sector organisations.
- **Partnership Approach** – Our reputation and that of our clients become inextricably linked, so Exchange enters into relationships to work with clients as a partner, not just a supplier. We help drive our clients’ business forward, drawing on both their specific knowledge of their business and our own knowledge of industry best-practice processes.
- **Innovative Technical Solutions** – Exchange has built an enviable reputation for delivering innovative solutions over the last 34 years. We have never failed to deliver a bespoke communications solution to a client that meets their requirements.
- **Accreditations** - Exchange Communications is the only company in the UK and Europe to be accredited with the Avaya Edge Diamond Enterprise Partner with Service Expert and Customer Excellence accreditations. We are also an accredited strategic partner of Content Guru for the provision of **storm** Contact Centre as a Service.
- **First Class Service Management** – Our continued dedication to the delivery of a first-class customer care service has been recognised by our market leading client retention rate. Service support is supplied by our own internal service delivery team including Avaya and Content Guru certified engineers.
- **Value for Money** – We constantly monitor market trends to ensure the Cloud systems and services on offer remain competitive and reflect excellent value for money.

We’re confident that we have the expertise, experience and service ethics you require to deliver a Cloud system and/or service that meets your requirements.

2 COMPANY OVERVIEW

2.1 Vision

“To continually exceed clients’ expectations by delivering tailored communications solutions to meet their individual business needs”.

As detailed within our above Mission statement, Exchange is focused on fully understanding the needs of our clients, delivering quality communications solutions and building long term partnerships. We were originally formed in 1990 and over the last thirty four years we have grown to become one of the largest and most successful independent telecommunications and connectivity specialist companies in the UK. We have grown substantially since our inception, satisfying a demand for innovative communication products, dependable maintenance and sustainable solutions that exceed client expectations time and time again.

2.2 Product Portfolio

As experienced providers of telecommunications solutions and a global presence in over 100 countries, we provide a range of solutions from single office telephone systems to complex hosted multi-site and call centre configurations and networked communications. All are tailored and designed to meet individual client requirements.



Hosted Phone Systems
1CloudTalk powered by Avaya



On Premise Phone Systems
*Avaya Enterprise/Aura
Avaya IP Office*



Contact Centre Solutions
*Avaya Experience Platform
Content Guru **storm***



Connectivity
*Managed Service,
Business Calls and Lines,
Business Mobile*



Collaboration Tools
*Video Conferencing,
Audio Conferencing*



Business Broadband
FTTP, SoGEA



Essential Add-Ons
*On Hold Marketing
Headsets*



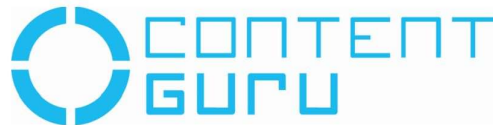
Smart Buildings
*In Building Mobile Coverage
Distributed Antenna Systems (DAS)*

2.3 Professional Bodies

Exchange Communications have achieved Avaya's highest level of partner accreditation and are fully accredited to design, Implement and support their industry leading IP Office and Aura (UCaaS) and Avaya Experience Platform (CCaaS) solutions which can all provide seamless integration with MS Teams.



We have entered into a strategic UK partnership with Content Guru to deliver their industry leading and 2023 Gartner Magic Quadrant CCaaS solution, **storm**.



We are accredited to the following BSI/ISO registrations

- Quality Management System ISO 9001: 2015
Certificate Number – FS 30620
Original Registration Date – 03/02/1995
Expiry Date - 17/06/2024
- Environmental Management System ISO 14001: 2015
Certificate Number – EMS 596794
Original Registration Date – 11/09/2013
Expiry Date - 17/06/2024
- Occupational Health and Safety Management ISO 45001: 2018 (SSIP) (supersedes OHSAS 18001)
Certificate Number – OHS 596795
Original Registration Date – 18/12/2020
Expiry Date - 17/06/2024



Exchange currently holds Cyber Security Essentials Plus accreditation and has also adopted IT Security Policy and Standards to ensure the adequate protection of our IT network, computer equipment, software, and data from theft, loss, damage, corruption or unauthorised use.

Exchange are both reputable and ethical employers who have been in business for more than three decades and have achieved the “Investors in People” award for the last 20 years. All Exchange employees are permanent staff and are paid well above the UK’s Minimum Wage.



**INVESTORS
IN PEOPLE**

We are fully committed to fair work practices including a fair and equal pay policy as well as promoting equality of opportunity and stability of employment and hours of work. As a company we support family friendly working and the wider work life balance as well as fully endorsing support for learning and development. Over the last 34 years, we have built a technical team whose knowledge and expertise is respected throughout the telecommunications industry and we are proud to say we have never failed to provide a solution.

Exchange Communications are on a number of UK purchasing frameworks including Crown Commercial Service G-Cloud as well as JISC – Telephony Purchasing Service DPS and Scottish Government – Telephony Services DPS



2.4 Testimonials

Key to our success is our client focused approach which lies at the very heart of our business. Our case studies and testimonials give insight into the long-term partnerships, and focus on our clients, their business and their challenges. We provide services to both public and private sector organisations within a wide range of markets including Education, Health, Local Government, Finance, Transport and Construction. Our clients trust us to deliver a range of communications and collaboration services that are critical to their productivity and competitiveness as detailed below;

- **Mark Walker (Oxford Health NHS Foundation Trust)** - *“Our decision to work with Exchange Communications should see our point of contact experience transformed across our multi-site locations. Not only will Exchange help us bolster our telephony capabilities, but the Trust will make important cost and carbon efficiencies as a result.”*
- **Mark Beecham (Faculty of Advocates)** - *“The Faculty chose Exchange Communications over larger firms for our switch to a Cloud based VoIP system, and it has been like a breath of fresh air. The installation presented several challenges, but the engineers worked tirelessly, and we now have a modern system which perfectly suits our business. It was also refreshing to work closely with Exchange on a personal level – they completely understood our needs and were quick to respond and deal with issues.”*

- **Karen Greaves (Orkney Islands Council)** - *"Being connected with a modern, robust and reliable phone system is vital to the day-to-day running of all our services to the people of Orkney. We are delighted that the new communications system has bedded in successfully. We look forward to it serving us well over many years to come."*
- **Tony Horobin (Experian UK)** - *"Exchange Communications have always been professional in their approach to any task that we raise with them, all faults are handled with professionalism, and the engineers are always courteous and polite. We have completed several large-scale projects with them, and they have always delivered what was expected of them on time and to budget. Overall, I would highly recommend Exchange Communications as a company to work with."*
- **Jacqui Steele (Ayrshire College)** - *"Exchange has provided us with exceptional service over the years and we have formed a long-standing partnership. The level of customer service and innovative solutions offered by Exchange has stayed at a consistently high standard. The staff are excellent and have a real understanding of the college's requirements and we find are always a pleasure to deal with."*

Oxford Health
NHS Foundation Trust



Norfolk County Council

3 1CLOUDTALK TELEPHONY POWERED BY AVAYA

3.1 Overview

In simple terms hosted telephony is an offsite system that sits in a data centre (known as the Cloud) rather than at your premises. Calls are made and received over an internet connection to the network. From there they are routed to the normal phone network and mobile devices. Companies manage the system through a web interface or mobile app.

Exchange Communications are able to offer subscription services hosted in the cloud for high-performance IP telephony systems. With each of these easy-to-use services, you eliminate capital investment and gain the ability to scale the services to meet your changing needs. There are many reasons why clients choose a hosted telephony system.

- No capital outlay.
- No on-going maintenance costs or upgrades.
- Free upgrades and immediate implementation of new features.
- Make changes, moves and additions instantly
- Great voice quality.
- Cost savings.
- Business Continuity/Disaster Recovery



1CloudTalk Telephony powered by Avaya is one of the fastest growing UK hosted telephony solutions, with single or multi-site deployment. It is available as a versatile web interface, desktop and mobile application and operates in either one (Standard) or two (Business Continuity) highly secure external UK based Tier 3 data centres, reached by VoIP technology (Voice over Internet Protocol) via the Internet. Instead of an ISDN connection, the Avaya cloud system is accessed directly via the Internet. This eliminates the need to install any telephone systems on site.

3.2 1CloudTalk Telephony

3.2.1 Summary

The 1CloudTalk Telephony solution (up to 500 users) utilises an Avaya IP Office platform, while any solution over 500 users will utilise the enterprise level Avaya Aura CM platform. Both are delivered as hosted services through UK based tier 3 data centre infrastructure. Both solutions provide single instance, resilient, flexible and secure systems for organisations looking to transition to the Cloud. It provides the following benefits:

- A Cloud-based delivery service offering unified communications with MS Teams integration
- Powerful team engagement, enterprise-grade scalability and resiliency.

- A single system that improves how you communicate within your business and with your customers. It provides a complete suite of collaboration solutions to help clients gain the benefits of cloud communications — shifting capital expense (CapEx) to operating expense (OpEx), simplifying on-going management, and accelerating application deployment.

1CloudTalk Telephony powered by Avaya offers a service based on proven technology and designed to meet changing business needs. The versatile platforms help if you're interested in using cloud-enabled communications to support your growth and to enable you to remain competitive. It's a more cost-effective way of employing new technology than using Capex-based CPE. The solution offers clients;

- Predictable costs and no up-front costs: a price per user per month.
- Ability to instantly access new capabilities that can be rolled out rapidly, without forecasting or capital expenditure.
- Improved financial control, with expenditure aligned with business demand - and capital released for investment in the core business.

Comprehensive capabilities include:

- Simplicity. A single proven platform that enables you to access all business communications.
- Higher productivity. This is achieved through fully featured voice services for both fixed and mobile users.
- Integration. Avaya Cloud solutions will integrate with your third-party application environments, including MS Teams, Google, and Salesforce.
- Versatile communications. Avaya platforms support a rich unified communications experience that 'presence enables' a broad range of users and devices, enabling you to make faster and better decisions.
- Strong support. Supports you if you want to migrate to hosted services at your own pace
- Scalability. Our service enables you to add users and functionality whenever you need to, enabling your business to be more agile.

The 1CloudTalk Telephony solution is ideal if you already have Avaya Aura, Norstar, BCM, Merlin Legend, CS1000 or older platforms and want to add a highly featured contact centre. If you're a new user, or you want to migrate, it provides a feature-rich and highly cost-effective solution that maintains the user experience whilst minimising any disruption

3.2.2 1CloudTalk Telephony - up to 500 users

1CloudTalk Telephony provided by Avaya (up to 500 users) includes an IP Office UC Licence for each user which not only provides entry level capability for basic telephony users but also includes access to the softphone client as well as access to numerous advanced features such as mobile twinning and hot desking. It also includes unified communication capability including instant messaging and presence. The key features & benefits include:

- Office telephony - Make/Receive unlimited calls
- Auto Attendant/Call routing
- Extension number and Voicemail box
- Telephony features - Park & Page, Call Forwarding, Call Transfer, Incoming/Outgoing caller display, Do Not Disturb, Intercept User, Last Number Redial, Three-Way Calling, Selective Call Acceptance, Selective Call Rejection
- Softphone - Workplace client
- Hot Desking and Mobile Twinning (ring extension and mobile simultaneously)
- Video Calling
- Instant Messaging and Presence are based on the UC user licence to include the Softphone client allowing users to access the system from any endpoint;

Features	UC Licence
Broad Endpoint Selection (IP Digital, Analog, DECT/Wireless)	✓
Basic telephony features (make, receive, hold, transfer, park/page)	✓
Secure remote worker	✓
Call recordings library	✓
Ad-hoc meet me conferencing (up to 6)	✓
Meet Me Conference	✓
Advanced telephony features (UMS, video calling, IM and Presence)	✓
Mobile endpoints	✓
Scheduled audio conferencing	✓
Softphone - Workplace Client	✓
Web collaboration	✓
Web application integration (SFDC, Google, O365, web)	✓

Auto Attendant/Call Routing - The solution supports multiple Auto Attendants and can route voice calls to the most appropriate resource based on language, knowledge, past history and availability. Standard push button menus based on custom audio files will provide automated call distribution to either individual users, hunt groups or external numbers. A scheduling system will allow the call routes to be different at different times of the day/week/year. Calls can be distributed based on various factors, like longest agent idle and also skills based, which would send calls to a certain department or to groups with a certain skillset. The different types of hunt groups are:

- Collective – All available phones in the group ring simultaneously.
- Sequential – Each extension is rung in order, one after the other, starting from the first extension in the list each time.

- Rotary – Each extension is rung in order, one after the other. However, the last extension used is remembered. The next call received rings the next extension in the list.
- Longest Waiting – The extension that has been unused for the longest period rings first, then the extension that has been idle second longest rings, etc. For extensions with equal idle time, 'sequential' mode is used

Voicemail Pro - The solution is supplied with licences which automatically entitles each user to their own voicemail box. Each extension can therefore have their own individual voicemail box with the end user able to record their own greeting to personalise the message that callers will hear. The Voicemail Pro application will also allow for each hunt-group extension to have its own voicemail account so any member of the group can access messages. Each box can also be configured for remote access, so messages can be retrieved even when the staff member is not on site. Other features and benefits include;

- Up to fifteen hours of Voicemail capacity.
- Users with fixed and mobile telephony have a single voicemail.
- Allows users to save, delete, forward, repeat, rewind, fast forward and skip messages.
- Has the ability to time and date stamp messages.
- Allows callers to leave messages or 'break out' of voicemail and be directed to reception.
- Announcements can be made and then call is terminated.
- Record temporary messages for a defined period then deleted at the end of the relevant period.
- Allows users to record a greeting that is applied until midnight.
- Recognises extension number or CLI of caller (if available) so correct message and details can be passed to user.

Hunt Groups - The IPO Subscription solution fully supports hunt groups to ensure calls get through to the correct department to help manage the workload among staff. These are configured by the system administrator and can be fine-tuned if it is later discovered the groups/call sequence need to be adapted. Queuing allows calls to a hunt group to be held when all extensions in the group are busy. When an extension becomes free the queued call is then presented.

Overflow - Overflow can be used to expand the list of group members who can be used to answer a call. This is done by defining an overflow group or groups. The call is still targeted to the original group and subject to that group's settings but is now presented to available members in the overflow groups in addition to its own available members. Overflow calls still use the settings of the original target group. The only setting of the overflow group that is used is its Ring Mode. For example:

- Calls that overflow use the announcement settings of the group from which they are overflowing.
- Calls that overflow use the Voicemail Answer Time of the original group from which are overflowing.
- Calls that are overflowing are included in the overflowing group's Queue Length and Calls in Queue Threshold. They are not included in those values for the hunt group to which they overflow.

- The queuing and overflow settings of the overflow groups are not used, ie. calls cannot cascade through a series of multiple overflows.

HotDesking - The IPO Subscription solution fully supports the use of Hot Desking. Staff can login at any IP handset connected to the network and be prompted for their login ID and PIN. All calls for their extension will then be routed to the new handset where they are working. If users forget to logout prior to working from a new location the system will prompt them to force a logout on their previous handset prior to connecting all their calls to their new handset.

Twinning - The IPO Subscription solution provides twinning and allows an external phone to be twinned with the IP Office extension. The twinned device can be any external phone, such as your mobile or home phone. When a caller rings the relevant IPO extension, both the extension and the twinned device will ring, enabling the user to take the call from either device. If the call is not answered from either device, the call will follow the rules set up for the extension (such as being re-directed to voicemail).

Softphone Client (Workplace) for Home/remote worker - The UC licence includes the Avaya Workplace which is a softphone application that provides users with real-time collaboration capabilities and enables them to manage their day-to-day communications from a single interface.. The client is delivered on the following operating systems:

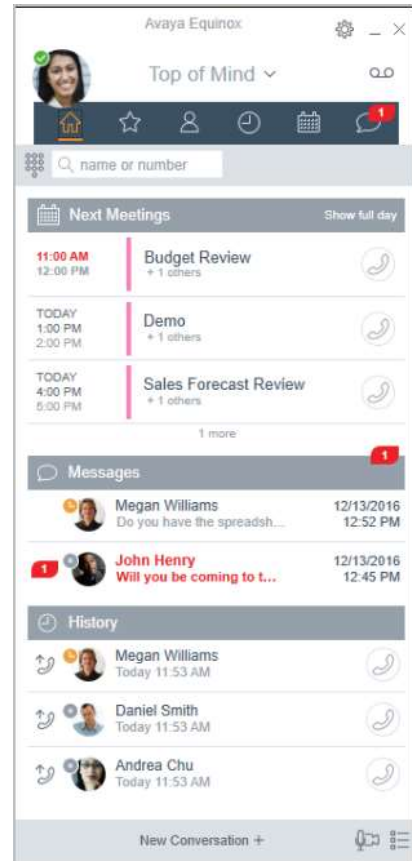
- Desktop;
 - Windows
 - macOS
- Mobile Phone
 - Android
 - iOS

Avaya Workplace Client registers as a SIP softphone for audio and video calling, and telephony features. The following features are supported:

- Top of Mind Home Screen
 - Next meetings showing local calendar schedule or Exchange Web Service/Office 365
 - Local Call History
 - Messages
 - Start Meetings/Launch Spaces dashboard
- Top of Mind Lite Option for Mobile phones
- IP Office directory and local contacts
- Messaging through Avaya Spaces
- Presence through IP Office server

- Centralized call log.
- Dialpad with Redial
- Desktop integration with Microsoft Outlook and Browsers
- Point to point audio and video calls (make, receive, and end)
- Multiple call handling (incoming and outgoing)
- Hold and retrieve (audio and video calls)
- Transfer (blind and consultative)
- Consult conferencing
- Escalate audio to video call
- Share control with supported desk phones in the Avaya IX Workplace Client desktop.
- CTI Control — Avaya Workplace Client for IP Office can be controlled through other applications. CTI is supported with Avaya Workplace Client for Windows only.

By providing a UC licence for all users, the solution provides remote working for all staff from day 1 of the contract. Additional or upgrade licences will not be needed to accommodate any current staff working from home using softphone or PC client.



Conferencing - The hosted IP Office system accommodates simple ad hoc conference calls. If another person is required to attend an existing two-way call the handset “conference” pre-programmed button or relevant mobile client icon can be pushed, and the number of the additional participant dialled to bring them into the call. The maximum number of participants is six for ad hoc conference calls. It also includes powerful in-built ‘meet-me’ conferencing which allows all users to host their own password-protected conference bridge to enhance collaboration, host a multitude of calls simultaneously or schedule them in advance and let IP Office notify participants automatically. Meet-Me conferencing is possible where a conference bridge number is dialled at a pre-arranged time and attendees (up-to 25) authenticate by dialling a PIN number to attend an open or moderator-controlled conference. The moderator, if active, can see who has joined the conference and selectively mute or drop attendees.

Single Sign On - The solution incorporates single sign on for all systems and applications across the system. This allows for the simultaneous logon to multiple devices as well as allowing the user to log off from the system remotely.

Teams Integration - To accommodate employees that use MS Teams to communicate, the UC licence included within the proposed solution incorporates Avaya Calling for Microsoft Teams, which is an application (available at no extra cost) that seamlessly integrates into Microsoft Teams by presenting the Avaya extension directly in the Teams desktop.

IPO Softconsole License

The Avaya IPO Subscription solution supports an optional Receptionist/Softconsole licence which is a powerful PC (Microsoft Windows) based switchboard application that enables a single operator (or group of operators) to manage calls for a single site or multiple locations. The application provides a visual display of incoming calls, which are routed with a simple mouse click. The interface also displays call status for all users—busy, on the phone, away—to improve effectiveness and responsiveness. IPO Softconsole provides the following benefits:

- Fast, accurate call handling – With its intuitive PC interface, it allows for convenient click-and-drag call handling that helps improve the efficiency and effectiveness of the operator, even with large call volumes. Calls can be transferred (blind or attended) as well as retrieved or diverted to voicemail.
- Visual call status – Call handlers can see the status and availability (presence) of all associates on the network – whether staff members are on the phone, away from their desks or do not want to be disturbed, which means calls can be routed more quickly and accurately.
- Centralised call management – A single operator can handle calls for multiple offices, transferring calls between locations, adding people to conferences, managing voicemail messages for associates.
- Streamlined operations – Handle large call volumes and call queues with just a single receptionist, in standalone or multi-site environments; use a single operator to manage calls for multiple locations
- Provide professional service to callers – The intuitive, easy to use interface, gives you the information you need to quickly route calls to the right people

The IPO Softconsole provides additional functionality including;

- Inbound & Outbound Call handling
- Ability to create script for incoming call handling
- Monitoring of up to 8 Queues & ability to answer calls in queue
- Phone Call Control including Conference Call Control & Conference Rooms; Transfer, Hold, and Park via drag & drop
- See user telephony presence
- Communicate with users via Instant Message
- Up to 16 Park Slots with customised labels
- Configuration of Phone Preferences
- Receive Caller ID & Name Display
- Speed Dial and Busy Lamp Field management of users
- Local Phone Directory
- Separate Call History logs – All, Incoming, Outgoing, Missed Calls, Messages
- Time on Call display
- Simple Outlook contact record creation

- Distinctive Ringing using WAV file
- Centralised receptionist across connected locations

Media Manager system licence

The IPO Subscription solution supports an optional Media Manager system licence for call recording and archiving. The solution allows users to record a call and save the recording to a voicemail mailbox, a group mailbox or the voice recording library via the optional Media Manager licence. Recordings can be triggered automatically for specific users, groups or incoming call routes or can be triggered manually by a user and any call on any phone type can be recorded. Media Manager is a native IP Office application to archive, store, search, playback, download, audit, and delete IP Office call recordings. Media Manager obtains the recordings from the IP Office Voicemail Pro application through a preconfigured hand-off directory. Access to the recordings will be available to authorised users through the system admin portal.

CTI system licence

The IPO Subscription solution supports an optional 3rd party CTI system licence which enables all CTI related licensed features such as DevLink 3 Recording, TAPI, TAPI WAV, OpenAPI CTI etc.

3.2.3 1CloudTalk Telephony – Over 500 users

1CloudTalk Telephony provided by Avaya (over 500 users) includes an Aura CM Core UC Licence for each user which offers a comprehensive suite of advanced communications applications. These applications benefit from multi-vendor, SIP interoperability and Avaya's industry leading position in implementing advanced collaboration features. In total the Aura platform delivers more than 700 services for unified communications, including support for mobility, customer contact, messaging, auto attendant and conferencing..

Elements	Core UC License
Multiple Device Access	10
Business Line Features	✓
Mobility	✓
Voicemail – IX Messaging	✓
6-party audio conferencing	✓
Softphone for Mobile / Laptop – Avaya Workplace	✓
Enterprise Single Sign On (Softphone)	✓
Presence / Multimedia Messaging	✓
Integration with MS Teams	✓
Avaya Spaces (Public Cloud personal meeting room for voice and video conference and collaboration)	Business

Multiple Device Access – The Core UC licence provides a single DDI per extension and licence per user that is fully transferable between any of up to 10 end devices including analogue, IP handset, desktop, mobile, softphone app etc.

Business Line Features - The Core UC licence supports a set of business line features that enable you to deal with most business communications requirements. The high quality enterprise level telephony features include;

- DDI numbers - The solution fully supports and is compatible with the use of DDI numbers.
- Direct Dialling Inward - The system has a direct dialling inward (DDI) feature which will allow for your existing DDI numbers to be retained and ported across to the new solution.
- Direct Outward Dialling (DOD) - Users are able to dial external numbers directly without using an operator or auto attendant.
- Linked Numbers and Flexible Numbering - Dialed digits can be manipulated seamlessly to add and delete digits, access codes etc in order to fit into any numbering scheme.
- Hunt Groups - A hunt group consists of a number of telephone extensions whose users perform a common task. A single telephone number would be directed at the group's main extension and calls are then distributed based on the routing algorithm chosen. You can choose from several methods to determine how the system distributes calls to members of the hunt group:
 - Direct Department Calling starts with the first extension in the hunt group, and hunts for an available extension (Sequential).
 - //Uniform Call Distribution (UCD) hunts for the extension that has been idle the longest. This helps to provide equitable distribution of calls.
 - Circular distribution calls are directed in the order in which participating extensions are administered.
 - Automatic Call Distribution and Expert Agent Selection distribute calls according to the workloads and the skill levels of the users in each hunt group
- Group Pick Up - The solution includes a Call Pickup feature which allows members of the same "pickup group" to answer calls for one another.
- Night Service – The solution provides Night Service capabilities that can be activated by a single key.
- Call Divert – Users are able to divert incoming calls. The forward-to number can be an internal extension or an outside number or mobile and calls can be diverted for different reasons including "All calls" and "Busy/Don't Answer"
- Caller ID - The Caller ID feature allows for calling party information to be displayed if required.
- Outgoing Calling Line ID (CLID) - Individual DDI extensions can be displayed to the recipients of external calls if required.
- Calling Line Identification Restriction (CLIR) - It is also possible for the CLID number to be withheld when making external calls. The recipient of a withheld number call usually sees a message such as "unknown" or "withheld number" in their phone display instead of a phone number.

- Announcement – This feature allows pre-recorded messages to be played to callers.
- Music on hold – This provides music to a caller on hold. The music lets the caller know that the connection is still active.
- Emergency Calls - The solution is capable of supporting calls to internal emergency numbers such as 2222 as well as calls to the emergency services via 999 and 112
- Integration with Active Directory - The hosted platform fully supports integration into AD and other LDAP compliant applications and databases.
- Call Barring - Call barring stops unauthorised users from, for example, dialling premium rate (speaking clock, directory enquiries, etc) or international numbers. This can be set on a user by user basis or by group (CoS) via Class of Restriction (CoR) configurations or globally for every user on that system. The barring includes the ability to stop calls being forwarded to external numbers. Authorisation Codes for over-riding these restrictions are possible on a user by user basis by configuring a short code on the system to permit international dialling for example. The short codes are programmed into the system by the authorised administrator. If the restriction has to be re-enabled after the call is made, then the short code must be removed from the configuration for that user.
- Speed Dial - The solution allows for the use of speed dialling, also known as Abbreviated Dialling (AD), to reduce the number of digits that must be dialled to place a call. Instead of dialling the entire number, a short code is used to access the number. The system then dials the stored number automatically. Speed dialling can be assigned to buttons on handsets, so that only a single button needs to be pressed to dial frequently called numbers. It is possible to store telephone numbers in four different types of abbreviated dialling lists:
 - Personal
 - Group
 - System
 - Enhanced

The high quality enterprise level extension features include;

- Call Forward – Users are able to divert incoming calls. The forward-to number can be an internal extension or an outside number and calls can be diverted for different reasons including “All calls” and “Busy/Don’t Answer”
- Call Waiting - Notifies User that a second call is waiting. This is done using a distinctive tone or a light indication on the handset
- Do Not Disturb – Allows users to notify the system that they cannot be disturbed so their extension will not ring.
- Call Transfer - The solution has a Call Transfer feature which supports user consultative and blind call transfers from one extension to another.

- Call Park/Retrieve - The solution includes a Call Park feature to retrieve a call that is on hold, from any other telephone within the system.
- Call Pickup – This allows members of the same "pickup group" to answer calls for one another.
- Call Drop - End users can press the Drop button on a handset, to disconnect, or "drop" any call, or drop the last party to join a conference call. To drop a specific party from a conference, you can use the Conference Display feature to scroll to a particular conference participant, and then press the Drop button to drop that party from the call.

The solution provides for a wide range of Auto Attendant and Call Routing capabilities including;

- Automatic Call Distribution (ACD) allows for the processing of high-volume calls and then distributes them to groups of extensions (hunt groups)
- Route Optimisation allows channels to the auto attendant to be released once the external incoming call has been connected by Auto Attendant
- Least cost routing allows for a call to be routed based on a short code matching the number being dialled from the system rather than number originally dialled.
- Automatic Alternate Routing (AAR) routes calls over the company network.
- Automatic Route Selection (ARS) routes calls that go outside to public networks.
- Time of day routing redirects calls to coverage paths according to the time of the day and the day of the week.

Mobility - The 1CloudTalk Telephony solution supports extensive mobility features such as in-building or in/out building wireless choices and hot desking to extend functionality to users, no matter where they are working. Key mobility capabilities include;

- VoIP calls – Lower mobile service charges by making VoIP calls over Wi-Fi or mobile data networks
- Cellular Voice integration – Traditional cellular voice service can be used and calls will still be routed through the 1CloudTalk Telephony solution
- Call Mobility – VoIP roaming between Wi-Fi and 3/4G networks, and call handoff between cellular voice and VoIP
- Single Number Contact – Incoming office calls ring on designated iPhone or any other phone being used

Users will be able to log in at any relevant handset (Hot Desk) on the solution and treat it as their normal workspace. All calls for their extension will be routed to the new handset where they are working. If users forget to logout prior to working from a new location the system will prompt them to force a logout on their previous handset prior to connecting all their calls to their new handset.

The solution provides Twinning and allows an external phone to be twinned with a user's own extension. The twinned device can be any external phone, such as a work mobile or home phone. When a caller rings the relevant extension, both the extension and the twinned device will ring, enabling the user to take the call from either device.

VoiceMail – The solution incorporates IX Messaging within the Core UC licence. IX Messaging is an enterprise-class messaging solution that is flexible, scalable, and resilient, integrating voice and fax messages with email and social collaboration applications such as Google and Microsoft. It provides flexible, simplified access to messages and has a suite of capabilities including;

- Unified messaging inbox, integrated with all common email platforms, that makes voicemail and faxes easily accessible from the user's standard email inbox, streamlining message treatment to a single location.
- Fax messages can be sent from within an individual's email, from the desktop, or via an online fax portal. Incoming Fax messages are received into the email inbox providing ready access and simplified storage.
- Bi-directional synchronisation ensures that the act of reading/listening to a message is reflected both in the email platform and on the individual's phone (via the message waiting indicator), so users can move on quickly to their next task.
- Simplifying the user's experience with sophisticated capabilities
- Call Completion services enable missed call events to be synchronised to an individual's email, a helpful reminder of urgent calls that need to be returned.

The voicemail feature list includes:

- HA / GR of all VM System and Storage
- Aria / Audix / CallPilot / Serenade TUI
- Cisco TUI
- Multiple Language Prompts - G15 Language Set + Hebrew and Dutch minus India.
- User Preferences
- Messaging Web Access
- Personal Greeting
- Extended Absence Greeting
- Multiple Optional Greetings for Audix, Aria and CallPilot TUIs
- System Greeting Before Call Answer (optional)
- Auto Attendant
- Site-Level Broadcast Messages
- Personal / Enhanced Distribution List
- Notify Me (Call / MWI) - Phone Call and MWI Notification included
- Phone Call to a Telephone or Mobile Device – "Outcall"
- Pending Deletion of Messages

- Transfer to Messaging
- Consultative Transfer from Call Sender
- Disable Default Avaya Branding / Record Your Own Greeting
- Variable Length Mailboxes
- Block Caller-ID

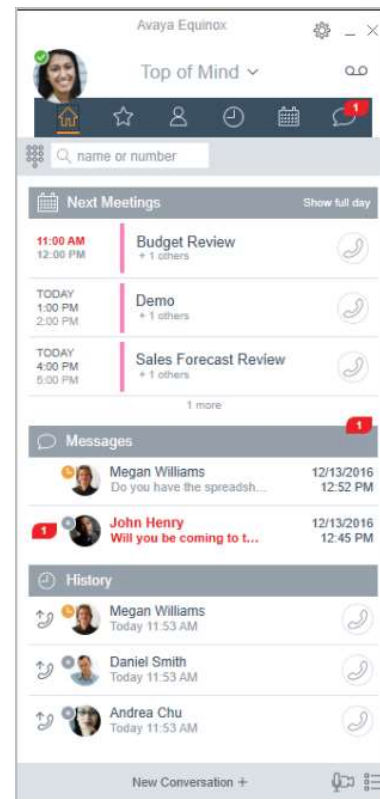
Conferencing - The default 6-Party Audio Conference feature enables an ad hoc conference from the phone for up six parties without using a set of dedicated conferencing servers.

Softphone Client (Workplace) for Home/remote worker - Avaya Workplace is a downloadable, SIP based unified communications client that is included in the Core UC license. Avaya Workplace connects the entire workforce by bringing all methods of communication together in one environment with a user interface that adapts to each platform operating system and device type. This software solution extends the features and services of the Avaya Aura platform to desktop, mobile, and virtual users including support for, iPhone, iPad, Android, Windows, and MacOS devices. The client is delivered on the following operating systems:

- Desktop;
 - Windows
 - macOS
- Mobile Phone
 - Android
 - iOS

The following key benefits are provided across all supported platforms;

- Enterprise grade UC and collaboration capabilities including multi-party audio, multi-stream video and web conferencing
- Avaya Multimedia Messaging – an advanced, multi-device messaging solution with text, audio, video and file attachments, providing persistent point-to-point and multiparty conversations
- Remote worker support with Avaya Session Border Controller for Enterprise (ASBCE) enables secure VPN-less access to services when working outside of the private network.
- Simplified provisioning – The client is designed to import administrator defined settings and removes virtually all end-user configuration tasks short of entering username and password.
- Solution resiliency with automated Avaya Aura Session Manager failover support including primary, secondary and branch registration.



-
- 1–click to join from Top-of-Mind view or Outlook notification
 - Security – all communication channels are secured to protect end-user privacy.

By providing a UC licence for all users, the solution provides remote working for all staff from day 1 of the contract.

Enterprise Single Sign On (SSO) for Soft Client - This configuration is available to each Core UC user. When using Avaya Workplace soft client, the end user login credentials (handle/user ID and password) are required when launching the soft client. This feature automatically provides these credentials to the cloud core for a Single Sign On (SSO) experience during the launching of the application.

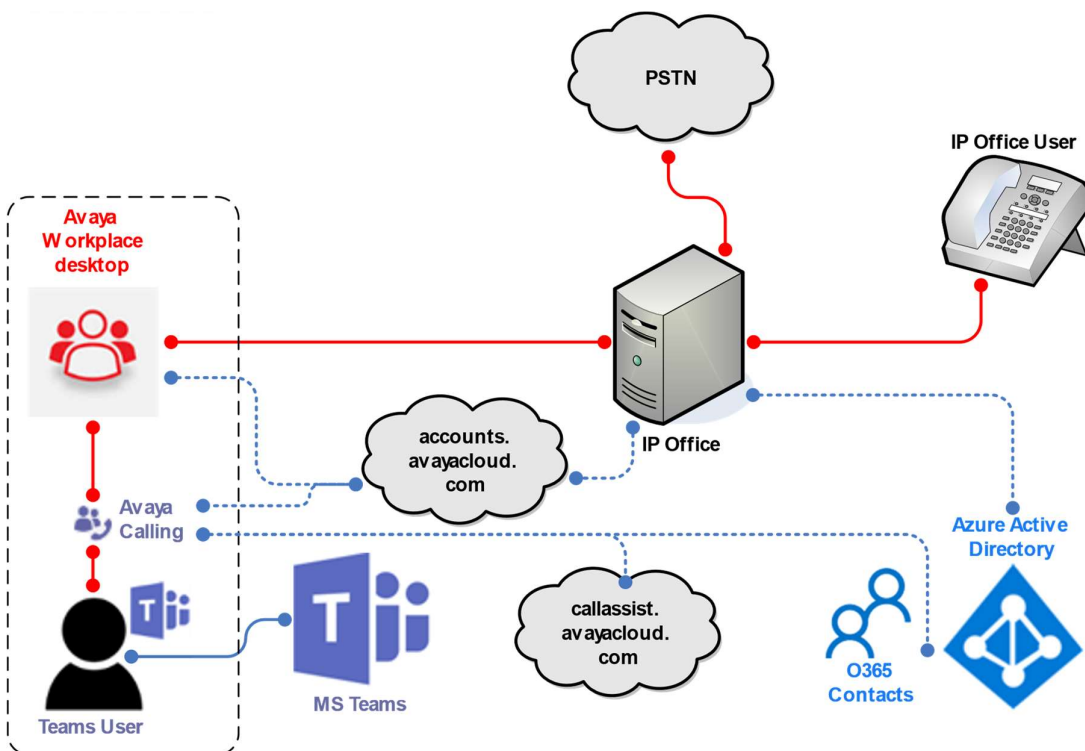
Presence / Multimedia Messaging – The Core UC licence includes a fully integrated presence service. Aura Presence collects, aggregates, and publishes presence from and to multiple sources and clients, serving as a common collection/distribution point. Its key features include;

- Robust, Aggregated Presence Information: Presence information from telephony, desktop, and other applications is aggregated to provide a comprehensive view of user and device availability.
- Multi-protocol and multi-interface support: Both SIP for Instant Messaging and Presence Leveraging Extensions are supported, which allows for aggregation across a broad array of presence sources to enable a more comprehensive representation of the individual.
- Rich Presence: Normalises and composes rich user presence such as location and device for applications

Avaya Multimedia Messaging provides users of the Workplace client with a powerful tool to interact with other users over IM and efficiently handle multiple IM conversations with individuals or groups. Detailed multimedia messaging end user capabilities include:

- Send & Receive all message content types.
- Record & send Media messages in client.
- Desktop Client experience: users see the paperclip and can use any options:
 - Record audio.
 - Record video.
 - Take a photo.
 - Attach a file; and
 - Image from clipboard (when there is something in the clipboard).
- Mobile Client experience: users see the paperclip and can use any options:
 - Record audio.
 - Record video.
 - Take a photo; and
 - Attach a file.

Integration with Microsoft Teams - The UC licence included within the 1CloudTalk Telephony solution incorporates Avaya Calling for Microsoft Teams, which is an application (available at no extra costs) that seamlessly integrates into Microsoft Teams by presenting the Avaya extension directly in the Teams desktop. The application has been designed to provide a Teams based user experience with minimum learning curve for existing Teams users. It uses the Workplace Client for call control and call handling and supports Windows, iOS, Android and MacOS.



Avaya Calling for Teams Concept

The Avaya Calling plug-in links the user's Avaya Workplace Client to their MS Teams. This allows the user to:

- Make and receive calls (audio and video) from 1CloudTalk users.
- Make and received external PSTN calls (audio and video) routed by the 1CloudTalk platform.
- Instant message and email contacts in their Office 365 Contacts.
- Contact information and dial pad access
- Click to dial from Microsoft Teams

Avaya Calling for Microsoft Teams gives the user access to 1CloudTalk features and functionality thus creating a single, easy-to-use, secure workspace that provides all the tools needed to communicate with colleagues and customers. It can be used with all levels of licensing with MS Teams including Basic thus removing the need for additional and separate Teams Telephony licenses including costly Microsoft E5 licenses and associated calling plans.

3.3 Optional Features

3.3.1 Avaya Call Reporting (ACR) call logger

Avaya Call Reporting (ACR) is a robust all-purpose custom call logging, call reporting and real-time display software suite. It provides true cradle-to-grave call logging and shows the call journey from start to finish and across departments and extensions. It offers a revolutionary set of features designed to overcome the limitations of traditional call history and reporting software. It provides detailed and accurate information by connecting directly to the phone system and logging everything that happens on each call, from the moment it starts to the second it ends irrespective of the endpoints used. This includes;

- Number of calls waiting/answered
- Call response times
- Call waiting times
- Idle times
- Statistics by individual switchboard operators

Cradle to Grave - ACR logs detailed information about every call that enters or leaves the phone network. Cradle to Grave is an intuitive and simple way to view this information. It will show exactly what happened to any call on the system from the moment the call arrived to the instant the call ended. True Cradle to Grave reporting means that it is possible to expand each and every call to view its ringing, talking, queue, hold, and transfer events; conference call information; and the agents, hunt groups, and external parties involved at each step along the way. The end user can sort, search, filter, and rearrange the tabular data or export it directly to a spreadsheet program for further analysis.

AVAYA IP Office User Portal

Last successful login was on 08/09/2021, 09:11:26

Historical Call Reporter

Search

☐ Today
 ☒ This Week
 ☐ 30 days

☐ From - to

Enter a date range

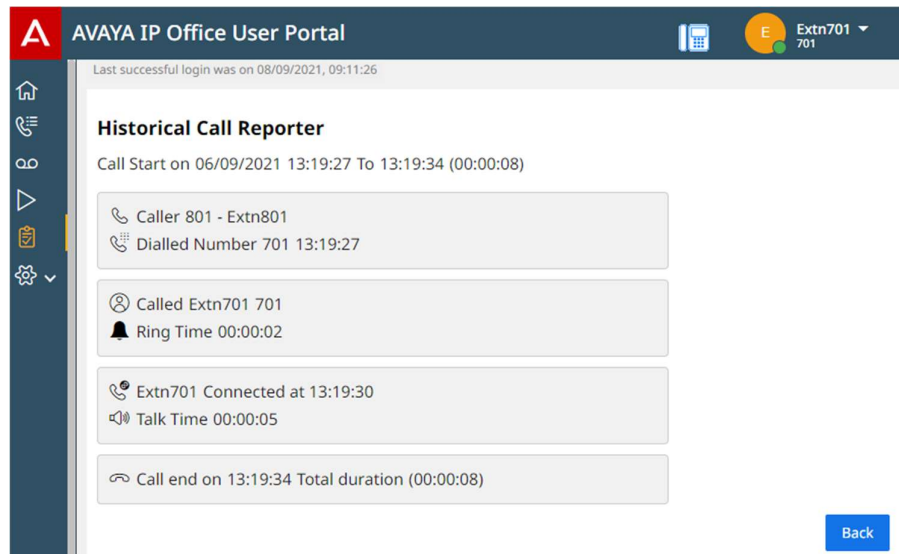
☐ Incoming
 ☐ Outgoing
 ☐ Internal
 ☐ Abandoned
 ☐ Completed

Group: _____ Caller: _____
 DID: _____ Duration: _____
 User: _____ Account Code: _____

Call Type	Called Date ↓	Talk Time	Caller	Group	Duration	Connected	Details
Internal	2021-09-06 16:13:55	00:00:00	801 - Extn801		00:00:03	701 - Extn701	Call Detail
Internal	2021-09-06 16:13:29	00:00:00	801 - Extn801		00:00:07		Call Detail
Internal	2021-09-06 13:39:38	00:01:20	701 - Extn701		00:01:23	801 - Extn801	Call Detail
Internal	2021-09-06 13:37:54	00:03:03	710 - 9641		00:03:05	701 - Extn701	Call Detail

Viewing Call Details - The call details show details of the original caller, where the call was originally targeted, and then various events in the call's history.

- To display the details of a call, click the Call Detail button next to the call in the calls list.
- The calls details are displayed.



Standard Reports – There are over 40 different reports included as standard. These reports can be used as often as necessary utilising charts and graphs to show a wide range of information from the simplest criteria to the most detailed and specific statistics available. The reports are separated into filters to allow the user to find the one that best fits the requirement quickly. Report filters include:

- Extension Reports.
- Group Reports.
- External Number / Caller ID Reports.
- Call Type, duration.
- Call Direction and trends.
- Call Costing based on extension numbers.
- Time Interval.
- High Value Calls.
- Answer times

Each installation of ACR gives access to each of the powerful standard reports and the intuitive Report Scheduler, which tells ACR to run reports automatically every hour, day, week, or month and send them to an email address or save them to a file. Reports can be viewed or saved in many standard formats:

- Adobe Reader (pdf).
- Microsoft Excel (xls/csv).
- OpenOffice.org (odt).
- IE/Firefox/Chrome (html)

3.4 System Resilience and Reliability

1CloudTalk Telephony powered by Avaya can be deployed in two service plan options.

Standard

- Single Data Centre
- Resilience within the primary data centre only.

Business Continuity

- Dual Data Centre
- Application Resilience of the Avaya IP Office platform between Data centres.

The 1CloudTalk telephony solution is deployed on servers in an Avaya Virtualised platform within UK Tier3+ data centres. For solutions with up to 200 users the “Standard” plan provides 99.9% availability. For solutions with between 200 and 500 users, the “Business Continuity” plan provides application resilience between DC’s and a 99.99% reliability. The solution offered for over 500 users utilises dual DC’s providing both resilience and diversity to meet “5-nines” high availability (99.999%) on an N+1 design for all major components. This results in less than 5 minutes, 15 seconds unplanned downtime per annum. Failover is automatic from the primary DC to the secondary DC site without dropping a call.

1CloudTalk Telephony powered by Avaya	Service Plan	Availability
Up to 200 users	Standard - Single DC option	99.9%
Between 200 - 500 users	Business Continuity – Dual DC’s	99.99%
Over 500 users	Business Continuity – Dual DC’s	99.999%

The hosted solution can be resiliently delivered across the internet to provide access from disparate locations (ie: home or field). Within the Business Continuity plan the UK data centres are interconnected via a high-performance 1Gb fibre network and are carrier neutral. All DC’s are monitored 24/7 and backed by a 100% uptime power and network guarantee.

Security

- Onsite Manned Security – 24/7
- CCTV & Intruder Detection Systems – Full site
- Access Control – Security card access all areas
- IT Critical Areas – Dual factor authentication

Technical Operations

- iomart Technical Engineers on Site – 24/ 7
- iomart Group NOC – 24/7
- Critical Engineering Specialists – 15min response, 4 hr H/W fix SLA

Interconnectivity

- Dark Fibre Capability
- Carrier Neutral
- Diverse Network Entry Points
- Tier 1 Connections
- Direct Peering Connections – LINX, Telehouse, Equinix
- Private Network Ring Connecting all iomart DCs
- Private Network Ring – Resiliency N+2

Power

- Site Capacity – 1MW
- Rack Distribution – Dual feed single phase/ 3 phase delivery
- UPS Resiliency – N+1 c/w battery backup
- Generator Resiliency – N

Environmental

- Cooling Systems – N+1
- Temperature Controlled Rooms – 22°C +/-2°C
- Fire Detection Systems – Dual zone, double knock system
- Full Gas Suppression System – All critical areas
- Under Floor Leak Detection System

The DC's undergo various UKAS audits for numerous certifications including:

- ISO 27001 – Information Security
- ISO 22301 – Business Continuity
- ISO 50001 – Energy Management
- Cyber Essentials – Cyber Threats
- Data Protection Act 2018
- GDPR 2016/679

3.5 Web Portal Access

1CloudTalk Telephony is designed to be self-managed and provides a user-friendly interface and admin portal that can be accessed from any device. The portal supports the latest major web browser releases corresponding to the release date of the latest software. This includes;

- Microsoft Edge
- Firefox
- Google Chrome
- Safari

It has an intuitive easy to use GUI to allow admin staff to make configuration changes to accommodate staff moves, adds and changes (MACs) associated with extensions as well as to opening hours and emergency closure information. Routing tables are also accessible so that staff can be, for example, added or removed from hunt groups, set fixed destinations for call forwarding, manage exception lists for Do Not Disturb and a multitude of other methods for controlling call flows. Full programming of short codes and hot keys, specific call barring details, bridged appearances and voicemail allocation are also possible. If necessary, Exchange are able to offer a fully managed service where all moves, adds and changes are carried out by ourselves.

Any 1CloudTalk Telephony solution will be entirely private with all data securely separated and protected from unauthorised use. Administrative access will be available to clients via logons with a secure username and password. This administrative access will allow for role-based access levels to be created by allocating defined user rights to relevant users. Service Users and Rights Groups are stored in the systems security settings. These are stored separately from the system's configuration settings.

- Security Administrators: By default, the security administrator is the only user who can access the system's security settings using security mode.
- Service Users: Each service user has a name, a password and is a member of one or more Rights Groups.
- Rights Groups: The Rights Groups to which a service user belongs determine what actions they can perform. Actions available to Rights Groups include configuration actions, security actions and system status actions. Where a service user has been configured as a member of more than one Rights Group, they combine the functions available to the separate Rights Groups.

4 AVAYA EXPERIENCE PLATFORM CCAAS PROVIDED BY EXCHANGE

4.1 Overview

Standing out from the competition is a challenge faced by most companies. In today's highly connected market, this challenge is greater than ever with empowered customers expecting the best customer service experience from their service providers. Today's customer is more interactive, collaborative, knowledgeable, and time sensitive than ever before. As they gain a deeper understanding of customer needs, contact centre teams become more efficient and effective. Exchange can deliver contact centre solutions the way clients need it whether in the cloud or on-premise. Get faster results with our deep contact centre expertise, innovative solutions, and industry-recognised services that help transform organisation's customer experience objectives into measurable results.

Avaya Experience Platform (AxP) CCaaS provided by Exchange is a subscription-based hosted Contact Centre as a Service solution running on the Microsoft Azure UK public cloud platform. It has an open API-first architecture that enables clients to customise and integrate the solution into any existing infrastructure. The solution also fully compliments and integrates with the 1CloudTalk Telephony powered by Avaya solution detailed above and also available through GCloud.

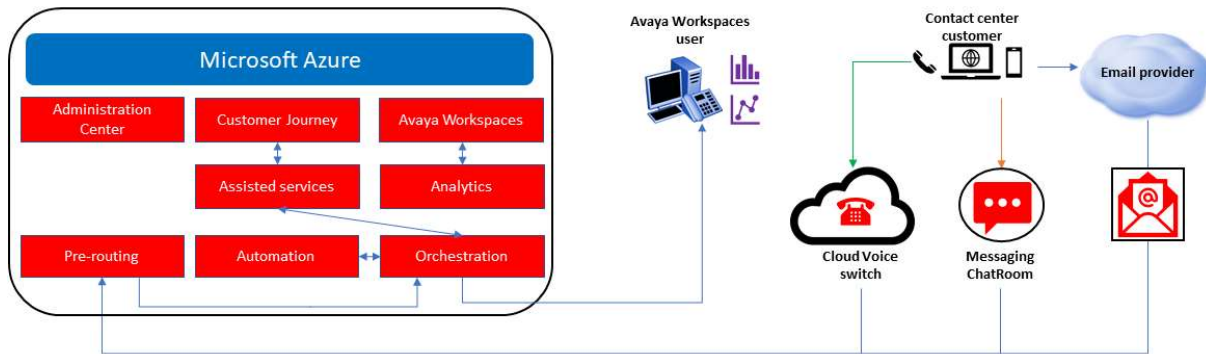
Several services are available the AxP, including:

- Automated and assisted routing of voice, email, chat, and messaging channels
- AI noise removal that removes noise from both agent and customer's end irrespective of the calling device used at both ends
- Centralised administration of all contact centre resources using Application Center
- Real-time and historical reporting and analytics
- Visualised customer journey tracking across multiple channels
- Avaya Workspaces, a browser-based application for agents and supervisors

As a cloud solution based on a subscription model, AxP's features and agent licenses can be purchased to meet exact solution requirements and then quickly scale up or down as necessary. New features become available as soon as they are released and there is no need for long maintenance windows to upgrade the solution. The key aspects of AxP architecture are:

- Horizontally scalable services, accessible by API
- Advanced automation with a single queue across all channels
- Large scale and high availability (HA) as a central aspect of the solution architecture
- Zero-downtime upgrades, where the HA model for all services minimizes the impact on contact centre operations

Multi-tenancy is a fundamental part of the AxP data architecture. Every event, entity, and configuration in AxP is associated with a client, which provides data partitioning at an account level. Architecture for the AxP solution is detailed below.



4.2 Avaya Experience Platform

4.2.1 Summary

AxP is a hassle-free, always-on contact centre that delivers a comprehensive, integrated, and open architecture with scalability, security and in-depth analytics for a simple and flexible cloud experience. It makes it easy to deliver an effortless customer experience across different channels and devices while helping maximise employee and team performance. AxP consists of the following main components. Each component is comprised of services that provide specific functionality for the solution:

- **Avaya Workspaces:** Workspaces is a browser-based application through which contact centre agents can handle inbound customer interactions. Supervisors can also use Avaya Workspaces to view reports, or design and use customised layouts and widgets on the user interface.
- **Application Centre Administration:** Application Centre Administration is a browser-based unified management application providing a single administration experience across the solution for multiple platforms and users.
- **Analytics for AxP:** Analytics for AxP is a browser-based reporting platform that uses measure definitions to map generic contact centre events across all channels. Analytics for AxP provides separate real-time and historical interfaces to view operational metrics.
- **Messaging and Digital:** Messaging and Digital provide services that manage routing and control of digital interactions. You can configure business rules for managing routing based on customer and interaction data. The digital pre-routing service makes this data available to Orchestration workflows to enhance the solution routing capabilities.
- **Voice:** Voice provides services that manage routing and control of voice interactions. You can configure how the contact centre routes voice calls by assigning a queue and base attributes to each DNIS (dialled number

identification service). To further enhance the intelligent routing capabilities for your voice calls, you also select the Orchestration workflow to trigger for each phone number.

- **Orchestration:** Orchestration provides a user friendly graphical tool that administrators use to create workflows to manage how interactions route through the contact centre according to business needs.
- **Automation:** Automation works in conjunction with Orchestration to collect additional interaction data and provide self-service treatments to customers.
- **Customer Journey:** Customer Journey maps a customer's journey across self-service and assisted service channels and stores related data for each customer interaction. Agents and supervisors can use Avaya Workspaces to view a visual representation of each customer's interactions.
- **Assisted Services:** Assisted services provides an assisted routing experience for the contact centre, using a channel-agnostic queue. Assisted services uses attributes to match callers with the best resources, based on the call data and resources available.

4.2.2 Licence bundles

AxP CCaaS provided by Exchange is available in different licence bundles as can be seen from the table below.

Feature	Digital Only	Voice Only	All Media
Digital Services - unlimited email, web chat, text messaging*	✓		✓
Bring your own digital channel	✓		✓
Inbound Voice		✓	✓
Preview Outbound Dialing		✓	✓
Voice Recording		✓	✓
Intelligent routing	✓	✓	✓
Powerful Reporting and Analytics	✓	✓	✓
Customisable employee and supervisor desktop	✓	✓	✓
Avaya Desktop embedded in CRM	✓	✓	✓
Back Office integrations	✓	✓	✓
Visual Workflow Orchestration	✓	✓	✓
AI-powered self-service Automation	✓	✓	✓
Customer Journey Intelligence	✓	✓	✓
Blended Media – simultaneously serve voice and digital enquiries			✓
Workforce Engagement			✓

*Additional charges may apply based on usage

Licences work on a concurrent basis so any number of Supervisors and Agents can be configured but a charge will only accrue for the maximum number of licences to be used at one time. This allows the number of contact centre users to be flexed up or down dependant on business need.

Digital Services

AxP digital services within the Digital and All Media licence provides the functionality to route and control chat, messaging, and email interactions.

Web Chat - AxP provides a list of APIs that clients can integrate into a pre-existing chat solution. Once the chat session is initiated, a greeting is offered while the system requests an agent resource. Once a suitable agent is identified based on attributes, the agent and customer are connected and can begin exchanging messages. The following Chat specific features are supported:

- Chat transcript - Chat transcripts are saved and can be viewed later using the Customer Journey widget in Avaya Workspaces.
- Transfer to queue - Transfer an interaction to a queue that can find a more appropriate agent that has the knowledge to deal with the customer query.
- Transfer to user - Transfer an interaction to another agent or supervisor. The target user must be able to handle chat interactions. This is a single step transfer; the transferring agent drops from the interaction immediately when the transfer completes. If an agent rejects a transferred interaction, AxP attempts to return the interaction to the original agent. If that agent is subsequently unavailable, the interaction routes to the last queue and retains the original attributes.
- Intelligent routing - Create context data rules to collect data about incoming interactions before the interactions pass to the workflow. Context data rules also assign attributes to these incoming interactions. The workflow can base routing decisions on this contextual data, which enhances the customer experience and leads to improved customer satisfaction. Each context data rule triggers a specific workflow, and the attributes you assign to the rule are also made available to the workflow.
- Welcome messages - Customise welcome messages that automatically appear to customers on the chat channel.
- Auto answer - You can enable auto answer for chat interactions on a per-user or per-profile basis.
- RONA - Return on No Answer with a fixed timer across all channels. The fixed timer value is 30 seconds.
- Quick text templates - Configuration phrases for use when handling chat interactions. Agents can select and insert these phrases while responding to customer chats. Using text templates can help save time and maintain consistency.
- URL templates - You can configure plain text URL templates that agents can use to send replies to customer chat contacts.

- **Observe** - Supervisors can observe ongoing chat interactions between agents and customers to assess whether intervention is required.
- **Coach** - Supervisor can coach the agents to provide expert advice and help to address a customer request.
- **Barge in** - While observing or coaching an agent, supervisors can barge into a chat interaction to provide expert advice to agents when they are unable to handle the interaction.
- **Screenpops** - Access an external website configured for a screenpop.

The table below lists the supported AxP digital chat channel capabilities.

Message type	Direction	Chat Channel
Text	Send	✓
	Receive	
URL	Send	✓
	Receive	

Out-of-the-box Chat SDK – AxP is provided with a chat software development kit (SDK) that clients can integrate with their website without extensive coding. The SDK consists of well-defined APIs for clients to customise. The Chat SDK is a JavaScript library that provides a collection of methods, objects, and events which clients can easily build or integrate as a chat client for their websites.

To provide a real-time experience to the customer, the sample chat SDK uses long polling to capture new events and messages. Clients can create multiple chat integrations, for example, they can create a chat integration for their Sales department and another one for their Support department. AxP uses a unique integration identifier to implement this capability. These two chat integrations can display and behave differently, depending on the client's requirement.

Out-of-the-box Chat widget - Avaya has developed a sample chat application that uses the out-of-the-box chat SDK. Clients can deploy it over Hypertext Transfer Protocol Secure (HTTPS) to ensure that interactions are secure. The application supports verified and unverified users. Before accessing chat, verified users provide credentials, such as an email address and username. On the sample chat application, clients can customise a wide variety of parameters associated with the appearance of the chat widget. Parameters include logos, colours, text, emojis, and advanced settings such as whether to pass context information to agents for routing purposes.

Email - The AxP Digital and All Media licence supports the retrieval of email messages from configured mailboxes and routes them to Workspaces agents as email interactions. Agents can use a number of configurable templates when responding to email interactions, such as text templates, automatic responses, signatures, and disclaimers. This allows the client to quickly respond to large numbers of emails without increasing staffing levels. For example, email templates help agents to respond to customers quickly, reducing interaction time and improving contact centre efficiency. AxP supports IMAP and POP3 for inbound mail and SMTP for outgoing email. It supports the following email features:

- Inbound email - Support for IMAP and POP3 mailboxes.
- Outbound email - Support for SMTP mailboxes.
- Intelligent routing - Configure keyword data rules to use configured keywords to identify email interactions that must be handled appropriately. AxP can scan the subject or body of an email for these keywords, and based on that, the keyword rule can trigger a particular workflow. Keyword rules also assign attributes to incoming email interactions. The account administrator can configure to ignore all emails from customers with auto-response flag, such as out-of-office-response. These auto-response flagged emails are not routed to agents, saving the agents' productive time.
- Email formatting - HTML or plain text support with formatting.
- Reply and forward email - Standard email reply, reply all, and forwarding capability.
- Outgoing email - Agents can create outgoing or ad hoc emails.
- Attachments - Email attachment supported for the following formats:
.doc, .docx, .eml, .gif, .ics, .jfif, .jpeg, .jpg, .log, .m4a, .m4v, .mov, .mp3, .mp4, .mp4a, .mpeg, .mpg, .oga, .ogg, .ogv, .pdf, .png, .pps, .ppsx, .ppt, .pptx, .txt, .wav, .zip, .7z, .avi, .bmp, .csv, .key, .svg, .tif, .tiff, .pub, and .accdb.
- Automatic responses - Configuration of automatic responses to automatically respond to interactions with no agent intervention.
- Signatures - Configuration of a list of signatures on Application Centre Administration. The agent selects a signature from a list of pre-configured signatures, which automatically adds that signature to the bottom of an outgoing message. For example, you can select a signature that adds your website URL to encourage customers to visit your customer support website. Or you can select a signature with promotional information for every outgoing mail.
- Disclaimers - Configuration of a disclaimer for each account. Only one disclaimer is published at a time. The agent selects the disclaimer, which appends it to each email response body.
- Templates - Configuration of templates that agents can use when sending outgoing emails to define the layout and content of the email message. You can select from the available macros to customize email templates.
- Quick text templates - Configuration phrases for use when handling email interactions. Agents can select and insert these phrases while responding to customer emails. Using text templates can help save time and maintain consistency.
- URL templates - Configuration of plain text URL templates that agents can use to send replies to customer email contacts.
- File templates - Configuration of file templates that agents can use to send replies to customer email and messaging contacts.
- Transfer to queue - Transfer an interaction to a queue that can find a more appropriate agent that has the knowledge to deal with the customer query.
- Transfer to user - Transfer an interaction to another agent or supervisor. The target user must be able to handle email interactions. This is a single step transfer; the transferring agent drops from the interaction immediately

when the transfer completes. If an agent rejects a transferred interaction, AxP attempts to return the interaction to the original agent. If that agent is subsequently unavailable, the interaction routes to the last queue and retains the original attributes.

- Auto answer - Enable auto answer for email interactions on a per-user or per-profile basis.
- RONA - Return on No Answer with a fixed timer across all channels. The fixed timer value is 30 seconds.
- Screenpops - Access an external website configured for a screenpop.

Messaging – The AxP digital and All Media licence supports messaging to enable agents to engage in rich, persistent, and asynchronous conversations with contacts. The solution supports SDKs for iOS, Android, and Web, allowing organisations to design their own modern messaging experiences. AxP SDKs are packed with best-in-class features to speed development time and reduce costs, helping clients bring to market products and services more quickly. It also allows for messaging history and content shared between consumers and agents to be available in the chat conversation channel. The following out-of-the-box Messaging features are supported:

- Rich Media Support on Agent Desktop - Send emojis, gifs, images, locations, carousels, and file attachments
- Digital Sample Library is available upon request for testing purposes
- Messaging transcripts storage in Customer's Journey
- Transfer to Queue/User
- Routing adjustment based on Estimated Wait Time
- Routing based on Queues and Context Data mapped to Attributes
- Customisable Welcome Greetings
- Automation before Customer gets to Agent
- Auto-answer
- Digital Library Templates:
 - Quick Text
 - URLs
 - Files

Social Media - The proposed solution currently supports or will support over the next 3 months the following Social Media Channels:

- Facebook/Facebook Messenger,
- X (Twitter),
- Instagram/Instagram Direct
- WhatsApp

More Social Media channels are being added to on each AxP enhancement.

Bring Your own Digital Channel

The AxP Digital and All Media licence allows for the integration of home-grown and common digital channels. For example, an organisation can add a Facebook Messenger link to AxP. This means that customers would not be routed to a random associate, but to a contact centre employee who understands their individual customer journey based on their history, buying habits, and past interactions. This access to customer data lets employees build real relationships, which increases brand loyalty and customer retention. Additional costs may be applied following further consultation with the client.

Inbound Voice

The AxP Voice and All Media licence provides the functionality to route and control voice interactions. Voice calls route to AxP when customers dial one of the phone numbers associated with the client. The system is configured with relevant attributes and queue information that apply for all voice interactions on each phone number. It is possible to select one queue for each phone number. AxP Orchestration is used through drag and drop icons to create the workflows that trigger for each phone number. The routing configuration impacts how the workflows can provide intelligent routing capabilities for each interaction.

Call Management - AxP supports routing voice interactions to agents using Workspaces. When a customer calls the contact centre it identifies a suitable agent based on the configured routing rules and attributes and the agent can answer the customer call and deal with their query. AxP supports the following voice features:

Feature	Description
Hold/Restore	Hold and restore calls using Workspaces.
Intelligent routing	Create routing rules that can use caller data to decide which workflow trigger. For example, trigger a specific workflow based on the country code of the caller's phone number. The workflow can base routing decisions on the available call data, such as estimated wait time, which enhances the customer experience and leads to improved customer satisfaction.
Auto answer	You can enable auto answer for voice interactions on a per user or per profile basis.
RONA	Return on No Answer with a fixed timer across all channels. The fixed timer value is 30 seconds.
Transfer to queue	Transfer an interaction to a queue to find a more appropriate agent who has the knowledge to deal with the customer query.
Transfer to user	Transfer an interaction to another agent or supervisor. The target user must be able to handle voice interactions. This is a single step transfer; the transferring agent drops from the interaction immediately when the transfer completes.

Transfer to external number	An agent or a supervisor can transfer a voice interaction to a PSTN number outside the contact centre in a single-step transfer.
Observe	Supervisors can monitor the incoming calls routed to agents or the outgoing calls initiated by agents. Supervisors can observe only one active voice call at a time.
Coach	Supervisor can coach the agents to provide expert advice and help to address a customer request. For voice interaction, supervisor can listen to the real-time voice conversation between the agent and the customer.
Barge in	Supervisors can barge into an interaction to help close a sale or interact with the customer. To barge in, the supervisor must first observe or coach the interaction. During barge, supervisor becomes an active party in the call with the customer and the agent.
Mute and unmute audio input	Agents can mute or unmute audio input. Muting the audio prevents customer from listening to undesirable audio.
Screenpops	Access an external website configured for a screenpop.
Localised Ringback tone	A customer can hear the localised ringback tone even when a call is transferred to an international agent.
Consult transfer and consult conference	During a customer call, an agent can make a consult call to a service or to another agent. The agent can also switch between the customer call and the consult call. The agent can complete the consult call with one of the following: - Consult transfer: Using this feature, an agent can transfer a customer call to another agent even if the target did not answer the call. Before completing the transfer, the first agent can pass the customer information to the next agent. - Consult conference: Using this feature, an agent can add other agents or supervisors to a customer call for assistance while remaining the primary point of contact.
Agent and supervisor internal extension call	Agents and supervisors within the same account can make internal extension calls to each other for non-customer call-related matters. For example, a supervisor can call an agent about the work schedule, or an agent can call the supervisor to discuss issues related to appraisal
AI noise removal	AI innovation automatically removes background noise from the agent and customer's end, irrespective of the calling device used.

AxP voice support uses a WebRTC client with Avaya Workspaces. Hence, firewall rule configurations are required for voice media connections when operating with a client virtual private network (VPN).

Preview Outbound Dialling

The AxP Voice and All Media licence provides a robust agent-based outbound Preview Dialer that can be used for contacting customers via the outbound Voice Channel. Preview Dialer selects one customer record at a time per available agent and presents the customer details to the agents. The agents can review the customer details and decide whether to “Accept” the interaction or “Reject” the interaction.

Key features and considerations:

- Outbound Campaign Management features such as defining an outbound contact list and selecting an outbound strategy
- Custom Completion Codes
- Contact List upload feature via a web browser or an SFTP site
- Export Campaign results with call outcomes from the portal or send it to an SFTP location
- Unified call-by-call delivery of inbound and outbound calls for blended agents
- Agents can Accept or Reject the interaction after previewing the customer’s data
- Fully configurable preview time
- Screen pop feature enables agents to view an external web page or agent script on the Screen pop tab
- Agent Notes feature enables agents to save important details about outbound interactions
- One queue allowed for each campaign
- Fully functional Standard/Campaign callbacks
- Maximum 10 Simultaneous Campaigns
- Maximum 100 Agents supported per tenant
- Tenant data segregation
- DNC register
- Campaign reporting and supervisor dashboard for monitoring agents and queues

Voice Recording

The AxP Voice and All Media licence includes Voice Recording which allows voice interactions between agents and customers to be automatically recorded in real time and then archived for 90 days. Agents can manually pause and resume the call recording of an active voice interaction at any time during the call to avoid recording sensitive information, such as credit card information. Agents and Supervisors are able to quickly search, replay, and report on calls by topic, which can dramatically reduce cost and time required for call reviews. The solution can even apply multiple tags to a single call, a benefit for long or complex calls, and provide alerts based on call disposition thresholds. Content-driven dashboards and intuitive reporting can help organisations gain a deeper understanding on why customers are calling, so they can take quick action.

Intelligent Routing

AxP has powerful attributes-based resource selection capabilities, which assign the right work to the right resource available, resulting in improved first contact resolution. It allows matching on multiple attributes, so resources can be in a single pool to be considered for incoming customer interactions resulting in reduced average handle time. Some examples of attributes could be situational contexts (location, weather, time, day, financial news, etc.) combined with customer data (demographics, device preference, contact details, social posts, purchase history, retention risks, etc.) and agent attributes (skills, experience, performance, location, language, gender, etc.) to match the customer inquiry to the right resource.

When an interaction is routed to the contact centre, many attributes can be associated with it from a variety of sources. AxP Orchestration services collate all of these attributes into a set, and this determines how agent matching occurs. AxP uses a dynamic queue, which changes for each set of routing attributes requested. To reduce customer wait times, AxP can refine the requested attributes and route the interaction to an agent that matches with some of the requested attributes. AxP can also set alternative attributes and route interactions to the first available agents matching the alternative attributes set. These routing strategies help to reduce customer wait times and improve customer satisfaction by still routing interactions to agents that can resolve the customers' request. The contact centre's routing strategy can be refined to suit the needs of each client and its customers.

Blending and Multiplicity - Agents can handle interactions across multiple channels, which can all be routed based upon the same set of attributes. Agents must be configured to handle specific channels, with interactions that best match the agent's skills routing to their configured channels. Agents can simultaneously handle multiple interactions using different channels. Administrators can configure the maximum number of active interactions agents can have open at any one time, ensuring agents do not get overloaded. Agents can handle the following interactions:

- Maximum 5 emails and chat interactions simultaneously
- Maximum 10 messaging interactions simultaneously
- Maximum 20 interactions simultaneously

Routing strategies - AxP supports routing strategy that allows the contact centre to route interactions efficiently, thereby improving customer experience and enhancing the reputation of your business. For instance the Most Idle Agent (MIA) strategy routes interactions to the agent who is idle for the longest time. It is possible to also define how interactions are prioritised when agents are available. Interactions can be routed based on the greatest need or based on the proficiency range. With greatest need, AxP routes the highest priority interaction with the longest wait time. With proficiency level, AxP routes the highest priority, longest waiting interaction to the most proficient agent available to handle the needs of the customer.

Timeout values - When an interaction is queued, AXP sets a queue timer. If the timer expires before the interaction routes to an agent, AXP removes the interaction from the queue. The timeout values for each channel are:

Channel	Timeout value (seconds)
Messaging	10800 (3 hours)
Chat	10800 (3 hours)
Email	604800 (7 days)
Voice	7200 (2 hours)
Video	7200 (2 hours)

Queues - All incoming AXP interactions requiring agent assistance are assigned to a queue. Once agents are assigned to queues, they can immediately handle interactions from those queues. Agents can be assigned to multiple queues and multiple interactions can route to a queue. An interaction can be assigned to a single queue. Queues are not associated with channels. Interactions can route to agents associated with a queue and assigned to the appropriate channel. When configuring the queues associated with agents or agent profiles, each queue is assigned with a proficiency level that determines the agent's ability to handle interactions in each queue. Proficiency is considered when matching work with available agents. When multiple interactions route to a queue and have the same selection strategy, the interaction with the higher priority routes to an available agent first.

A queue can be associated with a timetable. Before routing an interaction to a queue, AXP checks the associated timetable to ensure that the queue is within the hours defined, and AXP can assign interaction to this queue. If the queue is out of business hours, an out-of-hours handling behaviour is defined. For example, send an automated response to customers and end the interaction.

Interactions must route through a queue and can have attributes assigned. When an interaction has attributes assigned, AXP attempts to find an agent staffed with the queue with those same attributes. Workflows can have routing rules that modify the attributes set for interaction if the actual wait time is too long, the estimated wait time is too long, or the number of available agents falls below a certain limit. Removing attributes when one of these rules is met can increase the pool of available agents.

When an interaction is queued for routing with no associated attributes, it can be matched with agents in the queue with the appropriate channel assigned. If multiple agents are available, the interactions route to the agents that best match the requested proficiency level. If multiple agents are still available, the agent selection strategy defined in the workflow applies to find the best agent. The longest idle time is also considered when multiple agents are available. Agents can transfer interactions to queues. For example, transfer an interaction to a queue that finds a more appropriate agent with the knowledge to deal with the customer query.

Priority - Priority is a number that is assigned to an interaction entering a queue. Priority can be set while configuring routing settings per channel. Clients can decide on how to set priorities. For example, priority on a Support queue can be higher or lower than a Sales queue.

Powerful Reporting and Analytics

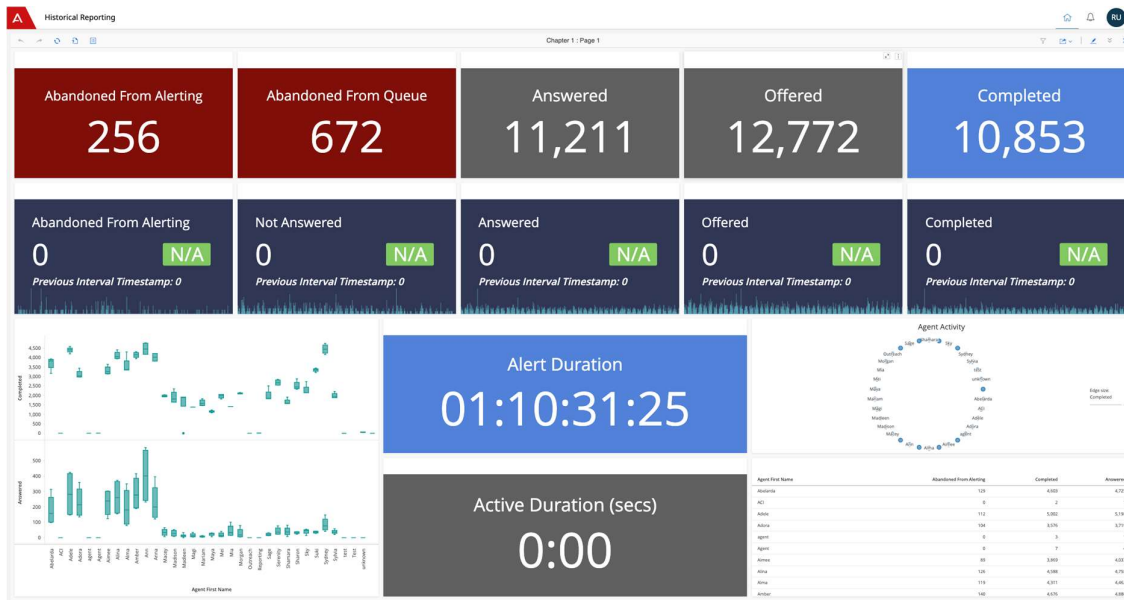
Analytics for AxP collects contact centre events, translates them into measures and stores them in the reporting database. With these measures, it is possible to create a suite of historical reports for AxP, and view these reports using the Analytics for AxP web interface. There are also a range of measures for use in real-time dashboards to provide an immediate view of the key contact centre KPIs to supervisors and Contact Center managers. You can view real-time reporting dashboards using Avaya Workspaces. Analytics for AxP is a generic reporting platform, and is event agnostic. The measures that the platform uses are generic. The Analytics for AxP web interface is hosted in the cloud, and supports interactive historical dashboards, dossiers, scorecards, formatted reports, ad hoc queries, thresholds and alerts, and automated report distribution. Using Analytics for AxP, you can:

- Streamline contact centre operations
- Reduce operational costs
- Provide enhanced services to customers
- Get insights from interactions to enhance customer experience and agent performance
- Analyse interaction types that AxP supports

The type of reports available out of the box include;

Historical

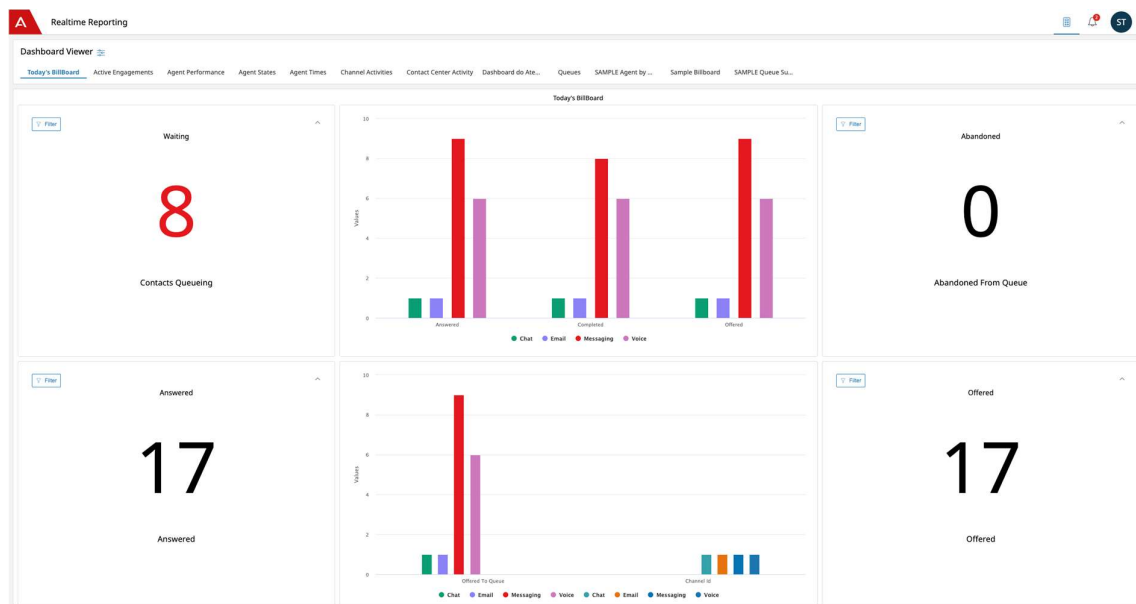
- Agent Login/Logout Report
- Agent Performance reports
- Not Ready Reason Code by agent
- Call-by-call reports
- Configuration reports
- Contact Summary Reports
- Multimedia reports (Email and webchats stats)
- Skillset performance reports (Offered, answered, abandoned)
- Cradle to grave reporting



Sample Historical Report

Realtime Reports

- Tabular Display (Agents activity) report
- Skillset Tabular Display (Calls Offered, answered, waiting, abandoned)
- Agent Graphical Display
- Graphical display



Sample Realtime Report

Customisable employee and supervisor desktop

Improve customer responsiveness, employee productivity and the customer experience by empowering your team to serve customer interactions using an intuitive, customisable desktop. Employees can serve multiple customer interactions simultaneously and receive data from multiple sources, including CRM and business systems, in a consolidated view. The unified desktop offers the following benefits for agents and supervisors

- Agents:
 - Support customer voice, email, messaging, and chat interactions
 - Efficiently handle multiple interactions at same time
 - Access to the customer's journey to view history of interactions
 - Easy access to a library of templates to speed response time
 - Feature rich Email Editor that allows for high customization of the agent's email response to their customer
 - Rich media support through messaging
- Supervisors:
 - Monitor omnichannel agents from a single pane of glass
 - Access to Real-Time Dashboards
 - Access to Historical Reports

Avaya desktop embedded in clients CRM

AxP CRM Integrations are modern Web Based, install-free omnichannel agent experiences that allows users to use the CRM as their main desktop while imbedding the AxP agent control function within the CRM Desktop. AxP unified desktop provides the following features:

- Support for Salesforce.com, Microsoft Dynamics 365 (Customer Service / Enterprise flavours) and ServiceNow CRMs
- Omnichannel Support for Email, Messaging, Chat, and Voice
- Multiplicity – allows an agent to handle multiple interaction cards simultaneously
- Interaction Cards
- Email Widget
- Messaging Widget
- Chat Widget
- Ad hoc Email
- Customer Journey Widget
- Change Agent State (Ready/Not Ready)
- After Contact Work Administration per Tenant/Queue
- Disposition/Reason Codes
- Internal Calling

- Blind Transfer to Queue
- Blind Transfer to User
- Blind Transfer to External Number
- Consult Transfer/Conference to User
- Consult Transfer/Conference to Queue
- Consult Transfer/Conference to External Number
- Supervisor Real-Time Agent Analytics Widgets
- Screen-pop Widget
- Routing Queue Name upload into CRMs' contact logs
- Service Observing Indicator for Digital Interactions

AxP Unified Desktop offers the following benefits for agents:

- Support customer voice, email, messaging, and chat interactions
- Efficiently handle multiple interactions at same time
- Access to the customer's journey to view history of interactions
- Feature rich email editor that allows for high personalization of the agent's email response to their customer
- Rich media support through messaging
- Backoffice Widget for Microsoft Teams integration

Back Office Integrations

Avaya Experience Platform with back-office integrations enables organizations to easily embrace a customer-centric culture by making every employee, not just the customer service team, responsible for and contributors of the customer experience. Organisations can drive experience improvements by enabling customer service employees to easily reach subject matter experts located in the back office, warehouse, a branch office, or an employee working from home, in the moment when it counts the most to quickly resolve customer enquiries. A unified system and consistent user experience eases collaboration and eliminates silos that can develop between departments and branch offices. AxP provides the following entitlements to facilitate collaboration:

- Avaya Spaces
 - Take calls, make calls, participate in video conferences, chat, collaborate – anywhere, anytime on one app
 - Stay on task, on schedule and act in the moment with file sharing, task management, in virtual team rooms or one-on-one
- Avaya Aura Integration
 - Access to Corporate Directory, create groups and add favourite contacts
 - Make Calls
 - Transfer ACD Calls
- Microsoft Teams Integration

- Access to Corporate Directory with user presence, create groups and add favourite contacts
- Make Calls
- Transfer ACD Calls
- Instant Messaging between Agents and back-office users

Key benefits include:

- Empower every employee to be responsible for customer experience
- Provide easy access to subject matter experts
- Make better, faster decisions by keeping everyone informed and connected 24/7
- Manage internal and customer projects within virtual, dynamic spaces

Visual Workflow Orchestration

AxP provides a web browser-based tool that enables Business Analysts and IT experts to create orchestration workflows by dragging and dropping capabilities from a palette onto a canvas. It is an intuitive tool that is the heart behind every AxP interaction (voice, email, messaging, and chat channel). It is the modern way to manage a contact centre and provides:

- Intuitive drag and drop GUI for rapid workflow creation
- Extensive, expandable, and customizable palette to tailor and customize Workflows
- Versioning of Workflows
- Live view of Workflow instances in process to observe the interaction from start to finish and discover any Workflow defects
- Queues Administration
- Workflow Templates
- Library of Pre-Routing Tasks
 - Start Automation Task – To start the customer with an automated app to enable basic IVR functionality before routing the interaction
- Library of Routing Tasks
 - Business Strategy Task – To automatically adjust the routing of an interaction based on Estimated Wait Time, Customer Wait Time, and Agent Count thresholds
 - Give Treatment Task – To automatically update the customer while in routing
 - Route to External Task – to route voice contacts to external DID's.
- Library of Expert Tasks
 - REST API Task – To pull in outside information from a CRM, database, etc. to make routing decisions
 - Azure Function Task – To leverage serverless Microsoft Azure functions from Avaya Experience Platform Orchestration

AI-powered self-service Automation

AxP Automation service allows Business Analysts and IT experts to configure first contact auto responses from customers and surveys to gather customer feedback after their interaction with an agent. It provides:

- Auto Responses
- Welcome Greetings
- Ability to quickly set up IVR flows
- Update voice prompts on the fly
- Intuitive drag and drop GUI for rapid workflow creation
- On the fly self-service applications deployment
- Workflow versioning

Automation is the interface where the client can create and manage assisted flows for Orchestration. Automation supports the following assisted flows:

- Virtual agents
- Self-service flows
- Flows

Flows and self-service flows have the same functionality. A self-service flow is a new way to present the functionality of the flows. A self-service flow is a set of tasks that Automation visualizes on the canvas. The creation process is similar to building a workflow in Orchestration. The following table shows Automation flows with respective tasks in Orchestration and describes their functionality:

Automation flows	Task in Orchestration	Function
Virtual agents	Add Virtual Agent	• Collecting attributes • Collecting customer identification information • Identifying a destination queue for agent matching
Self-service flows	Start Automation	• Collecting attributes • Collecting customer identification information • Identifying a destination queue for agent matching
	Give Treatment	Wait treatment
Flows	Start Automation	• Collecting attributes • Collecting customer identification information • Identifying a destination queue for agent matching
	Give Treatment	Wait treatment

Customer Journey Intelligence

AxP delivers the ability to create and view visualisations of the customer journey and interact with customer journey data. It enables a complete 360-degree view of the customer journey across all touch points and interactions. Each point in a customer journey is represented by an interaction with a touch point (web, email, voice, etc.) which provides agents and supervisors full visibility into any prior cross-channel interactions. From the AxP Customer Journey Widget, agents have the following capabilities:

- Ability to view all previous interactions for a customer
- Provide context to the agent about those prior customer interactions
- Visualize Customer Journey details such as:
 - Journey Start Date and Time
 - Journey End Date and Time
 - Interaction Point Type
 - Interaction Point Date and Time
 - Number of Interactions
- Availability to view transcripts of a digital interaction (email, messaging, and chat)

Workforce Engagement

The following table describes the main features and capabilities of Workforce Engagement that is part of the AxP All Media licence:

Feature name	Description
Basic Quality Management	It is possible to evaluate all the attributes of a customer interaction from a single screen, including voice conversations and associated screen data, messaging and chat interactions. Quality Management can help the contact centre make the transition to omnichannel customer engagement utilising Agent Coaching, E-learning and scorecards.
Screen Recording	Workforce Engagement can capture the entire screen of the agent in a video, while the agent has an active voice interaction. Supervisors can watch which tools the agents used during the voice interaction, how the tools were used, and how quickly the agents were able to provide the information to the callers.
Voice Recording	Voice Recording allows you to quickly search, replay, and report on calls by topic, which reduces cost and time required for call reviews. Workforce Engagement can also apply multiple tags to a single call, which is useful for working with long and complex calls.

4.3 Optional Features

Optional AxP functionality for contact centre agents is available through the following module for Voice and All Media licences..

Workforce Management - The following table describes the main features and capabilities of the optional Workforce Management

Feature name	Description
Advanced Strategic Desktop	Advanced Strategic Desktop provides reports on completed processes, how long they took, who performed them, and the steps involved. It is possible to view incomplete processes, transaction values, and account data at given steps.
Application Visualizer	This capability captures application and web usage data for each employee directly from the desktop without screen captures or video, eliminating potential distractions and protecting employee privacy. Application Visualizer also groups the applications into predefined categories, such as production-related, non-production, idle, and inactive time.
Automated Quality Management	This allows for the automation of the entire contact centre quality process, from scoring evaluations to assigning coaching. This capability can automatically score up to 100 percent of calls across all recorded interactions.
Compliance Trigger	Compliance Trigger ensures that the contact centre is complying with the appropriate rules, regulations, and processes. It can trigger actions based on real-time desktop events, such as pausing and resuming recordings, generating pop-up alerts with process step reminders for employees.
Da Vinci Speech Transcription	The Da Vinci Speech Transcription service can accurately transcribe calls in more than 75 languages and dialects and offers high transcription accuracy, including human-readable, term-level, and utterance-level formats. Transcripts include rich metadata, such as the speaker, start and stop timestamps, confidence level, and word placement.
Experience Management	It is possible to capture, analyse, and act on customer and employee feedback via multichannel surveying and multimodal campaigns for deploying surveys which apply conditional logic to allow specific interactions with the audience.
Interaction Data Export Manager	Interaction Data Export Manager exports all interactions and metadata outside of Workforce Engagement in a non-proprietary format for analysis, archiving, or storage.

Feature name	Description
Interaction Wrap-Up Bot	Interaction Wrap-Up Bot is an AI-driven automated summarisation tool that automatically summarises the conversation between the agent and the customer in real time to automate the wrap-up. Interaction Wrap-Up Bot provides precise summary notes after the call ends. Agents can review, edit, and approve the summaries.
PII Redaction Bot	PII Redaction Bot is an AI-driven, cloud-based compliance solution. The bot leverages the Da Vinci Transcription Engine to achieve an accurate transcription of AxP voice interactions and generate an accurate redaction of the sensitive PII information.
Real-Time Agent Assist	Real-Time Agent Assist (RTAA) is a cloud-based solution that analyses calls and desktop activities in real time and automates workflows. It automatically identifies opportunities to guide employees and provides in-context assistance and work automation solutions when certain criteria are met.
Speech Analytics	It is possible to build categories that reflect current customer issues across a large number of calls and instantly take action. Speech Analytics can identify themes automatically, continually refine them, and add new themes over time.
Workforce Management	This capability helps simplify hiring, forecasting, and scheduling, even with a large number of employees and complex scheduling periods. Workforce Management uses AI and virtual interviewing to automatically assess applicants. It also helps elevate candidate quality, accelerate time-to-hire, and enhance employee retention.

Social Connections - The Avaya Social Connections integration with Avaya Experience Platform supports the following social media platforms:

Social channel	Avaya Social Connections functionality
Facebook	The focus is on one-to-one private interactions. Agents can view complete conversation threads with a particular customer and tailor responses to the customer's needs. Note: The support does not extend to the public messages posted to a business page.

Social channel	Avaya Social Connections functionality
WhatsApp	Agents can use WhatsApp templates assigned to their queue to interact with customers. Additionally, agents can view end-to-end engagement threads with a specific customer and provide customized responses.
X (Twitter)	Agents can view complete conversation threads with customers and tailor responses to the customer's requirements. Agents can also share attachments of various formats, such as images and videos.
Instagram	Agents can view complete conversation threads with customers and tailor responses to the customer's requirements. Agents can also share attachments of various formats, such as images and videos.

The Avaya Social Connections integration with Avaya Experience Platform supports 16,000 BHCC (conversations per hour) across all four social media platforms for all Avaya Social Connections tenants.

AxP Messaging capabilities is an add-on service as part of the Avaya Social Connections offer, and is subject to additional usage based fees. The messaging services include:

- Easy to implement Web, Android, and iOS applications that can be fully customized and branded to fit customer requirements.
- Rich Messaging Interactions with Customer - Enable interactive messaging experiences using links, buttons, quick replies, carousels, location, and more
- Persistent conversation history - Retain context over time, and across web and in-app messaging via users' authentication
- Support for sending/receiving Files/attachments
- Support for Social Messaging integration to Facebook Messenger, WhatsApp and more.

4.4 System Resilience and Reliability

Avaya Experience Platform (AxP) CCaaS provided by Exchange provides the following performance, support and availability functionality including;

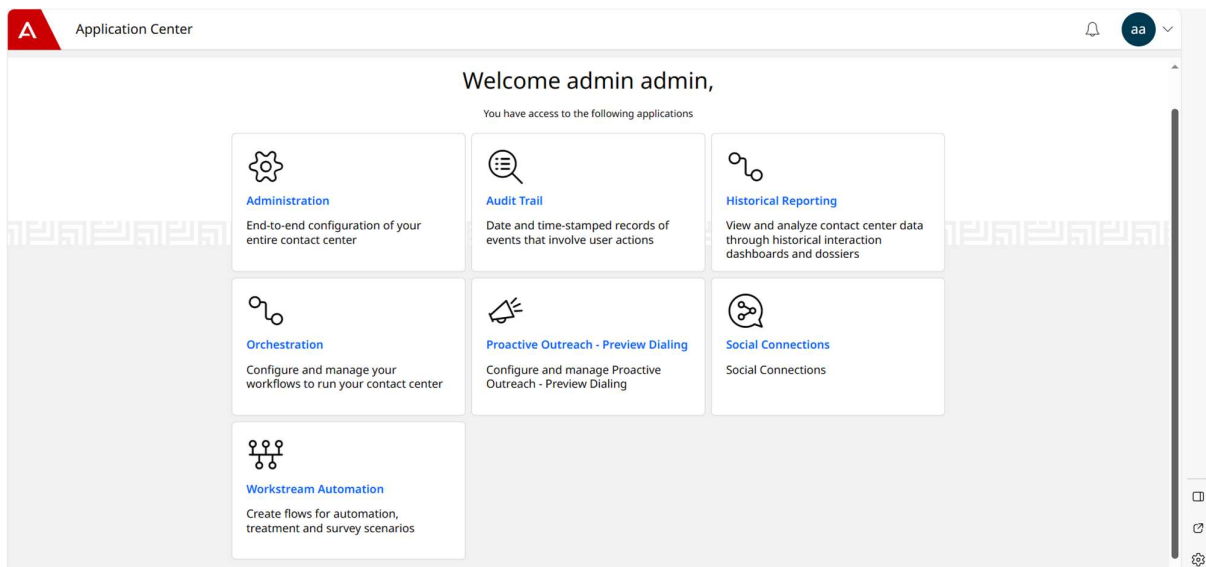
- 99.9% target availability at component level
- Upgrades performed out of hours with minimum impact.
- Evergreen Licence ensures latest release
- Full failover and resilient infrastructure

AxP is hosted on the Microsoft Azure cloud platform. It runs on Azure Kubernetes Service (AKS) clusters. AKS handles the management of the platform, which significantly reduces operational overhead. Avaya manages the AKS clusters on behalf of all AxP clients. All AxP services are deployed on multiple AKS nodes, and these AKS nodes form an AKS cluster. An AKS cluster can also contain multiple Availability Zones (AZ), which can contain one or more physical data centres. All AxP services are part of an Active-Active deployment within their cluster, which means if there is a local failure it does not impact service. This deployment model allows upgrades to happen with no downtime.

4.5 Web Portal Access

Application Center is a management interface that provides a single administration experience across the solution. The core administration services of AxP are available to configure in Application Center.

Figure : Application Center dashboard.



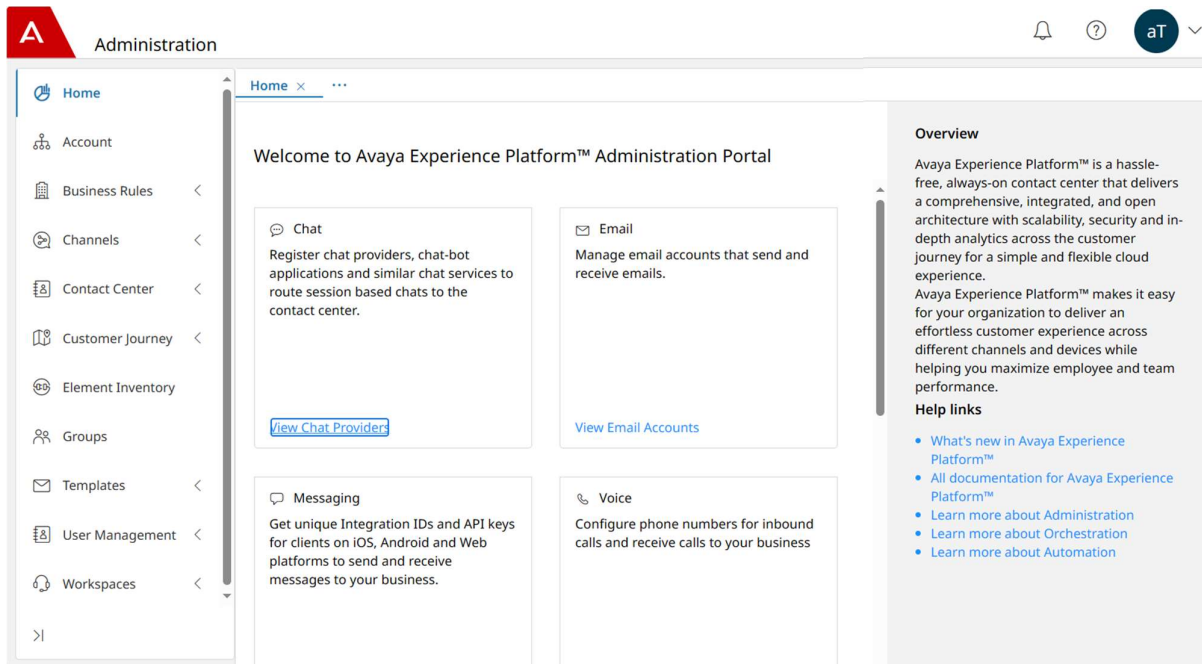
The Application Center dashboard has links to the Application Center Administration, Avaya Workspaces, Audit Trail, Orchestration, Automation, and Analytics for AxP applications and interfaces, providing a consistent user experience across the solution. Application Center Administration provides a navigation menu to configure different aspects of the contact centre.

Application Center has a persona-based login, and configuration is done at the system and account level. Account administrators manage entities that are specific to their account. Some initial default configuration exists in Application Center Administration after you first log in with the account administrator credentials Avaya provides. Application Center Administration supports a range of other roles, such as supervisors and reporting users. Application Center is based on industry standards and conforms with Section 508 standards.

Application Centre Administration

Application Centre Administration is a management interface where you configure all contact centre components, such as organisational data, templates, and users.

Figure : Application Center Administration Home page



In Application Center Administration, you can configure the following tabs:

- **Home:** quick access to the configuration of chat, email, and voice channels, profiles, and users.
- **Account:** configuration of the organizational data, including the multilevel hierarchy of locations, departments, and teams.
- **Business Rules:** management of business rules to collect data about incoming interactions and rules to configure keywords to identify email interactions.
- **Channels:** management and routing configurations of voice, chat, email, and messaging channels.
- **Contact Center:** creation and configuration of contact centre resources, such as attributes, customer identifiers, queues, reason codes, and timetables.
- **Customer Journey:** configuration of the timeline viewer for agents to display Customer Journey details.
- **Element Inventory:** configuration of elements, such as Security Assertion Markup Language (SAML) and digital chat connectors for available channels.
- **Groups:** creation of groups that you can use to sort users and data within your contact centre.
- **Templates:** creation of templates that agents can use to improve efficiency and simplify the handling of digital interactions.

-
- User Management: creation and management of user profiles for contact centre agents and supervisors.
 - Workspaces: configuration of Workspaces Layout Manager, Screenpops, UX profiles, and Widget Manager.

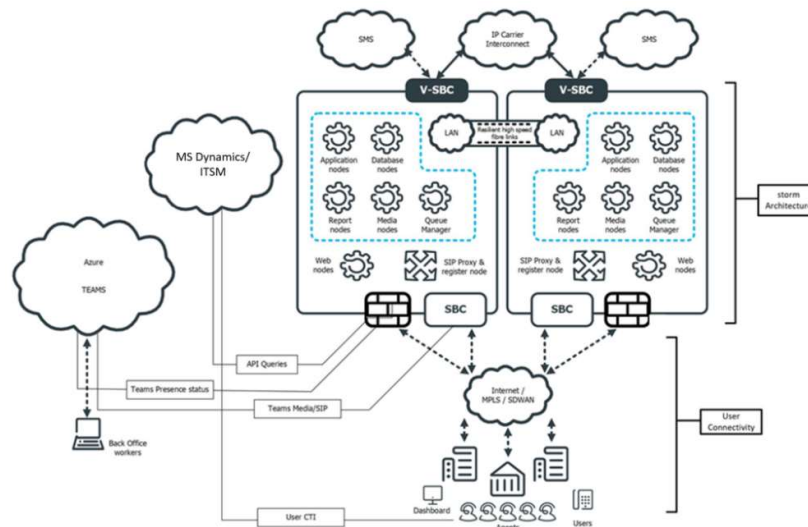
In Application Center Administration, the tabs in the navigation pane can be used to switch between different menus.

5 STORM CCAAS PROVIDED BY EXCHANGE

5.1 Overview

To be able to provide our clients with the best possible CCaaS solutions, Exchange have entered into a strategic UK partnership with Content Guru. The new partnership combines the leading capabilities offered by Content Guru and the market and delivery specialisms provided by Exchange further strengthening Exchange's position as an industry leader in this area. Content Guru is the only UK headquartered provider to feature on the 2023 Gartner Magic Quadrant for CCaaS and the **storm** platform is Europe's leading cloud communications solution and the only CCaaS platform in the UK to be trusted to operate 999 calls, which it does for 5 UK Police Forces and the UK's Ambulance services. It is architected to support huge spikes in demand, supporting customers such as UK Power Networks who themselves service 20 million customers, NHS111, who relied on **storm** during huge increases in demand through Covid, and Allianz, one of the largest organisations in the world.

storm is a true cloud solution provided in a multi-tenanted platform, meaning that each client's configuration and data only exists within its secure partition, whilst application nodes and other services such as SBCs are shared across the **storm** customer base enabling instant scalability. The platform is architected to 99.999% core availability (with 100% achieved over the past ten years) due to its mission-critical use. The solution is accessed via browser (Chrome, Edge, IE, Safari) on any internet-enabled device, over any internet connection (Public internet, dedicated connection etc). All features and functions work seamlessly and consistently regardless of where the system is being accessed from. The core **storm** architecture is labelled in the below diagram.



5.2 Storm CCaaS provided by Exchange

5.2.1 Summary

storm CCaaS provided by Exchange consists of a set of building blocks that can be deployed in any combination to create a vast array of contact centre services. Its modularity and flexibility, coupled with the breadth of services and features available, allow **storm** to provide value-added services to any type or size of business. As an organisation's requirements change, their **storm** services can adapt over time, with additional modules available to take an organisation from a small business to a growing enterprise. The **storm** platform consists of the following core items, which can be mixed and matched as required:

- **CONTACT:** intelligent ACD (automated contact distribution), IP contact centre functionality, flexible multi-channel routing and queuing, agent management and supervisor functions, provided via TDM or VoIP connectivity – this component is mandatory.
- **FLOW:** drag and drop automated workflow creation tool with inbound and outbound multi-channel and data integration capabilities
- **DTA:** DTA (Desktop Task Assistance) is a flexible, secure and easily accessible browser based app that allows agents to bring all interactions from every channel onto a single pane of glass.
- **INBOUND:** flexible inbound number management, allowing inbound access numbers to be pointed to automated IVR and contact centre services via the intuitive STUDIO™ interface
- **OUTBOUND:** powerful progressive, predictive and preview outbound dialler and multi-channel outbound campaign module with database integration, automated callbacks, reporting and wrap codes
- **CONTACT:SOCIAL:** Allows agents to deliver seamless omni-channel engagement across social media channels including (Facebook, Instagram, LINE, X (Twitter), Viber, WhatsApp and more, all on a single screen.
- **RECORDER:** always-on or on-demand call recording, with secure storage, archiving, distribution and search capabilities.
- **VIEW:** real time and historical reporting functions with automated scheduling and export options, threshold alerting and real-time service feedback triggers.
- **CKS:** CKS (Customer Knowledge System) uses customer data to support seamless, tailored interactions. CKS can be displayed as an overlay to present all data from all systems of record (including CRM) in a single pane. It allows for the mapping of journeys to see a 360-degree picture of customers experience.
- **WFO:** Provides all the tools needed to schedule, supervise, and support agents, maximising the quality and efficiency of the workforce
- **WFM:** Omni-channel workforce management system providing accurate forecasts and drag-and-drop scheduling to elevate agent performance.
- **QM:** Intuitive, browser-based interface to organise workforce allowing for the monitoring of agent performance with customisable score sheets.

- **ANALYTICS:** AI backed omni-channel analytics tool that ensures compliance allowing for every interaction to be reviewed quickly and accurately with Natural Language Processing with recordings grouped automatically by content and tone.
- **TRANSCRIPTION:** Provides automatic speech to text transcription to draw value from voice & video recordings
- **CKS: KNOWLEDGE MANAGEMENT:** Provides agents and customers access to knowledge quickly and easily, viewed either internally and externally, across any channel. The solution that can be updated as knowledge grows and it brings knowledge to a single, feature-rich platform, so customers get the answers they need when they need them
- **INTEGRATE:** connector modules that integrate **storm** services with thousands of different services including Microsoft Teams, Salesforce.com, Oracle RightNow CX, Microsoft Outlook and other third-party applications. Using open API's based on secure web standards, **storm's** services can be incorporated into customers' existing infrastructure allowing information to flow between the **storm** platform and third-party systems.

5.2.2 Licences

The commercial model for the proposed **storm** platform includes the following elements:

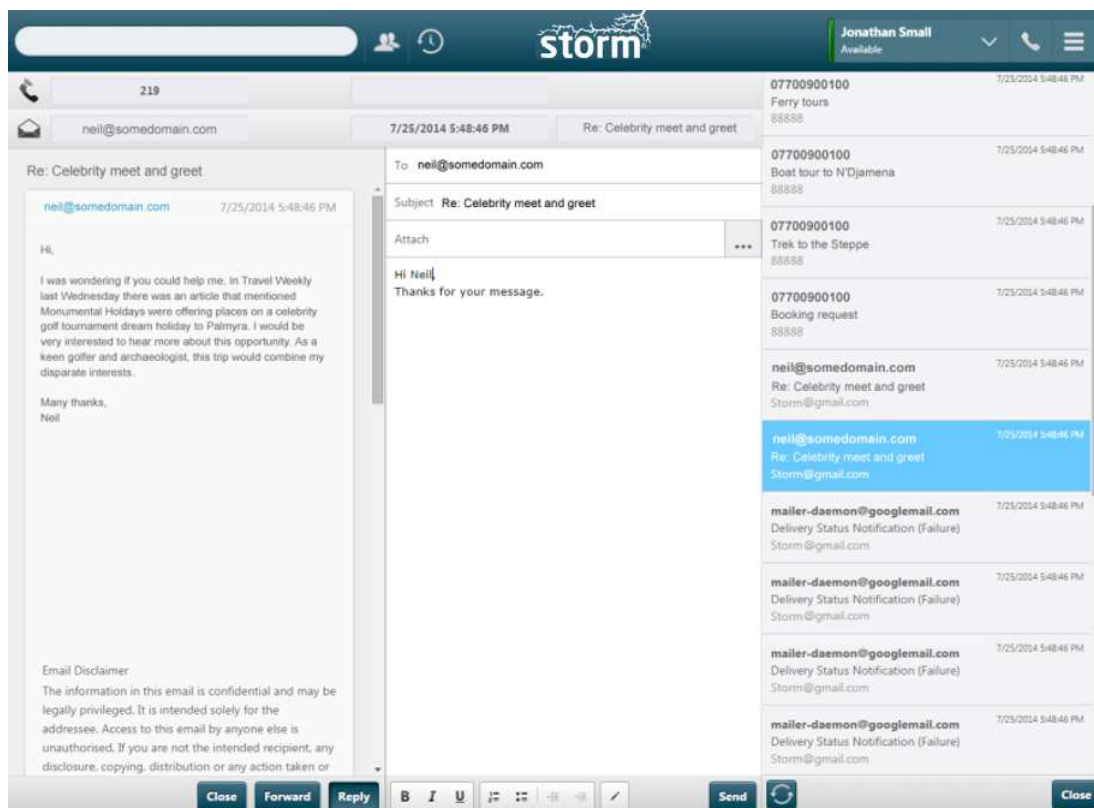
- Named licenses
- Concurrent licenses
- Professional services and set up charges
- Usage charges
- Transactional fees

The **storm** platform utilises both named and concurrent licensing models, depending on the type of license in question. Named licensing is used for critically important functionality such as administrator capability, which need to be reserved for only a pre-determined individual named user or subset of named users. All agents and supervisors have a named license, with concurrent licenses for the various channels in scope, providing flexibility and commercial benefit. Channels include: voice, SMS, email, web chat, Facebook, Instagram, X (Twitter), WhatsApp, Viber, Line, Trustpilot & Google Business Messenger.

A concurrent licence model is used for licences that are more widespread and whose functionality does not need to be limited to a select subset of users. Once a base profile is created on the platform, agents can be opted in or out of different queues, rights, and features for no additional charge. All the client has to do is have the appropriate number of concurrent licenses for each function it would like to take advantage of. For example, if a client wishes for 40 of their 150 agents to have access to SMS, they would simply purchase 40 concurrent SMS licences. These 40 licences are allocated on a first-come-first-served basis to the first 40 agents logging into the SMS queue for a given day. The client does not pay for all users to have the ability to use SMS at all times in this model. All Licenses are purchased for a set period, and more can be added immediately by liaising with the designated account manager.

Professional Services and Project management fees, as well as some one-off license fees will apply to the initial build. Inbound and Outbound usage charges are as per the supplied rate-card. Transaction fees will apply to modules such as PADLOCK and SMS. The modular a-la-carte approach ensures **storm** customers only pay for what they use, providing superior value for money. Functionality of the **storm** solution includes;

Agent Desktop: **storm** DTA is an intuitive online agent desktop, that is browser agnostic. DTA allows agents to respond dynamically to voice calls, emails, SMS messages, social media messages & web chats using a single intuitive interface. Caller information pulled from proprietary or third-party systems can be displayed, allowing agents to greet customers personally. For voice calls, an agent script can be displayed on screen to help agents speak to callers in a consistent manner. Users can make & receive voice calls via any device - an IP endpoint, a PSTN device, or the DTA Web iPath (softphone). The DTA will also enable agents to call both nationally & internationally with central alerting & call capping.



Clients will have the option to create a bespoke list of agent availability status' (e.g. on lunch, break, admin, etc). These will be reported on & supervisors/team leaders have the ability to move agents between statuses, as well as have full visibility over agents & their status' at all times. Agents have the ability to put calls on hold & make other calls as well as 'Cold' /'Warm' transfer contacts. Transfers can be made using the **storm** Active Directory which will be integrated with your AD & searchable via advanced search settings. The **storm** solution can inform callers of their place in the queue & provided estimated wait times as standard, as well as providing messages. Upon receipt of a voice interaction,

agents can be prompted by a whisper of the number or queue called, as well as IVR parameters being presented in the agent interface.

Digital Accessibility: Central to the new DTA design is the agent experience. Fully WCAG 2.1 AA-compliant, the DTA is highly accessible, with features including a high contrast colour scheme, the ability to navigate using both keyboard & mouse, & the flexibility to view channels & integrated modules together, in a single interface. This ensures that no matter the device, using **storm** is accessible & easy to use for all agents. Users of the solution, including agents & supervisors are able to adjust the appearance in the Agent Desktop.

Intelligent Automated Call Distribution (ACD) - ACD is a key component of the proposed **storm** solution, managed by administrators and (where appropriate) supervisors.

- **storm's** ACD rules are highly configurable and will give a client the ability to manage how calls are routed at all levels of the call flow. The below diagram shows how inbound contacts are conceptualised within **storm** and the corresponding configuration modules used by admins to customise and amend these flows.



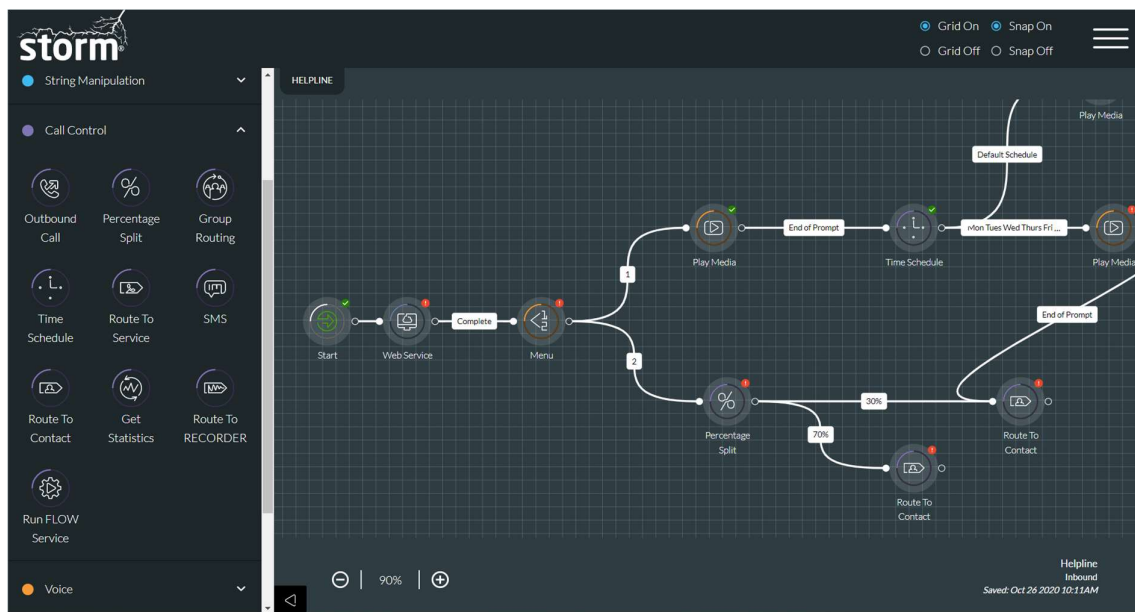
- Scripting variables are managed within FLOW, where administrators can define inbound scripts to service areas. Within FLOW, information is held as variables, these can represent any meta-data captured. This allows the interaction to be personalised for the customer.
- Automated call distribution can be configured to route calls to the most appropriate agent. Meta data, captured in FLOW, can be used to match callers to the most appropriate agent and to prioritise certain contacts. **storm** will provide skill-based routing, whereby agents are scored on particular enquiry types (service area, language, etc.)
- As a real world example, some public sector bodies using **storm** integrate their vulnerable citizen records with their call routing. A CLI match is used to identify those who are known to be at risk and route them to priority lines, bypassing queues and IVRs.
- Dynamic routing, based on available agent, staffed agents and queueing interactions is available within **storm**. When constructing call flows within FLOW, a client may use the “Get Statistics” action cells to interrogate this data by service area and use this as a variable to decide how to route the call.
- When thresholds such as no available agents are met, a client may choose to push callers down self-service pathways or load balance calls to other service areas, whereas when agents are available, calls may be delivered directly to the agent without these pathways being actioned.

IVR's – **storm** provides rich IVR functionality from within the **storm** service creation environment, **storm** FLOW. FLOW is a low-code environment enabling appropriate users to create, edit & maintain customer journeys across all channels from within a single, intuitive interface. FLOW allows users to create intelligent IVR's with highly flexible & dynamic call flows.

- Natural Language Processing - The **storm** FLOW tool will incorporate Natural Language Processing & Speech to Text capabilities within the IVR. This is used by some customers for ID&V or to completely replace IVR menus & enable callers to 'say why they are calling' & be routed to the right service.
- DTMF Entry - DTMF options can be configured into customer journeys within **storm** FLOW in a no-code, intuitive manner. DTMF entry from customers can be used for ID&V, self-service & for connecting customers to agents.
- Queue messaging - The **storm** solution can inform callers of their place in the queue & provide estimated wait times. This messaging is configurable & the routing logic can be reactive to queue position & wait time.
- Capturing IVR intent - IVR utterances can be captured & reported on fully to give visibility over callers' intent. Moreover, they can be tagged as metadata to recordings enabling you to perform advanced searching.
- Queue/IVR messaging – The client will have complete control over the IVR & Queue messaging/music. Recorded announcements can be uploaded into IVR scripts or queues by uploading media files. These can be saved into a 'media library' for ease of access. Enhanced Text-To-Speech (TTS) functionality also removes reliance on voice artists & speeds up IVR message changes. Furthermore, scripts can be designed to allow dial-in access for authorised staff to record messages ad-hoc & automatically insert at pre-determined points in the script.
- Skills based routing (SBR) - SBR is configured within the **storm** admin portal with key configuration elements also available in the Supervisor desktop for ease of operational management. **storm** offers advanced contact routing capability above & beyond routing by common factors such as IVR selection, time of day, customer's available channels, contact recognition & business logic. The **storm** platform provides the ability for intelligent automated contact distribution (iACD), such as skills-based routing, to be configured within the **storm** CONTACT service. Within **storm** CONTACT, agents can be assigned skill-levels individually & as a service type, enabling the system to select the most appropriate agent to handle each contact. Once skills-based criteria have been established, it

can be leveraged to prioritise incoming calls & contacts. Agent skills can be managed by Administrators in **storm** CONTACT, or by Supervisors in **storm** DTA.

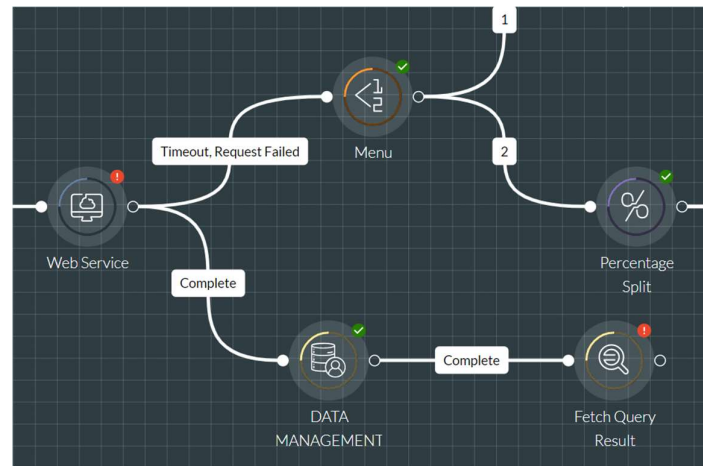
- Automated overflow rules widen the selection of agents available for a particular queue based on wait time, queue length or any other criteria. Agents with appropriate rights are able to manage their own agent group attendance, allowing back-office staff to step in to help with front-line services during periods of peak demand. **storm** is also capable of routing a customer through to the agent with whom they last interacted.



storm FLOW

FLOW's programming and integration tools include:

- Variables: user, system, global, and CDR variables, variable manipulation, calculations, and comparisons
- Data management: retrieve data from and write to DATA MANAGEMENT database tables as part of an automated CONTACT:IVR service
- Database connection: connect to local or remote databases to retrieve and write data and execute SQL queries via secure sockets and VPN. Over 100 database engines are supported.
- Web services: secure web services operating in a DMZ can connect to any third party data source using REST and XML/SOAP
- Developer tools: programming tools to assist service creation, development and debugging
- Live events: monitor specific script routes and send customised information to VIEW
- Dynamic service logic: adjust service in real time based on feedback and alerts.



Supervisor Controls - The proposed **storm** solution provides supervisors with self-service functionality to make changes to their service areas and the agents within their Contact Centre including,:

- Agent Monitoring & Management; including ability to amend/add/delete agents, log agents out, change statuses, cherry-pick interactions. Listen, whisper & barge onto agent calls.
- Amend/Apply skillsets for skills based routing
- Manage agent groups & queues, channel management
- Reporting Access, including real-time & historical.
- Recording Access for Call Recordings & QA
- Ability to change call flows/workflows with appropriate licence (**storm** FLOW) in real time
- Ability to manage closure times and holidays.
- Ability to broadcast & set messages/alerts/ad-hoc and emergency announcements

Call classification – Agents can be forced to classify each call through wrap up codes which can be designed within **storm** and be unique for a client (e.g. at the queue level) enabling agents to capture the desired detail according to the contact centre the caller comes into. Wrap codes can be designed to capture data by:

- Drop down lists
- Tick boxes
- Button press
- Free-text
- Set call-back timings (requires dialler licencing)

The amount of time an agent can be in wrap can be configured, with the ability to enable the agent to choose when they leave wrap, if required.

Optional sign-in - If necessary the proposed solution caters for some agents such as supervisors, to become an agent and help answer calls at a click of a button. This also extends to certain back-office staff who can become contact centre agents when staffing is low. It also allows for agents to work in multiple contact centres and diverse service areas. Agents will be able to join specific groups flexibly as per their assigned rotas. The system provides several ways to manage agents who work across multiple service areas.

- **Real-time Opt-In:** Supervisors can assign services to the agents in service based on their daily rota through the DTA interface. The client can also configure this for
- **Automated Overflow Management:** Calls redirect based on set criteria, like wait times.
- **Bulk Administrative Actions:** Admins manage agents at scale, adding/moving/editing them in relevant groups.

Fully Customisable call queue - Using **storm**, supervisors are able to configure queues independently. This includes:

- Hold and comfort beep/ messaging for each queue.
- Time of day routing-configurable within the INBOUND administrator interface.
- Ability to provide call back option to caller if queue becomes too long
- Ability to onward route calls to surveys following their interaction. Post-call surveys can be delivered either over the phone or using a text message after a call.
- Whisper tones for agents to notify them of the queue, or other information about the interaction, before they are placed on the line with a caller.

Real-Time Reporting - The **storm** platform offers both real-time and historical reporting features, ensuring that various aspects of agent activity, interaction details, and system configuration are tracked and analysed. The **storm** reporting suite, VIEW, enables the generation of reports based on agent performance, skillsets and service areas/contact centre. The platform's intuitive interface allows users to create customised data analysis reports that track these metrics in real time. In addition, the historical reporting feature provides detailed insights into agent activity, skillset usage, and service area/contact centre performance over time.

The reporting solution covers the entire lifecycle of interactions, from initiation to closure. This includes interactions that involve transfers between agents, back-office functions, and external numbers. The Historical Reporting feature of **storm** VIEW allows users to construct bespoke historical reports that offer cradle-to-grave insights into the duration and progression of each interaction.



The system's real-time reporting capabilities extend to call queues and menu options. Users can create real-time reports that provide visibility into call queue performance and menu option utilisation. This real-time monitoring ensures efficient management of call traffic and menu responsiveness, providing each contact centre with the business intelligence required to improve and measure these services over time. All Reports can be accessed on supervisors' devices as well as displayed on wallboards. The **storm** solution allows administrators to configure access and restrict users to specific reports based on their service areas, ensuring data security and privacy while providing a tailored view of information relevant to each user's role. Summary reports can be scheduled to be emailed to stakeholders on daily, weekly or monthly basis.

Call Recording - The **storm** RECORDER is capable of recording all calls initiated by or received in a client's contact centre, whether inbound or outbound. This includes transferred calls between agents, ensuring that the full lifecycle of each call is captured. The solution also allows for the selection of specific agents and service areas to be recorded. This means that a client can choose which agents and/or services need to have their calls recorded. **storm** RECORDER integrates with the other **storm** applications to deliver flexible and secure cloud-based contact recording, archiving and retrieval. Multi-channel conversations (via voice calls, SMS, email, web chat, and social media) can be archived, searched, retrieved and downloaded. It includes the capability to record an agent's workstation screens and store them on the system for replay via the RECORDER interface. The screen recording feature works by having a small application installed on each agent's workstation. When a recording is detected for a particular extension or agent then the associated

screen agent is instructed to start recording. Once the call is terminated both the audio and screen recording is terminated and the recording is immediately available for replay via RECORDER.

Conversations are stored and backed up securely across two geographically separate UK data centres and accessed over a network connection, meaning that clients do not need to invest in on-premise servers and infrastructure. Conversations can be hosted on the platform for as long as required – if needed, recordings can be stored indefinitely. The configurable access rights that **storm** offers means that a client will have the ability to configure user access to these features as they see best.

- Access recorded calls via the RECORDER interface or via the DTA desktop interface
- Download and email calls- All calls may be downloaded in this way as standard. This may be done using both the RECORDER and DTA interface by appropriately righted users.
- Tag sections of recordings- Within **storm** RECORDER, areas of calls may be tagged.
- Call transcription- Call transcription is available within the **storm** RECORDER interface.

Omni-Channel - storm has full Omni-Channel capabilities covering the following channels:

- Voice
- Email
- SMS
- Web Chat
- Twitter, Facebook, WhatsApp, Viber, Line, TrustPilot, Instagram

As the **storm** solution is built on single software architecture, owned, developed and maintained by Content Guru, all channels brought onto the platform are seamlessly integrated into the entire suite. For example, configuration, reporting, recording and channel handling are all done from common interfaces regardless of channel. This simplifies the contact centre environment and allows blended channel management and seamless transition between channels from a customer and organisational perspective. Depending on a client's preference with regards to user rights profiles, administrators, supervisors and agents may define how channels are prioritised. For example, calls may interrupt web chats, or a queueing call may be delivered to an agent ahead of a queueing email. Further to this, rules may be set, especially regarding digital channels, regarding how many interactions can be handled at any given points. Some organisations often allow more experienced agents to handle more than one simultaneous web chat, this is something that a client would be able to consider should they utilise **storm**.

Teams Integration - The **storm** product has been certified by Microsoft under Microsoft's connected contact centre program. This should not only provide reassurance that **storm** will work seamlessly with any core telephony platform but also demonstrates Content Guru's commitment to continue working with Microsoft Teams and improve the functionality offered as the Microsoft APIs develop. The **storm** solution can provide integration with shared tenancy Microsoft Teams environment to provide the following functionality::

- PSTN breakout capability for MS Teams users
- Presence of MS Teams users to be represented within **storm** agent interface. This data is passed through API's between **storm** and Microsoft Azure.
- From the **storm** interface agents are able to make transfers either to individual MS Teams users or to MS Teams auto-attendants or queues. Individual MS Teams users or queues can also be accessed through IVRs.
- All calls that pass through **storm**, either via the contact centre or via a **storm** IVR can be recorded within the **storm** recording product. This includes outbound calls from MS Teams.
- All MS Teams calls that pass through **storm** can be reported on within the **storm** reporting suite, common to the contact centre, thus simplifying operations and gaining quick and easy views of the end-to-end call journey.

The Teams user will require an E3 Telephony license or an E5 license to consume this capability. For clarity, a client's contact centre agents will be setup on **storm** & linked with their corresponding MS Teams account via the integration. They will be able to see Teams presence whilst benefitting from the advanced **storm** reporting, & call recording functionality.

Other Integrations: **storm** FLOW provides the option of a REST API action cell which can allow for the call script to send a request for data retrieval, modification, or deletion to a RESTful API, & then store any data returned for use elsewhere in your script. Modern APIs can be defined in OPEN API/Swagger specifications. These machine readable documents can be uploaded to **storm** to automatically provision the data items that these APIs require & surface. The agent's knowledge management can be set to search the database & bring up articles upon delivery of the interaction to the agent.

CRM - To provide a simple integrated CRM, the **storm** solution can support CRM capability in two forms: (1) the ability to carry out CLI look ups, & associate these to interactions & recordings, which can be reported on in both the reporting & recording tool. (2) An alternative option, is to provide the in-built Customer Data Platform (CDP), known as **storm** CKS (Customer Knowledge System) which will utilise the callers CLI as the identifier & tag to a record, this will then provide

a full 360 degree view of the customer journey, where the agent responding to the interaction has the ability to view previous interactions.

CKS - **storm** Customer Knowledge System unifies all customer, staff and organisational data into one highly-accessible interface, delivering a 360° view of every aspect of a client's customer base and business. Customers engaging with an agent are automatically identified across any channel they choose, such as SMS, email, and voice, and provided with instant, personalized service, whether interacting with an automated response for an update on a raised ticket or engaging with an agent with all relevant knowledge to-hand.

The screenshot displays the 'storm' Customer Knowledge System interface. The top header shows the user 'James Rodger' and the date '2/14/2017, 8:50:26 AM'. The main content area is divided into several sections: 'Contact Details' (including Willingness of Contact, Owner, Job Title, Surname, Preferred Contact Number, Reports To, Date Of Birth, and Favourite Football Team), 'Contact Type' (Contact), 'Title' (Mr), 'Forename' (Matt), 'Work Number' (07793545545), 'Email Address' (mar325@contentguru.com), and 'Notes' (Heavily involved in integration work). The 'Comments' section on the right shows a list of interactions with dates and times, such as '21/07/2017 16:09:48' and '19/07/2017 16:09:35'. Below the comments is a table for 'Associated Opportunities' with columns for Name, Company, Type, and Owner. The interface also includes a 'Records' sidebar on the right and a 'Delete' button at the bottom left.

storm CKS

The Customer Journey tab provides agents with access to the interactions made to and received by a customer.

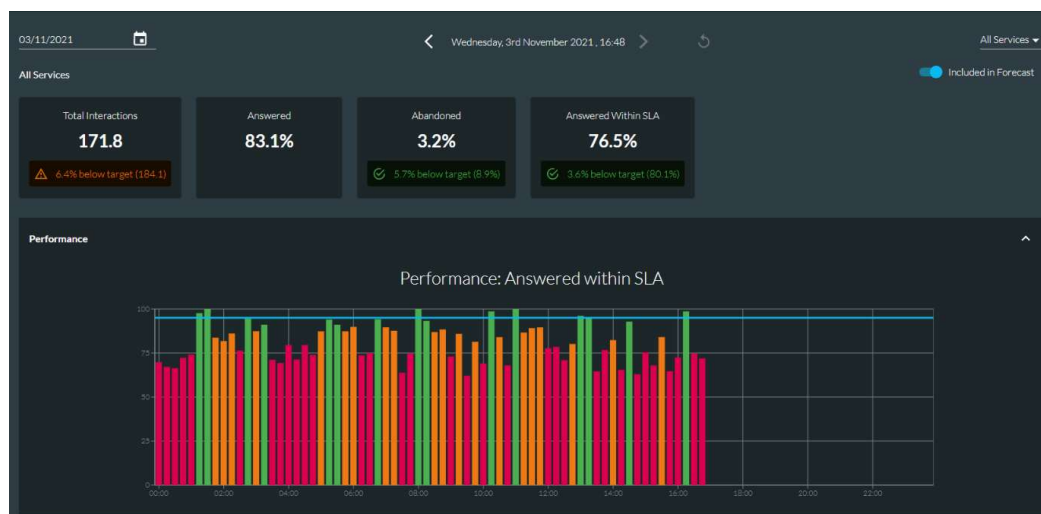
The screenshot displays the 'CKS: Customer Journey' interface. The top header shows the user 'Agent 7' and the date '2020-09-29 14:27:02'. The main content area is divided into several sections: 'Customer Details' (including Name, Email, and Phone Number), 'Open Orders' (including Claim, Home Insurance, Car Insurance, and Rental), and 'Customer Journey' (including a timeline of interactions with dates and times, such as '17 mins 42 secs' and '0 mins 39 secs'). The 'Customer Journey' section shows a list of interactions with dates and times, such as '2020-09-29 14:27:02' and '2020-09-29 13:56:35'. The interface also includes a 'Queue Name: WebChat' section on the right and a 'Close' button at the bottom left.

CKS: Customer Journey

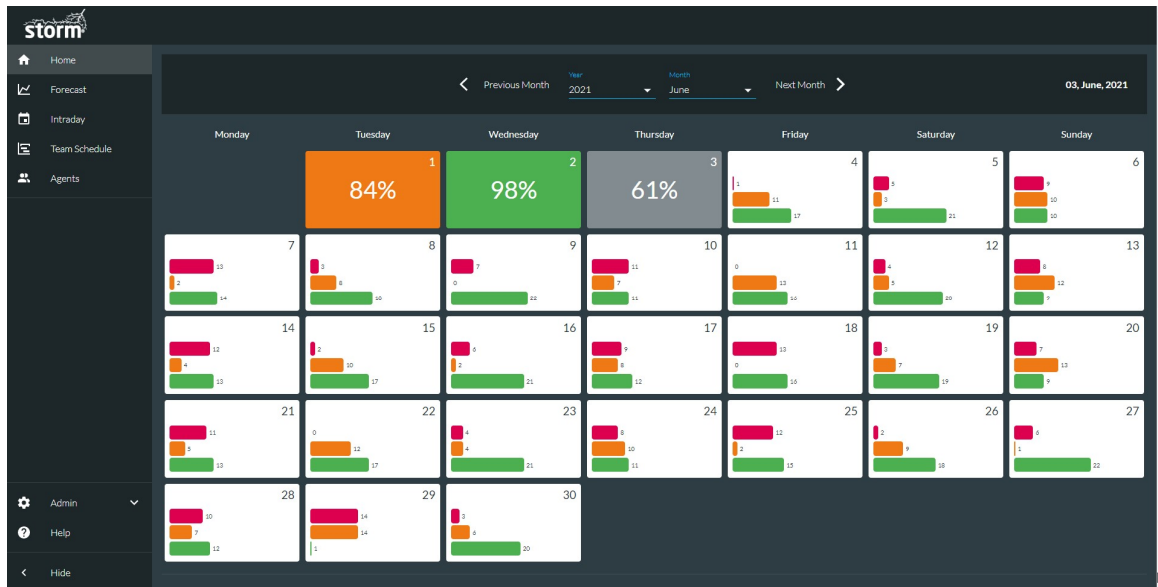
Workforce Management - storm WFM delivers powerful, native Workforce Management functionality through a simple, intuitive interface. This enables supervisors and administrators to both access and understand information at-a-glance, as well as to implement changes rapidly and improvements. It delivers this simplicity without sacrificing the power and complexity of a classic WFM tool, allowing contact centres of all sizes to adopt the system with little management overhead. These capabilities allow management to view actionable data and get powerful insights into their contact centres without a lengthy set up or training process.

storm WFM sits within the CONTACT product set as a native contact centre tool. As a result, it avoids the inherent limitations of a standalone WFM. Rather than relying on a network of integrations for even the most basic of functions, resulting in unavoidable oversights in the hand-off from the contact centre environment to the WFM, **storm** WFM is built-in to the **storm** environment. Consequently, the tool is fully integrated by default, and capable of handling the complex and powerful data **storm** provides. It analyses the data from services such as **storm** CONTACT during 15-minute intervals of each day. The algorithm then predicts the number of interactions expected throughout the day. To do this **storm** WFM creates various models and then runs a simulation of the various models to determine the most accurate one. The forecasting function allows administrators to see the predicted level of interactions, plotted against the recommended number of agents for that volume of demand. This can be broken down on a per-queue basis, or combined in order to gain a holistic view of the contact centre. Supervisors use the forecast to schedule the required agents for each shift.

Administrators have the ability to set Key Performance Indicators (KPIs) and SLAs, as well as alerts to be triggered if these KPIs or SLAs are being exceeded, or not met, as appropriate. **storm** WFM defines a service as a queue or a group of queues; alerts can be set for each service for when SLA for service is met or missed and for when too many agents (overage) or too few agents (underage) have been scheduled for the actual requirements. The SLA Adherence graph displays adherence of the contact centre performance to a set SLA, giving supervisors a real-time view of compliance, and the ability to respond rapidly to issues.



Other charts show total interactions and agents online, allowing supervisors to ensure the planned number of agents are online, as expected. The Calendar View is displayed on the home page and shows the SLA adherence as a percentage, and shows the scheduling for the days ahead.



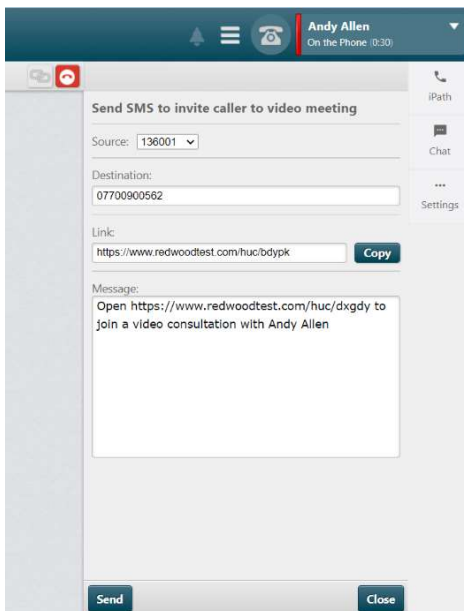
WFM features include:

- Forecasting: the algorithm uses historical data to predict the number of interactions expected throughout the day
- Manual scheduling, using agents' skills and forecasted number of Agents to build and export a schedule against the forecast. The automation of this process is coming soon.
- Charts provide at-a-glance information on how closely the current number of ongoing interactions matches the forecast and whether there are too many, too few, or the right number of agents online
- Calendar View of historical and future days.

5.3 Additional Features

Optional **storm** functionality for contact centre agents is available through the following **storm** modules.

LINK: Powerful, feature-rich customer engagement tool allowing clients to deliver video, file and location sharing services within a call. By using WebRTC it allows DTA users to initiate a video session with clients by utilising the video capability of smart phones. During a phone conversation, the DTA user clicks the LINK button to send an SMS message to the client's mobile phone. A form is displayed to the DTA user, allowing them to enter the client's mobile phone number and compose the SMS message that includes the link to the web page.



The client receives the SMS message and then clicks the link in the message to begin a video session with the DTA user.



Custom reports can be generated in VIEW to report on LINK video sessions, enabling you to report on, amongst other statistics, the number of invitations accepted and rejected, the call duration, and the video session duration.

MACHINE AGENT: provides the contact centre with an always-on, AI-powered workforce that delivers cutting-edge intelligent automation and conversational customer service across all channels, including voice, web chat, and social media. This conversation flow is structured by intents, entities, and responses. When a customer's reply matches any entity, a pre-programmed response is sent via voice or SMS, as configured in FLOW. A machine agent can be used to replace a human agent in that it:

- Handles one enquiry at a time.
- Works to an organisations requirements.
- Works both In hours / Out of hours.

-
- Is trained for one skillset.
 - Gives first line support
 - Handles reception / switchboard tasks
 - New action cell within FLOW, new action cell.

Other optional functionality includes

- **BRAIN:** Powerful AI toolkit bringing intelligent automation to improve customer service. Create personalised experiences with custom Machine Agents[®]. automate self-service for 24/7 contact. Integrates with all **storm** modules for future-proofed customer journeys.
- **ASK:** Quick and easy surveying tool to gather valuable, insights from customer interactions across multiple channels.
- **MTA:** Softphone for smartphone allowing users to use their mobile phone as a telephony device on **storm**, managing interactions from anywhere
- **LOCK and PADLOCK:** automated PCI-compliant card payment solution, with self-service IVR and agent-assisted option via PADLOCK.

5.4 System Resilience and Reliability

The proposed **storm** platform is embedded within tier 1 carrier networks, with resilient links to the carrier's MSP/MPLS network for Voice over IP (VoIP) and the PSTN for TDM calls. Typically, the platform is interconnected with multiple carrier networks, for additional resilience at the network layer.

The platform is hosted at a minimum of two secure and physically separate data centres. These exist in an active-active configuration, and are delivered leveraging high speed, low latency cross data centre connectivity. This architecture delivers seamless resilience and load sharing with the infrastructure and services architected to provide 99.999% uptime.

In addition to data centre failover, redundancy is provided within the individual data centres to provide further resilience. This is at: server, disk, networking and security levels (e.g. dual firewalls, clustered session border controllers and switches).

The platform's built-in resilience capabilities can be summarised as follows:

- Hardware clustering
- Hardware resilience and automatic failover
- Active-standby and active-active backup server configuration

- Configuration and database mirroring
- Distributed media storage
- Inter-site resilience links
- Automated failover in the event of a data centre failure with no disruption to service

As stated above, the **storm** services are delivered across diverse components located within geographically dispersed data centres, resulting in a Recovery Point Objective of 0. Full and transactional back-ups are completed on a regular schedule. The platform offers as standard four hour Recovery Time Objective (RTO) to fix P1 service faults. To summarise:

- Hosted in a public cloud, highly secure and multi-tenanted environment
- Logical, secure separation between 'organisations' on **storm**
- No single points of failure in platform architecture
- 99.999% core platform availability
- Recovery Point Objective of 0, Recovery Time Objective of 4 hours for a P1
- No hosting partners

5.5 Web Portal Access

storm CCaaS provided by Exchange is completely browser-based & allows self-serving through a secure, highly intuitive and user-friendly interface which provides clients with full control & autonomy if required, where administrators can build &/or modify the entire contact centre via industry standard two-factor authentication. Administrators will be able to manage agent, agent groups, queues, skills & rules, number & access point management, as well as full control on reporting, recording & service creation of workflows. The following features are available:

- CONTACT:INBOUND number management: route to multi-channel iACD services, FLOW scripts, PSTN numbers, SIP trunks, SIP endpoints, or back office services such as hunt groups or voicemail or CONTACT:IVR services
- Disaster recovery: re-route services to alternative destinations with a single click
- Time of day routing: open and close services based on time of day, day of week, or configurable holiday schedules
- Origination recognition: recognise incoming contacts by origination address or number prefix and route them to alternative services
- Access point groups: group multiple access points together for easy management
- Multiple onward routing: send voice calls to multiple PSTN destinations on busy or no answer
- Call recording: enable call recording for any type of call

- Cloud-based voicemail: overflow voice calls to access numbers into voicemail if the destination is busy or unavailable
- Voicemail to email: receive notifications and attachments when new messages are left
- Sub-organisation management: assign numbers and manage services for child organisations
- Auto-attendant: intuitive point and click template IVR service
- Media upload: upload and manage voice prompts and other media for use in **storm** services
- Percentage weighted routing: load balance between different destinations according to a percentage weighting.



Access to the **storm** solution is roles based and there are a number of security checks to validate entry and audit logs to monitor entry and activity. All entry to the **storm** solution is password controlled. If required, agents can be configured with 2FA requiring an OTP sent via SMS or email to login. All supervisor and administrators log in via 2FA using RSA tokens or via the methods above.

Within a partition, user rights define what a person can do (e.g. add, edit, and delete information). User profiles can be built, the properties of which can be inherited by users. Access profiles can be assigned to a user to allow an organisation to segment visibility and control of data within a single partition, i.e. they define what assets within a partition the user can control, and the user profile defines what they can do to those assets. These profiles are defined within the admin portal so top level administrators have complete control of them. The **storm** solution maintains a full audit history of any user that makes a change and when.

6 SIP TRUNKS

6.1 Overview

SIP (Session Initiation Protocol) is a technology that allows you to make calls over an Internet connection (IP connection), rather than a traditional phone network. It facilitates the use of Unified Communications essential to modern business: voice, video, streaming, and web conferencing. This reduces costs and can help you maximise your network investment for your business.

If you've invested in, or are considering investing in, a network, or fast internet access, SIP can help that investment go further. You'll get more flexibility than with a traditional phone service and can take your number with you if you move, reducing any risk of losing customers and negating the need to re-advertise a new phone number or reprint stationery. Our SIP service is backed up by a dedicated 24/7 support available 365 days a year via our Customer Management Centre.

Other advantages of SIP are:

- Cost-effective and comprehensive disaster recovery options to help protect your business.
- The business migration to SIP.
- SIP voice, with obvious cost savings combined with the greater flexibility.

In short, SIP enables organisations to do more for less.

6.2 Benefits

- **Reduced call costs** - Make calls over your IP connection rather than a standard phone line.
- **Save on network costs** - Single network means simpler to manage
- **Always keep the same number** - Take your phone number with you no matter where you move to.
- **Look local** - Use numbers local to where your customers are, giving the impression of a local presence.
- **Quality** - Calls get priority over other data so they always get through
- **Business Continuity** - In-built options to make sure your customers can always get through to you.

Each SIP trunk will be provided with an inclusive call bundle covering calls to 01,02,03 and 07 UK mobiles with the following monthly usage limitations;

- 5000 Minutes per channel per month to UK landlines (01,02,03) with a maximum of 15% of total minutes being to 03 numbers.
- 2000 Minutes per channel per month to Mobile (fm1,3,4,5,6)

Additional charges for UK landline and mobile calls will only be applied if calls are in excess of the call allowance.

6.3 Number Porting

Exchange Communications are able to provide DDI number porting as part of the SIP services on offer. Our Managed Services department will work with clients to determine the precise porting requirements with our standard process includes the following;

- written and signed confirmation (“Letter of Authority”) that the client wishes to take ownership of the services
- a full list of individual DDIs including area codes
- the name of your underlying Direct Supplier
- the account (or reference) number
- the billing address for all the services

We are fully experienced with porting numbers and are accustomed to extracting the necessary information from client’s bills. We ensure the correct and complete notification is given to any proposed new carrier. We will discuss at length the porting date and apply for a date and time that offers limited disruption. If required, we will be able to apply for separate porting dates for individual sites. Number porting requests usually take around four weeks, but we always ensure a built-in recovery time is included within our implementation plans. Once the porting request is accepted the actual date of the port can be adjusted to suit the rollout plan so there should never be a delay to the go-live date. The managed services department is highly knowledgeable in resolving any issues that arise once the porting request has been sent including porting emergencies that may occur on the day of port, thus avoiding a reversal back to the current supplier.

6.4 Connectivity

Exchange Communications are able to offer a full range of broadband services including Ethernet, SoGEA and Fibre to the Premises (FTTP).

Ethernet Features

- Dedicated high capacity and flexible connectivity
- Dedicated, uncontended bandwidth
- Managed router
- Service Level Agreement
- Resilient failover
- Maximise productivity

SoGEA Broadband - SoGEA stands for Single Order Generic Ethernet Access and allows users to place one order for their broadband data service without the need for a traditional phone line installation. It delivers the same performance and

data rates as FTTC broadband, uses the same infrastructure and has the same geographic availability and future proofing connectivity as the UK moves to an all-IP network. The benefits of SoGEA include

- **Cut costs** - Because you are only paying for a broadband data connection, your monthly costs will be lower as the landline rental cost is no longer included.
- **Deal with only one provider** - With SoGEA everything comes from us and you are no longer tied into a landline contract. SoGEA is using an established network without the addition of a phone line so the chance of interference or an unstable connection is lower.
- **Quicker installation** - You only place one order with us for SoGEA, making it quicker to install and minimising disruption to your business.
- **Great for homeworking** - Many UK businesses are shifting towards a hybrid workforce, because of the Covid-19 pandemic, so having good connectivity at home has become essential for many. SoGEA is quicker to install, easier to manage and works well with UCaaS and hosted telephony products.
- **Future-proof connectivity** - The PSTN network will be switched off by the end of 2025, and many PSTN exchanges are already under notice of switch-off as the UK prepares for the move to full fibre. SoGEA enables you to have a broadband or ethernet connection agnostic of the PSTN network, future-proofing your business connectivity.

FTTP (Fibre To The Premises) Features

FTTP is fibre broadband, wired directly to the site instead of a cabinet that services the site. FTTP, unlike FTTC, uses all fibre optic cables, making it the fastest type of fibre you can get. In fact, fibre optic allows for up to 1GBps (1000Mbps), though there aren't any current UK providers that offer speeds that high. With the combination of fibre optic cables and the fact that they go directly to your home, FTTP is certainly the preferred option for those who are serious about their broadband use.

7 CLOUD CONSULTANCY AND PROFESSIONAL SERVICES

7.1 Overview

From initial consultancy to implementation and beyond, Exchange Communications can provide businesses with the full spectrum of cloud services, all with comprehensive, ongoing support. Our relationships with our business partners mean that we are truly a one-stop shop for all your telecom needs.

These strategic partnership agreements with market leaders, such as Avaya and Content Guru, mean our clients can access an extensive portfolio of leading-edge cloud telephony services. We also offer a wide range of products, from Analogue phone systems to the latest VOIP Integrated voice and data phone systems. We also supply a full suite of applications to complement your business telecom system, including audio conferencing, video conferencing, IP Security, Wi-Fi, voicemail, call recording, call logging, call centre applications and speech recognition. Exchange has everything to tailor your system to suit your business needs.

The backbone of any voice and data telephony solution is the quality of the network infrastructure. Exchange Communications have a team of highly trained and qualified engineers who can build simple but effective 5 user Cat5e/Cat6 networks up to 5,000 or more user systems based on layer 3 switching products with redundancy, Gigabyte back bone and full CTI (Computer Telephony Integration). We are able to consult, advise, design, build, install and support your entire ICT operation, providing a complete turnkey solution.

From initial consultancy to implementation and beyond, Exchange Communications can provide businesses with the full spectrum of cloud services, all with comprehensive, ongoing support. And our relationships with our business partners mean that we are truly a one-stop shop for all your telecom needs.

7.2 Communication

We believe communication is the foundation of a solid relationship and we make sure we are there for our clients throughout a project - from clear project management and in-depth staff training to responsive maintenance support and ongoing account management.

Project management - your dedicated contact

We offer clients a dedicated Project Manager to guide the installation, ensuring the system that goes live on completion day meets all your requirements. Dealing with one person who is fully involved in your implementation is vital for simplifying lines of communication and assures a swift, smooth delivery.

A typical implementation will include these key steps:

- Initial project orientation meeting: We meet with you to identify the site, the configuration of the system, feature plans, feasibility and conduct a thorough inspection. Our site surveys are always carried out by the Project Manager or the Senior Engineer in charge of the project. As part of our ongoing commitment to our clients, all site surveys are free of charge.
- Demonstration: We give a presentation of the equipment and project plan to all involved.
- Business needs examination: We work with you to identify how you see the system working, and the customer service model you wish to provide. This is a key discussion, ensuring that we set up the system to best meet your needs.
- Training schedules: We agree a training and development schedule for your staff. Training will help maximise your investment and ensure staff are confident in using the new systems.
- 'Go live' day: We are on-site with you when the system goes live. The Project Manager, Engineers and Trainers are there to support you closely as you start to use the new technology.
- Evaluation and evolution: We hold a debrief meeting to make sure you are happy with the project work, and also discuss the potential growth and development of the system and services.

7.3 Managed Services

With our Managed Services option, you have a single source of support for all your communication system needs, combining all your data and voice products in one fixed contract cost. This is ideal for growing companies spread over multiple sites, managing business costs, improving efficiencies and allowing a better return on investment. With Exchange's reliable, responsive support in place, you are freed up to focus on core, key business activities. We provide a full range of managed services, including:

- SIP Direct (IP Direct Connect, free calls between sites, lower cost calls, DDI, CLI as standard - all over existing IP network)
- Bespoke call rates to save money over your existing provider
- Voice and data circuits
- Private circuits
- Virtual numbers (geographical independence)
- High speed broadband (High speed fibre broadband (SOGEA/FTTP))

Our Managed Services bring many benefits to busy businesses, including:

- Reduced system 'down time' due to proactive monitoring and improved service levels
- Immediate savings on communication costs
- Consolidation of all data and voice products into one fixed monthly bill.
- Seamless changeover from BT - staying on the same Tier 1 network, but at a reduced cost

- One escalation procedure
- Reduced capital and overhead costs
- Reduced training and HR overheads
- Rapid deployment of new technologies
- Secure data and systems
- Availability of 24/7, 365 days a year direct access to technical expertise
- Shared risks and responsibility
- Improved capacity planning through constant proactive analysis

7.4 Training

Exchange Communications has successfully supported the implementation of cloud-based systems and as part of our portfolio we are able to provide a wide range of client training including IT Admin, Super User/Train the Trainer courses, as well as Contact Centre Agent/Supervisor training. A dedicated training contact will be allocated, who will be responsible for co-ordinating any relevant Training Plan required. Further details regarding some of our most popular courses are;

Course	<i>IT Administration Course</i>
Length:	½ day
Class Size:	5 people
Audience:	Client personnel with system programming administration responsibilities
Description:	The course provides skills and knowledge to perform front end administrative tasks including Moves Adds and Changes on the hosted system
Objectives:	Upon successful completion of the Course, the student will be able to: ▪ Login/Logout procedure and changing passwords ▪ Use of keyboard and help feature ▪ Simple diagnostics ▪ Mobile twinning features ▪ Assigning Voicemail ▪ Altering auto attendant menus ▪ Modifying names and extensions ▪ Adjusting out of hours settings ▪ Automated alerts for sites and types of users

Course	<i>Train the Trainer (Super User)</i>
Length:	½ day
Class Size:	up to 10 people

Audience:	Designated people to become internal training contacts
Description:	Each session is designed to fully train students with the functionality of IP handsets and to train them to impart information learnt to others within their organisation.
Objectives:	Upon successful completion of the course, the student will be able to: • making outgoing internal and external voice calls • receiving incoming internal and external voice calls • placing an incoming/outgoing voice call 'on hold' • transferring an incoming/outgoing voice call to an internal extension • transferring an incoming/outgoing voice call to an external number • Conferencing in colleagues • Diverting calls to alternate numbers • Retrieving Voicemail • Voicemail box administration • Impart knowledge gained to others in the form of formal or informal training

We have successfully completed full skills transfer and are happy to engage in a range of knowledge transfer activities to share learning with end user staff including;

- Online knowledge databases
- Collaborative service portals to share documentation
- Access to how-to videos for the hosted solutions
- Project team meetings

8 CLOUD SUPPORT SERVICES

8.1 Overview

Selecting Exchange Communications as your cloud-based communications systems provider is the start of a long-term partnership. The primary objective of this partnership is to maintain your communications systems to their optimal performance level to help your business provide first class service to your customers and staff. To achieve this, Exchange Communications aim is to clearly understand your business goals, the needs of your staff, and the special demands of your markets. By investing this time, it enables Exchange Communications to design a support maintenance contract that best reflects the needs of your business.

We pride ourselves on having first-class customer care with a dedicated and fully experienced Service Desk team. Our team takes ownership of any support issues from beginning to end and have easy access to our technical support and field engineers. They also have a close relationship with our partner companies to ensure all problems are resolved as quickly and efficiently as possible.

Customer Satisfaction Score

**AVAYA**

Customer Excellence Score



8.2 Cloud Support Plans

The Cloud Support Packages offered by Exchange Communications scope the operational hours within which the response will be delivered. There are three Service Support Plans:

- 1 Silver
- 2 Gold
- 3 Platinum

Exchange Communications handles all client communication requirements, from complex multi-site and call centre configurations and networked communication solutions to installation, commissioning and training. All this is backed up by Exchange Communications being a BS EN ISO 9001: 2000 approved maintainer ensuring that in the important area of after sales, the system is supported at every level. Client requirements will include network suppliers, business resilience, disaster recovery and cost models for any technology refresh or networks supplier agreements.

The Cloud Support Plans offered by Exchange Communications are therefore made up of a number of service elements. Below are outlined the component elements that are used to build a Support Plan. The flexibility provided by this building block approach ensures that our clients benefit from selecting a Support Plan that is tailored to meet their business needs.

Service	Silver (level 1)	Silver (level 2)	Gold	Platinum
Cover	Mon-Fri*	Mon-Fri*	365*	365
Call-Out	09:00-17:00	08:00-20:00	24 hours	24 hours
*Excluding public holidays				
<i>Proactive monitoring</i>	✓	✓	✓	✓
<i>Access to service desk</i>	✓	✓	✓	✓
<i>Customisable notification</i>	✓	✓	✓	✓
<i>Remote diagnostics</i>	✓	✓	✓	✓
<i>Troubleshooting</i>	✓	✓	✓	✓
<i>Portal access for SW</i>	✓	✓	✓	✓
<i>Portal access for health check</i>	✓	✓	✓	✓
<i>Maintenance permissions</i>	✓	✓	✓	✓
<i>Clear and concise billing</i>	✓	✓	✓	✓
<i>Remote systems back-up</i>	✓	✓	✓	✓
<i>Tier III and IV supported</i>	✓	✓	✓	✓
<i>Annual preventative maintenance</i>	✓	✓	✓	✓
<i>Network assurance/assessment</i>	Available	Available	Available	✓
<i>Software release management</i>	Available	Available	Available	✓

Silver Support Plan – SSP

The Silver Support Plan is Exchange Communications entry-level offering for clients who require an all-encompassing support plan, without the need for bespoke elements or cover outside of standard working hours. Like both the Gold and Platinum plans, the Exchange Silver level support provides clients with annual preventative maintenance.

Gold Support Plan - GSP

The Gold Support Plan is Exchange Communications comprehensive offering based on 365 days cover, for those clients who require more than the standard working week cover. The Gold package gives you the same service as the Silver plan, in addition to having on-site critical spares, to resolve any issues as quickly as possible.

Platinum Support Plan – PSP

The Platinum Support Plan is established for Exchange Communications and the Client to design a fully bespoke Support Plan. The Platinum Support Plan as a basis includes all the facilities offered within the Gold Support Plan, but in addition may include other services such as network assurance and software release management. The Platinum plan gives you

true 24/7 – 365 cover; including public holidays. Due to the bespoke nature of the Platinum Maintenance Support Plan it would normally be supported by a separate Service Level Agreement (SLA).

As an accredited Avaya Edge Diamond partner as well as an accredited strategic partner with Content Guru, Exchange Communications has a vast amount of documented information to provide a library specific to our hosted services and solutions. This documentation can be supplied and used in conjunction with any of our support packages.

8.3 Preventative Maintenance

At Exchange Communications we believe in pro-active, and wherever possible, preventative maintenance. Our experience has shown that the vast majority (>95%) of faults can be responded to by monitoring alarms and resolving issues prior to any noticeable impact on the end user.

- Remote Access - Our support service is provided on the understanding that remote access for support, diagnostics and monitoring is available. The assigned engineers will perform routine platform maintenance and administration.
- Software Updates - Exchange will be responsible for all software support for the cloud solution including necessary remote upgrades, patches, hotfixes, etc. When new features/patches become available these are fully tested by our engineers prior to installation to ensure they are efficient and beneficial and that the upgrade is completed seamlessly. Exchange will ensure that any system downtime required to carry out system upgrades is undertaken at a time convenient to all parties.
- Preventative maintenance – This is of huge importance to many clients and is something that we build into our service offerings. Our qualified engineers will be able to constantly monitor the solution to head off potential issues before they arise.
- Monthly Service Calls – These “courtesy” phone calls provide the opportunity to raise any issues with us.
- System Health Checks – This will consist of an in-depth review of the relevant system. Site documentation and our own service desk database will be updated to reflect the current status of the solution
- Management Information – Management reports on solution and contract performance will be supplied on a quarterly basis. These MI reports will reflect any pre-agreed SLA’s and will be configured to precise requirements.

8.4 Service Desk

All our support plans provide access to our award-winning in-house service desk which is available 24/7, 365 days a year. We are able to allocate unique service desk telephone numbers to all our contracted clients so that when a call is answered we are immediately aware of who is calling. Exchange provide each client with full contact details for a primary and secondary engineers as well as the Service Desk Manager. This Points of Contact document will be maintained by Exchange Communications and will include the main client contact where necessary.

In order to ensure the best quality of support and that SLA targets are met in all circumstances all contacts, no matter how informal, asking for technical engineering advice will be handled via our Service Desk in the first instance. This enables us to track requests and have a history log regarding queries. The Service Desk can be used to raise faults, arrange moves, adds and changes or for advice and information regarding the supported system and deals with all reported faults as well as providing assistance on resolving operational issues, which are not classified as faults. Service tickets can be raised with our award-winning service desk via;

- Freephone number.
- Terrestrial number of our Network Operating Centre (NOC).
- Designated Service Desk number.
- Email address of service support.

For major system faults we recommend using the telephone to make contact as it will always be answered without delay. It is our corporate policy to not queue incoming client calls on our support desk lines. If a particular department is busy, then calls automatically extend out to a larger hunt group of our staff so that the person calling will always get a human response from an individual within Exchange Communications. Upon reporting a fault, full details are entered onto our Salesforce CRM. These details include;

- Client Name.
- Contact Name.
- Type of Fault (Critical, Major, minor, other).
- Fault details.
- Time fault reported.
- Contact details.

A unique fault reference number will be issued by which subsequent enquiries pertaining to the fault can be tracked. The fault reference number is created automatically upon insert and remains for the lifetime of that record. A complete and thorough record is kept of all correspondence received regarding each and every fault whether received via phone, email or web portal. Salesforce CRM is designed to allow for similar types of faults to be monitored so that if a fix is found it can be forwarded on to the client's support staff and easily applied to other relevant tickets.

The Service Desk are responsible for identifying the appropriate resource to resolve the issue and the following details are required for accurate fault resolution;

- Time responded to.
- Date and time started.
- Date and time completed.
- Cause code.

- Action code.
- Action taken: This is to be completed in as much detail as possible.

8.5 Escalation Procedure

Our Service Desk Manager will be able to track the progress of all support calls within our Salesforce CRM. Salesforce monitors all open faults and automatically highlights via the “Traffic Light” system if 75% (Amber) and 100% (Red) of the response time has elapsed. The response time is formatted depending on the terms of the contract logged on the system at commencement date. This enables any critical issues to be highlighted immediately upon receipt so that all necessary parties are fully aware at the earliest possible moment. The Service Desk Manager proactively carries out the following with regards checking on the status of all outstanding faults.

- Any changes in the following areas are updated into the system:
 - Allocation/re-allocation of Engineer.
 - Telephone response detailing in notes how response was made.
 - Extension of fault detailing reason for extension.
 - Contact from client.
 - Investigating and recording reasons for missing response times.
 - Any other relevant information relating to that fault.
- Faults that reach 75% and 100% of response times are notified to the Client Director and progressed immediately.
- Relevant notes are made of any actions taken in such an event.
- Root Cause analysis - Any findings discussed with Primary Engineer and Account Management team as appropriate

Our Escalation process has a documented series of escalation steps to resolve problems satisfactorily. It commences with the Service Desk Manager and then progresses through the Account Manager, Sales Manager and ultimately the Managing Director. Contact details for each step in this process are provided at the start of all maintenance contracts.

We monitor our performance automatically against targeted SLAs as part of our internal Quality Management system and the results are reported to management every quarter. Any slippage in performance is analysed and corrective actions implemented to ensure we meet our stringent quality standards.