Strictly Private & Confidential

OPUS BUSINESS SYSTEMS LIMITED

GOV.UK Digital Marketplace

G-Cloud 15

Netcall Service Definition

Prepared by
Jenny Critchfield
Bid Director
0208 545 7121
bid@opustech.co.uk

OPUS

Table of Contents

Distribution List

Name	Role	Representing
Jenny Critchfield	Bid Director	Opus

Change Control

The document and its associated procedures, templates and diagrams are created and maintained by Opus Business Systems Limited trading as Opus Telecoms (Opus). When a change must be made, Opus will record and agree the change with the Framework team manager and a note will inform all in the distribution list that a change has occurred. Opus will periodically update this document to reflect agreed changes.

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

Amendment Record

Version	Date	Status	Comments
1.0	30/01/2026	Issued	First Release

OPUS

About Opus

Opus stands as a prominent UK-based provider of unified communications, collaboration, contact centre, and remote working solutions. With our headquarters located in Surrey, our dedicated team of over 120 highly skilled technical consultants, project managers, and account management specialists has successfully served more than 2,500 customers. Collaborating closely with you, we strive to gain a comprehensive understanding of your requirements, enabling us to deliver tailored telephony and IT solutions that elevate your service quality, optimise operational costs, and boost staff productivity.

Opus takes immense pride in our extensive collection of industry accolades, solidifying our position as one of the premier managed service providers (MSP) in the UK. Our commitment to excellence is further underscored by our ISO9001, ISO14001, ISO27001, and Cyber Essentials Plus accreditations, demonstrating our steadfast dedication to maintaining the highest standards of quality and security.

A key strength of Opus lies in its independence, which empowers us to offer impartial advice and recommendations regarding the most suitable hardware, software solutions, and cost-effective business-class network providers. We supplier business communications solutions that are built to withstand the rigorous demands of our customer's organisations, ensuring robustness and reliability in every aspect.

Celebrating Our Best Companies Achievement

Best Companies Accreditation is one of the most respected benchmarks for workplace excellence in the UK. This recognition is based entirely on employee feedback, measured through Best Companies' unique BCI scoring framework. It represents the highest standard for organisations that truly put their people first.

Accredited organisations meet rigorous criteria through anonymised survey data and the BCI scoring system, earning official recognition for their commitment to employee engagement. For Opus, this accreditation reflects our unwavering dedication to creating a culture where our people thrive. It demonstrates that workplace engagement isn't just a priority—it's a vital part of our success.

Opus has been recognised for the second time as '3 Star – World Class' in our 2025 Best Companies survey, and at the Best Companies 2025 Big Reveal Event in November, Opus was proud to achieve the following outstanding results:

- No. 1 in the Business Services category
- No. 5 among companies in the South East
- No. 6 in the UK Mid-Sized Companies rankings

These accolades highlight our commitment to fostering an exceptional employee experience and reinforce our belief that engaged teams drive exceptional outcomes.

Our Story

Established in 1992 under the visionary leadership of our Chief Executive, Michael O'Donnell, Opus has evolved into a thriving organisation while preserving the ethos of a compassionate, customer-centric business. Our unwavering commitment to our people lies at the core of everything we do, fostering an environment where they can flourish and excel with ample support.

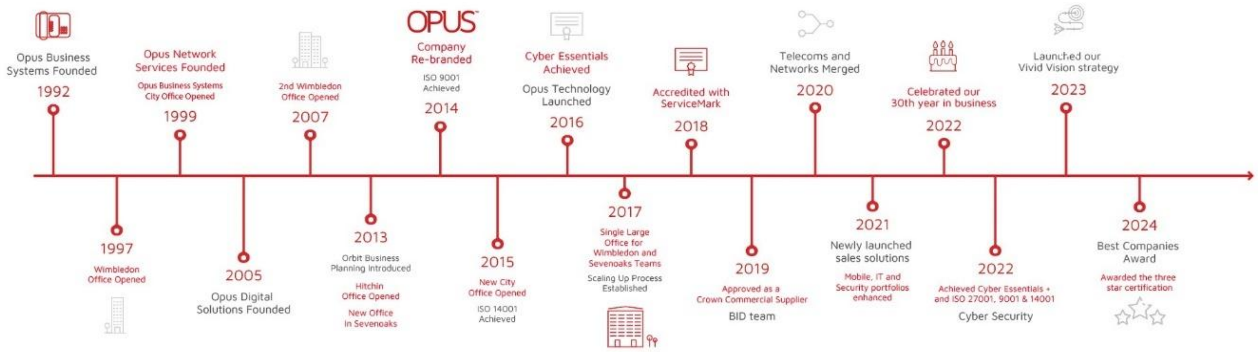
Inspired by his own quest for a communications company that could meet his specific needs, Michael founded Opus with a clear vision: to provide personalised, expert support - an aspect that remains integral to our operations to this day.

At Opus, we are driven by the goal of comprehending our clients' strategic objectives and crafting tailored technology roadmaps to accompany them on their unique journey. Our team of highly qualified solution designers, engineers, project managers, and account managers based in the UK are dedicated to delivering optimal results.

Our services are backed by accreditation from the Institute of Customer Services, ensuring that our customers consistently receive superior service and support. This accreditation serves as a testament to our unwavering commitment to providing exceptional experiences at all times.

Opus thrives on fostering close working partnerships with world-class, industry leading product suppliers. This strategic collaboration grants us access to rapid and reliable industry knowledge and the latest technologies, while also providing the commercial flexibility afforded by a diverse range of vendors.

Our History



Our Partners

Opus brings together a carefully curated selection of top-tier products and services, seamlessly integrating them into comprehensive, end-to-end solutions that are fully managed and supported for our valued customers.

Our commitment to excellence is reflected in our strategic partnerships with a select few industry-leading manufacturers. These trusted relationships are built on strong foundations, enabling us to collaborate closely and deliver reliable solutions that exemplify the very best in their respective fields. By handpicking our partners, we ensure that we can provide purposeful technology solutions that meet the unique needs of our customers.

Working in tandem with our partners, we actively engage in understanding and shaping the development of new services. As a trusted technology partner, we empower our clients to make informed decisions about the technologies they adopt, guiding them towards optimal solutions that align with their goals and objectives.

We are dedicated to attaining the highest level of accreditation with all our vendor partners. This commitment equips us with the expertise and resources needed to consistently deliver the highest standard of service and support to our customers. By staying at the forefront of technological advancements and maintaining strong relationships with our partners, we ensure that our customers receive industry-leading solutions and unparalleled support throughout their journey with Opus.

Best Practice

Our knowledge and experience mean that more projects succeed, and more customer expectations are met.

ISO 9001:2015 ISO 14001:2015 ISO 27001:2013

Social Value

Opus is currently progressing towards B-Corp certification and has entered the verification stage of our application. As part of this journey, we have streamlined processes to better reflect and optimise our core values. Our policies place stakeholders and shareholders at the forefront, with a strong commitment to generating a positive social and environmental impact.

We provide our staff with opportunities to volunteer within their local communities or near our head office in Reigate. Additionally, we have identified and support specific charities that align with our values. Our commitment to charitable activities is growing, and we expect this trend to continue as our business expands. We have established a long-term relationship with one charity for over a decade and are cultivating connections with two more.

Driven by our CEO, our philanthropic efforts include a sponsored STEM scholarship, reflecting our desire to support industry development. For over 11 years, we have supported Polar Bear International, which works to conserve sea ice and provide global best practices.

We also support Renewed Hope, a local food bank and support service for the homeless and vulnerable, and The Lucy Rayner Foundation, a staff-selected mental health charity that offers workshops and training for our staff.

We are deepening our relationships with these charities to develop unique projects aligned with our core values. Throughout the year, we have supported several additional charities, including The Samson Centre, Against Breast Cancer, a local SEN nursery, and a local girls' football team, contributing over £23,000 in charitable donations.

Our engagement extends to our suppliers and customers, encouraging them to join us in our charitable ventures—a focus we plan to expand over the next five years. We actively collect feedback from our staff on volunteering opportunities and charity selections, as well as from the charities themselves, helping us understand our impact and improve our efforts for the next financial year.

We assist our customers to maximise social, economic, and environmental wellbeing of local communities in accordance with The Public Services (Social Value) Act 2012, The Procurement Reform (Scotland) Act 2014 and The Wellbeing of Future Generations (Wales) Act 2015. We have a direct responsibility to the communities in which we operate to maximise social value in terms of economic, social, and environmental wellbeing. We conduct our business socially and ethically. We obey the law, encourage universal human rights, and protect the environment. We aim to create an environment that not only embraces creativity and diversity but is financially rewarding for the people who believe in us.

Opus and Netcall

Opus is proud to be a Netcall partner and reseller and is working in partnership with Netcall to provide these services. Opus can provide the full Netcall solution portfolio, designed to accommodate the needs of the Public Sector these include:

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

Liberty Create - An enterprise low code application development platform that enables public sector organisations to rapidly build secure, scalable applications. It simplifies the delivery of case management, CRM, workflow and self-service services, helping teams digitise operations and improve citizen experience.

Liberty RPA - An enterprise robotic process automation solution available through G-Cloud, enabling public sector organisations to automate repetitive, rule-based tasks across systems and applications. It improves accuracy, accelerates workflows and frees staff for higher-value work.

Liberty Spark - Optimises process discovery, enhancing engagement and understanding while improving accuracy and version control. Centralised storage and governance ensure consistency, while robust reporting uncovers insights for efficiency and automation opportunities across functions. Customers who buy it love its ease of use, time to value, immediate ROI, speed of approval/sign-off. Reducing overheads of administering process improvement.

Liberty IDP - Enables you to automate and optimise document workflows, helping you redefine processes while saving valuable time and resources. By streamlining high-volume, low-complexity administrative tasks, it delivers measurable impact, reducing operational costs and freeing up teams to focus on higher-value work.

Services Overview

Liberty Converse CX

Liberty Converse CX is a cloud contact centre for voice and digital that brings **conversation, automation and action** together in one place. It is feature rich and undergoing continuous development; this service definition describes the features currently available, and capabilities may be added, changed or retired over time.

Converse CX is part of the **Liberty Platform** – a unified and AI-enabled set of capabilities that you can compose to solve real-world service problems without disruption. There is no technical overhead or lock-in: Converse CX can run standalone and connect to the capabilities you need, when you need them, to modernise incrementally and maximise existing investment.

Capabilities at a glance:

- **Connected Customer Experience**: omnichannel conversations across voice, email, chat, SMS and social, with virtual agents and Web Assistant for seamless digital-to-human hand-off.
- **Workforce Enablement**: unified agent desktop, skills-based routing, workforce management, quality monitoring and coaching - everything in a **single browser**.
- **CRM and Unified View**: surface the right context in the agent desktop at the right time, without forcing a CRM change (CRM capabilities can be extended, modernised or even created using the rapid application development capabilities of Liberty Create where appropriate)
- **Embedded Intelligence and Decisioning**: intent recognition, generative summaries, translation, speech analytics and sentiment, all **governed** with role-based access and audit information.
- **Operational Efficiency and Process Automation**: orchestrate work and remove repetitive tasks through governed workflows and integrations to your existing systems (enabled by Liberty Create low-code application development and Liberty RPA, where useful).
- **Case, Incident and Request Management**: raise, look up and progress cases against your **Systems of Record** with clear hand-offs, audit trails and SLA tracking (enabled by rapid application development using Liberty Create where useful and appropriate).
- **Legacy Extension and Modernisation**: extend what you already have using secure APIs/webhooks and automation, avoiding "rip and replace" and **sweating existing assets** (supported and enhanced by rapid application development using Liberty Create where useful and appropriate).

The result: people get help on their channel of choice; teams have the right context at their fingertips; and the mundane is automated so staff can focus on higher-value work - **safely, accessibly and accountably**. Accessibility is designed-in (keyboard navigation, screen-reader compatibility and high-contrast support).

Highlights

- **Fast, Robust Deployment:** Achieve a quick, efficient and sustainable deployment that is built to last and future-proofed, enhancing the effectiveness of your contact centre.
- **Elevate Scalability:** Seamlessly scale your contact centre operations to meet dynamic business demands without the hassle of traditional infrastructure constraints.

- **Unmatched Flexibility**: Embrace the freedom of a cloud-native approach, empowering your team to deliver exceptional service from anywhere, at any time, with the agility to adapt to evolving customer needs.
- **Cost Efficiency at Its Best:** Maximise your return on investment by optimising resource allocation and reducing operational costs.
- **Omnichannel Excellence:** Connect with customers effortlessly across various channels, including voice, email, chat, social media and video. Provide a consistent and personalised experience that aligns with modern communication preferences. Enable customers to shift channels effortlessly without losing the context of their case or enquiry.
- **Intelligent CRM and system Integration:** Seamlessly integrate with CRM systems enabling a unified view of customer data and interactions. Equip your contact centre team with the insights they need to deliver personalised and efficient support.
- **Enhanced AI-Powered Engagement** Leverage advanced AI-powered features for analytics, automation and summarisation. Streamline operations, reduce wait times, optimise handling times without compromising quality and ensure swift issue resolution for unparalleled customer satisfaction.
- **Customer Experience Optimisation:** Deliver consistent and personalised customer experiences by eliminating siloed systems and disjointed processes. Exceed customer expectations and drive loyalty with advanced analytics, automation capabilities, and customisation options.
- **Innovation and Adaptability:** Fostering innovation and adaptability, our technology agnostic solution provides flexible tools for prototyping customer journeys and experimenting with new technologies. With additional low-code development and rapid application deployment, organisations can stay ahead of market trends without technical hurdles.
- **Unmatched Efficiency with Process Automation Integration:** Automating repetitive and time-consuming tasks allows your team to focus on higher-value interactions, reduces response times and enhances overall productivity and experience.
- **Adaptability and Speed with Workflow Process Optimisation:** Automates repetitive tasks and streamline workflows, allowing contact centre teams to focus on high-value customer interactions. With process optimisation tools, organisations can enhance productivity and responsiveness.
- **Unified Agent Desktop:** A single browser-based interface that provides agents with access to customer information, interaction history, knowledge bases, and communication channels. Team members can handle real-time customer interactions across multiple channels, including voice calls, email, chat, SMS, social media, and messaging apps, all from within the same interface.
- **Proactive Customer Self-Service:** Advanced speech recognition and Natural Language understanding technologies empower customers to find answers to their enquiries and resolve issues independently without the need for agent assistance. They can achieve this through IVR, Chatbot and Virtual Agents
- **Connect Field Service and Helpdesk Operations:** Breaks down internal data silos and integrate seamlessly with field service and helpdesk operations. Fostering collaboration across customer-facing operations, to optimise efficiency and deliver superior service.

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

AI and Agentic Capabilities

Converse CX includes embedded AI features and an **agentic** execution model. The system can understand, summarise and assist - with the right permissions, it **takes safe actions** through your approved tools and systems.

Core AI capabilities

Understanding, insight and coaching

- **Sentiment analysis and call transcription**: evaluates tone and turns speech into text for quality monitoring, coaching and trend analysis. https://www.netcall.com/platform/contact-centre/ai/
- **Summarisation**: condenses long interactions or documents into clear, accurate summaries to reduce after-contact work.
- **Keyword extraction**: pulls out key terms from text to help agents and workflows spot critical information quickly.
- **Agent guidance (AI Agent Assist)**: suggests and refines replies, adjusts tone and structure during live interactions to help advisors handle complex queries.
- **Natural conversations and accessible experiences**
- **Virtual Agents (voice and chat)**: automate routine queries using natural language, route to the right queue/agent, and hand off smoothly to people when needed.
- **Text-to-speech and speech-to-text**: enable natural IVR/virtual-agent experiences and inclusive interactions for customers.
- **Live translation**: auto-detects languages and translates in real time so teams can converse in the customer's chosen language.

Quality of written communication (Text Enhancement)

- **Spelling and grammar correction**: fixes mistakes automatically to keep communications clear and professional.
- **Expansion**: turns shorthand notes into complete sentences (e.g., making medical notes understandable in records).
- **Tone adjustment**: shifts from abrupt to friendly, or informal to professional, to match your service style.

Knowledge-grounded answers (Ask/Set Liberty AI)

- **Ask Liberty AI**: in calls, chat, virtual agents and Agent Assist, returns answers grounded in approved **Documents and Collections** from Knowledge Management, shown conversationally alongside sources.
- **Set Liberty AI**: a virtual-agent step that prompts Liberty AI and stores the result in a variable for use later in the flow (display, decisioning or hand-off).

Intent and routing

- **Intent lookup and conversational understanding**: detect what customers need, triage, and either self-serve or route to the best queue for resolution.

Agentic Execution

Agentic means the AI does more than answer questions: it can take the next step safely when policy allows.

- **Tool use:** Trigger approved workflows (e.g., raise or look up a case against your Systems of Record), start automations (e.g., update a legacy record), and call secure APIs/webhooks or third-party connectors (e.g. CRM updates, scheduling, directory lookups).
- **Human-in-the-loop controls:** You decide which actions require agent confirmation and which can run unattended.
- **Clear transitions and required variables**: Define when to end, offer further help, transfer to a specialist queue, or hand off to a human based on intent and context. Before a transition, the AI can collect required details (e.g., customer name, case/reference number) so actions execute with the right context.
- **Shaping behaviour (kept simple):** Set instructions that describe role, objective, greeting, escalation rules and tone (friendly/formal/professional) to match your communication style. Point the assistant at approved Documents and Collections for accurate answers. Control the initial question used at hand-off between virtual agents so the conversation continues smoothly.

  Tune Speed vs Accuracy (fast replies vs deeper retrieval) and Reasoning level (quick answers vs more thoughtful responses) per use case.
- **Outcome tracking:** Dashboards and reports show where AI assists, resolves or hands off, so you can tune flows and confidence thresholds.

Practical examples

- Confirm a category, collect a reference number, and route to the correct queue.
- Look up a case, provide a status, and offer a callback at a suitable time.
- Update a record in a legacy system via RPA, with an agent approval step for safety.

Security, safety and governance

AI in Converse CX is governed by design. Controls run across identity, access, data and audit.

- **Identity and access:** Single Sign-On via OpenID Connect (e.g., Microsoft Entra ID) and SCIM provisioning. Role-based access and fine-grained permissions restrict AI features and actions to authorised users and queues.
- **Data protection:** Redaction options for transcripts and summaries; pause/resume recording for sensitive moments; domain allow-lists for Web Assistant; malware scanning for uploads.
- **Auditability:** Interactions, summaries, actions and approvals are logged for compliance, quality monitoring and post-event review.
- **Policy and guardrails:** Confidence thresholds, grounding to approved sources, human-in-the-loop for high-risk actions, and tool-use restrictions ensure safe operation within organisational policy.
- **Model flexibility:** Supports Netcall-managed defaults and customer-approved model policies where required, under your governance.

Outcomes you can expect

- Faster resolution of routine enquiries through safe automation and assist.
- Lower effort for advisors with accurate summaries and grounded knowledge.
- Better consistency and coaching via sentiment and speech analytics.

- Inclusive experiences with natural speech interfaces and multi-lingual translation.

Converse CX Key Features

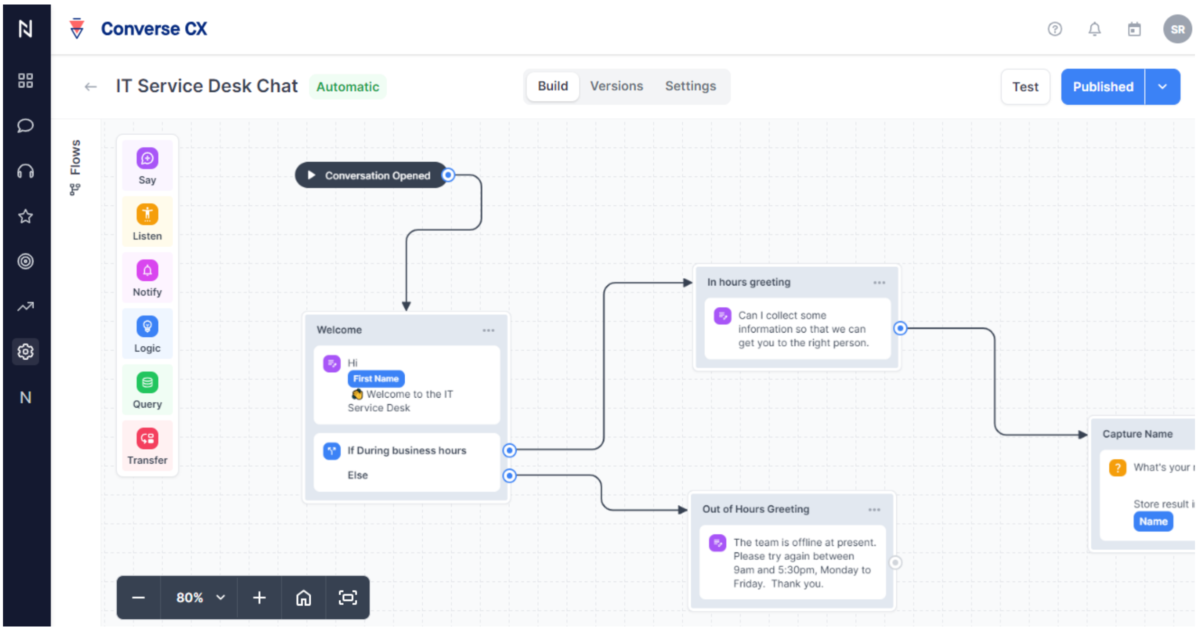
Liberty Converse CX offers advanced features and capabilities to help enhance customer interactions, streamline operations, and improve overall efficiency and cost reduction. The key features listed are subject to continual improvement and revision as part of the Netcall development roadmap. Information regarding the latest features is available from Netcall on request.

- **Self-Service Options:** Enhanced self-service capabilities, allowing customers to resolve issues independently through intuitive IVR and messaging channels.
- **AI-Powered Virtual Assistants and Chatbots:** AI-driven virtual assistants and chatbots to handle complex queries, provide instant responses, look up information and assist customers 24/7. Using speech recognition and natural language processing, our automated assistants free up human team members for more complex tasks.
- **Intelligent Routing:** Algorithms that dynamically direct incoming calls and digital interactions to the most appropriate team member based on skills and issue complexity.
- **Omnichannel Communication:** Orchestrating multiple communication channels (including voice, email, SMS, chat, social media, video and integrated call-backs) into a unified platform, providing a seamless and consistent experience for customers and customer service teams.
- **Integration with CRM Systems:** Seamless integration with existing systems such as ticketing or Customer Relationship Management (CRM) systems to provide teams with a comprehensive view of customer information, enabling personalised interactions.
- **Seamless Data Flow and Unified Customer View**: Integrate rapid application development, RPA, and process-mapped workflows for a smooth data flow, providing a unified view of customer interactions for informed decision-making.
- **Secure Payments:** Integration to your secure payment service to ensure the secure handling of customer payment information over the phone/IVR or digital channels in compliance with PCI DSS requirements.
- **Co-browsing and Screen Sharing:** Collaboration tools such as co-browsing and screen sharing assist customers visually, guiding them through processes and troubleshooting in real-time.
- **Generative AI Summarisation:** Generate contact summaries to support team members during and after customer interactions, enhancing the customer experience and streamlining post-call wrap-up. Managers can leverage AI-generated summaries to analyse trends and address issues, enabling targeted coaching across the contact centre.
- **Multi-lingual translation:** Enable seamless multi-lingual communication across your chatbot and team assisted webchat channels, with the ability to translate into over 75 languages.
- **Speech Analytics:** Analysis of customer-employee interactions, using speech recognition and transcription to monitor sentiment, identify keywords, and offer immediate feedback to team members for improved performance.
- **Workforce Engagement and Optimisation:** Workforce management tools help optimise scheduling and forecasting, ensuring that your contact centre is staffed adequately during the day.

- **Quality Management and Monitoring:** Tools for monitoring and evaluating the quality of customer interactions, allowing supervisors to provide real-time feedback coaching, and ensuring compliance with service standards.
- **Advanced Reporting and Custom Dashboards:** Customisable reporting and dashboards with real-time metrics, allowing organisations to pass data in and out of third-party systems (through APIs), monitor key performance indicators and make informed decisions.
- **Compliance and Security Features:** Robust security measures and compliance tools to ensure the protection of customer data and adherence to industry regulations (e.g. GDPR, Single sign-on and easy onboarding tools).
- **Robot Process Automation (RPA):** Automate routine tasks that slow down your teams, reduce workload and minimise errors for greater accuracy.

Virtual Agents

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



Screenshot of the visual flow designer

Virtual Agent Features

- **Build multiple Virtual Agents**: Virtual Agents are either digital or voice. Channels are routed to the required Virtual Agent.
- **Drag and drop designer**: Drag steps onto the canvas, connect them together, zoom in, fit to screen.
- **Triggers**: Triggers define what behaviours cause the flow to be executed, whether it be a new conversation, a message received or a web page visited.
- **Steps**: Steps represent the different types of interactions with customers:
- **Say:** Say or type a message; send an App.
- **Listen:** Ask a free-form question or make a choice from a list of options; supports both quick replies and natural language.
- **Notify:** Send ad hoc SMS to the customer or other number.

- **Logic:** Use conditional decision step, set variables, write JavaScript for more advanced capabilities.
- **Query:** Get stats such as longest wait and number of customers in the queue or query an external REST web service for external information.
- **Transfer:** To a Queue, an Agent, a Virtual Agent, or phone number.
- **Audio**: Play an audio file from URL or uploaded file.
- **DTMF Menu**: Simple IVR menu for calls only.
- **Test and Preview**: Users can preview flows in the browser.
- **Auto-save**: Flows are automatically saved so work is not lost if a user closes the browser.
- **Versioning**: Tag flows with a version number or name so you revert to it later.
- **Import/Export**: Individual flows can be exported and imported.
- **In-Queue Flows**: In-Queue Flows can be used when a customer is waiting in a queue to speak to a live agent. They are typically used to play comfort messages and music-on-hold. In-flow queues are only available to Calls.
- **Natural sounding Text-to-Speech (TTS)**: Natural sounding TTS, with a choice of English-speaking voices.
- **Intent Recognition and Natural Language**: When users configure an intent, they supply example phrases e.g. *"order a garden bin"*, *"I would like to order a garden bin please"*, that help train the natural language engine so that it can cope with the different ways that a customer might ask. Intent can be global for example, the customer may ask to speak to someone at any point during the conversation, or local to the question being asked.
- **Intent Training**: When an intent is recognised with low confidence the administrator can train the system by confirming which intent a phrase should match. This helps improve the confidence of future intent recognitions.
- **Proactive Triggers**: Flows can be configured to automatically trigger messages on Web Assistant when a webpage is visited – this is known as a proactive trigger. As there is a potential cost to the customer for each proactive trigger, the customer can limit the maximum number of triggers to fire per month.

Channels

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

Calls

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

- **Liberty Voice:** Customers choose to purchase their telephony (SIP channels, minutes and DDIs) from Netcall.
- **Inclusive Outbound Minutes:** Inclusive minutes to UK landlines and mobiles (subject to licence).
- **DDIs**: Add UK National DDIs, tollfree, non-geographic and golden numbers.
- **Number Porting**: Port your existing number into Liberty Voice.
- **OPUS Managed SBC's & SIP Trunk services** - Providing carrier grade secure and resilient session boarder controllers supporting SIP trunks, SIP Trunk Call Manager services providing

network level DR routing options. Supporting porting of the customers current DDI numbers.

- **Fraud Prevention**: Calls to premium and international numbers are blocked by default.
- **Caller Presentation Numbers**: Present a different calling number per queue.
- **Embedded Agent softphone**: Agents answer calls directly in their browser using WebRTC.
- **Virtual Agents and IVR**: Route calls into Virtual Agents to provide both DTMF and Speech IVRs with Natural Language support.
- **Comfort messaging**: Design an in-queue Virtual Agent to provide an in-queue experience to callers – includes support for comfort prompts, time in queue, call back offers, SMS, as well as other advanced features.
- **Standard Call Control features**: Hold, mute, DTMF, cold and warm transfers to agents, queues and external contacts, supervisor monitoring and assist, three-way conference call.
- **Queue Buster / Call-back**: Offer callers the option to be called back if the queue length is long. The caller's place is held in the queue and when the agent answers, a call is made back to the original caller. If the original caller is not available, then the agent can reschedule for later.
- **Video Assist**: when the customer is talking or chatting with an agent, the agent can invite the customer to share video with them. For phone calls, this means that the customer can show video from their mobile phone to the agent (e.g. to show a problem with the boiler); for chats, this means a two-way video call between the customer and the agent.
- **Call Transcriptions**: automatic transcription of calls in historic reports and for agent evaluation.

Email

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

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

Web Assistant

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

- **Simple deployment:** Copy and paste small code snippet into your web pages.
- **Branding**: Choose your own brand logo and colours.
- **Custom launcher**: Provide your own launcher button or choose the default.
- **Homescreen**: Add articles, links and apps to the chat home screen.

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

Social Messaging and Conversational SMS

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

- **SMS**: Supports connecting your own SMS accounts on Gov.Notify, BT Smart Messaging and Twilio.
- **Facebook Messenger and Instagram**: Connect one or more Facebook Messenger accounts or Instagram Pages to Converse CX.
- **WhatsApp**: Connect your existing WhatsApp Business Account to Converse CX. Allows agents to respond to incoming customer messages within 24 hours[1].
- **Multi-service support**: Connect to different Facebook pages or different SMS accounts from the same provider and link to different Virtual Agents. Allows you to support multiple brands or different services.
- **Attachment and Image Support**: Support attachments and images and across all social channels (excludes SMS).

Routing and Queuing

- **Skills-based routing**: Route interactions to agents based on media, skills and agent proficiency.
- **Unified omnichannel routing and queuing**: Single scalable queue that matches all interactions and tasks to the most appropriate agents.
- **Channel prioritisation**: Configure which channels interrupt other channels. For example, should calls interrupt emails in progress?

[1] Converse CX does not provide WhatsApp numbers or support templated outbound messages

- **Media prioritisation**: Configure which medias take priority over others. For example, should calls always be presented to agents before emails that were already queueing?
- **Interaction concurrency**: Configure how many interactions of each channel can be worked on at the same time by each agent.
- **Skill templates**: Group skills into templates and assign to agents.
- **Service Level Targets**: Configure target answer times per queue and report in real-time via the dashboards and in historical reporting e.g. the target for Queue A is to answer 80% of calls in 20 seconds, or 90% of emails within 2 hours.

Agent Productivity

- **Busy Codes:** Agents can put themselves into a Busy Code to signify that they are not available to handle interactions. Busy codes can be optionally configured to expire after X minutes.
- **Configurable Wrap Time**: Managers can configure max wrap time per queue.
- **Activity codes**: Agents can record an outcome against any interaction. Managers can report on volumes by activity code. Activity codes can be optional or mandatory.
- **Optional mandatory Activity Codes**: Agents are forced to record the activity code
- **Outbound interactions:** Agents can make outbound phone calls, outbound emails and follow up on social interactions, all of which are logged against a contact centre queue.
- **Supervised and blind transfers**: Agents can supervise or blindly transfer calls to other agents or back-office contacts.
- **Interaction management**: Allows agents to pull up related interactions from the same contact.
- **Live queue search**: Search in real-time for other interactions from the same contact - means that multiple contacts can be handled in one go, by a single agent.
- **Click-to-dial**: Agents can click on a number to call it - no need to type in the number.
- **Multichannel interaction alerting**: Agents are alerted of new interactions.
- **Agent not responding:** If agents do not answer an interaction, then they are automatically marked as not responding. Interactions can then be routed to a more suitable agent.
- **Snippets**: Provide canned responses that agents can easily include in chat responses.
- **AI Chat Assist**: Uses AI to recommend responses to agents, improve their response (e.g. expand a brief response into a well written formal response), and translate into their language.
- **Native Co-Browse:** Native co-browse to allow the agent to help the customer browse/use your website.
- **Links and Buttons:** Create custom links to external web applications (such as a CRM) that the agent can click on in the agent details panel to access relevant info from third-party systems.
- **Interaction Tabs:** Add a tab to the agent interaction panel that can host an external web app (such as a CRM) in an iframe.
- **Workspaces**: External web applications (such as CRMs) can be embedded into the user app via an iframe so that agents do not have to tab into different applications to do their work.

Integrated Call Recording and Monitoring

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

User Management, Authentication and Roles

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

Capabilities include:

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

Workforce Management

Shifts and Rotas

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

Shift Adherence and Conformance

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

Agent Evaluation

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

- **Scorecard Designer**: Scorecards are used to assess agents against interaction quality requirements. Multiple scorecards can be created to assess different media, queue or skill types.

- **Scorecard Sections**: Scorecards are configured into multiple sections to help identify key areas of agent performance and group questions together.
- **Screen Recording**: Record the agent's screen alongside the call recording for both quality monitoring and governance.
- **Matrix Question**: Multiple questions with the same answer options. A comments box can be added if required.
- **Multiple-Choice Question**: Allow for single questions with differing answers. Comments can be added if required.
- **Critical Question:** Multiple-choice questions can be made Critical Questions which will score the entire section or scorecard zero if the question failed.
- **Evaluation Score**: Each question and section can be assigned a user-configurable score to allow higher weight to be given to the most important questions.
- **Evaluation Profiles:** Evaluation Profiles are used to select the interactions to be evaluated. These can be configured for specific groups, queues, skills, agents, media types, activity code or interaction result. Evaluation Profiles can be configured so that they must include a customer survey or a screen recording if required.
- **Evaluation Workflow:**
    - The evaluator pulls the number of required interactions to evaluate, based on the evaluation profile.
    - The evaluator reviews and scores the interactions, using the scorecard assigned to the evaluation profile. If screen or call recordings are available, these can be reviewed by the evaluator.
    - The evaluated scorecard is sent to the agent to review.
    - The agent reviews the evaluation and adds comments.
    - The evaluator reviews the comments and either discusses these further or marks the evaluation complete.
- **Evaluating specific interactions**: Managers can evaluate specific interactions from historic call reports.
- **Extensive Reporting and Realtime Dashboards** – including:
    - **Agent Performance Report:** Number of interactions evaluated and average score.
    - **Evaluation Performance Report**: Breakdown of evaluation performances by several criteria.
    - **Evaluation Scorecard Heatmap Report**: Analysis of trends in scorecard question scores over time.
    - **Evaluation Summary Report:** Evaluation summary including score, evaluator, scorecard, and interaction details.
    - **Evaluation Breakdown Dashboard Widget**: Displays a table showing the number of evaluations, the average score, the highest score, and the lowest score.
    - **Evaluation Count Dashboard Tile:** Displays the evaluation count based on the configured criteria.
    - **Evaluation Performance Dashboard Widget:** Displays a bar chart on the dashboard showing the number of evaluations completed and a line chart of the average score for the evaluations. Hover the mouse over the bar to reveal a pop up showing the data for average score and number of evaluations.
    - **Evaluation Ranking Dashboard Widget**: Displays a table of agents on the dashboard ranked by their average evaluation score. The widget will update once an evaluation has been marked as Completed by a supervisor.

- **Evaluation Score Dashboard Tile:** Shows the average evaluation score on the dashboard based on the configured criteria.

Customer Surveys

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

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

- **Survey Question Breakdown**: Report focuses on an individual survey question showing the number of responses. The bar chart displays the percentage of responses to each of the survey options.
- **Survey Responses report**: Shows the raw response information, with a row per survey recipient, and columns for the Contact Centre Interaction details and each question answered. Selecting a row allows you to view the transcript of the interaction, view the survey or create an evaluation.
- **Survey Response Feed**: Shows a real-time view on the dashboard of the free text responses that are coming in from customers.

Dashboards

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

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

Reporting

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

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

Agent reports:

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

Agent Evaluation reports:

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

Interaction reports:

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

Survey reports:

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

Workforce Management reports:

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

Integrations

Working with the Liberty platform – rapid application development and RPA

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

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

Working with Microsoft Teams[2]

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

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

APIs and Webhooks

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

Supported APIs:

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

[2] Converse CX does not natively support calling in Microsoft Teams. This is achievable by routing calls via Liberty SIP or connecting Converse CX to a customer SBC that supports Microsoft Teams Direct Routing.

OPUS

Supported Webhooks:

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

Security:

APIs are secured by granular API Tokens.

Extend your Liberty Solution

Liberty is the AI-powered platform for transformation, bringing intelligent automation and customer engagement together. With its trusted low-code application development and communications tools you can build faster, connect better and transform how work gets done without complexity.

Liberty Converse CX can operate as a standalone omnichannel contact centre or integrate with the wider Liberty Platform to extend functionality when required. This modular approach allows organisations to add automation, AI and low-code capabilities without replacing existing systems.

Optional extensions include:

- Rapid application development with **Liberty Create** – an enterprise low-code application development platform that enables transformation of processes, deployment of case management workflows and delivery of digital experiences that make lives better for employees and customers.
- With intelligent AI powered **Liberty RPA** (Robotic Process Automation), you can streamline your processes and boost efficiency. Liberate your people to use their talents better by releasing them from time-consuming, mundane, repetitive tasks.
- Analyse, understand and manage business processes with **Liberty Spark** – the effective and connected way to rapidly document, analyse and continuously improve business processes at scale. Accessible and understood by everyone in an organisation.
- Turn unstructured content into structured, usable data — fast with **Liberty IDP**. With our AI-powered intelligent document processing solution, that data can then drive applications, trigger workflows and power smarter decisions across the Liberty platform.

All Liberty components share a common governance framework, security standards and integration-ready architecture, ensuring compliance and resilience across your digital ecosystem.

Liberty Create

Liberty Create is a cloud-based, enterprise low-code platform for rapid application development. Create is designed for organisations that need to deliver secure, scalable digital services quickly.

It provides a visual, drag-and-drop interface for building data models, workflows, integrations and user experiences.

Create enables professional developers and business users to collaborate safely within governance guardrails. Developers can extend functionality with custom code when required, while non-technical users can configure processes and interfaces without risk.

Key Capabilities:

- Rapid delivery of new services and continuous iteration of existing ones.

- Modern, accessible UX that adapts across devices and channels.
- Integration-ready architecture with reusable APIs and connectors.
- Enterprise security, audit and role-based access controls.

Liberty Create can be deployed standalone or extended as part of the Liberty Platform, adding AI, robotic process automation and advanced engagement tools when required.

What do people build with Liberty Create?

Liberty Create is used to build applications that transform operations and improve citizen experience across public sector organisations. It supports everything from simple departmental workflows to complex, enterprise-wide systems.

Typical use cases include case management, Business Process Management (BPM), Customer/Citizen/Tenant Relationship Management (CRM) and multi-experience services that combine web, mobile, messaging and voice. Applications often integrate with multiple systems to automate processes end-to-end while providing intuitive, accessible interfaces for staff and citizens.

Examples:

- **Departmental apps**: data capture, workflow, reporting and integration with core systems.
- **Enterprise apps**: organisation-wide CRM, grants and benefits processing, claims management, mortgage applications.
- **Multi-experience apps**: citizen portals, mobile apps, chat and messaging with seamless human hand-off.
- **Foundational apps**: reusable data, security and governance models for rapid reuse across services.

Liberty Create also enables innovation and legacy modernisation by providing integration-ready architecture and governance guardrails. It can be extended with AI, robotic process automation and intelligent document processing to deliver smarter, faster services.

Proven in practice:

- Millions of NHS patients manage appointments via Liberty-powered portals.
- 1 in 5 UK mortgage approvals run on Liberty Create.
- Network Rail digitised safety and compliance processes with 30+ Liberty apps.

How does Liberty Create work?

Liberty Create provides all the capabilities required to build and manage robust applications in one platform. It is designed for scalability, security and rapid deployment, ensuring organisations can deliver and adapt digital services quickly.

Developer Tools:

- **Controller**: manage environments, access and provisioning across applications.
- **Build Studio**: drag-and-drop configuration of data objects, workflows, APIs and themes.
- **Code Studio**: extend with JavaScript/Vue components, processors, theming and page logic.
- **Test Studio**: in-built automated testing for regression and quality assurance.
- **Monitor Studio**: performance dashboards and diagnostics for APIs, messages and server metrics.

Deployment and operations:

- UK-based cloud hosting on Amazon Web Services (AWS) with ISO and Cyber Essentials certifications.
- Containerised runtime using Docker: resources sized to customer requirements.
- Daily backups by default (configurable) with manual rollback points.
- Disaster recovery/failover: automated health checks and DNS-controlled failover between primary and secondary: reversal on restore.
- Elastic scaling aligned to performance needs.

Integration:

- API-first approach with REST/JSON endpoints and reusable connectors.
- On-premises integration supported via Liberty On-Premise Adaptor (OPA).
- Document and data import/export, IDP for intelligent capture.

Security, governance and accessibility:

- Role-based access, audit trails and configuration guardrails for safe collaboration.
- Support for penetration testing, vulnerability scans and Operational Acceptance Testing.
- Accessible UX aligned to WCAG 2.2; accessibility testing and reporting available.

Liberty Create can operate standalone or integrate with Liberty's composable capabilities, enabling AI-powered automation and advanced engagement when required.

AI Capabilities in Liberty Create

Liberty Create includes embedded AI capabilities that enable organisations to automate processes, improve decision-making and enhance user experience without requiring specialist technical skills.

These features can be configured through rule actions within applications, making AI accessible and practical for public sector teams.

Key AI capabilities:

- **Ask Liberty AI**: Configure applications to analyse content and return answers to user questions using defined personas and moderation settings. This enables embedded virtual assistants that make information more accessible and reduce reliance on staff for routine queries.
- **Knowledge management**: Automatically group related data and documents into dynamic collections. Liberty AI learns from these collections to provide accurate, curated answers via an integrated chat feature—using Ask Liberty AI—reducing pressure on teams and improving response times.
- **NLP services**: Apply Natural Language Processing tools to automate text-based tasks, including:
    - Sentiment Analysis to interpret tone and feedback.
    - Text Summarisation to condense lengthy communications.
    - Keyword Extraction to identify and store key information.
    - Text Enhancement to correct and refine written content.
- **Machine Learning and Predictive Models**: Build custom predictive models within Liberty AI using your own datasets. These models allow organisations to predict outcomes, automate decisions and improve operational efficiency without complex coding. Supported model types include:

- Data classification
- Data regression
- Text classification
- Text regression
- Time series forecasting.

Planned AI Enhancements:

Liberty Create's AI roadmap includes advanced capabilities designed to further automate and accelerate application development:

- **Agentic Workflows**: AI-driven orchestration of multi-step processes, enabling applications to complete tasks autonomously across systems based on defined goals and governance rules.
- **AI-Assisted Code Generation**: Tools to automatically generate code snippets and application logic from natural language prompts, reducing development time and supporting non-technical users.

All AI capabilities operate within Liberty Create's governance framework, ensuring secure, compliant, and controlled use of AI in public sector applications.

Liberty RPA

Liberty RPA is an enterprise robotic process automation solution designed for organisations that need to automate repetitive, rule-based tasks quickly and securely. It enables teams to build, deploy and manage automation flows with minimal coding, using an intuitive drag-and-drop interface.

Liberty RPA supports both attended and unattended bots, allowing automation to run on-demand or on schedule across desktop and web applications. Bots can interact with systems where APIs are unavailable, bridging gaps between legacy and modern platforms. Integration options include API triggers, email triggers and event-based workflows, making Liberty RPA ideal for streamlining processes across multiple systems.

Key Capabilities:

- Visual automation studio for rapid workflow design and deployment.
- Support for Python scripting for advanced automation scenarios.
- Intelligent element recognition with Liberty Wand for robust UI automation.
- Optical Character Recognition (OCR) for document handling and data extraction.
- Centralised bot management, scheduling and credential vault within Liberty Controller.
- Embedded AI features to optimise automation performance over time.

Liberty RPA can be deployed standalone or extended as part of the Liberty Platform, adding low-code application development, AI-driven decisioning and advanced customer engagement tools when required. Hosted in UK-based AWS environments with ISO and Cyber Essentials certifications, Liberty RPA operates within a governance framework designed for public sector compliance.

What challenges do people tackle with Liberty RPA?

Liberty RPA helps public sector organisations overcome inefficiencies caused by manual, repetitive tasks and lack of system integration. By automating rule-based processes, Liberty RPA accelerates workflows, improves accuracy and compliance, and frees staff to focus on higher-value activities.

Common use cases include:

- **Data entry and extraction:** Automate collection and transfer of data across multiple systems and documents.
- **Customer service:** Reduce back-office workload and enable faster responses in contact centres.
- **Report generation:** Gather and consolidate data from multiple sources for accurate reporting.
- **Reconciliation checks:** Verify and reconcile data between systems to ensure compliance.
- **Account opening and closing:** Automate multi-step processes across legacy and modern systems.
- **Customer and employee onboarding:** Streamline setup, communications and system updates.
- **Customer enquiries and complaints:** Automate triage and routing of inbound emails and documents.
- **Exception handling:** Monitor high-volume transactions and manage exceptions with automated workflows.
- **Document processing and validation:** Use Optical Character Recognition (OCR) to extract and validate data from scanned documents.

Liberty RPA is proven in practice across UK public sector and NHS organisations, helping teams reduce operational costs and improve service delivery. It operates within a governance framework aligned to public sector standards, ensuring security and compliance at every stage.

How does Liberty RPA work?

Liberty RPA provides all the capabilities required to design, deploy and manage automation in one platform. It is built for scalability, security and ease of use, enabling organisations to automate processes quickly and reliably.

Developer Tools:

- **RPA Studio**: visual drag-and-drop interface for building automation flows, with optional Python scripting for advanced scenarios.
- **RPA Bots**: attended and unattended bots to run processes on-demand or on schedule across desktop and web applications.
- **RPA Wand**: machine learning-based element recognition for robust UI automation, even when screen layouts change.
- **RPA Trace**: record processes as they are performed to accelerate automation design.
- **Liberty OCR**: extract text from scanned documents and images for automated data handling.
- **Liberty Controller**: centralised management for bots, processes and credentials, including:
    - Bot provisioning and secure connectivity.
    - Scheduling and intelligent queueing.
    - API and email triggers for event-based automation.
    - Version control and audit trails for governance.
    - Notifications via email, SMS, or collaboration tools.

Deployment and operations:

- Bots run on Windows desktops or in virtual remote desktop (VRDP) sessions.

- Hosted in UK-based AWS environments with ISO and Cyber Essentials certifications.
- Governance framework includes credential vault (ensuring secure bot authentication), audit logging and role-based access controls.

Liberty RPA also includes embedded AI capabilities to optimise automation performance over time. It can operate standalone or integrate with the Liberty Platform to add low-code application development, intelligent document processing and advanced engagement tools when required.

AI Capabilities in Liberty RPA

Liberty RPA includes embedded AI capabilities that enable organisations to automate processes more intelligently, improve decision-making and optimise performance over time. These features are designed to be practical and accessible, configured through rule actions within automation flows—without requiring specialist technical skills.

Key AI capabilities:

- **Adaptive Automation**: Liberty RPA uses machine learning to improve bot resilience and performance, adapting to changes in screen layouts and workflows.
- **Intelligent Element Recognition (Liberty Wand)** – Machine learning-based UI recognition ensures bots can locate elements even when screen positions or attributes change.
- **NLP services**: Apply Natural Language Processing tools to automate text-based tasks, including:
  - Sentiment Analysis to interpret tone and feedback.
  - Text Summarisation to condense lengthy communications.
  - Keyword Extraction to identify and store key information.
  - Text Enhancement to correct and refine written content.
- **Machine Learning and Predictive Models**: Build custom predictive models within Liberty AI to forecast outcomes and optimise workflows. Supported model types include:
  - Data classification
  - Data regression
  - Text classification
  - Text regression
  - Time series forecasting.
- **Knowledge Management**: Group related data and documents into dynamic collections for smarter automation and faster responses.
- **Ask Liberty AI**: Enables conversational AI-powered text generation within Liberty RPA, allowing users to pass a prompt and receive an intelligent response.
- **Code Generator**: Converts natural language queries into Python code using Liberty AI's generative capabilities.
- **Flow Generator:** Automatically generates flow logic from natural language prompts, reducing development time and supporting non-technical users.

Planned AI Enhancements:

Liberty RPA's AI roadmap includes advanced capabilities designed to further automate and accelerate application development:

- **Agentic Workflows**: AI-driven orchestration of multi-step processes, enabling applications to complete tasks autonomously across systems based on defined goals and governance rules.

All AI capabilities operate within Liberty's governance framework, ensuring secure, compliant, and controlled use of AI in public sector applications.

Liberty Spark

Spark offers several important features to help with process improvement:

Supporting process discovery

- Identify process variations, dependencies, and inefficiencies for comprehensive analysis.

Visual insights

- Generate rich visualisations to provide a clear understanding of mapped processes.
- Visualise process flows, decision points, and resource utilisation to facilitate analysis.
- Gain actionable insights into process performance, bottlenecks, and opportunities for improvement.

Intuitive mapping interface

- Map processes with a highly collaborative and intuitive user interface.
- Create detailed process maps with drag-and-drop functionality.
- Use hierarchy to simplify complex processes.

Customisation and flexibility

- Customise process maps to align with organisational preferences and requirements.
- Modify labels, and annotations to effectively communicate process details.
- Adapt maps to accommodate changes in processes or business needs over time.

Real-time collaboration

- Enable collaboration among stakeholders with editing, commenting and approval features.
- Facilitate communication and knowledge sharing to ensure alignment on process optimisation.
- Engage business users, IT professionals, and process experts in collaborative mapping workshops.

Analytics and optimisation

- Analyse process performance metrics such as cycle time, throughput, and resource utilisation.
- Identify optimisation opportunities and areas for improvement based on data-driven insights.
- Drive continuous improvement initiatives to enhance efficiency, quality, and customer satisfaction.

Integration and compatibility

- Seamlessly integrate with Liberty applications and workflow automation tools.
- Ensure compatibility with industry-standard file formats for easy sharing and collaboration.
- Connect Spark with analytics and process automation platforms for advanced data analysis and visualisation, efficiency, and cost savings.

Security

- Prioritise data security with robust encryption and access controls.
- Safeguard sensitive process information and ensure adherence to regulatory requirements.
- Implement audit trails and version control mechanisms to maintain data integrity and accountability.

Compliance

- Generate process maps that are used to demonstrate compliance against regulations e.g. ISO, ITIL etc.

Accessibility

- Access Spark from anywhere, anytime, with intuitive interfaces and applications.
- Enable remote collaboration and on-the-go process mapping to accommodate distributed teams.
- Stay productive and responsive even when working outside the office environment.

Scalability and performance

- Scale seamlessly to accommodate growing process discovery and mapping needs.
- Ensure high performance and reliability even with large and complex process datasets.
- Minimise downtime to maximise productivity, resources and efficiency.

Health check

- Monitor how healthy the documentation process is and audit its effectiveness.
- Validate how consistent the process is with your standards, how quickly it's being honed and who it being owned by, and the people engaging with it.

Spark offers a powerful solution for organisations seeking to uncover, analyse, and optimise their business processes through process discovery and mapping capabilities. In simple terms, it's the foundation step for making all workflows better. It connects smoothly with tools that automate tasks and make building apps faster without needing lots of coding.

Spark is for those in an organisation responsible for creating and building processes and documenting them e.g. program management, governance, risk and compliance, quality management, digital transformation, BPM, policy creators (e.g. HR). These govern the way the company orchestrates its work.

Process discovery

- Capture and analyse business processes.
- Create detailed process maps with an intuitive interface, customisable symbols, and real-time collaboration features.

Key AI Driven Features in Spark

Process Creator

- The Process Creator tool allows a Spark Editor to create a new process from a prompt. The user simply types in the process they want, and the AI will return a process diagram following the UPN rules (input, activity, output).
- In addition to creating a process from a prompt, the Process Creator will also accept a text document or an image of a flow chart.

- When a text document is submitted the AI will create a summarised version as a UPN process.

Process Assistant

- The Process Assistant is a simple prompt that end users of a process library can use to query the processes in the library. For example, a user may want to know how to raise a Purchase Order. They can ask the question in the prompt window and the AI will respond based on the processes in the Spark Workspace.
- The AI will summarise the answer and provide a link directly to the process that it is based on.

Process Optimiser

- The Process Optimiser is an assistant for Process Editors that will help them identify improvement opportunities, such as automation suggestions, based on a given process.
- The Editor will first create a process, validate that it against the current state and then ask Spark to suggest improvements.

App Designer / Create Integration (Igniter)

- The App Designer will propose the design for a new app based on a To-Be process creating in Spark.
- The user can then choose to import those designs into Liberty Create to create an app or to export the designs as a document.

Benefits:

- **Holistic Process Insights** provides a complete view of your organisation's processes, enabling you to identify inefficiencies, mitigate risks, and capitalise on opportunities for improvement.
- **Streamlined Collaboration** ensures communication and alignment on process optimisation initiatives.
- **Agility and Innovation** empower your organisation to adapt and innovate in response to changing market dynamics, driving continuous improvement and operational excellence.

Scalability and compatibility

- **Scalability:** Spark scales seamlessly to accommodate organisations of all sizes, from mid-sized businesses to large enterprises, providing the flexibility to grow and adapt over time.
- **Compatibility:** Spark is compatible with a wide range of systems, applications, and data sources, ensuring seamless integration with existing technology investments.

Reporting

- Process health, key word searches, process owners, process performance, changes, updates and dependencies.

Liberty IDP

Liberty IDP empowers you to transform labour-intensive workflows into smart, efficient and scalable operations. Going beyond traditional automation, **it uses advanced AI to unlock the full potential of your data**, enabling precise document classification and extraction. You can also use values, conditions and logic within the data to trigger onward workflows in RPA or low-code applications.

By leveraging machine learning and natural language processing, Liberty IDP:

- Scans incoming communications or uploaded documentation.
- Suggests and identifies key information.
- Integrates into backend systems without the need for manual data entry.
- Eliminates manual data entry and reduces the risk of errors.
- Accelerates processing times.
- Frees up staff to focus on higher-value tasks.

As part of your wider automation strategy, Liberty IDP enhances operational efficiency, ensures data consistency, and supports scalable, digital-first workflows across critical business functions.

Liberty IDP uses advanced AI to revolutionise document processing and unlock the full potential of your data, with benefits including:

- **Typically save up to 97% of time**[3] by automating document handling, reducing manual effort and operational costs.
- **Accelerate turnaround times** for customer onboarding, claims validation and accounts payable.
- **Smart AI for accuracy and speed**, eliminating the pain of manual document or image analysis.
- **Effortless document classification and data extraction**, tailored to your needs via prompt-driven AI control.
- **Scalable and flexible,** it adapts to the volume of your documents.
- **All-in-one solution**, integrating Liberty IDP with low-code development, robotic process automation (RPA)[4] and other tools to boost productivity and digital transformation.

What challenges do people tackle with Liberty IDP?

This advanced, AI-driven solution automates the extraction and interpretation of data from unstructured and semi-structured documents, such as customer emails, PDFs, images and order forms.

Citizen/customer/patient correspondence

- Automates mail processing
- Classifies requests using AI
- Digitalises paper forms

Finance and procurement

- Processes invoices and orders
- Simplifies budget reporting
- Manages supplier documents

HR records

- Processes HR documents
- Tracks policy acknowledgments

[3] This is an estimate only based on customers' experiences.

[4] Ask your Account Manager if you'd like more information on how low-code development and robotic process automation can help you streamline your processes and boost efficiency.

- Automates payroll documentation

Regulatory compliance

- Automates FOI requests
- Manages records efficiently
- Validates documents for audits

Environmental and planning

- Streamlines planning applications
- Manages project documentation
- Automates property records

Public consultation

- Processes consultation responses
- Manages feedback forms
- Analyses public sentiment

How does Liberty IDP work?

Document Capture: Scan or ingest documents from multiple channels including email, portals or paper.

Classification: AI identifies document types and sorts them automatically.

Data Extraction: NLP and OCR extract key data fields from documents, even in complex or unstructured formats.

Validation & Quality Control: Data is checked against business rules; exceptions are flagged for human review.

Integration & Automation: Extracted data is routed to workflows, CRM or ERP systems and can trigger automation processes.

Analytics & Reporting: Monitor document processing KPIs, track bottlenecks and improve operational efficiency

Support Services

Project Management

The Opus project team, composed of Prince2-certified professionals, leverages a standardised, ITIL-aligned agile project management methodology to ensure seamless and successful project delivery for The Buyer. Our proven approach offers:

- Collaborative creation of project plans with a strong focus on the solution
- Effective risk management to minimise disruption to The Buyer's daily activities
- Clear and mutually agreed-upon expectations by all stakeholders
- Transparent communication channels among all project team members

Our methodology encompasses the following key stages, aligning seamlessly with distinct project phases:

Project initiation

- Planning and design
- Delivery
- Acceptance testing
- Go-live and training
- Sign-off
- Handover to Business as Usual (BAU)

By implementing our proven methodology and leveraging the expertise of our certified professionals, we ensure a streamlined and successful project execution tailored to The Buyer's unique requirements.

Onboarding Process Overview

Once awarded the contract to support The Buyer, Opus will initiate a tailored onboarding process designed to align with your unique needs. This process ensures we gain an in-depth understanding of your solution, with a focus on meticulous documentation to promote effective knowledge sharing and ensure continuity across the Opus team.

Project Initiation

To launch the project, Opus will assemble a dedicated project team. We recommend appointing a project executive from The Buyer to provide leadership, maintain focus, and ensure collaborative decision-making.

During this phase, the Opus project manager will deliver a comprehensive Project Initiation Document (PID) that will outline:

- Quality standards and project objectives
- Project scope, including boundaries and deliverables
- Key assumptions, constraints, and dependencies
- Business case overview
- Control mechanisms for managing risks, changes, and tolerances
- Communication plan to ensure timely and effective updates

Additionally, the project manager will establish essential logs for actions, risks, issues, and changes while identifying key milestones. These milestones will include both internal benchmarks and external factors, such as planning approvals and build completions. Dependencies between tasks will be mapped to ensure any potential delays are promptly identified and managed effectively.

Planning and Design

Ensuring uninterrupted service throughout the implementation is a top priority. During the planning phase, Opus will work closely with The Buyer to finalise the PID. A collaborative workshop will be conducted to perform due diligence and audits, ensuring smooth knowledge transfer and alignment with your business objectives.

Deliverables during this phase include:

- A detailed Project Plan outlining timelines, responsibilities, and dependencies
- A Low-Level Design (LLD), covering all technical aspects of the solution

Once approved, the design will be baselined, with any further changes carefully managed through formal change control procedures. Completion of this phase is essential before moving to equipment procurement, ensuring a well-orchestrated implementation.

Delivery

Upon approval of the LLD, we will transition into the delivery phase, marked by multiple concurrent workstreams focused on The Buyer deployments and training. To ensure a strong foundation, we will host a project kick-off meeting to align all team members on the project's framework, governance, and control protocols. During this session, we will collaboratively finalise a communication plan, detailing the cadence, format, and participants for project update calls and any in-person board meetings. Each meeting will adhere to a predefined agenda and include a comprehensive project management highlight report.

Dedicated workstream teams will be established, with the project manager regularly gathering progress updates from work package owners. These updates will include key milestone achievements, risk assessments with mitigation strategies, issue tracking, and actions taken to achieve stage plan objectives.

Project progress will be systematically reported to the project board through structured highlight reports and project logs, delivered via conference calls or in-person meetings as outlined in the communication plan. All reporting and monitoring will align with the baseline plan defined in the PID, providing clear visibility into performance against time, budget, and quality metrics. This ensures adherence to the agreed tolerances, enabling proactive management of the project's delivery.

OPUS

Risk Management

Opus employs a robust and proactive risk management framework combined with meticulous continuity planning to ensure the seamless delivery of projects, even amidst unforeseen disruptions. This approach enables us to safeguard ongoing operations while consistently achieving project milestones and objectives. Our risk management methodology utilises a Red-Amber-Green (RAG) system, with dedicated project teams regularly reviewing, reporting, and addressing both existing and emerging risks, actions, and dependencies.

Early Risk Identification and Mitigation

Timely identification, logging, and tracking of risks are critical to minimising potential disruptions to The Buyer's business-as-usual (BAU) operations. As part of our collaborative engagement, we will facilitate interactive workshops to identify and evaluate potential risks, establish a comprehensive risk register, and verify the effectiveness of all mitigation strategies.

Structured Risk Management Stages

Our approach to risk management is structured around the following key stages:

- **Risk Identification**: Systematically identifying potential risks that could impact project timelines, costs, or deliverables.
- **Risk Assessment**: Evaluating the probability and potential impact of each risk to prioritise mitigation efforts.
- **Risk Planning**: Assigning risk ownership to qualified team members with the authority to implement mitigation strategies and defining the necessary actions.
- **Risk Monitoring and Management**: Continuously tracking and updating the status of each risk, assessing the effectiveness of mitigations, and identifying any new or escalating risks.

RAG Status Reporting

Each report will provide a detailed RAG status for cost, quality, and time, as well as an overall project status:

- **Green**: Effective management of all issues and risks with no known impacts on cost, quality, or time
- **Amber**: Identified risks or issues that could impact one or more of cost, quality, or time, with an active plan in place to restore status to green
- **Red**: Identified risks or issues that could impact one or more of cost, quality, or time, without an agreed plan to restore status to green

If any element—cost, quality, or time—receives a red status, or if two or more are rated amber, the overall project will be rated as red. In such cases, the project manager will issue an exception report, outlining available options to restore the project to green status. This report will include a recommended course of action and an assessment of the potential impacts.

By leveraging this comprehensive risk management and reporting structure, Opus ensures that every project remains on track, with clear visibility into potential challenges and the actions necessary to mitigate them effectively.

Regular Reporting and Monitoring

Regular progress reporting will be provided to the project board through comprehensive highlight reports and project logs as outlined in the agreed-upon project progress framework. Updates will be delivered via conference calls or in-person meetings, ensuring alignment with the baseline plan established in the Project Initiation Document (PID). All reporting will adhere to clear criteria focused on time, budget, quality, and pre-defined tolerances.

Acceptance Testing
A successful implementation hinges on the effectiveness of the testing phase. We understand that The Buyer's unique operational environment demands a meticulously crafted test plan. Our approach focuses on developing a bespoke testing framework designed to thoroughly validate hardware, software, and feature functionality across all critical components.

A key milestone in this process is the execution of User Acceptance Testing (UAT), ensuring that the solution is meticulously built and validated in strict alignment with the approved Low-Level Design (LLD). This guarantees that the final deployment meets both technical specifications and business requirements.

To foster transparency and accountability, a designated representative from The Buyer will actively participate in the testing process. Their engagement is essential for validating that all workstreams have been rigorously tested, successfully completed, and formally documented through sign-off.

Upon the successful completion of this testing phase, we will seamlessly transition the solution to a live operational state, ensuring a smooth and confident launch for The Buyer.

Go-Live and Training
In alignment with the agreed project plan, a specific Go-live date, or a phased approach, will be established. At Opus, we recognise the crucial role of training in ensuring the project's overall success. We are committed to collaborating closely with The Buyer to develop a comprehensive training program. This program aims to provide robust support to employees throughout the implementation of new resources and the transition to new systems.

By prioritising training, we facilitate a seamless transition that positively impacts the user experience within The Buyer. This approach enhances management and administrative operations, leading to improved efficiency and effectiveness.

Sign Off
Following a successful Go-live and the implementation of the new working solution, the Opus project manager will compile all pertinent Project Acceptance Documentation. These crucial documents will then be presented to The Buyer for formal sign-off, ensuring that all aspects of the project have been satisfactorily completed and met the agreed-upon requirements. This meticulous process guarantees a clear and transparent acknowledgment of the project's successful delivery and paves the way for the next phase of our partnership.

Handover to BAU
Upon the successful completion of each implementation phase, a meticulous handover process will be initiated. This process facilitates seamless knowledge transfer and collaboration between our internal support team and The Buyer. By engaging our support team throughout the implementation, we ensure their comprehensive understanding of the delivered solution. This approach positions them to provide ongoing support and assistance to The Buyer in future endeavours. Our commitment to a thorough handover process guarantees continuity and a smooth transition, fostering a strong and sustainable partnership.

Moving Forward
Upon the successful completion of the initial project phase, we are committed to maintaining an ongoing partnership with The Buyer. Through regular conference calls, we will keep you informed about the latest features and product releases that can benefit your team. By staying updated on

advancements in the market, you can plan effectively and make informed decisions about leveraging emerging technologies to enhance your operations.

Our collaborative approach ensures you have a clear understanding of the evolving landscape, empowering you to capitalise on technological advancements that align with your business objectives. By providing timely insights, we aim to foster continuous improvement and innovation within your organisation, ensuring your team remains at the forefront of industry developments.

Project Resources

Overview - All customers are assigned a project team consisting of the below roles:

Project Sponsor / Account Manager - The project sponsor will be accountable for the successful delivery of the implementation. They will be the point of escalation throughout the project and will work closely with the Project Manager to ensure success.

Project Manager - The Project Manager will oversee the implementation and will have overall responsibility for the project deliverables. They will co-ordinate both Opus resources as well as deliverables from the Customer team.

Solution Architect - The Solution Architect will document the current solution customer and will commute that information into a design on the platform. They will leverage best practice methods gleaned through hundreds of successful implementations for customers.

Project Engineers - The System Builders will build the solution, including the business continuity plan and traffic migration from the existing platform.

Opus work closely with you to understand the project context, testing requirements, project plans and provide a tailored approach to take on the engagement based on various factors. We provide complete clarity on the testing process with proactive communication, regular progress updates and complete transparency on any project risks highlighted during testing.

Trainers - Trainers are responsible for training and support through the 30-60-90-day cycle. Opus will train the person or team who is responsible in rolling out the training across the contact centre and for any new starters that will be joining in the future. We will also assist with any documentation or eLearning slides that may need to be created. There are many training videos on the Cirrus portal that will help with this.

Change Management

Opus will support your change management journey using our experience from previous deployments. We have a variety of frameworks that help us to deliver the best solution for customers, and your Project manager will discuss these in further detail at the time of delivery.

Account Management

All of our valued customers are paired with a dedicated and experienced account manager/director who oversees their services strategically. This pivotal relationship serves as the foundation of seamless interaction between our respective businesses. Recognising the significance of this role, we exclusively employ exceptionally trained and highly skilled professionals.

Account management holds a paramount position within the comprehensive Opus service package offered to our esteemed customers. Our proficient account management team enjoys privileged access to both internal resources and external support from our trusted partners. This guarantees that all tasks conducted for our Public Sector customers receive utmost priority and attention.

Opus will provide you with a dedicated account director, who will take charge of the project and nurturing the ongoing day-to-day relationship.

Your account director will expertly manage your account according to your specific requirements. We recognise that each customer operates with distinct internal processes and expectations, and our aim is to support you in delivering the precise service you demand. Drawing on a wealth of experiences shared not only in individual meetings but also through events and will provide valuable expertise in devising a comprehensive communications strategy.

As part of our standard practice, we conduct quarterly account review calls or face-to-face meetings to thoroughly evaluate your account and continuously develop long-term plans. With a wealth of experience and a genuine interest in understanding your business, your account director will offer guidance during the account review process. This includes providing advice to you on enhancing efficiency through available technologies and delivering updates on the following aspects:

- Identification of system issues and anomalies
- Updates on new business activities and orders
- Resolution and maintenance of any account-related issues
- Reporting of system issues and general feedback
- Introduction of new beneficial products, software, and services.

Opus employs a range of essential processes to effectively manage and monitor changes, enhance knowledge, and identify future communication strategies. In this regard, your account director will take on the responsibility of creating and updating an Account Development Plan in collaboration with key stakeholders within your organisation. We highly value input from you to ensure a partnership that caters to your present and future needs. This process plays a crucial role in our comprehensive business review, which your account director will oversee, complemented by monthly product bulletins. These meticulous measures and documented procedures are implemented to ensure you receive continuous and well-informed support.

Moreover, your account director will coordinate with your customer services team to address day-to-day issues and deliver insightful analytical reports as part of the review meeting process. By actively engaging with your team, we strive to streamline operations and provide high-level service quality.

Customer Services

At the core of Opus service delivery lies our cutting-edge Opus Service Desk (OSD), located in Reigate, Surrey. It serves as the central hub for coordinating, controlling, and executing all our service activities. Accredited by ITIL and the Institute of Customer Service, the OSD embodies our commitment to excellence.

While your account director assumes ultimate accountability for maintaining and managing your account, a team of skilled customer service representatives provides day-to-day support to ensure smooth operations.

To report incidents or request minor replacements or new hardware, your users can directly contact their office support, who will then escalate the matter to our OSD. Incidents are carefully triaged and escalated through our multi-tiered support system, overseen by our dedicated service delivery management team.

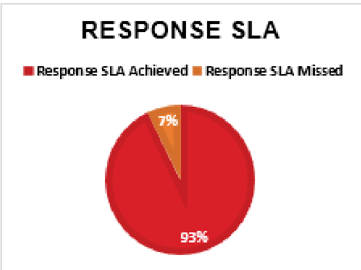
Service Performance and Review

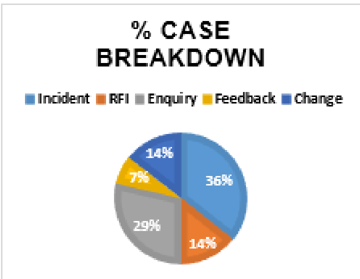
Opus conducts comprehensive quarterly service reviews tailored to your specific needs. Through well-defined reporting channels, Opus effectively manages high-priority and aging incidents, analyses trends, proactively identifies potential issues, and provides performance feedback to you. These reviews serve as a valuable opportunity to ensure continuous improvement and align our services with your evolving requirements.

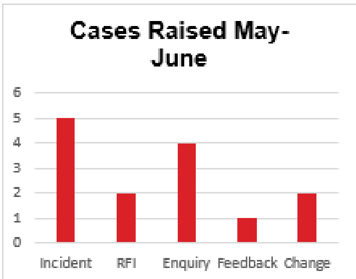
Reporting Type	By whom	To whom	Timeframe
Quarterly Closed Incident Performance Report	Opus Service Delivery Team	The Buyer	As agreed
Quarterly Service Delivery Meeting	Opus Service Delivery Team	The Buyer	As agreed

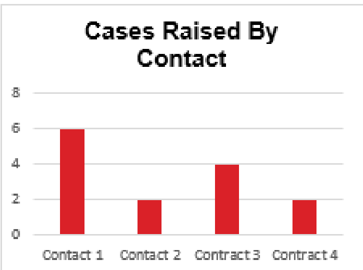
Example Quarterly Report Highlights

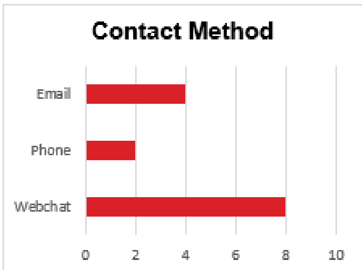
- P1 Incidents raised to the service desk = 0
- Current open cases = 0
- All Incident and RFI (Request for Information) cases responded to within SLA
- All Incident and RFI cases resolved within SLA











Case Ref	Ticket Type	Raised By	Opus Analyst	Response SLA Raised - xx/xx/20xx		Resolutions SLA Closed - xx/xx/20xx	
CAS-00011	Incident	OJ	PJ	Agreement	8-hours	Agreement	16-Hours
				Achieved	Yes	Achieved	Yes
Summary							

Case Ref	Ticket Type	Raised By	Opus Analyst	Response SLA Raised - xx/xx/20xx		Resolutions SLA Closed - xx/xx/20xx	
CAS-00012	BAU Change	TE	BS	Agreement	2-hours	Agreement	16-Hours
				Achieved	Yes	Achieved	Yes
Summary							

Service Delivery

In today's technology-driven landscape, Opus recognises the significant challenges and costs businesses face due to communication disruptions and hardware failures. Our commitment lies in engineering robust, resilient solutions that proactively mitigate these risks. Nevertheless, we understand that unforeseen issues can occasionally disrupt operations. It is in these critical moments that an organisation's true support capabilities are revealed, and at Opus, we strive to set the standard for exceptional response and resolution.

At the heart of Opus' exceptional service delivery is our cutting-edge **Opus Service Desk (OSD),** strategically located in Reigate, Surrey. Accredited by both **ITIL** and the **Institute of Customer Service**, the OSD operates as the central hub for orchestrating, managing, and delivering our comprehensive service offerings.

The OSD is equipped with robust capabilities to ensure seamless support, including:

- **Call Logging and Tracking:** Efficiently receiving and documenting all customer queries and incidents.
- **Expert Guidance:** Offering immediate solutions whenever possible to minimise disruptions.
- **Timely Updates:** Providing clear estimates for resolution times and proactively keeping customers informed of progress.

Our customers can conveniently report incidents through a variety of accessible channels: **phone, email, web chat, online portal, or automated alerts from onsite monitoring systems.** Additionally, we ensure collaborative support for incidents reported by third parties, particularly those involving third-party physical infrastructure such as network connectivity.

Service Request and Incident Reporting
Opus Service Desk (OSD) provides four convenient channels to raise support incidents or service requests:

Telephone: Call 0208 545 8545, with most calls answered within 20 seconds.

Email: Contact us at customerservice@opustech.co.uk.

Web Portal: Visit Opus Customer Portal.

Web Chat: Access real-time assistance via our website Customer Support Chat.

All Priority 1 cases must be logged with Opus by phone to 0208 545 8545.

Below is a detailed explanation of each channel and the Opus incident management process:

Telephone Support - Fast and Reliable 24/7 Assistance
For immediate support, subject to your SLA, The Buyer can contact the OSD via telephone, available around the clock, 365 days a year. A dedicated representative will promptly answer your call, log the issue into our Incident Management System (IMS), and assign a priority level. From there, the issue is directed to a technician for initial triage and investigation.

If escalation is required, our comprehensive multi-level support structure (first through fourth line) ensures efficient resolution, with progress updates provided promptly.

Critical Service Faults (P1/P2): For critical issues outside core business hours, telephone support ensures rapid engagement, even if other communication methods are disrupted. Rest assured; response times adhere strictly to your Service Level Agreements (SLAs).

Email Support - Convenient Issue Reporting During Core Hours
The Buyer can report issues via email at customerservice@opustech.co.uk , monitored during core business hours: 08:30 – 17:30, Monday to Friday (excluding bank holidays).

Process: Upon receipt, an OSD representative logs the issue into our system, assigning a priority level. You will receive an automated email confirmation, including a reference number and fault details.

Critical Issues (P1/P2): For urgent matters outside core hours, telephone support is recommended to bypass potential delays caused by email disruptions.

Web Chat Support - Real-Time Assistance During Business Hours
Access real-time support via the Web Chat feature, available from 08:30 – 17:30, Monday to Friday (excluding bank holidays).

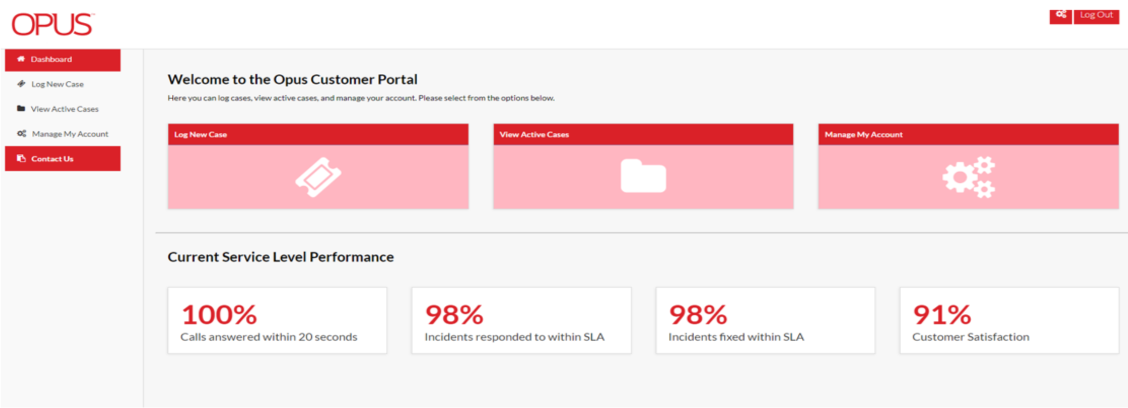
Access: Visit Opus Customer Support, and click the chat icon at the bottom-right corner of the page.

Our support agents are ready to address queries, log incidents, and provide guidance in real time.

Opus Customer Portal - Comprehensive Self-Service Platform
The Opus Customer Portal offers a seamless way to log cases, view active cases, and manage your account efficiently.

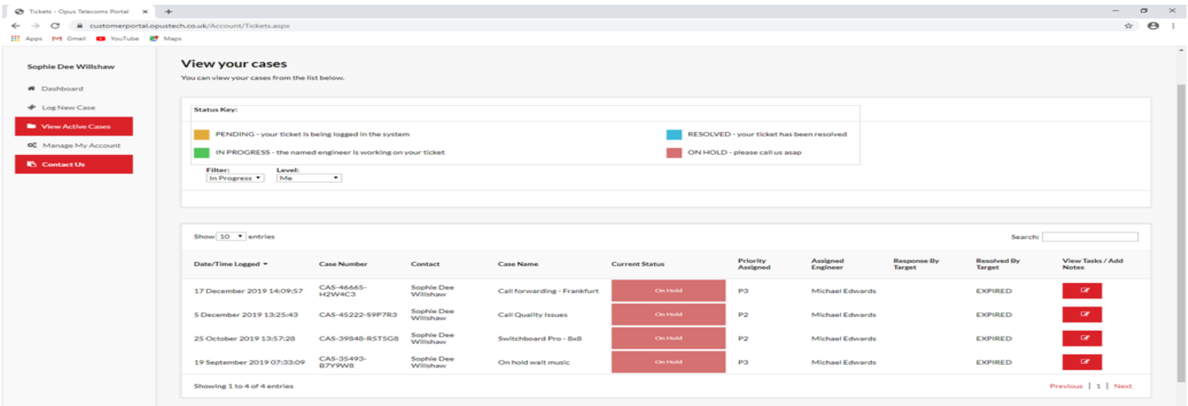
Capabilities: Log incidents, track real-time progress, and manage account settings.
Ease of Use: The portal's intuitive design ensures quick access to case information and streamlined communication.

Opus Customer Portal



The screenshot below illustrates how you can conveniently access and view active cases through our support portal.

Opus Support Portal – Viewing Active Cases



Opus Incident Management Process

Our incident management system ensures prompt and transparent resolution:

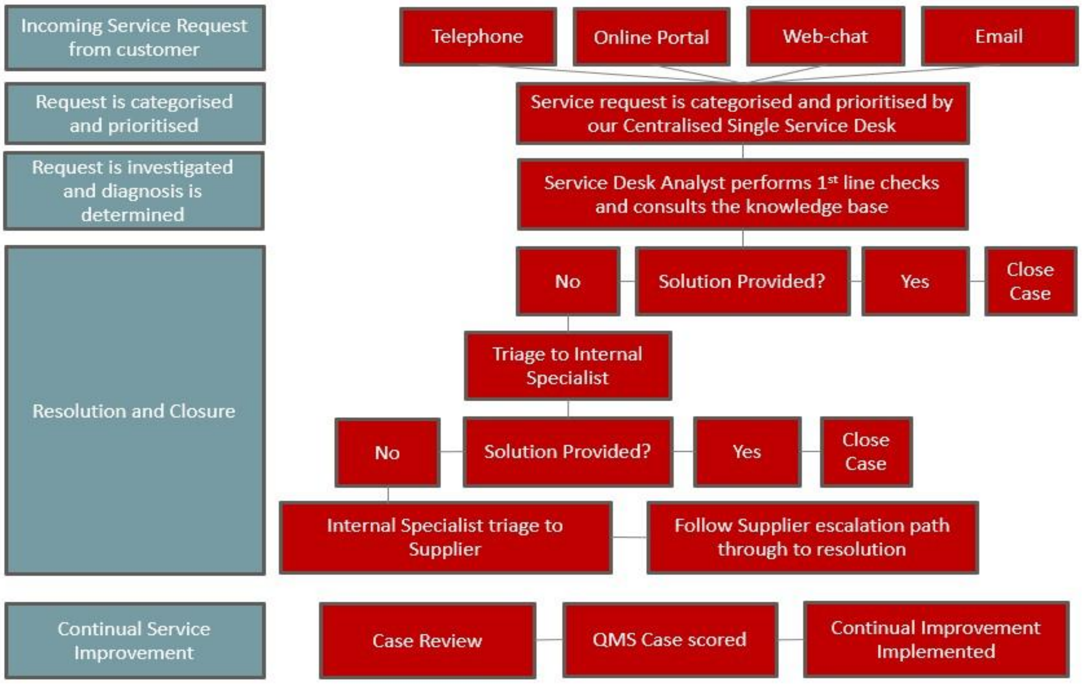
- **Incident Logging**: Emails are automatically converted into incidents in the IMS, assigned a default severity of 4 unless specified. Telephone calls bypass auto-attendants to ensure direct reporting.
- **Prioritisation and Monitoring**: Calls and incidents are monitored in real time. Key performance indicators, such as response times and escalation alerts, are displayed on our office wallboards.

Escalation Protocols:

- **Level 1 & 2 Incidents**: Immediate alerts to the Service Desk Manager (SDM) for management intervention.
- **Threshold Breaches**: Incidents nearing SLA thresholds trigger alerts to the SDM and Service Delivery Director (SDD). Critical cases are escalated to the Operations Director, with the SDD assuming ownership.

• **Transparency and Accountability**: Incident status, severity, and timers are continuously displayed for team-wide visibility, ensuring adherence to SLAs.

Process Flow Overview
Our incident resolution journey—from notification to resolution—is clearly outlined in the diagram below, showcasing our commitment to efficiency and transparency.



Escalation Process
At Opus, we are passionate about delivering exceptional customer service and understand the importance of tailoring our solutions to meet each customer's unique needs. No matter the size or scope of your organisation, we treat every customer with the highest level of care and attention.

Effective Communication and Swift Resolution - We pride ourselves on our rapid response times and clearly defined service delivery targets. Our mission is to consistently exceed expectations by providing industry-leading support. Should you ever feel that our service falls short, please contact our dedicated support team or your account director. They will make resolving your concerns a top priority. If additional support is needed, Customer Services will be promptly engaged on your behalf to ensure a complaint is formally logged, and you will be contacted directly to discuss the resolution process.

Proactive Service Management - Opus has made substantial investments in refining our service management processes to provide real-time monitoring and escalation of support calls. This ensures you have complete transparency regarding any reported issue; from the moment it is logged until its resolution. You will receive timely updates that include:

- **Case Details:** A summary of the issue and key insights.
- **Action Plans:** Steps being taken to resolve the issue.
- **Engineer Allocation:** Information on the assigned technical experts.
- **Resolution Timeline:** Our recommended path to resolution.

Automated Escalation for Priority Assurance
Our system is equipped with an advanced Operational Service Dashboard (OSD) that automatically escalates cases based on priority if key milestones within the Service Level Agreement (SLA) are at risk. Proactive notifications are sent to service management and executive leadership *before* any SLA breach occurs, ensuring swift intervention. Most importantly, no case will be closed without your explicit approval. Your satisfaction and peace of mind remain our top priority.

Standard Escalations - Escalations follow a clearly defined process. The contact numbers shown in the table connect directly to mobile devices. While staff availability may vary, voicemails are actively monitored. Opus request that a voicemail be left if a call is not answered, with a minimum of 60 minutes before escalating to the next point of contact.

Level 1 Escalation – Step 1		
Should you need additional assistance beyond that which you've received or are unable to contact the representative working on your request, please contact:		
Scott Murphy Customer Experience Team Leader	***Urgent - call*** +44 20 7046 6021	***Non urgent – email*** s.murphy@opustech.co.uk
Level 2 Escalation – Step 2		
Should you need additional assistance beyond that which the Customer Experience Team Leader was able to provide or you're unable to reach the Customer Experience Team Leader, please contact:		
Georgina McKenna Head of Service Delivery ***or*** ***Mark Balzaretti*** Head of Technical Services	***Urgent - call*** +44 20 7046 6022	***Non urgent - email*** g.mckenna@opustech.co.uk m.balzaretti@opustech.co.uk
Level 3 Escalation – Step 3		
Should you need additional assistance beyond that which the Service Delivery Manager/Head of Technical Services was able to provide or you are unable to reach the Service Delivery Manager/Head of Technical Services, please contact:		
Stephen Brown Service Delivery Director	***Urgent - call*** +44 20 7046 6023	***Non urgent - email*** s.brown@opustech.co.uk
Level 4 Escalation – Step 4		
Should you need additional assistance beyond that which the Service Delivery Director was able to provide or you are unable to reach the Service Delivery Director, please contact:		
Chris Terry Chief Operations Officer	***Urgent - call*** +44 20 7046 6024	***Non urgent - email*** c.terry@opustech.co.uk
Level 4 Escalation – Step 4		
Should you need additional assistance beyond that which the Chief Operations Officer was able to provide or you are unable to reach the Chief Operations Officer, please contact:		
Michael O'Donnell Chief Executive Officer	***Urgent - call*** +44 20 7046 6025	***Non urgent - email*** michael@opustech.co.uk

Urgent Escalations - For critical matters, escalations must be made via telephone to ensure prompt attention. Due to the nature of these issues, Opus is unable to process urgent escalations via email. Any email submissions will be addressed as non-urgent.

This structured approach ensures an efficient and reliable escalation process to meet service requirements.

Finally, Opus is here to ensure that your experience is seamless, efficient, and always prioritised. We are committed to being your trusted partner in service excellence.

Customer Satisfaction

At Opus, customer satisfaction is a cornerstone of our business, continuously monitored through diverse channels, including phone calls, surveys, and a feedback "thermometer" embedded in every customer service email. We prominently display our Net Promoter Scores (NPS) and customer testimonials throughout our offices, showcasing our dedication to transparency and consistently exceeding industry benchmarks.

NET PROMOTER SCORE	CUSTOMER SATISFACTION	FIRST TIME FIX ON A P1
90	97.5%	99.2%
Month on month we survey our customers to ensure our customer experience levels remain consistently high	*CSAT is measured closely to ensure our customers are satisfied with their products, services, and interactions with Opus*	*We pride ourselves on delivering fast first time fix rates to ensure faults are resolved quickly on P1 incidents*

Cultivating a Culture of Service Excellence

We invite both existing and potential customers to visit our head office, where they can meet our customer service team and gain insights into our robust five-level escalation process, reinforcing our open-door approach to service.

Valuing and Acting on Customer Feedback

Customer feedback is integral to our continuous improvement strategy. We conduct annual surveys to understand what Opus should start, stop, and continue doing, and survey selected customers monthly following service interactions. Our customer service team also conducts regular **"Touchpoint"** calls to gather real-time NPS data and ensure ongoing satisfaction.

In instances where dissatisfaction is expressed informally, account managers or assistant customer service managers proactively address concerns, initiating customer feedback cases to resolve issues swiftly and effectively.

Tailored Feedback Response Framework

Our feedback process is designed to address three key scenarios:

- **Positive Feedback:** Exceptional employees are recognised and rewarded for delivering superior service.
- **Complaints:** We thoroughly address and resolve all customer complaints to their complete satisfaction.
- **Dissatisfied but Silent Customers:** We proactively reach out to customers who may need additional support, even without formal complaints.

Comprehensive Customer Communication

Keeping customers informed is a top priority. Our proactive communication strategies include:

- Regular service update emails and customer newsletters
- Active engagement on social media platforms such as Twitter and LinkedIn
- Timely product updates on our website
- Personalised phone calls during service disruptions or unusual usage patterns
- Scheduled service reviews and customer value statements
- Technology briefings on the latest innovations

Commitment to Best Practices and Continuous Improvement
Our commitment to **ITIL** best practices ensures consistency, value-driven service delivery, and excellence in customer experience. To stay ahead of industry standards, we actively collaborate with the **Institute of Customer Service**, engaging in continuous training and networking to refine our methodologies.

In 2018, Opus achieved the prestigious **ServiceMark** accreditation—a testament to the strength of our customer service processes, awarded following a rigorous independent assessment. We are proud to have recently earned this certification for the third consecutive time, this time with distinction. The assessor praised our unwavering dedication to service excellence, further reinforcing our position as a leader in customer experience.

> *This is the third time Opus Telecoms have achieved the ServiceMark standard – this time with spectacular results. And it was easy to see why. From leadership to frontline staff, there was a clear and unwavering commitment to delivering outstanding customer service. The team consistently demonstrated a customer-first mindset, with proactive problem-solving, effective communication, and a genuine passion for exceeding expectations. Processes are streamlined, feedback is actively sought and implemented, and a culture of continuous improvement was evident at every level.*
>
> *Throughout the assessment there was a clear sense of togetherness among the employees. This strong sense of shared purpose is a direct reflection of the senior leaders' commitment to fostering a positive and inclusive culture. Their actions set the tone for the organisation, ensuring that the company values are embedded at every level. By leading with transparency, actively engaging with employees, and creating opportunities for open dialogue, they have built an environment where both long-serving and new team members feel equally valued and connected. Their dedication to employee development, recognition, and well-being has helped cultivate a workplace where people feel motivated, supported, and proud to be part of the organisation's vision. This has had a direct impact on the customer satisfaction. When employees feel valued, supported, and connected, they are more engaged and motivated to deliver exceptional service. The open communication, collaboration, and shared purpose within the organisation create a seamless and customer-focused approach, ensuring that every interaction is handled with care and professionalism. As a result, customers experience consistent, high-quality service, leading to increased trust, loyalty, and outstanding satisfaction results. The organisation has ambitious growth plans and wants to lead the market when it comes to innovation and meeting future customers' needs. With this genuine commitment to its people and its customers, I am excited to see what future successes Opus Telecoms will achieve.*

Driving Customer Success Through Innovation
At Opus, we constantly evaluate our performance to enhance customer satisfaction and loyalty. Our position as the UK's leading independent technology partner enables us to guide organisations on transformative journeys, delivering tangible benefits such as increased productivity, streamlined resource management, and elevated customer experiences through seamlessly integrated, cutting-edge solutions.

This focus on customer-centric innovation underpins our mission to provide unparalleled service, ensuring that we remain a trusted and indispensable partner to our customers.