Service Definition Document

TTEC Digital Calabrio Workforce Management (WFM)

CX Optimized

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1. Introduction

1.1. Company Overview

G-Cloud 15 Legal Entity and Ownership

TTEC Consulting (UK) Limited, a TTEC Digital Company, is the legal entity for G-Cloud 15. TTEC Consulting (UK) Limited is ultimately owned by TTEC Holdings, Inc., a listed company publicly traded on the NASDAQ Stock Exchange.

Parent Company Overview: TTEC Holdings, Inc.

TTEC Holdings, Inc. (NASDAQ:TTEC) is a leading global customer experience (CX) technology and services innovator for AI-enabled digital CX solutions. Serving iconic and disruptive brands, TTEC's outcome-based solutions span the entire enterprise, touch every virtual interaction channel, and improve each step of the customer journey.

TTEC operates through two business segments:

- TTEC Digital: Designs, builds, and operates omnichannel contact centre technology, CRM, AI and analytics solutions.
- TTEC Engage: Delivers AI-enabled customer engagement, customer acquisition and growth, tech support, back office, and fraud prevention services.

TTEC Digital: Customer Experience Technology and Consulting Services

At TTEC Digital, we offer customer experience (CX) consulting, software, and technology services at the intersection of contact centre, CRM, AI and analytics. We call this intersection the point of conversation and we apply our expertise here to drive shareholder value for our clients in the form of revenue growth, cost reduction, and productivity improvement.

In today's digital landscape, customer conversations and the contact centre technologies that support them are inseparable. With decades of innovation across leading contact centre platforms and deep expertise in CX strategy, data, and AI, TTEC Digital enables organisations to maximise their technology investments and create exceptional customer experiences.

TTEC Digital: Strategic Partnerships

- Microsoft: Seamless CRM and productivity integration through Dynamics 365 and Teams.
- Genesys: Global Platinum Partner delivering advanced cloud contact centre solutions.
- NiCE: Workforce optimisation and analytics for operational excellence.
- ServiceNow: Unified service workflows and agent desktop integration.
- Google Cloud: AI-driven conversational experiences and scalable infrastructure.
- Cisco: Secure, scalable network and telephony solutions for enterprise-grade CX.
- Salesforce: Omnichannel CRM orchestration and customer engagement expertise.
- AWS: Cloud infrastructure and services for scalability and innovation.
- Calabrio: Advanced workforce engagement and analytics solutions.
- Shelf: Knowledge management platform for streamlined agent support and efficiency.

1.2. Value Proposition

TTEC Digital enables G-Cloud organisations to provide secure, citizen-focused, and digitally advanced services through a broad suite of capabilities. Our methodology integrates consulting proficiency, sophisticated technology platforms, and managed services to achieve quantifiable results and maintain compliance with UK standards.

Core Pillars of Our Value Proposition

- Client-Centric Solutions: Our approach is centred on the needs of citizens and end users, ensuring that every service is designed to deliver a seamless and positive experience. We tailor our solutions to address specific organisational goals while maintaining a strong focus on accessibility, ease of use, and satisfaction at every interaction.
- Digital Transformation Expertise: Drawing on deep knowledge and experience in digital transformation, we guide organisations through every stage of technological change. Our

team ensures that the adoption of new platforms, tools, and processes is smooth, effective, and aligned with long-term business objectives.

- Integrated Multichannel Engagement: We enable organisations to interact with citizens and customers across a range of channels, including voice, digital, and self-service options. This integrated approach ensures that people can engage in the way that suits them best, resulting in more meaningful and effective communication.
- Data-Driven Insights: Our solutions leverage advanced analytics and data to provide actionable insights. By turning data into knowledge, organisations can make informed decisions that drive continuous improvement and deliver measurable outcomes for both stakeholders and citizens.
- End-to-End Delivery: We manage the complete lifecycle of each engagement, from initial consultation and solution design through to implementation and ongoing support. This comprehensive approach ensures consistency, quality, and reliability at every stage of the project.

1.3. What the Service Provides

TTEC Digital Calabrio Workforce Management (WFM): Transforming Citizen Engagement

Calabrio provides a secure, scalable, and future-ready contact centre solution designed specifically for government organisations. Built for flexibility and compliance, it enables agencies to deliver exceptional citizen experiences across every channel.

Core Service Highlights

- Omnichannel Excellence: Engage seamlessly across voice, chat, email, and social channels with a unified 360° customer view.
- Cloud-Native & Robust: Work from anywhere with architecture optimised for remote and hybrid teams.
- Secure & Compliant: Fully aligned with UK GDPR, Cyber Essentials, and GDS Service Standards.
- UK-Centric Compliance: Certified for Cyber Essentials and GDPR compliance.

- Cost Efficiency: Pay-per-use pricing model reduces annual costs.
- Scalable & Flexible: Easily adapt to workforce size, location, and evolving citizen needs.
- Evergreen Innovation: Continuous feature upgrades accelerate time-to-market.

AI-Driven Innovation

Deliver smarter, faster, and more human interactions through automation at scale.

- Reduce manual effort with bots and self-service.
- Enable hyper-personalisation and real-time, context-aware engagement.
- Leverage predictive insights and data-driven decisions for better outcomes.

Why TTEC Digital?

Beyond Technology

TTEC Digital offers more than CCaaS. Our expertise spans:

- CX Strategy & Design: Creating human-centric journeys backed by analytics.
- Data & Analytics: Turning insight into impact with predictive intelligence.
- SurroundCX™ Managed Services: Continuous optimisation and operational support to maximise ROI.

SurroundCX™ enhances technology adoption, improves visibility across multiple cloud platforms, monitors license usage to optimise costs, and validates system flows to ensure your customer experience remains on brand.

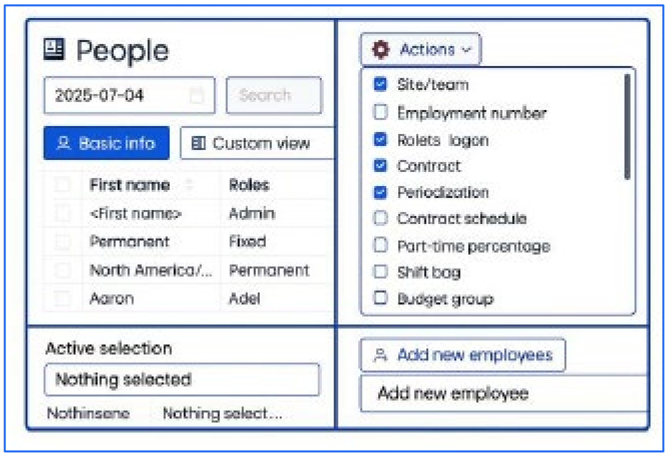
1.4. Overview of the G-Cloud Service

Workforce Management

Calabrio workforce management is designed for the modern contact centre and the modern workforce. Through employee empowerment tools, intelligent automation, advanced forecasting and scheduling, Calabrio’s WFM solution addresses the acute needs organisations face in today’s challenging environment; while helping you navigate the evolving world of work going forward. Calabrio WFM is a highly agile and scalable workforce management platform that allows delivery of seamless experiences for customers, agents, and contact centre managers, no matter where agents are working, remotely, on-location or a hybrid mix.

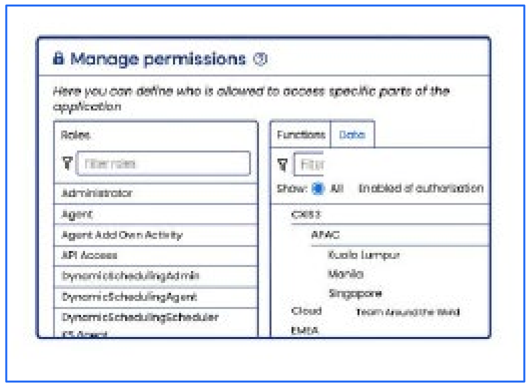
People

The People module offers a comprehensive solution for managing employee data, scheduling, and compliance. It allows administrators to configure work rules, track absences and availability, and manage roles and access controls. The module ensures accurate scheduling by aligning agent hours with contractual targets and organisational needs, while also supporting communication, organisational hierarchy set-up, and auditing for compliance. It also offers *Periodisation* - this allows administrators to balance agents' work hours over extended periods, such as a year, ensuring alignment with contractual targets.



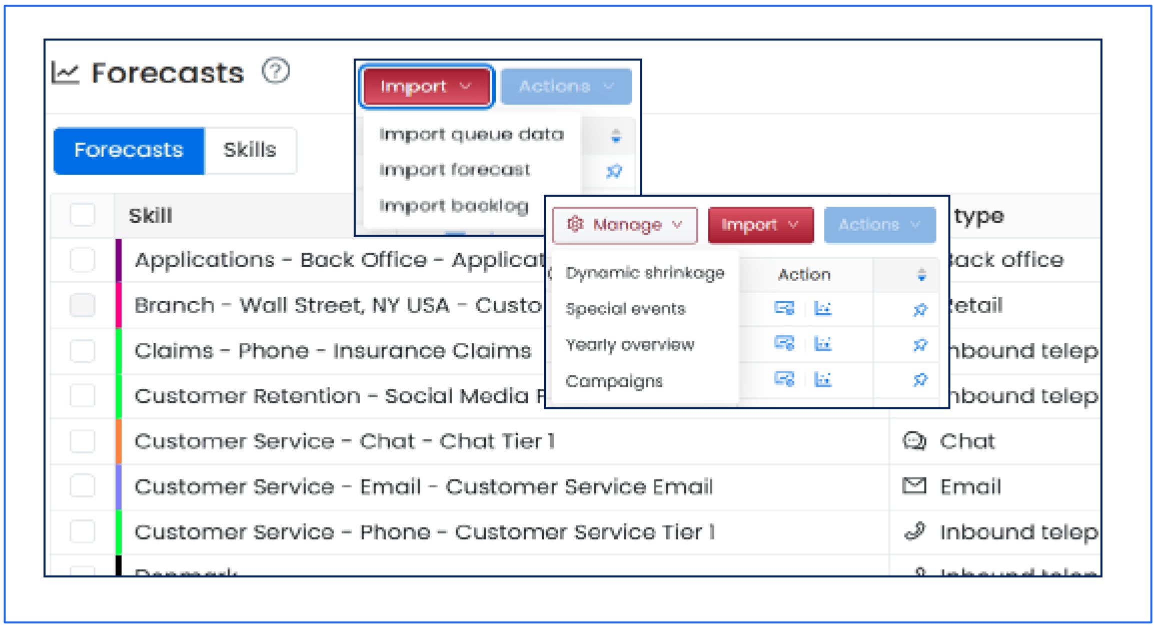
Permissions

The Permissions module in Calabrio WFM allows administrators to control user access through roles that combine function and data permissions. Function permissions define what users can do, while data permissions control what data they can access. Roles can be dynamic adjusting automatically with organisational changes or static for fixed access. This granular, auditable permission structure ensures secure and efficient system use.



Forecasts

The Forecast module in Calabrio WFM is designed to generate accurate staffing forecasts by leveraging historical data and predictive modelling. It facilitates the creation of long-term forecasts, cleaning of historical data to remove outliers, and application of day-level templates to define intraday distribution patterns. The module supports importing queue data and exporting forecast data.

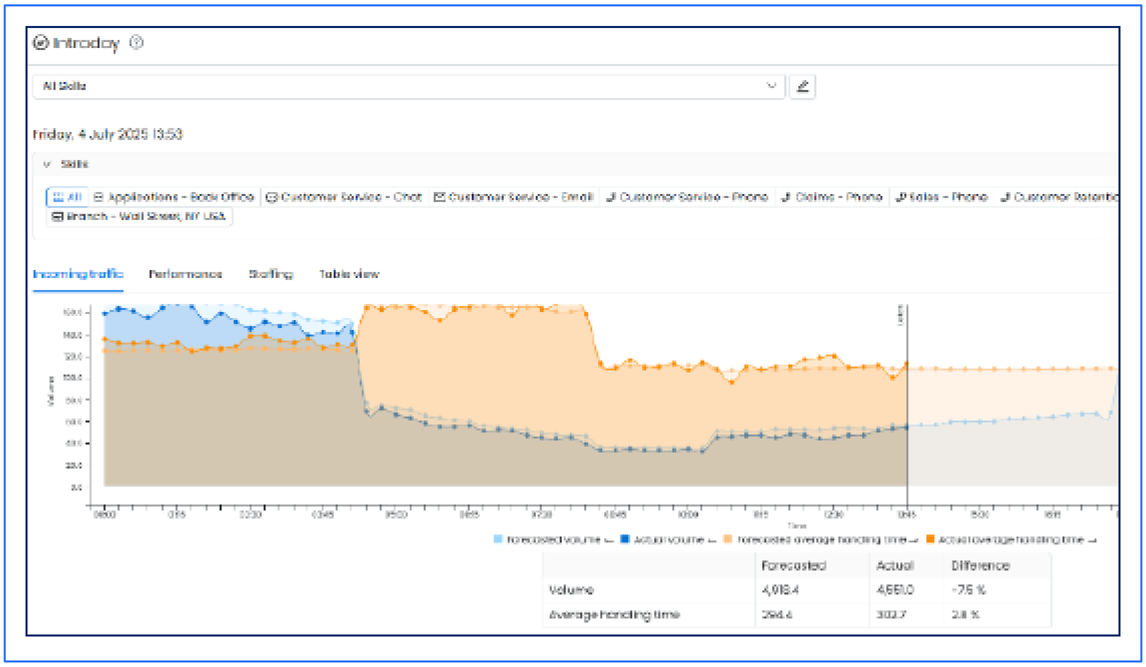


Schedules

The Schedules module delivers efficient resource planning and scheduling. It allows for the creation of agent schedules that adhere to contractual obligations and work rules, utilising both automatic scheduling and optimisation processes to align with forecasted needs. Users can manually adjust schedules to accommodate known absences, meetings, and other activities.

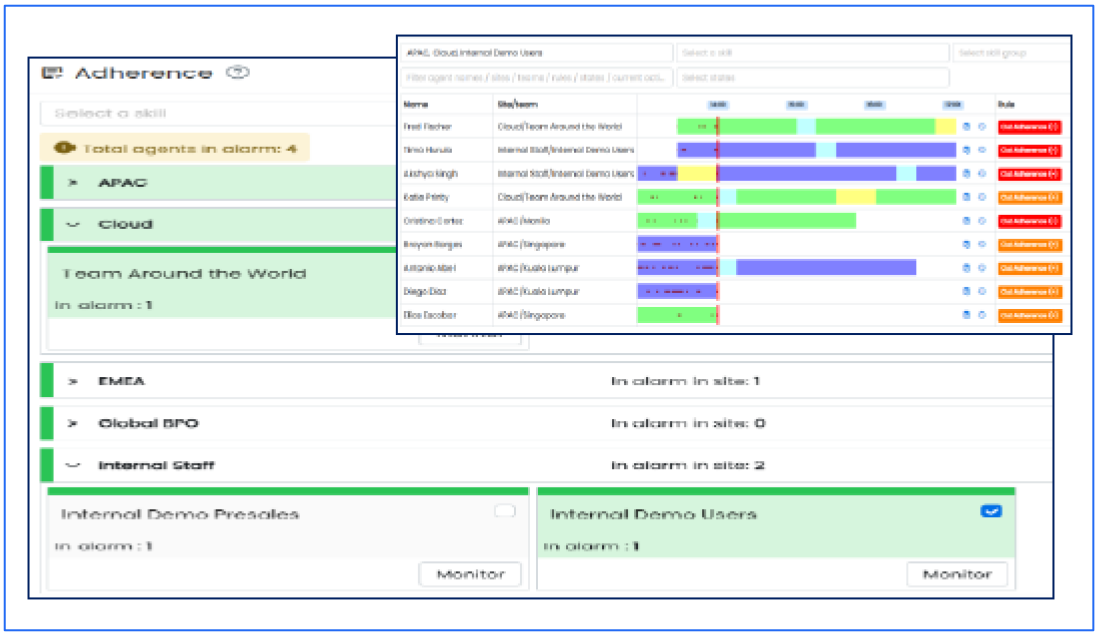
Intraday

The Intraday module provides near time visibility into contact centre operations. It compares forecast versus actual metrics such as volume, average handling time, and service levels across four key tabs: Incoming Traffic, Performance, Staffing, and Table View. The module calculates "Required agents" for past intervals & "Reforecasted agents" for upcoming intervals, helping managers proactively address staffing gaps. It also allows for on-the-fly schedule adjustments, including activities, and absences.



Adherence

This offers real-time and historical monitoring of agent activity compliance with schedules, using customisable rules to flag deviations. It includes visual alerts and supports adherence reporting. RTA Snooze temporarily pauses alerts during specific scenarios. Real-Time Desktop Analytics (an addon module) tracks agent activity based on desktop usage, identifying productivity patterns and training needs, especially for back-office tasks like email or document processing.



Configurable Settings

The WFM Settings screen is the central configuration hub, enabling administrators to define organisational hierarchies, contracts, activities, and absence types. It supports setting validation and adherence rules, configuring bank holidays, and managing integration and notification preferences. These settings ensure the system aligns with operational policies.

Sessions

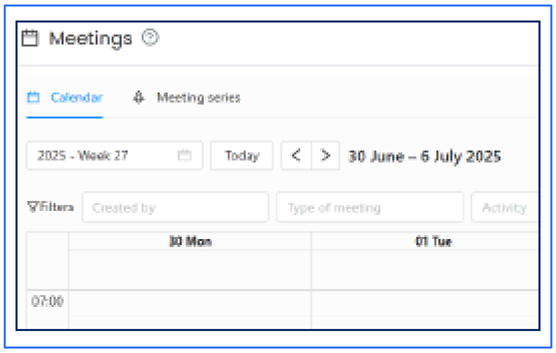
The Sessions screen enables efficient scheduling of individual activities such as e-learning, coaching, or training, for one or multiple agents. It distributes these activities evenly over a specified date range, ensuring balanced workloads and adherence to staffing thresholds. Sessions can be optimised to minimise impact on service levels, and administrators can easily view, edit, or remove sessions.

Requests

This allows agents to submit schedule-related requests, such as absences, shift trades, and overtime through the MyTime interface. Requests may be automatically approved based on configured rules or manually reviewed by team leaders using the web Requests tool. Absence and text requests can be filtered, sorted, and reviewed in detail, including via time zone filters and customisable columns.

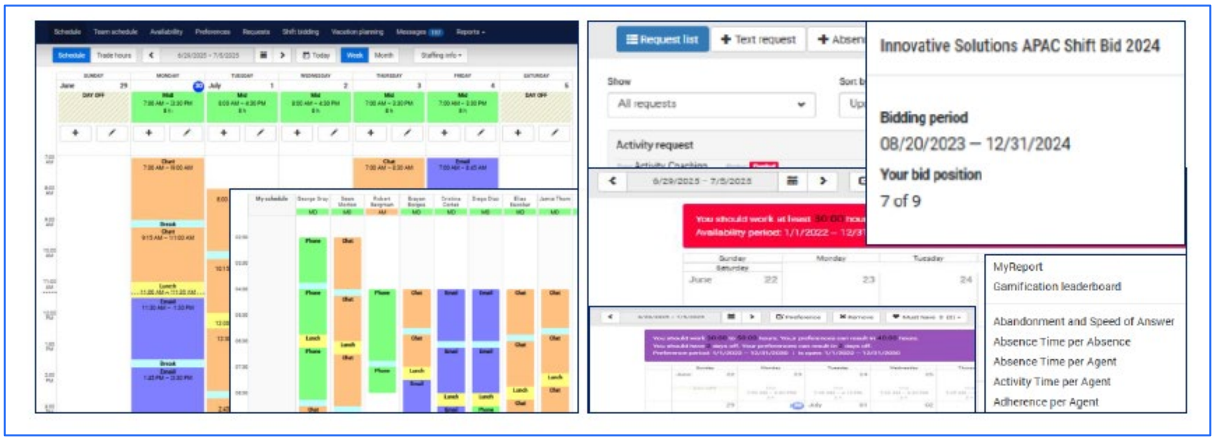
Meetings

Meetings enables schedulers to efficiently plan and manage various meeting types, including one-time, recurring, 1:1 session, and e-learning activities. Meetings can be scheduled for individuals or groups, with options to define time zones, durations, and internal notes visible only to authorised users. The module ensures meetings are integrated into agents' schedules without disrupting staffing levels and provides visual indicators and tooltips within the Schedules tool for easy identification and access to meeting details. Additionally, it supports importing participant lists from external sources and offers filtering capabilities to view planned meetings based on specific criteria.



MyTime

MyTime empowers agents with self-service capabilities to manage their schedules and preferences efficiently. Agents can view their schedules, request time off, trade shifts, and move breaks or lunches directly within the platform. The module supports self-scheduling, allowing agents to add work hours based on staffing needs, with visual indicators guiding optimal times. Additionally, agents can subscribe to their schedules via external calendar apps. Notifications for schedule changes are available through the MyTime mobile app time. The module also facilitates activity requests for tasks such as training or administrative duties, with configurable approval workflows.



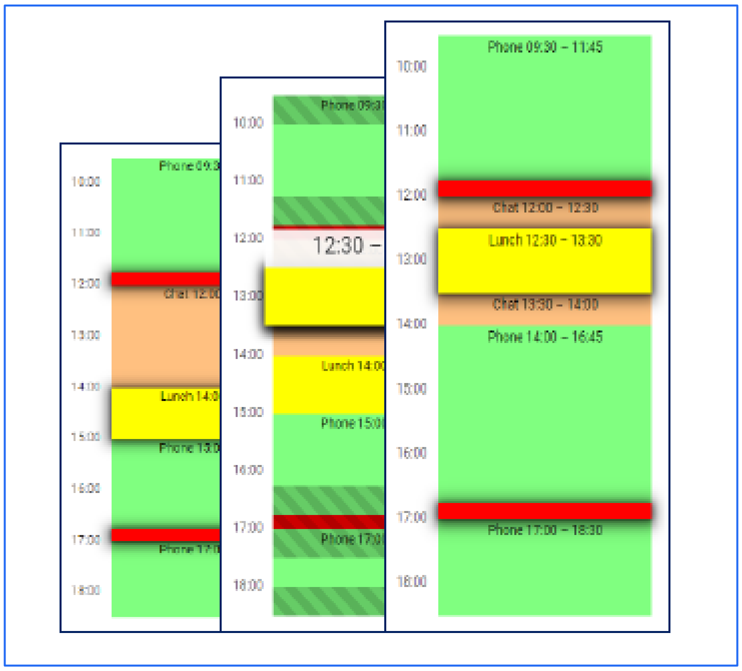
MyTime Breakdown

<u>View Schedules</u>

This allows agents to access their schedules, request time off, and manage shift preferences. Team leaders can not only view their own schedules but also those of their entire team, making it easier to manage shifts, monitor staffing levels, and ensure proper coverage. Agents can also view the schedules of their teams.

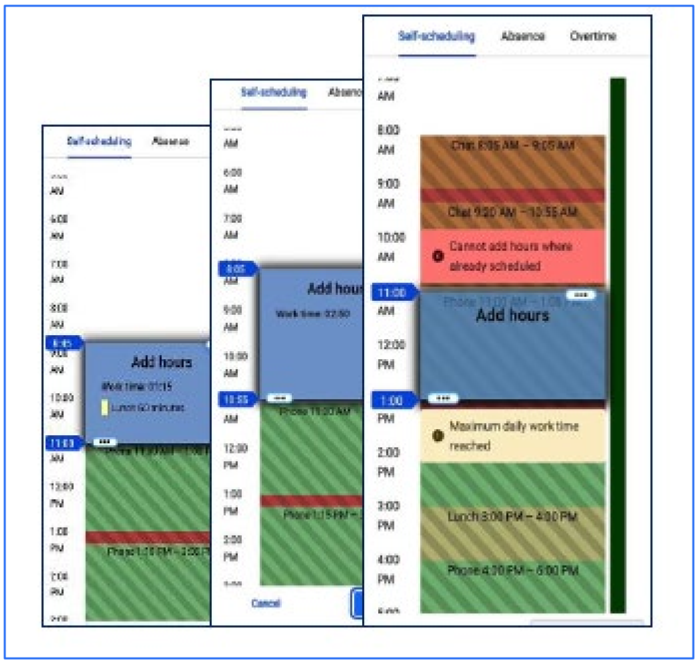
<u>Move Breaks or Lunch</u>

This allows agents to independently adjust their scheduled breaks or lunch within predefined guidelines. Agents can move their breaks in 5-minute intervals, ensuring flexibility while maintaining compliance with staffing levels, shift durations, and overlap restrictions. The system enforces validation checks to avoid overstaffing.



Schedule Own Work Hours

This allows agents to independently manage their work schedules within set guidelines. Agents can select and adjust shifts via a user-friendly interface, with visual indicators to highlight optimal times and conflicts. Admins can configure rules to comply with staffing thresholds, work durations, and regulations.



Shift Trading

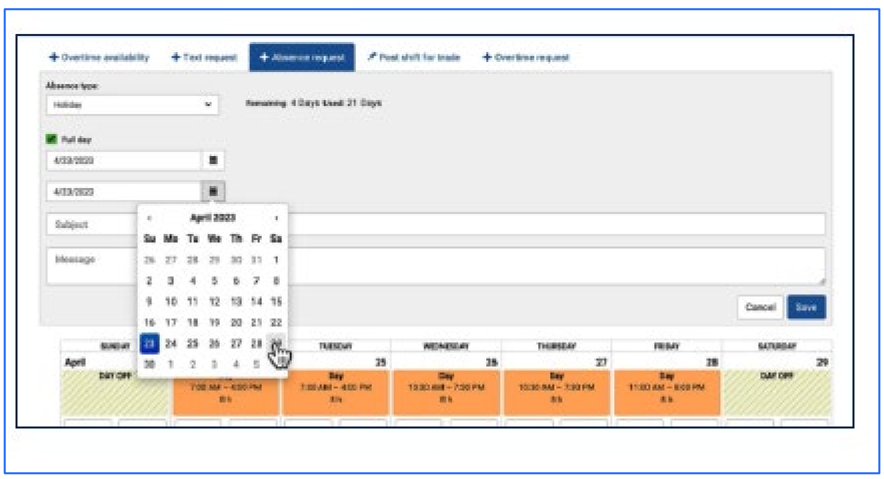
The Shift Trade module allows agents to propose and manage shift exchanges, including partial trades, providing flexibility for both full and partial shift swaps. Administrators can set rules for auto-approval or manual validation, ensuring compliance with contract terms like rest periods and work limits. Shift trades are audited for transparency, and the system supports flexible scheduling, including gap enforcement and lunch hour management. This module enhances workforce flexibility while maintaining operational compliance and efficiency.

Request Time Off

Agents can submit absence requests for full or partial days through the MyTime tool. Agents can select the day(s), choose the type (e.g., vacation, personal day), and specify the time if it's a partial day. The system may display a probability indicator (green, yellow, or red) to show the likelihood of approval based on staffing levels. Requests can be automatically approved, pending, or denied, depending on settings. Once submitted, agents can track the status and make cancellations if needed.

Request Extra Hours

This allows agents to submit requests for additional overtime beyond their scheduled shifts. Agents can easily request extra hours via the MyTime interface, with visual indicators showing the likelihood of approval. Requests can be managed through automated or manual approval processes, and agents can track the status of their requests. This feature ensures flexibility in staffing, helping organisations meet dynamic operational needs.



Preferences

Agents can specify preferences for shift timings, days off, and absences (e.g., vacation) through the MyTime interface. These preferences are then considered during the scheduling process, subject to organisational policies and staffing requirements. Administrators can configure the availability of shift categories, days off, and absence types in the Workflow Control Set within the Options module.

Availability

This allows agents to specify their available work hours, helping to streamline scheduling. Agents can input availability for multiple days, ensuring compliance with their contracts, and adjust as needed.

Activity Request

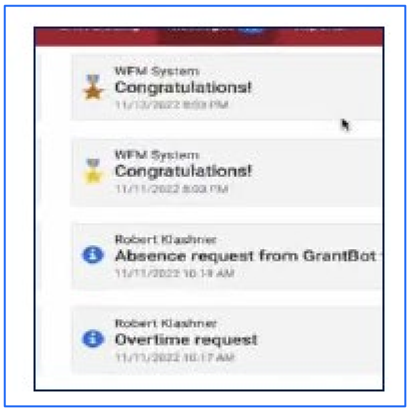
This allows agents to request specific activities, such as training or administrative tasks, outside their regular shifts. Administrators can configure approval rules, such as automatic or supervisor approval, and set flexible timing options for requests. The feature supports team-specific activity assignment and provides an audit trail.

Shift Bidding

This allows agents to select and rank their preferred weekly shift patterns during an active bid process. Agents can view available patterns, rank them according to their preferences, and submit bids within a timeframe. Administrators can monitor the progress of the bid process, preview results, and finalise assignments.

Handle Messages

This allows agents to efficiently manage and respond to messages from supervisors, planners, or system-generated notifications. Agents can read and acknowledge messages, reply with predefined responses or custom text, and access related requests for more details



Change Settings

This allows users to customise their interface and system preferences. Key options include managing passwords, selecting language and date formats, and more.

Agent Schedule Messenger (ASM)

ASM is a compact window that allows agents to monitor their schedules while working in other systems. It provides real-time notifications for schedule changes, upcoming breaks, and transitions.

CalendarLink

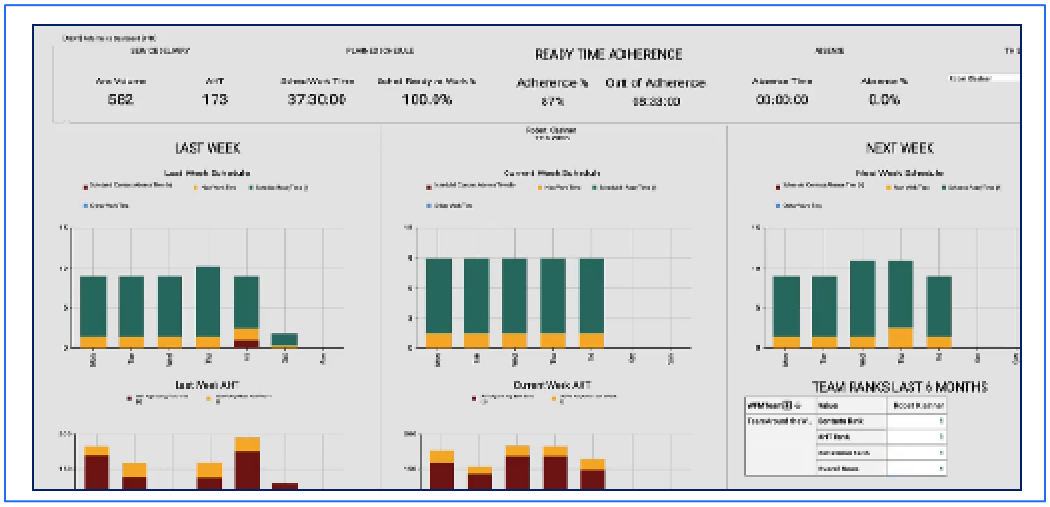
CalendarLink enables agents to subscribe to their schedules using third-party applications such as Microsoft Outlook, Google Calendar, and Apple Calendar.

Manage your notification settings

Calabrio gives agents and managers control over notification preferences, ensuring they receive timely alerts for critical events like shift bidding, adherence, absence, overtime, and shift trades. With flexible delivery options including desktop, in-app, and mobile teams can stay aligned and respond quickly to changes.

View Reports

This allows users to access performance reports to track individual and team progress over time. Using the MyReport dashboard, agents can view key performance metrics such as readiness adherence, average handling time, talk time, after-call work, and the number of calls answered. Additionally, users can check the Leaderboard to see top performers based on badges earned. Reports can be customised and accessed for both personal and team-level performance, with historical data available for deeper insight.



Mobile App Access

The MyTime mobile application is dedicated to agents, specifically. It allows agents to access their schedule information from anywhere, ensuring they have the most up to date schedule information. Employees can easily view their schedule, set their schedule preferences, submit and manage time-off, bid on shifts, and sign up for OT/VTO – allow for a more flexible scheduling environment. However, Calabrio WFM is a browser-based solution so all of the functionalities can be accessed from a mobile device browser in the same manner as it would on a desktop/laptop device.

Easy to Deploy

Web-based setup with simple configuration and strong security.

Mobile-Optimised Desktop Version

Responsive design for mobile-friendly access on any device.

Schedule Requests

Request time off or sign up for OT/VTO; get instant change notifications.

iOS and Android Compatible

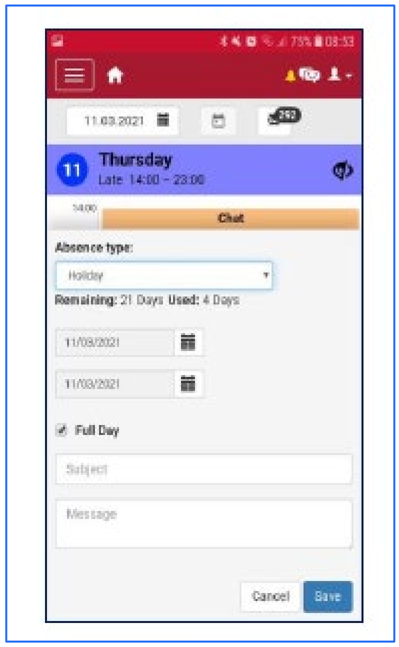
Accessible via iOS/Android apps or any web-enabled device.

Full Schedule Visibility

Everyone shares the same up-to-date schedule view, agents to planners.

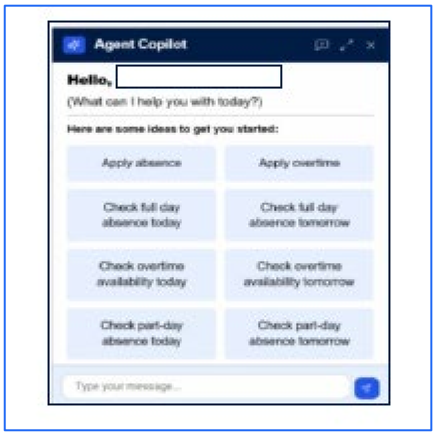
Efficiently Streamline Communications

Quickly send updates to keep your team informed and aligned.



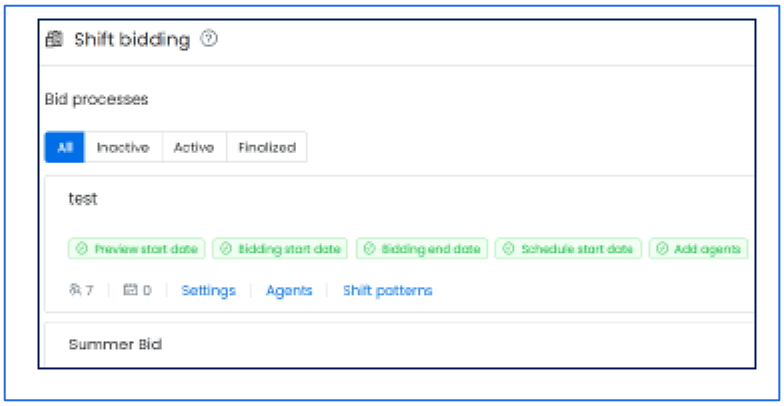
WFM Agent Assist

Calabrio Agent Assist is a GenAI-powered assistant embedded directly into the WFM experience, designed with an agent-first approach. It enables conversational, real-time self-service for daily scheduling needs such as checking shifts, requesting time off, or volunteering for overtime, all while adhering to business rules and policies. Context-aware and policy-driven, it ensures accurate, actionable responses, and with its mobile-friendly, globally scalable design, it empowers agents to manage their schedules seamlessly.



Shift Bidding

The Shift Bidding empowers organisations to align employee preferences with operational requirements by enabling agents to bid on preferred weekly shift patterns. Administrators can configure bid processes by selecting eligible agents, defining ranking criteria (such as seniority or performance metrics), and specifying available shift patterns. The module supports a preview phase, allowing agents to review shift options before bidding, and provides tools to monitor bidding progress and finalise assignments. Once finalised, agents are scheduled.



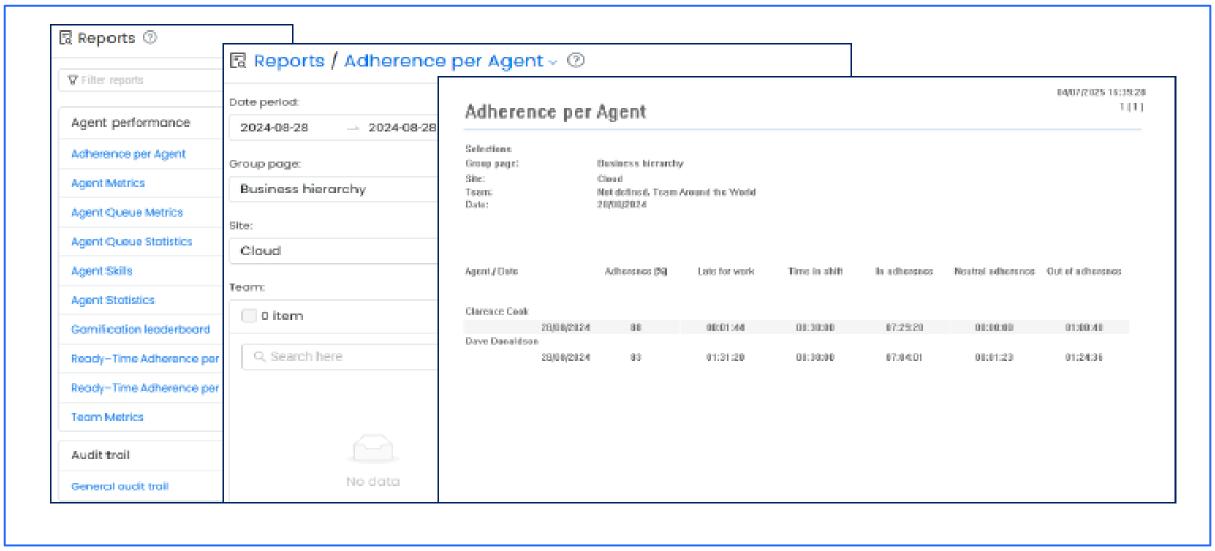
Staffing

Staffing provides a view of staffing levels by comparing forecast agent requirements with scheduled agents for specific skills or skill groups. It enables monitoring of overstaffing or understaffing situations, allowing for immediate adjustments to maintain optimal service levels. The module also supports the inclusion of shrinkage factors to account for variables like absences. Additionally, staffing data can be exported for further analysis or shared with external partners, facilitating collaborative planning during peak periods or when utilising external resources.

Reports

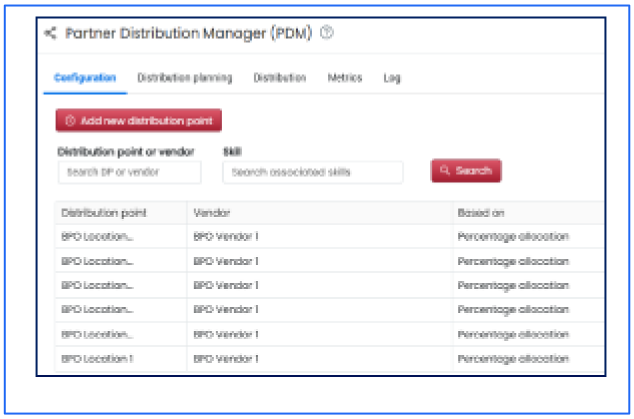
The Reports offers a suite of standard reports that provide insights into various aspects of contact centre operations. These reports cover key areas such as agent performance, scheduling, forecasting accuracy, service levels, and adherence. Administrators and team leaders can generate reports in formats like PDF, Excel, or Word, with options to filter data by date ranges, teams, skills, and other criteria. The module supports scheduled report generation and email distribution. Access to specific reports and data is governed by user roles and permissions.

Additionally, Calabrio offers Insights, a business intelligence tool that extends the reporting capabilities of WFM. Insights let you create custom dashboards and reports. With a user-friendly interface, drag-and-drop functionality, and support for data visualisation, Insights empowers users to analyse trends, monitor KPIs, and make data-driven decisions across workforce operations.

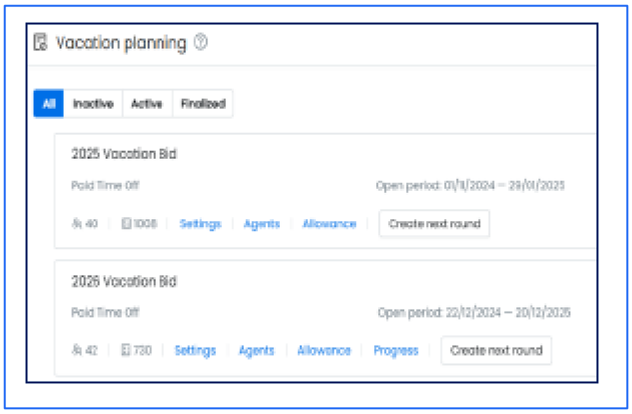


BPO Exchange

The BPO Exchange facilitates seamless collaboration between organisations and their outsourcing partners. It enables the secure sharing of staffing forecasts, schedules, and performance data, ensuring alignment across all parties. By providing a centralised platform for data exchange, the module enhances transparency, streamlines communication, and supports efficient workforce planning.



Vacation Planning: The Vacation Planning module in Calabrio WFM automates and simplifies the vacation request process. It allows administrators to configure planning periods, set ranking rules, and define vacation allowances. Agents submit ranked vacation preferences, which are processed fairly based on set criteria. The module supports flexibility through change requests and ensures efficient, transparent time-off management.



Gamification

Gamification module is designed to enhance agent engagement and performance through structured, game-like elements. It enables administrators to set up weekly or monthly game periods, during which agents earn bronze, silver, or gold badges based on key performance indicators such as the number of answered calls, average handle time, and ready-time adherence. These badges are awarded using predefined thresholds or ratio conversions, and the system supports the import of up to ten external performance measures for badge calculations.

Gamification rules can be assigned to specific sites and teams, allowing for tailored motivational strategies across the organisation. Additionally, the module includes features for recalculating badges and provides leaderboard reports to recognise top-performing agents.

Payroll Integration

This streamlines the process of exporting payroll-related data by allowing administrators to extract information on scheduled activities and absences. It supports three standard export formats; activities, time, and detailed exports and offers the flexibility to create customised exports tailored to specific payroll system requirements. The module ensures accurate compensation calculations by incorporating multiplicators for extra compensation scenarios, such as shift allowances and overtime.

Notifications

Notifications enable alerts for key workforce events. Calabrio enables administrators to centrally manage notification settings for their business units, ensuring agents, supervisors, and team leaders receive timely alerts for critical events such as shift bidding, adherence, absences, overtime, and shift trades. With flexible configuration and role-based controls, organisations can streamline communication, reduce missed updates, and maintain operational alignment.

Absence Attributes

With Absence Attributes, administrators can tag different types of absences (e.g., sick leave, emergency leave) for better categorisation and analysis. This allows for more granular tracking, forecasting, and reporting, which is essential for effective absence management and operational planning.

Integration Self Service

The Integration Self-Service module in Calabrio WFM allows administrators to independently manage and deploy integrations with external systems, such as CCaaS platforms and HRMS. It features a comprehensive dashboard for monitoring the status of active integrations, flexible configuration options for syncing agent data and other relevant information, and a structured deployment process for historical and real-time integrations. Additionally, the module offers integration health monitoring, role-based access control, and color-coded status updates to quickly identify issues. This self-service approach streamlines integration management, enhancing operational efficiency and control for administrators.

Dynamic Scheduling

This is an add-on feature that empowers agents to influence their schedules while ensuring organisational staffing needs are met. Administrators can create availability templates with specific hours of operation and validation rules, which are then used to generate availability forms for agents. Agents submit their availability through these forms, and a point system encourages selection of less popular shifts, such as early or late hours. Schedulers can then use this information to create optimised schedules that align with both agent preferences and business requirements. This approach enhances flexibility and agent engagement in the scheduling process.

Performance Management

Calabrio allow supervisors to track key metrics such as daily adherence, number of interactions handled, and average handle time. These metrics are displayed on customisable KPI Dashboards and can be filtered by agent, team, or group. The system helps ensure agents are adhering to their schedules, improving efficiency, and enabling better coaching based on performance trends. Performance management is an add-on module.

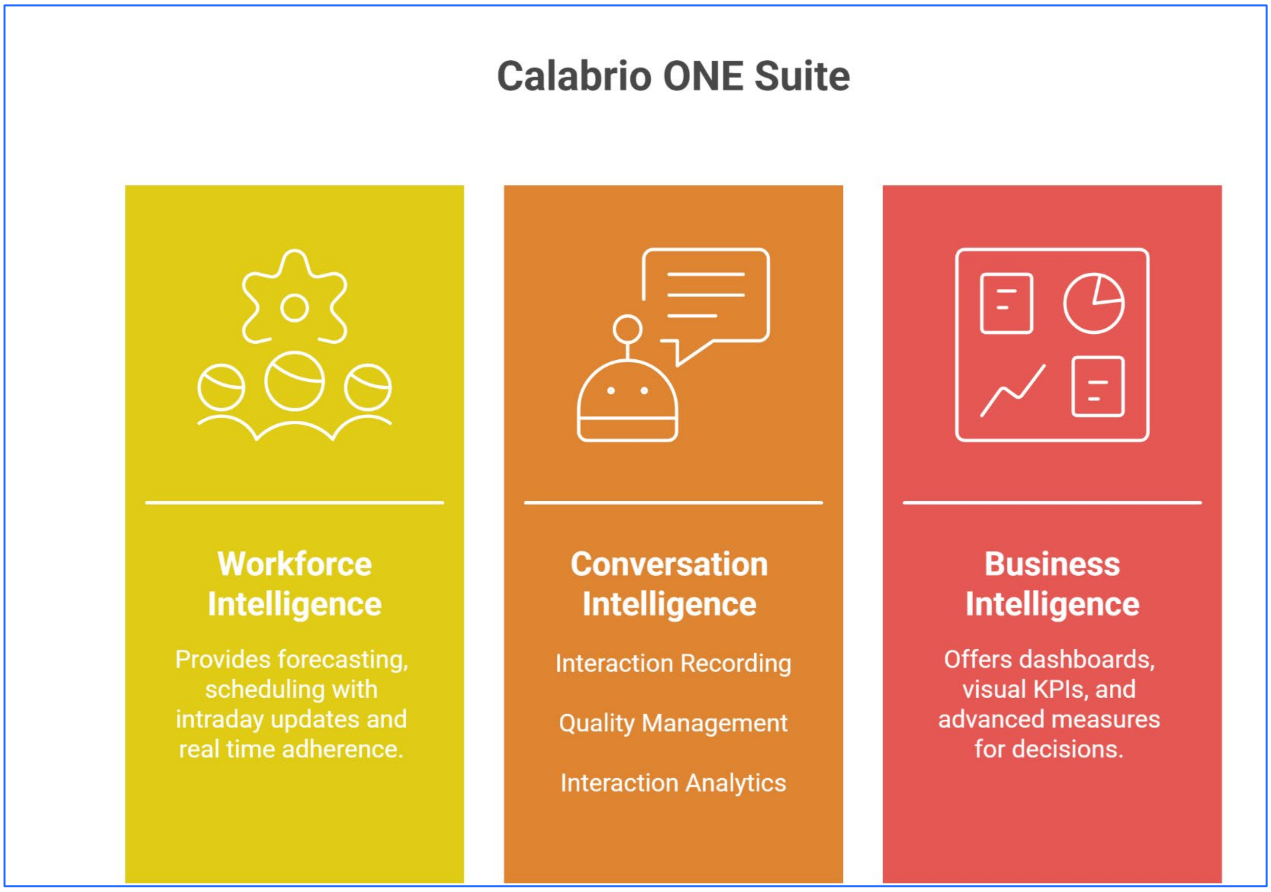
1.5. Associated Services

Calabrio offers native integrations with a wide range of modern contact centre and telephony platforms, including ACD/PBX, CCaaS, HRMS, CRM, Payroll, and more. For customised integration needs, the solution features an Open API infrastructure employing RESTful API technology, facilitating seamless connection to external systems. Additionally, TTEC Digital’s Professional Services maintain a dedicated custom development team to design and support bespoke integration requirements.

Calabrio ONE Solution

Calabrio ONE, a unified suite, including Call Recording, Quality Management, Analytics, Workforce Management, and Business Intelligence, equips you with a complete toolset to unlock the tremendous value buried within your contact centre and to transform your entire business. One seamless solution combines workforce optimisation tools with powerful voice-of-the-customer analytics tools.

This tightly integrated, and easily scalable, suite of products captures every customer interaction across all channels, extracts insights, elevates the customer experience, improves employee engagement, and increases operational efficiency. The contact centre can share customer-centric strategies across the business to accelerate sales, drive innovation and move your business forward.



Call Recording

Record every call, every time, and transform customer interactions into a trove of highly usable data. Capture 100% of interactions and simplify compliance. Robust metadata lets you quickly search for hundreds of hours of calls to prove adherence, settle disputes and mitigate risk. Connect the voice of your customer with key goals across the business. Calabrio Call Recording is an enterprise recording solution that allows you to prove adherence to regulations, clear up transaction disputes, and defend the interest of the business while upholding excellence in customer service. See below for Calabrio' s Call Recording functionality:

<u>Multiple Recording Types</u>

- Desktop recordings, network recording, gateway recording, and more.
- Desktop Recording: Ideal for remote agents; does not require servers at each location.
- Network-Based Recording: Robust option for Cisco Unified Communications Manager environments.
- Server-Based Recording: Suits thin client environments, such as Citrix or Windows Terminal Services.
- Multiple Registration: Provides effective recording capabilities for Avaya IP telephony device.

<u>Call Recording Features</u>

- Omnichannel capture: A single integrated platform ensures 100% capture of every interaction across traditional and digital channels, including screen recording.
- Built-in capabilities like auto pause-and-resume ensure privacy and security to meet compliance requirements.
- Standard and custom metadata tagging automatically adds deeper context and searchability to interaction data.
- Automated organisation sorts and stores interactions based on intelligent business rules.

Efficient, AI-powered search

Harness the power of machine learning and AI-driven analytics to make searching simple, and to seamlessly integrate with advanced reporting and analytics tools.

- One unified interface makes evaluations easy, with access to embedded analytics, screen recording, transcription, metadata, and evaluation forms. Search based on employee, agents, date, time, and other user-defined fields
- Easy CRM integration allows hyperlinking to connect customer interactions with CRM records.
- Tag interactions for recall and easily share or export interactions for coaching and training.

Secure compliance recording

Whether it's HIPAA, PCI, GDPR, or CCPA, you're covered with our compliance call recording solution. You'll be able to prove adherence, defend against legal risks, and protect your brand.

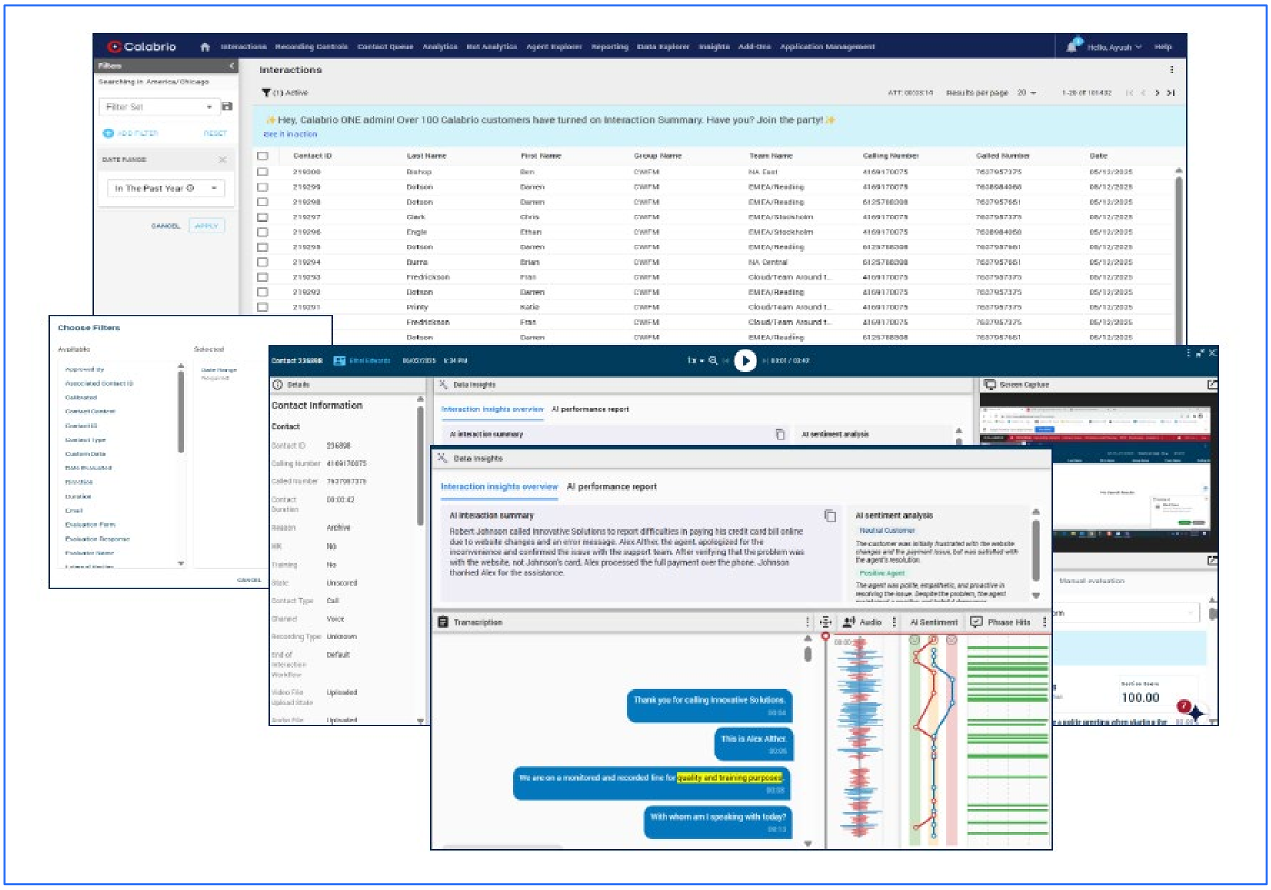
- All data and files are encrypted using the Advanced Encryption Standard (AES-256), before they are transmitted and stored.
- Granular access controls make it easy to define and limit access privileges by user, role, or group.
- Data easily flows through short-term to long-term storage.
- Built-in features like automatic pause-and-resume ensure private information is never recorded.

AI analytics and reporting

Our suite-wide AI-fuelled business intelligence tool makes it easy to build and automate custom reports and dashboards that pull together omnichannel interaction recording data and transform it into key insights aligned to your business goals.

- Speech Energy Bar: Shows talk over and silence events as well as speech analytics hits, sentiment, and desktop analytics activity to speed call evaluation.

- Monitoring and Notification Alerts (MANA): Automatic notifications when system errors arise that may prevent calls from being recorded.
- Call Exporting: Export calls in common media formats for third-party access.
- Data Compression: Recordings are compressed using voice-specific algorithms before they're sent to the designated storage device to minimise storage usage.
- Advanced Integrations for Complex Environments: Calabrio Recording offers options that fit a wide variety of IP-based ACDs, TDM devices and mixed-infrastructure deployments.
- Gateway Recording: A reliable call-recording option for the most complex, multi-gateway environments.
- Complex IP/TDM Integration: Audio Codes SmartWorks Plus supports IP and TDM integration with most IP soft switches and proprietary TDM PBX systems.
- Single-Step Conferencing: Captures calls in Avaya TDM environments.

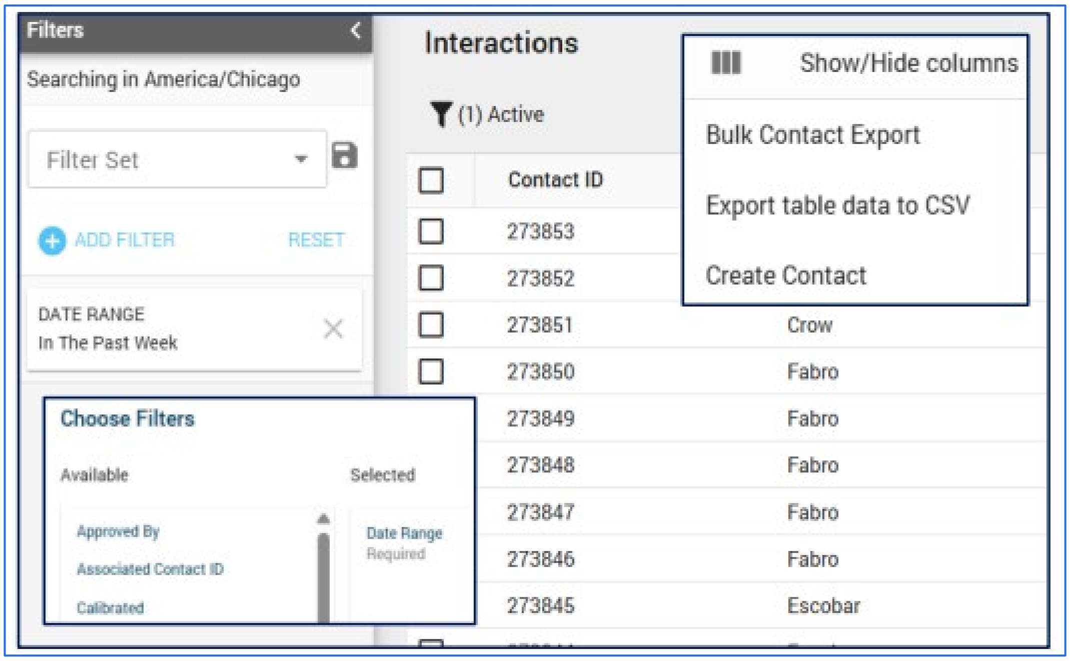


Quality Management

Customisable quality evaluations equip your supervisors with the tools they need to strengthen employee engagement and drive measurable impact across the business. Automate recording evaluation and reporting so you can spend more time coaching and leading. All the features of Calabrio Recording are included with Calabrio Quality Management.

Interactions

The Interactions page offers a highly configurable interface for agents, evaluators, and supervisors to access and analyse recorded customer contacts. It allows users to efficiently filter, search, organise, and prioritise based on operational needs. Users can apply flexible filters such as date, and more to surface interactions. Custom filter sets can be saved for repeated use. Additionally, users can show, hide, or rearrange columns to streamline their view.
Calabrio supports advanced text search queries for locating specific words, phrases, or patterns within interactions. Users can search using Boolean, wildcards, exact phrases, and proximity searches.

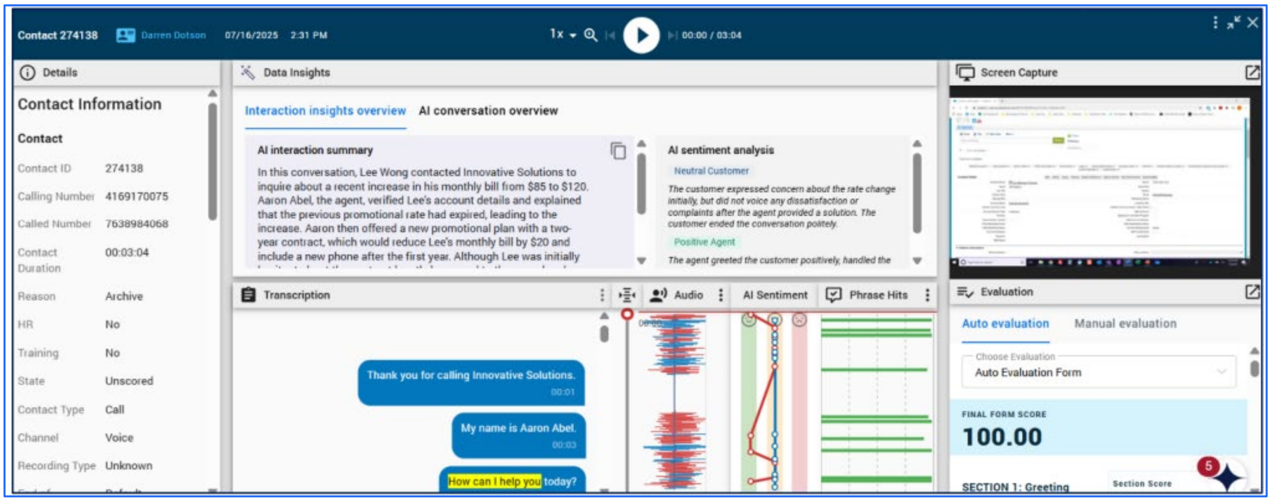


Evaluate Interactions

Calabrio enables evaluators to review and assess customer interactions across multiple channels, including voice, chat, email, and screen recordings. The Media Player acts as a central hub where evaluators can playback, zoom, annotate, score, and gather in sights on contacts, depending on their permissions.

State-of-the-Art Media Player

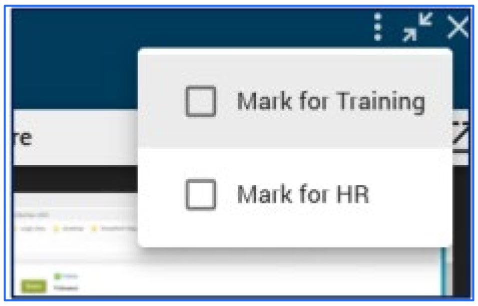
- Play Contacts: Evaluators can play recordings, adjust speed, zoom for detailed insights, and view agent profile metrics like NPS and Reputation Score.
- Download on demand: When media is in cold storage, Calabrio prompts evaluators to download / stream the unavailable segments, notifying once available.
- Skip Forward and Back: The Media Player's Timeline panel allows evaluators to efficiently navigate forward and backward through contact audio or screen.



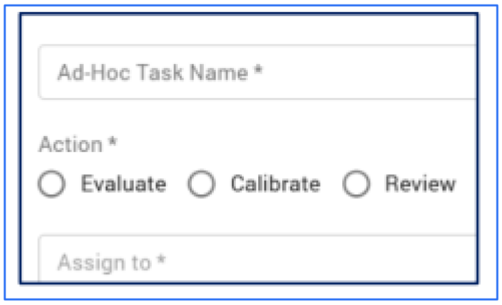
- Silence and Talk Over Events: The Audio panel marks silence and talk over events using Voice Activity Detection, adjustable by global settings for accuracy.
- Watch Screen Recordings : The Screen Capture panel shows agent desktop activity, supporting single - and multi -monitor, with undocking options for visibility.
- Explore Associated Data: The Details panel provides metadata, including contact information, speech metrics, sentiment scores, and custom fields.
- Speech Energy Bar: The vertically aligned speech energy bar in the Audio panel visually represents inbound and outbound speech energy.
- Evaluation Forms: Evaluation forms are displayed during playback, allowing evaluators to quickly and easily score and assess the contact.
- Edit Metadata: Evaluators can edit custom metadata fields, including text, dates, and hyperlinks, with batch editing available for administrator managing contacts.

Assign and Share Contacts

- Tag a Contact: Tagging contacts in Calabrio WFM allows organisations to extend retention periods beyond standard limits, ensuring critical media files are preserved even after Quality Management workflows, keeping important data accessible when needed.
- Mark Contacts for Training or HR: Contacts can be marked for training or HR purposes . Tagged training contacts help develop agents by providing specific, relevant examples, while HR -marked contacts allow for escalation and further review.



- Mark a Contact for Calibration: Marking a contact for calibration allows evaluators to assess scoring consistency across reviewers. This integrates with the Evaluation Calibration Report to compare scores and align with organisational standards .

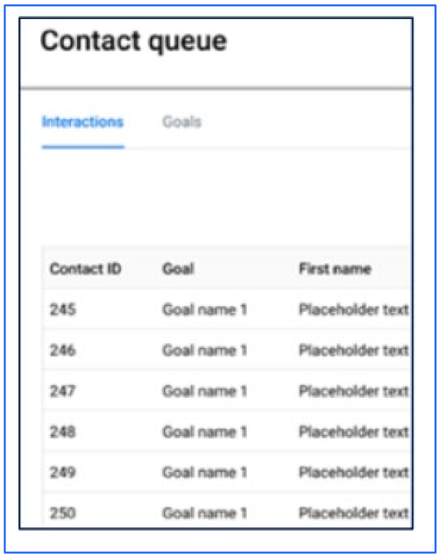


- Export a Contact: Calabrio supports the export of contacts in WebM , WAV, MP4 format. This feature ensures that critical recordings, including screen captures, can be shared and reviewed on external devices.

Assign Evaluations

- Automate QM Workflows: Calabrio allows administrators to automate QM workflows by determining which recordings to retain, delete, or process, based on defined workflow rules. These rules can trigger evaluations, insert metadata, or manage the retention policy for contacts, ensuring efficient and consistent handling of recordings across the organisation.

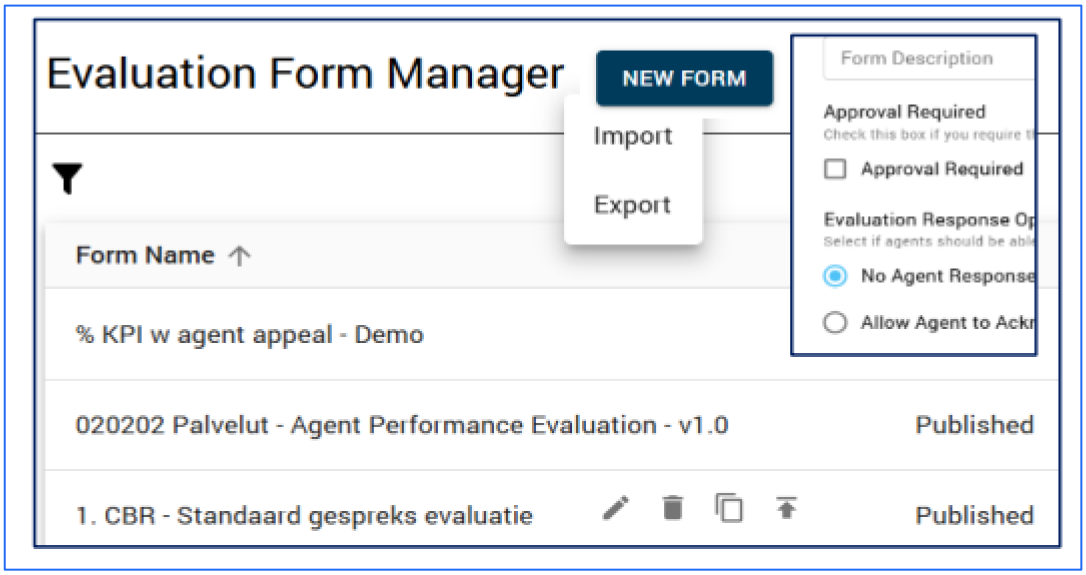
- With configurable event types like "End of Interaction" or "Daily," workflows are streamlined to meet operational goals.
- Additionally, actions like immediate upload or recycling can be set, enhancing data processing efficiency.
- Assign Evaluations, Calibrations, and Reviews Automatically / manually: Calabrio allows both automatic and manual assignment of tasks, enabling administrators to assign specific contacts for evaluation, calibration, or review with customisable due dates, notifications, and instructions. This ensures better control over task distribution and progress. Additionally, tasks can be automatically assigned through the Contact Queue page.



- Calibrate Evaluators: Calibration allows multiple evaluators to assess the same contact, ensuring evaluation consistency across the team. The calibration process compares scores from different evaluators to ensure alignment with the established standards. Calibration scores are tracked separately from regular evaluations and are reported only in the Evaluation Calibration Report, which aids in monitoring and evaluator performance.

Evaluation Forms

- Create and Manage Evaluation Forms : Evaluators use evaluation forms to assess agent - customer interactions to ensure adherence. The process involves creating sections, questions, and answer options, allowing evaluators to monitor agent performance. Admins can create, update, publish, clone, and archive forms. Sections, questions, and answer options are customisable, and KPIs can be integrated into evaluation forms for targeted performance tracking.



- Configure KPIs : Key Performance Indicators (KPIs) track goals within the contact centre. Administrators can configure KPIs with specific goals for groups or teams, refining default broad goals to ensure alignment with business priorities. KPI configuration enhances performance measurement and allows for detailed trend analysis.

More Features

- Real-Time Monitoring : Calabrio enables supervisors to listen to agent calls and view their screens as they interact with customers. This feature ensures customer service by allowing managers to observe agents. Real -time monitoring supports both audio & screen viewing.
- Add Post-Call Surveys to Contacts: Calabrio enables the integration of external survey providers like Qualtrics and SurveyMonkey to distribute post -call surveys to customers. These surveys capture valuable customer feedback on their contact experience. The system allows configuring survey distribution schedules, importing responses, and marking contacts for survey requests via metadata. This Integration ensures that feedback is linked to specific interactions.

- Configure QM Settings: Calabrio allows administrators to configure system-wide QM settings that apply to all users and applications. This includes setting parameters such as screen recording quality, talk over events, silence events, and retention times.

- Pause and Resume: Calabrio offers manual and automated pause and resume functionality for audio and screen recordings. Manual pause and resume can be controlled through the Recording Controls application or page. Automated pause and resume are facilitated through desktop, application, and field-level triggers .
- System Error Monitoring and Alerts: Calabrio offers automatic alerts for potential system errors through features like the System Status Report, which categorises system events by severity (INFO, WARN, ERROR). Notifications can be configured to alert users of errors and warnings, helping to address issues proactively and ensure system reliability.
- Performance Management: This module provides tools to track and measure key KPIs such as evaluation scores, section-level performance, and KPI failure rates. It includes gamification features like points, badges, and leaderboards to boost engagement, personalised agent dashboards with customisable widgets for real-time performance tracking, and coaching tools that use metrics like Question Scores to identify and address skill gaps. These capabilities help supervisors and agents improve performance through targeted insights and continuous feedback. Performance management is an add-on module.

- Agent Empowerment : Calabrio enables agents to manage and review interactions efficiently by accessing recorded contacts on the customisable Interactions page. Agents can play back interactions with markers for key events like "pause" or "talkover." The page also allows agents to filter contacts by Date Range, Score, or State, save custom filters, and adjust display columns.
- Play and Evaluate Contacts with the Accessible Contact Evaluator (ACE) : This is a streamlined, screen -reader -friendly interface within Calabrio, primarily designed for users who rely on assistive technologies such as JAWS. ACE supports keyboard navigation and includes accessibility shortcuts for playback control and evaluation. Users can filter and search contacts, adjust playback speed, skip through recordings, and submit evaluations. It also supports adding comments, marking contacts for training or HR, and managing evaluations across a range of criteria including agent, team, duration, and contact ID. While existing users can continue using ACE , new activations are currently restricted.

Interaction Analytics

Comprehensive Interaction Analytics

Calabrio integrates speech, desktop, and text analytics into a unified solution tailored to optimise contact centre operations. The platform enables organisations to extract valuable intelligence from every customer interaction by transforming them into actionable data and identifying key trends. Utilising its suite of tools, Calabrio efficiently collects and processes information from audio recordings, email communications, and desktop activities via the Task Manager. All captured data is stored in a searchable database, allowing for thorough, multi-channel analysis to uncover insights and drive strategic improvements across the business.

Omnichannel Capabilities

Calabrio’s omnichannel approach empowers organisations to capture and analyse interactions across voice, email, chat, and desktop channels. By consolidating information from these varied sources, the platform supports informed decision-making and enhances the overall customer experience. The Analytics module provides comprehensive visibility, enabling organisations to assess and visualise each customer interaction within a cohesive, single view. This integrated methodology ensures swift identification and understanding of customer journeys across multiple touchpoints.

Customer Journey Mapping and Sentiment Analysis

With detailed metadata, Calabrio Analytics maps customer journeys through factors such as interaction frequency, contact method, and agent involvement. The platform incorporates insights from quality assessments and multi-channel engagements, including chat, email, SMS, and IVR. Sentiment analysis tools visualise the emotional tone of interactions, offering real-time indicators ranging from positive to negative. This functionality assists teams in monitoring customer satisfaction and pinpointing opportunities for further experience enhancement.

Customisable Dashboards and Visual Analytics

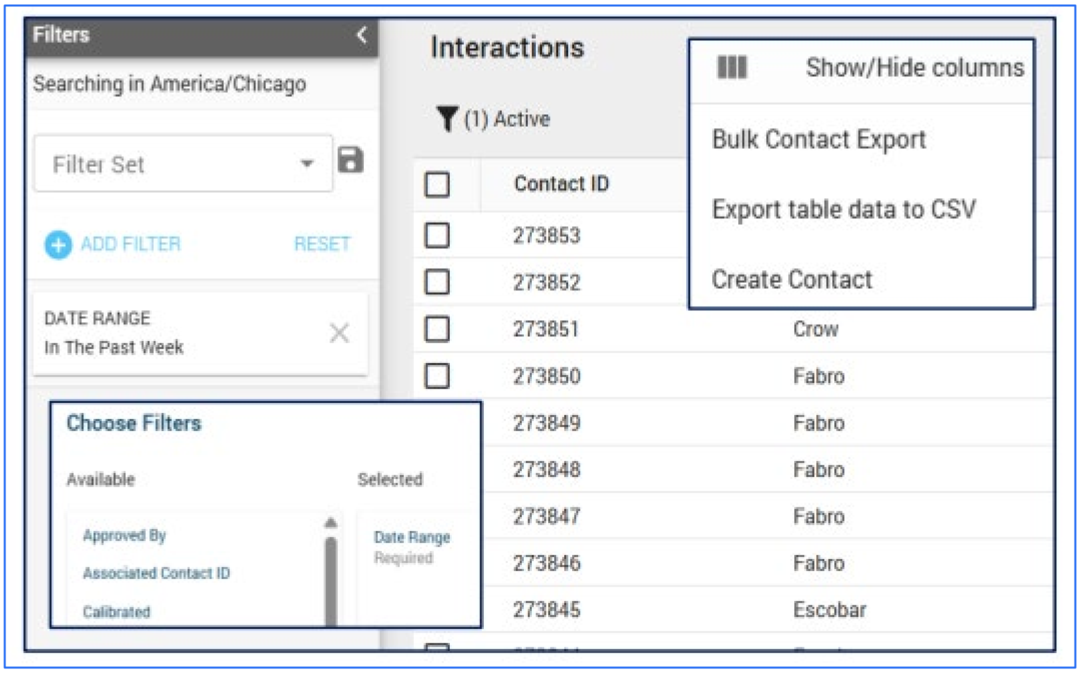
Calabrio’s widget-based dashboards deliver intuitive visual analytics suitable for users of all technical abilities. These interactive dashboards support in-depth exploration of performance trends, root cause analysis, and the identification of actionable insights. By presenting complex data in a clear manner, they facilitate effective decision-making and usability throughout departments. Expanded language packs for the interface, speech-to-text, and phonetics ensure a thorough understanding of customers, regardless of language.

Automated Dashboards for Business Objectives

Organisations can design and automate dedicated dashboards that address specific business goals, such as customer retention, brand awareness, upselling and cross-selling opportunities, script adherence, and compliance. This capability empowers both managers and agents to concentrate on priority areas, driving meaningful results for the business.

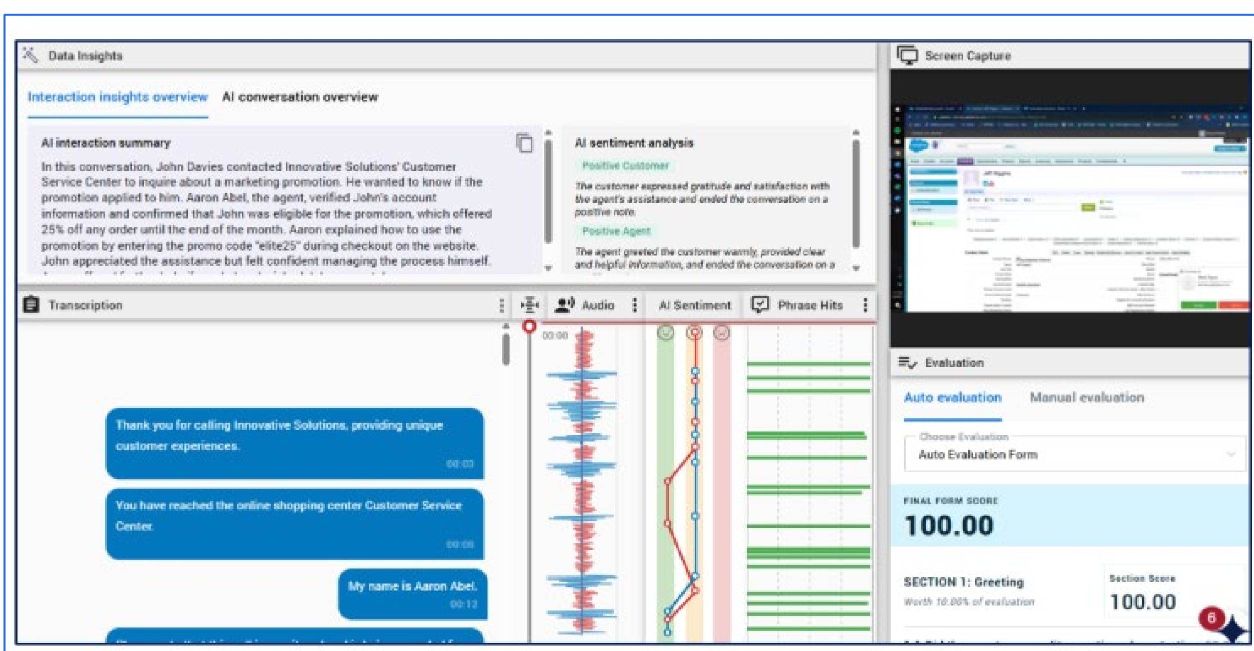
Interactions: Calabrio's Interactions page provides a robust and highly configurable interface designed for agents, evaluators, and supervisors to access and analyse recorded customer contacts. The platform enables users to efficiently filter, search, organise, and prioritise interactions according to operational requirements. Flexible filters, such as by date, can be applied to target relevant interactions, and custom filter sets may be saved for recurring use. Users also have the ability to show, hide, or reorder columns, optimising their viewing experience.

Furthermore, Calabrio supports sophisticated text search queries, allowing users to locate specific words, phrases, or patterns within interactions. Boolean operators, wildcards, exact phrase matching, and proximity searches are all available to enhance search precision and efficiency.

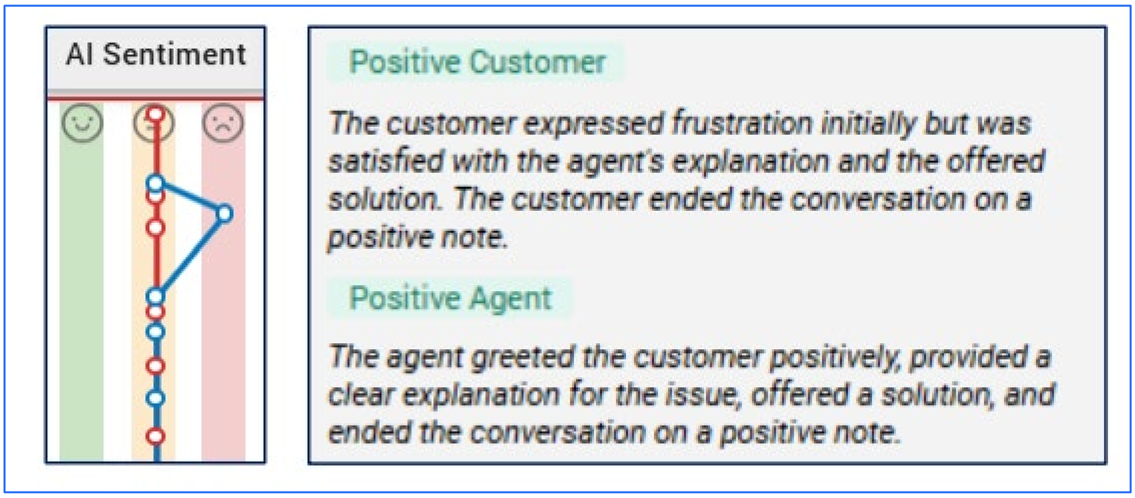


Conversation AI Intelligence with Calabrio Analytics

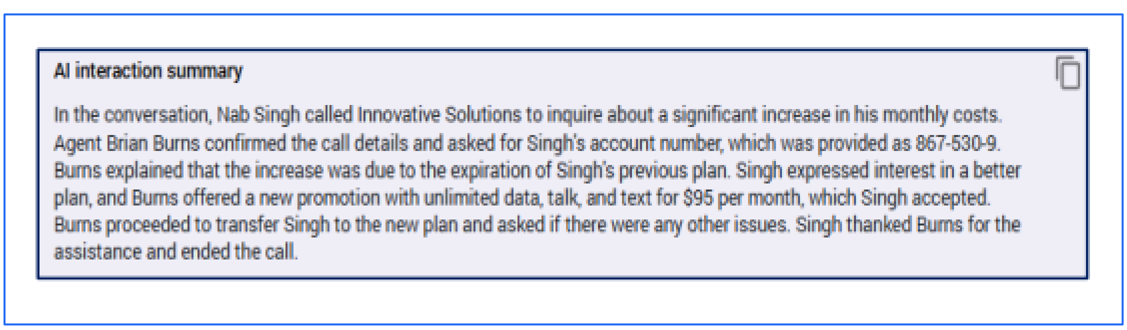
- Speech and Text analytics: Calabrio's unified Speech and Text Analytics captures and analyses all voice and text interactions across channels. With shared infrastructure and metadata, it provides consistent insights for QA, sentiment detection, auto-scoring, and journey analysis. Transcription turns calls into text, allowing users to filter and search transcripts efficiently.



- Sentiment Analysis: Calabrio advanced sentiment analysis uses AI to identify and display the emotional tone of both customers and agents during a call. It categorises sentiment as positive, negative, or neutral, tracks changes in emotion throughout the conversation, and provides explanations for its assessments. This feature helps teams quickly identify customer frustrations, aids in agent coaching, and supports quality improvement efforts. Additionally, it includes message-level sentiment visibility within the Media Player.

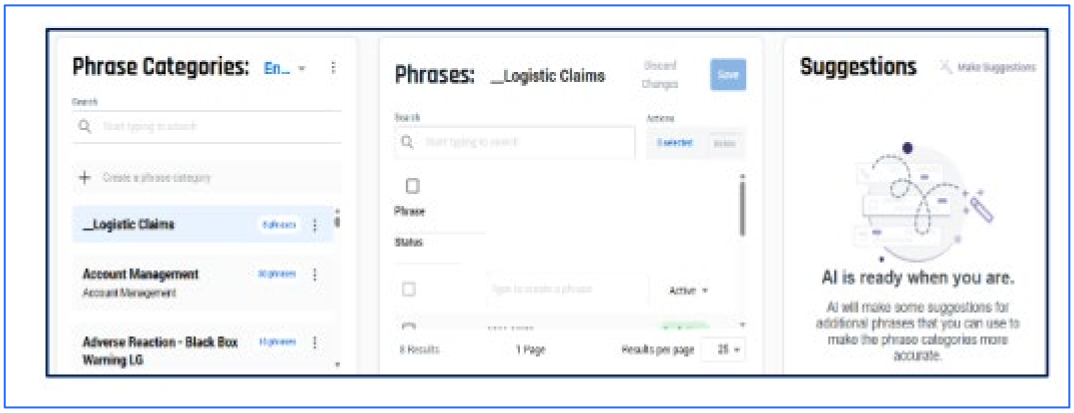


- Interaction Summary: Calabrio Interaction Summary uses AI to automatically generate concise summaries of customer -agent calls based on transcripts. It eliminates manual notetaking, enabling agents to focus on customers. Summaries can be exported to CRM systems via API, streamlining after - call work.



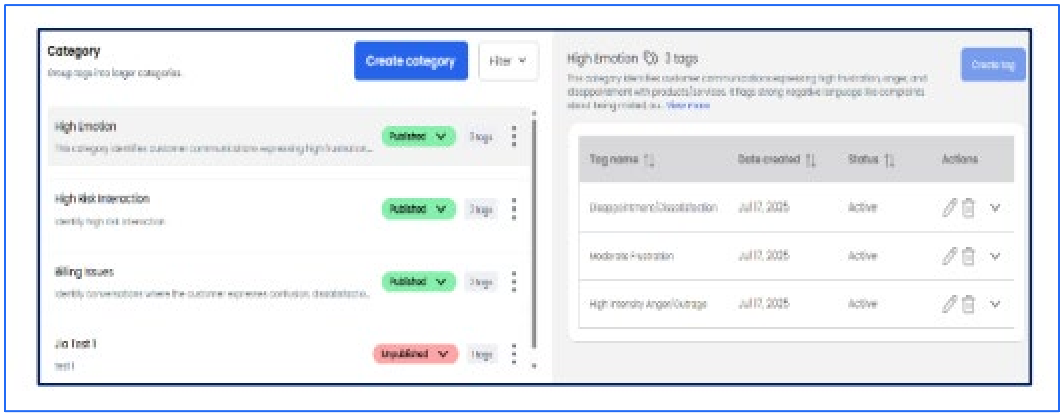
- Phrase-based scoring: Recognise key phrases automatically - even when agents use similar wording , to keep evaluations aligned with real conversations and business - specific language.
- Custom Dictionary: Personalise analytics with industry -specific and business relevant terminology. Customers can bring their own dictionary with the help of Calabrio.

- <u>GenAI Driven Task - Level Prompts:</u> Allows customers to add more context at the task level for a more accurate model output in Advanced Sentiment , Interaction Summary and trending Topics.
- <u>Business Signals:</u> This helps customers identify key conversation points in your contacts, based on exact phrases or AI -detected tags.
- <u>Phrase Manager:</u> Calabrio's Phrase Manager enables users to create, manage, import, and export phrases used in speech and text analytics tasks. A phrase is a group of one or more words that Calabrio can search for as a single grammatical unit in audio and text tasks. By defining specific phrases, organisations can monitor and analyse interactions for compliance and quality assurance purposes. Phrases are organised into categories, which can be grouped by business purpose or language. The Phrase Manager also supports AI generation of phrases of similar words .



- <u>AI tags:</u> Calabrio Tags feature uses AI to automatically label customer interactions based on conversation content, enabling efficient categorisation and trend analysis. Tags such as “Fee Waiver” or “Long Wait Times” - are grouped into categories tied to specific

business purposes and applied through tasks in the Analytics module. These tags support deeper insights into customer behaviour, risk detection, and operational performance. The AI Tags dashboard lets users monitor tag trends, associate them with phrases or topics, and export detailed data for further analysis



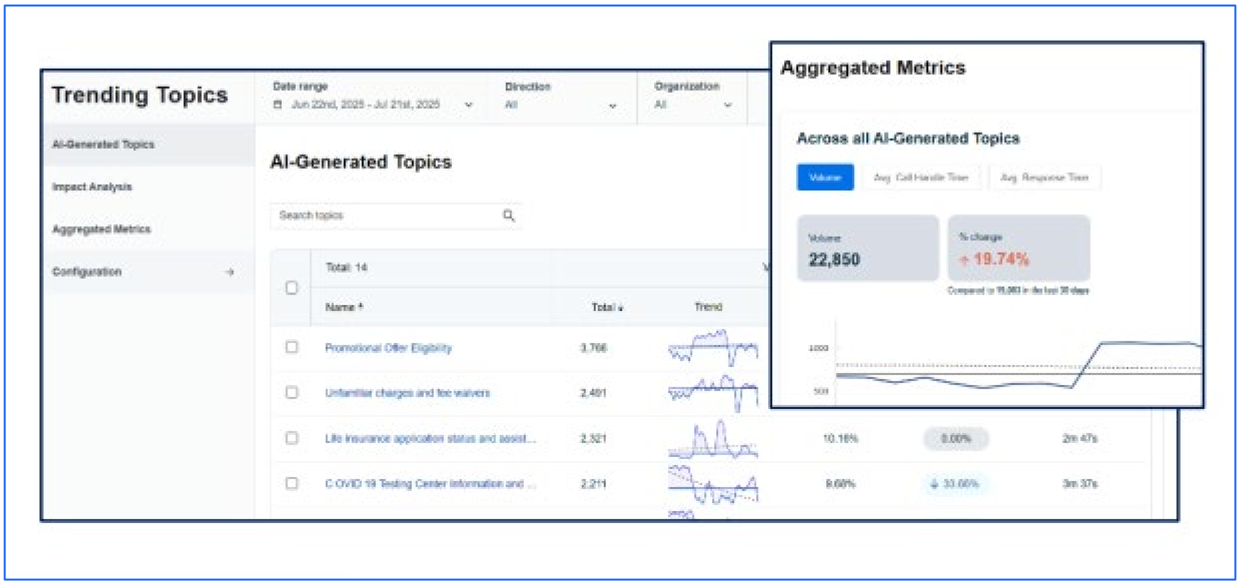
- <u>Desktop Analytics:</u> Desktop Analytics provides detailed visibility into agent activity before, during, and after interactions. It monitors application and web usage, tracks time spent per app, interaction state (active call, hold, ACW, idle), webpage focus percentages, and whether URLs are approved. Users can link contact IDs for full drill -down into productivity and process analysis. Integrated with screen and call recordings, it enables root cause analysis based on app or URL usage, with dashboards that highlight key events by agent, team, or date offering access to recordings.
- <u>Trending Topics:</u> Calabrio uses AI to analyse interactions in near real -time, identifying 100 –150 customer inquiry topics. Users gain a consolidated view with topic -level metrics, drilldowns by agent, performance trends over time, and access to transcripts and media for root cause analysis. Includes Impact Analysis to measure coaching and campaign effectiveness

• Topics level impact analysis

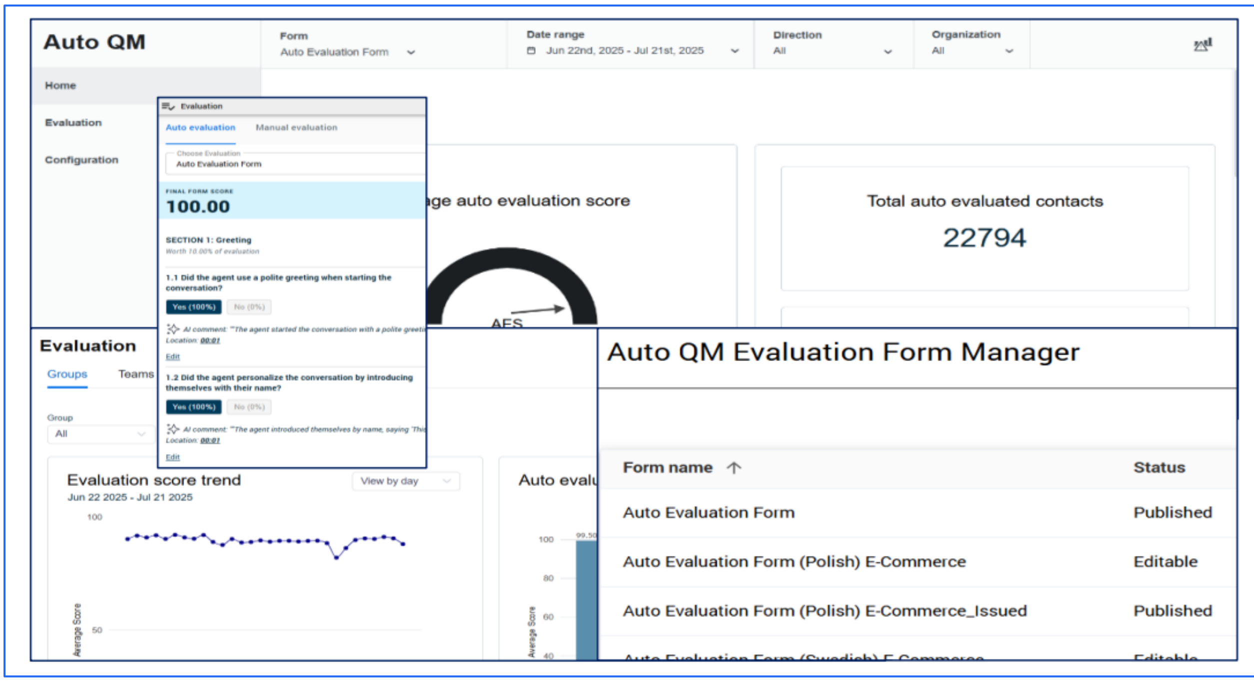
• Topics level KPIs & KPI trend analysis Topics level sentiment analysis

• Configurable usage notification & alert

• Related Topics



- Auto QM: Calabrio uses AI to evaluate 100% of conversations, providing out -of-box scores for standard agent performance questions. These scores are available at both aggregated and individual contact levels. Supervisors can override auto scores, which supports flexible human -led QA where needed.
    - Q by Q auto scoring with score reasoning
    - Configurable score card (sections & questions from library)
    - Configurable section/question level weight
    - Group, team, agent -level application dashboards
    - Supervisor override capability
    - Actionable insights with signal breakdown
    - Configurable form description
    - Configurable KPIs & Targets
    - Intelligent phrase -based scoring
    - Customisable score cards
    - Add business process context at form level
    - Customise BYOQ (Bring your own questionnaire)
    - Shareable/reusable BYOQ library



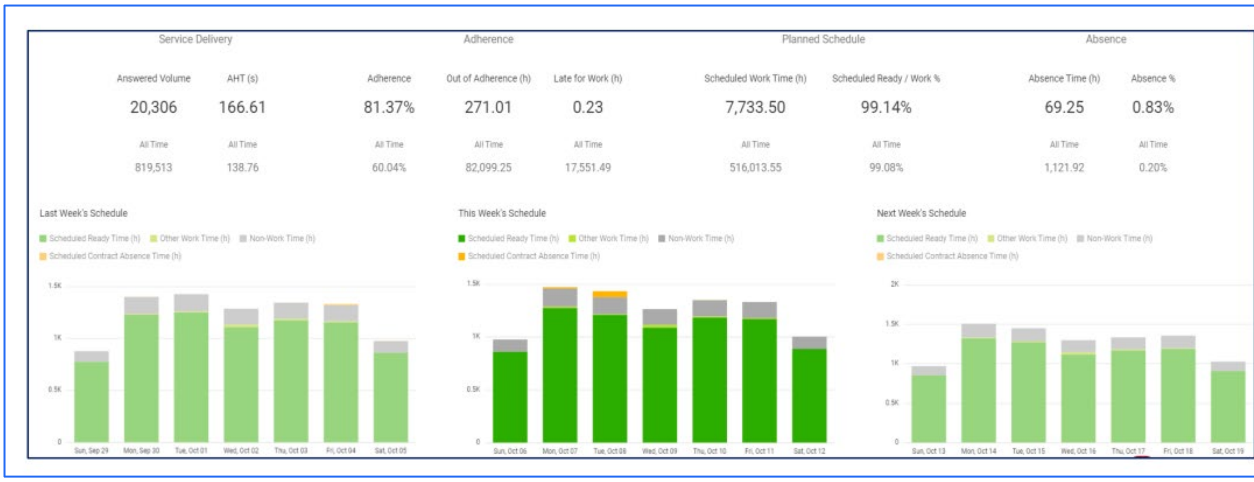
Insights (Business Intelligence Tool)

Calabrio has a standard reporting tool called Insight, that is built into the standard user interface. This suite -wide feature delivers added business intelligence, integration, and flexibility across Calabrio WFM. In addition to a robust set of pre -built visualisations, it provides users with the ability to easily create , and customise , personalised reports and dashboards. Because Insights utilises an integrated data model that supports blended, non -siloed reporting, users can easily combine QM, WFM, as well as Analytics data into a single report or dashboard and use these comprehensive sources of workforce optimisation information to fuel better decision making.

- Dashboards can also be utilised as a user's homepage. The tool offers thresholding, configurable and customisable KPIs, export in standard file formats (xls, csv, pdf, jpeg, png, html) and a variety of formats.
- You'll enjoy the benefits of a robust, scalable, and user -friendly BI solution that will empower your organisation to make data -driven decisions and gain a competitive edge in the market.
- Insights allow users to create reports and dashboards that provide the specific information they need. Users can decide which type of chart or table best displays their data and can customise the chart to show only the measures they want to see.

Insight Data Export Service

This Service allows organisations to export data from Calabrio's Insights data lake to their own Amazon S3 buckets, enabling seamless integration with external systems. It provides a manifest file for each export, detailing status, row counts, and metadata . Additionally, Calabrio can provide a Datamart and/or database views of the Calabrio solution data for use in other reporting tools or export datasets via API



Performance Management

Performance Management is a new solution in Calabrio that brings coaching, performance metrics, and agent development together in one place. It helps track coaching conversations, monitor progress over time, and integrate key QM and WFM metrics into a unified experience.

My Calabrio is a new centralised hub to manage performance, introduced as part of the Performance Management solution. It is a personalised hub where agents and supervisors can access their:

Agents

- WFM Schedule
- Coaching sessions
- Request coaching
- View their personalised progress

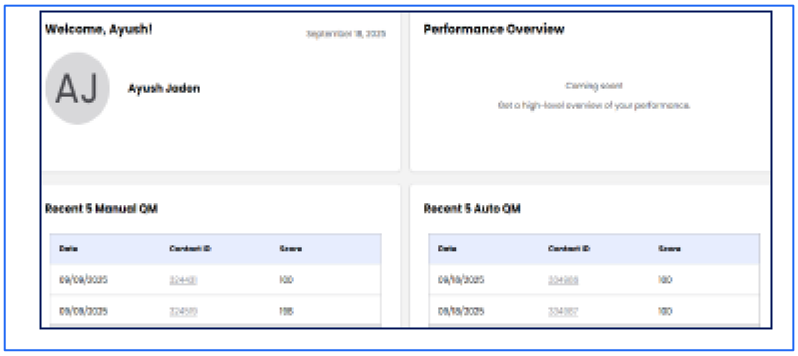
Supervisors/Coaches

- Create coaching session and custom benchmarks
- Identify trends and track progress
- View their team's progress

Features of Performance Management

<u>Empower with My Calabrio</u>

A personalised hub to manage performance. Empower agents with clear goals, timely feedback, and access to growth tools, while giving supervisors centralised coaching, actionable insights, and measurable impact, all in one place.

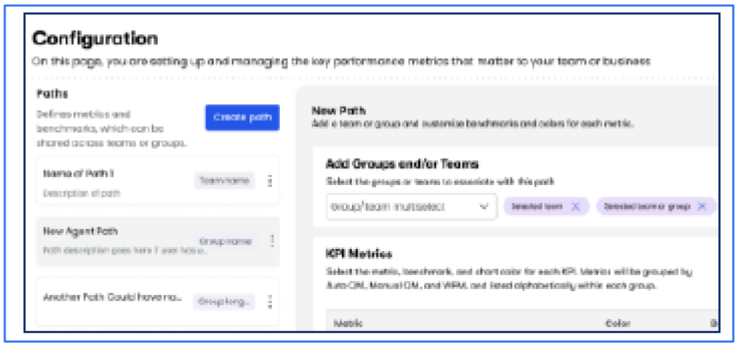


<u>KPI Dashboard to Track What Matters Most</u>

The KPI Dashboard gives agents a clear view of key metrics tied to their personal goals, helping them understand performance while fostering daily ownership and accountability.

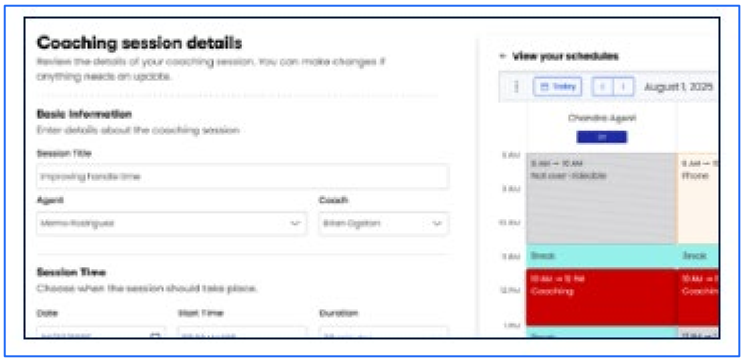
Custom Benchmarks

Custom Benchmarks let organisations tailor performance paths for specific teams or groups by setting unique KPI targets such as AHT, scores, or fail rates while providing flexibility to adapt benchmarks as teams grow and evolve.



Streamline Coaching Setup

Streamline Coaching Setup makes it easy to schedule sessions and assign coaches, aligning each session to targeted KPIs and performance goals, with seamless WFM integration for smarter scheduling.



Tracking Mini Goals

Tracking Mini Goals breaks larger objectives into manageable steps, giving agents clear milestones to stay focused, making progress visible and easier to track, and supporting continuous growth through structured coaching.

Coaching is Actionable and Trackable

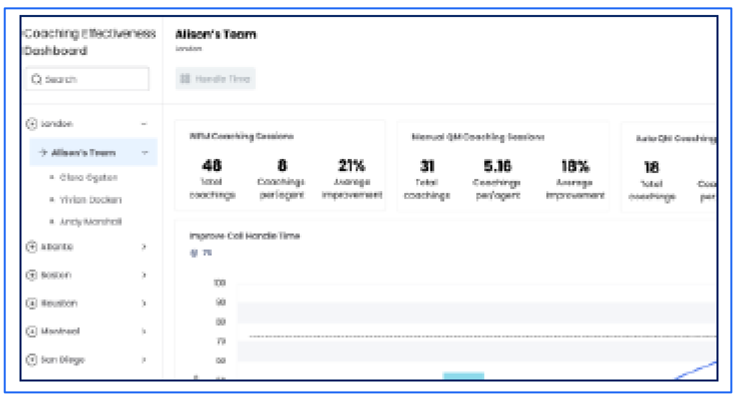
Coaching is actionable and trackable with sessions that are easy to manage, goals directly tied to performance improvement areas, and built-in timelines with progress tracking to ensure accountability.

Measure What's Working

Measure What's Working by tracking coaching impact across teams with an intuitive, all-in-one view that highlights trend, enables quick action, and uses data to refine strategies for continuous improvement.

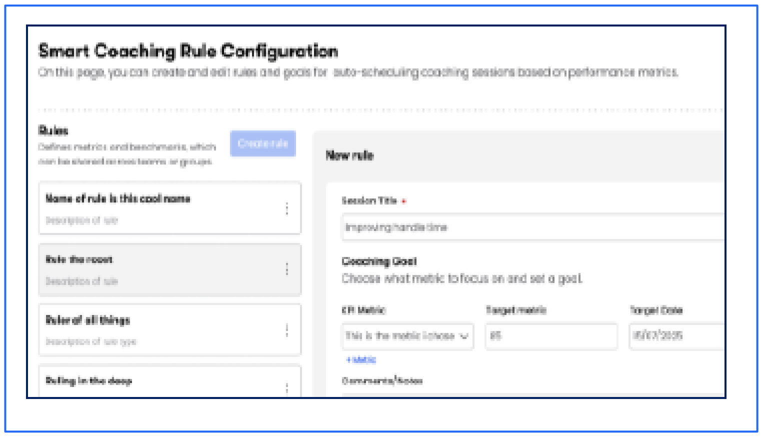
Custom Metrics

Bring Your Own Data - Custom Metrics let you bring in your own data to unlock deeper insights by connecting key business measures like CSAT, NPS, Resolution Time, FCR, and Sales Conversions. With flexible integration options CSV upload or automated API, you can enrich agent performance data.



Smart Coaching Scheduling

Smart Coaching Scheduling automates the creation of coaching sessions, reducing manual work for supervisors and ensuring timely, data-driven support. By delivering consistent, personalised sessions, it strengthens accountability for both agents and coaches.



2. Data Protection

2.1. Information Assurance/Security

Information security is one of the important pillars of TTEC Holdings, Inc. (NASDAQ: TTEC) and TTEC affiliates core global business model, and maintaining it is crucial for our company, our stakeholders, and our clients. By performing internal audits and independent IT compliance audits, the results provide information that can be used to improve operations, enhance accountability, and identify areas for improvement.

The adherence and certification to multiple compliance frameworks ensures that TTEC maintains industry standards to secure data and network systems for our business and our clients. To maintain compliance across these frameworks, TTEC contracts an independent, third party, accredited, qualified auditing firm to conduct the following assessments. Depending on the platform, TTEC technology environment and business facility space, TTEC aligns and is certified under these compliance frameworks:

Engage:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 1 Type II (SSAE 18) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.
- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

Digital:

- PCI DSS (Service Level 1) - maintained and assessed annually.
- SOC 2 Type II (SSAE 18 / 4 of the 5 Trust Principles) - maintained and assessed annually.

- ISO 27001: 2022 - maintained and assessed annually. Full assessment year 1, surveillance audits year 2 and 3.
- HIPAA S.C.R.A. - maintained and assessed annually.

TTEC Consulting (UK) Limited and TTEC (UK) Solutions Limited Environments (EU Cloud Services Only):

- Cyber Essentials Certificate of Assurance (Basic) - maintained and assessed annually for EU cloud services only.
- Cyber Essentials Certificate of Assurance (Plus) - maintained and assessed annually for EU cloud services only.

Cyber Essentials and Cyber Essentials Plus are certifications developed and recognised by the UK government to help organisations protect themselves against common cyber threats and demonstrate their commitment to cybersecurity best practices.

TTEC's achievement of the Cyber Essentials and Cyber Essentials Plus certifications validates TTEC's security controls and safeguards implemented and maintained adhere to these cybersecurity best practices, how we secure TTEC and our clients against common cyber threats and how TTEC demonstrates, annually, our commitment to improving our cybersecurity posture to align to these best practices.

The following provides an overview of each Cyber Essentials Certification assessment which includes but not limited to:

- Cyber Essentials Certification:
  - Focuses on five key areas of cybersecurity: boundary firewalls and internet gateways, secure configuration, user access control, malware protection, and patch management.
  - Designed for organisations of all sizes and sectors.

  - Requires organisations to complete a self-assessment questionnaire and provide evidence of their cybersecurity measures.
  - Certification is valid for one year and can be renewed annually.
  - Provides a basic level of assurance to customers, suppliers, and stakeholders that an organisation has implemented essential cybersecurity controls.

- Cyber Essentials Plus Certification:
  - Includes all the requirements of Cyber Essentials certification.
  - Involves an independent assessment and verification of an organisation's systems to ensure they meet the necessary security standards.
  - Requires organisations to undergo vulnerability scanning and penetration testing.
  - Provides a higher level of assurance compared to Cyber Essentials certification.
  - Certification is valid for one year and can be renewed annually.

2.2. Back-Up and Restore

Calabrio implements a robust backup and restoration framework to ensure data integrity, service continuity, and compliance with industry standards.

Backup Strategy

- Multi-Tenant Architecture: Calabrio operates as a true multi-tenant solution, ensuring strict isolation of tenant data in separate databases to prevent cross-access.
- Comprehensive Backups: All critical data is backed up across AWS and Azure environments using secure, versioned, and geographically redundant storage. This approach provides resilience against localised outages and supports disaster recovery.
- Frequency and Scope: Backups include all essential components such as configuration data, interaction recordings, workforce management schedules, and performance metrics.

Restore and Recovery

- Disaster Recovery (DR) and Business Continuity (BC): Calabrio maintains documented BC/DR plans that are tested and updated annually to ensure readiness for system failures or emergencies.
- High Availability: The platform leverages cloud-native redundancy and automated failover mechanisms to minimise downtime during restoration.

Monitoring and Alerts

- System Error Monitoring: Automated alerts and system status reports categorise events by severity (INFO, WARN, ERROR). Configurable notifications enable proactive issue resolution and maintain service reliability.

Compliance and Security

- Information Assurance: Backup and restore processes align with recognised industry standards and comply with UK Government Cloud Security Principles and GDPR requirements.
- Privacy by Design: Data handling practices incorporate privacy safeguards throughout the lifecycle, ensuring secure and compliant operations.

2.3. Data Processing and Storage Location

Calabrio' s cloud services are hosted within secure, enterprise-grade infrastructure in AWS and Azure environments, leveraging multi-region deployment options to ensure resilience and compliance.

All data processing and storage for EMEA customers occurs within the European Economic Area (EEA), in full alignment with GDPR and UK data protection requirements.
The platform operates as a true multi-tenant solution, with strict isolation of tenant data in separate databases to prevent cross-access.

Data is stored in secure, client-dedicated Virtual Private Clouds (VPCs) with multi-region redundancy to support high availability and disaster recovery.
Privacy by Design principles are embedded throughout the service, and Calabrio supports bespoke Data Processing Agreements (DPAs) and Standard Contractual Clauses (SCCs) where required for cross-border data flows.
Advanced security measures, including anti-malware protection, intrusion detection, DDoS mitigation, IP whitelisting, and continuous monitoring by a 24x7x365 Network Operations Centre, ensure robust protection of customer data.

2.4. Data Restoration / Service Migration

Calabrio provides robust data restoration and service migration capabilities to ensure operational continuity and compliance. All customer data is backed up using secure, versioned, and geographically redundant storage across AWS and Azure environments.

Restoration processes are designed to maintain data integrity and minimise downtime, leveraging multi-region redundancy and automated failover mechanisms.

Business Continuity and Disaster Recovery (BC/DR) plans are documented, tested, and updated annually to guarantee readiness for unexpected incidents.

For service migration, Calabrio supports seamless transitions from legacy systems or across regions through a structured approach that includes discovery and planning, data mapping and transformation, platform build and optimisation, and comprehensive testing and validation.

Stakeholder enablement through training and documentation ensures smooth adoption post-migration.

All restoration and migration activities adhere to GDPR and UK data protection standards, incorporating Privacy by Design principles and encryption for data in transit and at rest.

2.5. Business Continuity Statement / Plan

TTEC and TTEC's affiliates are committed to business continuity planning, a prudent business practice to protect employees, clients, stakeholders, and TTEC from various risks and events that may impact the ability to conduct business. TTEC's programme aligns with ISO 22301, NIST 800-34 & 84, CSF (Cyber Security Framework) and Disaster Recovery Institute International – The Professional Practices for Business Continuity Management.

TTEC, being a global company, must remain diligent and be prepared when unexpected incidents occur (fire, earthquakes, typhoons, hurricanes, human events, etc.). TTEC's Crisis and Resiliency Management programme, which includes Business Continuity (BC) and IT Disaster Recovery (DR), emphasises the ability to continue providing business services in the face of adverse operational impacts. TTEC's Global Crisis Management Programme is led by the Vice President of Business Continuity (BC) and IT Disaster Recovery (DR).

TTEC's approach to global crisis and business continuity and IT disaster recovery is to adhere to guiding principles of: Putting People First; Establish Trust; Protection of Clients; and Providing Leadership, with managing unexpected and expected incidents and events. With a strong focus on these principles, TTEC will have the ability to anticipate, prevent, recover from, and learn from crises that may impact employees, facilities, brand/reputation, or operations. Along with TTEC achieving the protection of TTEC's people, TTEC's clients and client's brand, profits and TTEC's brand.

TTEC's Global Crisis and Business Continuity (BC) and IT Disaster Recovery (DR) Management programme has developed a product-driven customer focused recovery model that is both practical and scalable. TTEC establishes, implements, and maintains world class crisis response capabilities through solidifying policies and procedures for response to an emergency or other occurrence that can compromise the privacy, confidentiality, integrity, or availability of Client Personal Information and/or damage TTEC's information systems. Such policies and procedures include, but are not limited to: creating and maintaining retrievable copies of Client Personal Data; restoring any loss of Client Personal Information; enabling continuation of critical business processes involving Client Personal Information in emergency mode; assessing relative criticality of specific applications and Client Personal Information to support other contingency plan components; periodic and annual testing and updates of contingency plans and implement lessons learned from testing.

The programme integrates and builds upon existing capabilities within our Security Event Handling Plan, Information Security Operations, Business Continuity, IT Disaster Recovery and Virtual Response teams. Additional partners in resiliency include Information Technology, Operations, Real Estate and Facilities, Legal, People and Culture, and other shared services. The unifying approach and framework are contained in TTEC's Global Crisis Management Policy for managing and responding to crises across TTEC's global enterprise (including but not limited to WFH environment).

TTEC provides redundancy in our technology through hardware and software configuration. Redundancy provides clients with the services that in the event of hardware failure, or software failure, services remain active and available.

Redundant premise equipment mitigates the risk of equipment failure; dual firewalls with stateful inspection, dual routers, and dual core switches in the data centre provide a highly available architecture for client links. TTEC firewall infrastructure provides stateful inspection and the configuration is in active/active or active/standby mode depending on the project specifications/requirement.

The different types of DRP technology and redundancy capabilities used include but not limited to:

- Geo-redundant centralised data centres.
- Dual MPLS WAN via multiple carriers.

- Carrier grade disaster recovery.
- Voice via PSTN TFN/DID, TDM, VoIP, or SIP (SBC).
- Regular testing to ensure readiness and After-Action Plans for lessons learned.
- Functional Management tool that enables systemic, collaborative, and controlled resiliency programme management.

In addition, at least annually, TTEC's Executives (Sr. Advisor BCDR/Resiliency, CSO, CIO, IT, and other supporting departments) review the Global Crisis Programme and the Business Continuity and IT Disaster Recovery plans, processes, and policies, update (as needed) to align to TTEC's business, security and compliance models and adherence with industry compliance framework requirements. TTEC's BCDR and applications are exercised annually and are governed by our Crisis Management and Disaster Recovery policies and guidelines. TTEC's Global Crisis and Resiliency Management Programme, including TTEC's Security Event Handling Programme is assessed and maintained annually, and is certified against TTEC's ongoing industry compliance audit assessments of PCI DSS, SOC 2 Type II, ISO 27001:2022, HITRUST and more.

Lastly, regarding TTEC's Business Continuity (BC) and IT Disaster Recovery (DR) plan approach, TTEC bridges a partnership with our clients with the development of a specific client focused business continuity (BC) and disaster recovery (DR) plans. TTEC collaborates with clients to build a tailored, resilient, and mutually agreeable BC and IT DR plan that encompass applicable TTEC Technology and Services, prevailing industry compliance standards, information security controls, safeguards, and measures, along with operational best practices, and client-specific SLA requirements. Through TTEC and client partnership and strong collaboration will result with eliminating risks and returning to "business as usual" status, and more.

2.6. Privacy by Design

TTEC Digital accommodates applicable data privacy regimes through bespoke data processing agreements (DPA) with its customers that set forth relevant rights and obligations in the context of the data controller-data processor relationship. TTEC Digital also applies appropriate agreed technical and organisational measures and data privacy safeguards (including intercompany standard contractual clauses) to satisfy the legal requirements and the DPA undertakings.

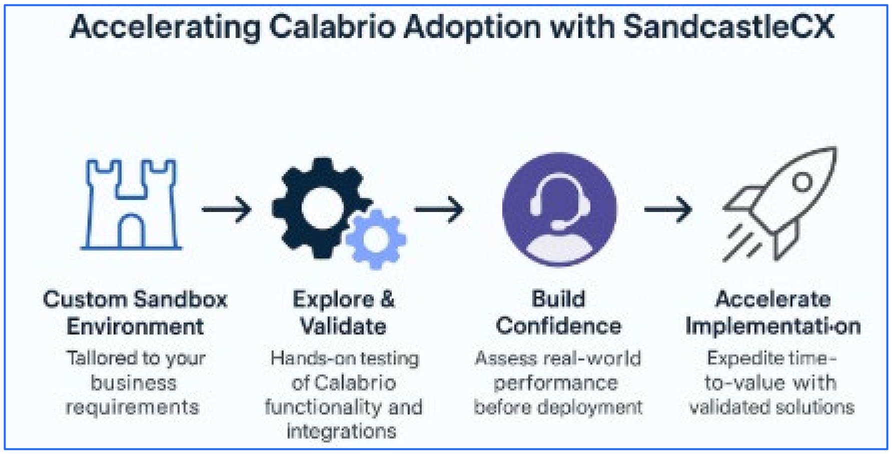
3. Using The Service

3.1. Ordering and Invoicing Process

Buyers wishing to find out more about this service and how to order should contact Wayne Kay, VP EMEA, at gcloud@ttecdigital.com

3.2. Availability of Trial Service

SandcastleCX™ is a no-cost, customised sandbox environment offered by TTEC Digital to help organisations evaluate and validate customer experience solutions before full deployment. This service enables clients to test Calabrio WFM functionality, integrations, and workflows using real business requirements in a secure, tailored environment.



SandcastleCX™ provides expert guidance from dedicated CX architects and supports hands-on exploration of features such as Workforce Engagement Management, API integrations, and advanced analytics.

The engagement typically spans three months and includes standard use cases at no charge, with optional paid add-ons for advanced capabilities such as Learning & Performance Management and CX Transformation services. By leveraging SandcastleCX™, organisations can mitigate risk, accelerate implementation, and reduce time-to-value, ensuring confidence in solution performance prior to production rollout.

3.3. On-Boarding

Regarding Scope, TTEC Digital will work with the customer to define a precise scope of work based on our service definitions and associated rate card. This will form the basis of our engagement.

Migration

With a large number of migrations to our name we have experience in all aspects of CX from a Partner of record change to a full migration of a large on premise solution with multiple complex integrations such as CRM WFM, SAP, call flows and knowledge bases.

TTEC understands that migration is not an all or nothing process. There will be occasions where migration has to be planned around operational requirements. An example of this includes a voice first approach, where only telephony is initially migrated from an existing platform over a number of sites and set number of days. Digital and other applications such as WFM are migrated after this initial migration as part of a phased approach. TTEC will work closely with the customer to agree the correct migration approach.

Transition

During the transition process, TTEC will provide support to the customer to ensure a seamless migration. Once the contract is transferred to TTEC, our support services will be provided through TTEC Support. We are committed to working with the customer to develop their CX strategy and provide ongoing support and guidance.

The onboarding process involves an administrative task undertaken by TTEC. Examples of these tasks are:

TTEC will capture essential details relevant for the managed services migration including:

- Essential configuration and architecture details.
- Existing solution and configuration documentation.
- Customer support organisation and process details, escalation process details, relevant 3rd parties.
- Change management process details.
- Open incidents and problems.
- Review if any in-progress support tasks will need to be transferred to TTEC.

TTEC's Support Service will be engaged following go live.

3.4. API

Calabrio WFM provides an open API framework designed to enable seamless integration with third-party systems such as CRM, HRIS, CCaaS, and ERP platforms.

The APIs support both real-time and historical data connectors, allowing organisations to extend functionality and maintain interoperability across enterprise environments. Calabrio offers secure API-based data export services, including the ability to transfer data from its Insights data lake to external destinations such as Amazon S3, accompanied by manifest files for transparency and auditability.

Additional options include Datamart access and database views for advanced reporting and analytics through external BI tools.

All API interactions adhere to strict security protocols, including encryption for data in transit, and comply with GDPR and UK Government Cloud Security Principles.

3.5. International SMS

Calabrio WFM supports international SMS functionality to enable efficient and timely communication with agents and stakeholders across global regions. T
his capability allows organisations to send outbound notifications for schedule updates, shift confirmations, adherence alerts, and emergency communications.

Two-way messaging is supported, enabling agents to respond to schedule changes or confirm shifts via SMS.

The service integrates seamlessly with Workforce Management (WFM) workflows, with notifications triggered by events such as schedule adjustments or overtime requests.
Delivery is facilitated through secure SMS aggregation services or approved third-party providers, ensuring global reach while adhering to local telecom regulations.

All messaging processes comply with UK Government standards and GDPR requirements, incorporating opt-in/opt-out management for recipients and encryption for data in transit.

3.6. Off-Boarding

TTEC Digital follows a structured, compliance-driven process to ensure a smooth, secure, and transparent transition when a customer contract ends. The approach typically includes:

Transition and Knowledge Transfer

- TTEC Digital initiates a comprehensive knowledge transfer to the new provider or the client's internal team. This involves meetings with the Client Success Manager, Solutions Architect, and other key resources familiar with the customer's environment.
- All operational and technical documentation, such as call flows, IVR pathing, and integration details, is updated and handed over to ensure continuity.

Data and Artifact Transfer

- All customer data, records, and artifacts are securely transferred to the client or their nominated supplier within 30 days of notification, in line with contractual obligations and data retention requirements.
- Strict protocols are applied to maintain data integrity and security during migration, including encryption and controlled access.

Access Revocation and Account Closure

- TTEC Digital ensures timely removal of user accounts and system access for its staff from client environments, including CRM, collaboration tools, and cloud platforms.
- Federated identity management (e.g., via Okta and SAML) is used to enforce secure offboarding and prevent residual access risks.

Compliance and Data Privacy

- Offboarding aligns with GDPR and contractual data protection clauses, ensuring that personal and sensitive data is either returned or securely deleted after the retention period.
- TTEC Digital provides written confirmation of data deletion or transfer, maintaining audit trails for compliance.

Service Continuity and Exit Planning

- A draft exit plan is prepared early, detailing timelines, responsibilities, and any applicable exit costs.
- Optional transitional support projects may be delivered to minimise disruption, such as temporary hosting or migration assistance.

3.7. Training

TTEC Digital provides comprehensive training and enablement services to ensure successful adoption and optimal use of Calabrio WFM solutions. Training is delivered through structured programs and tailored workshops designed to meet client-specific requirements.

Workforce Management (WFM) Training

A dedicated workshop is offered remotely over five days, with three-hour sessions each day (total of 15 hours). Each workshop accommodates up to 15 participants and includes:

- Business Requirements Discovery (BRD) to align training with operational needs.
- Hands-on configuration and guidance for scheduling, forecasting, and performance optimisation.
- Support from a dedicated consultant and project manager for seamless delivery.

Consulting and Enablement Services

Training is integrated into implementation milestones, including Discovery & Design, Execution, and User Acceptance Testing (UAT). These services cover solution design, build, testing, and validation to ensure the platform meets business objectives.

Access to Calabrio Success centre

Clients and partners are encouraged to register for Calabrio’s Partner Success centre, which provides self-service resources such as training materials, enablement guides, and roadmap documentation for ongoing learning.

Advanced Workshops and Professional Services

Additional workshops and consulting services are available for advanced topics, including API integrations, custom configurations, and analytics. Professional Services are offered on a day-rate basis, tailored to project scope and complexity.

3.8. Implementation Plan

TTEC Digital has an engagement framework, CXEdge™ that governs our approach to the client experience. This framework allows for a consistent delivery methodology across all technologies.

With CXEdge™, the Client will have a dedicated team of experts for the project, clearly communicated outcomes, and defined, distinct stages to ensure continuous improvement and value delivery. the Client will have a dedicated team to ensure a seamless implementation from the contract signature to go live. Our methodical implementation approach has been used for hundreds of clients ranging in scale across all industries and is proven to reduce overall project risk. We will bring best practices and our experience from delivering cloud services to other clients with similar business challenges that we support to ensure optimal transition and performance. Our methodology has defined distinct phases to ensure continuous improvement and value delivery.

During the initial "**Initiate and Define**" phase, TTEC Digital's business analyst will work with the Client to review business goals, objectives, and map the customer journey through the contact centre. The BA will be primarily responsible for designing a solution that meets the desired goals and objectives. This role is occasionally shared in some areas, and certain technical design sessions may be led by a skilled developer working in concert with our BA and PM, where appropriate. If the Client's solution includes other specialised applications, additional TTEC Digital consultants may participate in design sessions.

For the "**Build**" phase, TTEC Digital will complete the configuration and custom development work included in the project's scope once design documents and decisions are completed and signed off by the Client. As part of the configuration build out, TTEC Digital will perform quality assurance (QA) testing before turning the system over to your project team for testing. Based on the project scope, TTEC Digital will conduct additional application configuration, custom solution development, and unit testing.

After QA testing, the Client will conduct UAT as part of the "**Test and Train**" phase. TTEC Digital trainers will train the Client's key resources e.g., team leads, trainers, administrators during this phase, most often prior to UAT to ensure the Clients testers can effectively navigate the solution and execute test scripts. Any resulting issues that do not meet the agreed upon design, as outlined in the customer journey diagrams and the DCW, will be addressed by TTEC Digital's project team. Occasionally, new requirements result from business test cases that may require change requests, which will be handled through the project change control process. After UAT testing is complete and TTEC Digital has addressed any issues, the Client will be required to indicate their acceptance of the solution before TTEC Digital finalises a production deployment plan. TTEC Digital and the Client will then confirm a go live date. the Client's trainers will then complete preparations for conducting end-user training during the Deploy phase.

The "**Deploy**" phase involves moving the solution into production state, so it is ready to support the Client's business operations. the Client's assigned trainers will conduct end user training for agents and business users (when appropriate). We recommend the Client conduct the end user training sessions as close to the go live date as possible to best ensure user preparedness. The production deployment plan will be executed, and the system will take live traffic. Your trainers will train your agent and business end users just prior and during the Go Live period to ensure their preparedness.

For the "**Transition & Accept"** phase, TTEC will provide the Client with up to two weeks of HyperCare before transitioning final tasks to the Client. During this phase, TTEC will open a support bridge and will complete open tasks and documentation activities outlined in the SoW. The TTEC project manager will then work with the Client to transition them to our SurroundCX™ manages services offering and will ask the Client to sign off on the project completion document.

Once the Client has transitioned to SurroundCX™, their TTEC account executive and client success manager will partner with them to drive success by providing client success management and platform adoption services.

3.9. Service Management

TTEC Digital's Service Management is fully aligned with the specific scope of work agreed upon with the client and delivered upon completion of that scope. This ensures that all service activities directly support the client's operational and strategic objectives.

TTEC Digital will supply an operational enhancement layer we refer to as "SurroundCX™". SurroundCX™ is our service management offering that supports tens of thousands of agents for some of the most complex customer service deployments in the world, including major financial institutions and government agencies where uptime is measured in seconds. SurroundCX™ will help the Client to maximise your investment by helping drive technology adoption, increasing visibility across multiple cloud platforms, monitoring license usage to optimise costs and even testing system flows to assure your client experience is on brand.

The SurroundCX™ Service Management function is led by a Customer Success Manager (CSM), who acts as the single point of contact for the client. The CSM's responsibilities include:

- **Support Oversight:** Managing day-to-day support activities and ensuring timely resolution of issues.

- **Escalation Management:** Serving as the escalation point for critical incidents and coordinating internal resources to resolve them quickly.
- **Commercial Administration:** Handling contractual matters, invoicing, and any financial queries related to the engagement.
- **Reporting and Insights:** Providing regular reports on support activity, performance metrics, and service health to maintain transparency.
- **Client Advocacy:** Acting as the client's representative within TTEC Digital, ensuring their needs and priorities are communicated and addressed across all internal teams.

This structured approach ensures clear accountability, efficient communication, and a proactive partnership model, enabling clients to maximise value from TTEC Digital's services.
As a leader in customer experience orchestration, TTEC Digital enjoys partnerships with the major technology platform players, hyper-scalers, and niche application providers that together can solve our clients' business objectives. We front-end the technology discussion with an extensive capability in the CX consulting space and wrap the technology with SurroundCX™.

3.10. Service Constraints

Calabrio WFM is delivered as a SaaS solution with no inherent technical limitations beyond standard cloud dependencies. Successful implementation and ongoing service delivery require timely access to customer stakeholders, systems, and information.

Any specific constraints are identified during the scoping phase and documented in the agreed Scope of Work (SoW).

Customers are responsible for providing access to required infrastructure, availability of subject matter experts for workshops and validation, and timely approval of deliverables to maintain project timelines. Integration with external systems such as ACD platforms, CRM, or HRIS may require additional configuration and testing.

Scheduled maintenance windows and platform updates are managed by Calabrio and communicated in advance; while high availability and redundancy minimise impact, customers should plan for potential downtime during major upgrades.

3.11. Service Levels

Calabrio WFM is delivered as a cloud-based SaaS solution with defined service levels to ensure reliability and performance.

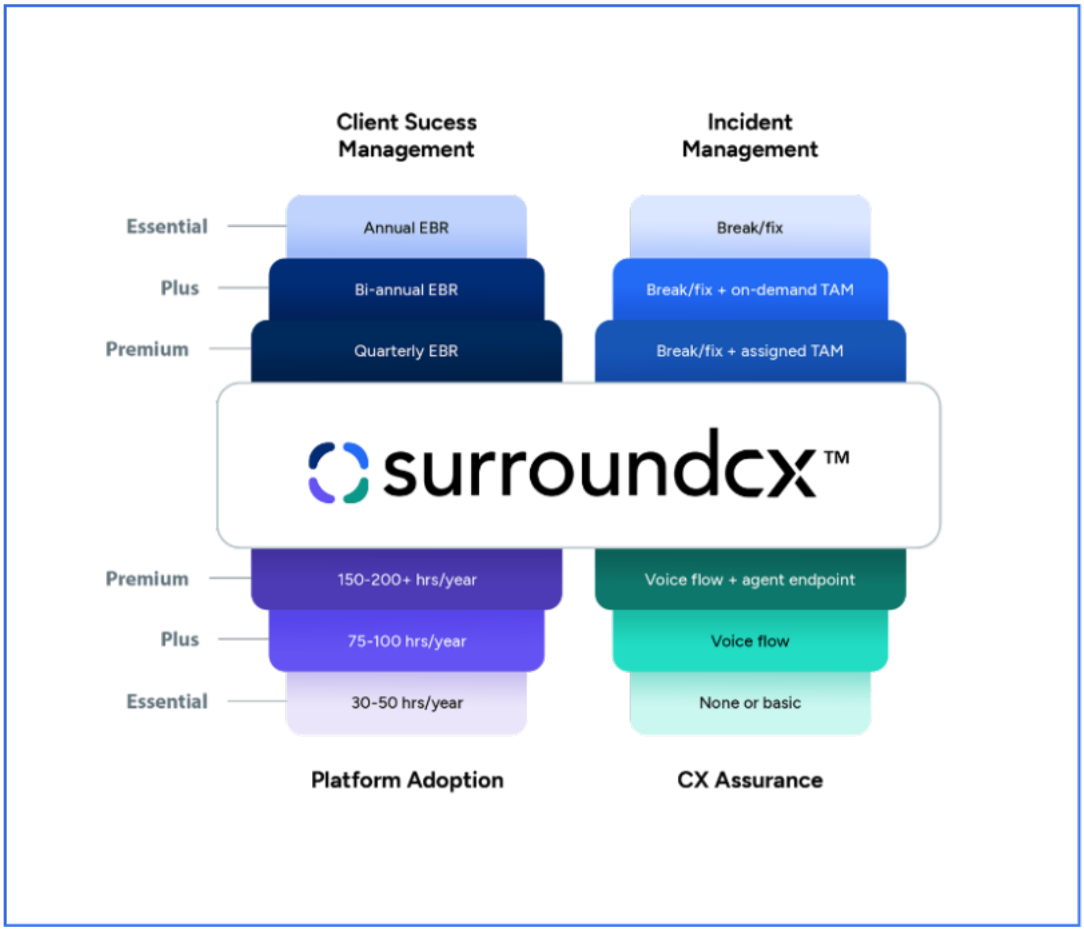
The platform is designed for high availability, leveraging cloud-native redundancy and failover mechanisms across AWS and Azure environments, with a target uptime of 99.9%, excluding scheduled maintenance windows. Continuous monitoring is provided by a 24x7x365 Network Operations centre (NOC), supported by automated alerts and system status reporting to enable proactive incident management.

Scheduled maintenance and updates are communicated in advance to minimise disruption, and security patches are applied regularly to maintain compliance and system integrity. Incident response times vary by severity, with critical issues addressed immediately, high-priority issues typically resolved within hours, and standard requests managed within agreed SLA timelines.

TTEC Digital priorities and Service Level Objectives for technical implementations are as follows:

Priority	Business hours	Non-Business hours and Holidays	Hours of Activity
P1 - Emergency	Initial Contact: Immediate	Contact: 30 min Follow-up: Hourly	24 x 7

Requires live call into queue	Follow-up: Constant	Escalation: 4 Hours	
P2 - High Live call into queue	Initial Contact: Immediate Follow-up Service Level: Daily	Contact: 10:00 AM next business day Follow-up Service Level: Daily	UK Business Hours M-F
P2 - High Logged via Portal	Initial Contact: 4 Hours Follow-up Service Level: Daily	Contact: 10:00 AM next business day Follow-up Service Level: Daily	UK Business Hours M-F
P3 - Medium All interaction types	Initial Contact: 4 Hours Follow-up Service Level: 3 business Days	Contact: 10:00 AM next business day Follow-up Service Level: 3 business Days	UK Business Hours M-F
P4 - Low All interaction types	Initial Contact: 4 Hours Follow-up Service Level: 5 Business Days	Contact: 10:00 AM next business day Follow-up Service Level: 5 Business Days	UK Business Hours M-F
Move, Add, Change, Deletion (MACD) All interaction types	Requests will be completed within a target of 2 business days following receipt of the request	Changes will be scheduled during TTEC Digital business hours and will have a target completion date within 2 business days after receipt of the request	UK Business Hours M-F



3.12. Outage and Maintenance Management

TTEC Digital manages outages and maintenance through a structured support process designed to minimise disruption and maintain service continuity.

A dedicated support team is available 24/7, operating in line with the Service Level Objectives (SLOs) defined in section 3.9. Clients can report issues or outages via live call, email, or the online support portal, where each help desk ticket is assigned to a qualified support engineer who owns the case from initiation to resolution.

If an outage requires escalation, senior engineers or developers are engaged to expedite resolution. The Customer Success Manager (CSM) remains informed throughout, ensuring transparent communication with the client.

Maintenance activities, including software updates, security patches, and scheduled downtime, are planned and executed by the support team. Clients receive advance notifications of any maintenance windows, and efforts are made to perform updates during low-impact periods. In the event of unplanned outages, TTEC Digital follows a rapid response protocol, prioritising restoration, and root cause analysis to prevent recurrence.

This approach ensures proactive maintenance, swift outage resolution, and clear communication, safeguarding service reliability, and client confidence.

Escalation Matrix

To ensure timely resolution of issues, TTEC Digital follows a structured escalation process:

Priority Level	Response Time	Escalation Contact
P1 – Critical (Service outage)	Immediate	Customer Success Manager (CSM) → Service Delivery Director
P2 – High (Major functionality impact)	2 hours	CSM → Technical Lead
P3 – Medium (Minor impact)	4 hours	CSM
P4 – Low (Informational)	Next business day	CSM

Notification Process

- Initial Notification: Client reports issue via support portal or email; automated ticket confirmation sent.
- Status Updates: Regular updates provided at agreed intervals (e.g., hourly for P1, daily for P2).

- Resolution Confirmation: Client receives closure notice with root cause analysis for P1/P2 incidents.
- Escalation Alerts: If SLA thresholds are at risk, escalation notifications are sent to client stakeholders and internal leadership.

3.13. Financial Recompense Model for not Meeting Service Levels

TTEC Digital shall provide bespoke Service Level Objectives, inclusive of a financial recompense mechanism for any failure to meet the agreed service levels, as set out in and governed by the mutually executed Call-Off Contract.

4. Provision of the Service

4.1. Customer Responsibilities

To ensure successful implementation and ongoing service delivery, customers are responsible for:

- Access and Information: Providing TTEC Digital with timely access to relevant personnel, systems, and documentation required for implementation, configuration, and support activities.
- Infrastructure Readiness: Ensuring that client-side infrastructure (network connectivity, desktop/browser compatibility, and security policies) meets the minimum requirements for Calabrio.
- Data and Integrations: Supplying accurate data and specifications for any integrations with in-house or third-party applications and maintaining those systems in a supported state.
- Compliance and Governance: Managing internal compliance obligations, including GDPR responsibilities as the Data Controller, and ensuring lawful processing of personal data.
- Change Management: Coordinating internal change management processes, including user training and communication, to support adoption and minimise disruption.
- Escalation and Collaboration: Engaging with the Customer Success Manager (CSM) and support team for issue resolution and following agreed escalation paths when required.

These responsibilities will be clearly defined during the scoping phase and documented in the Scope of Works, ensuring alignment between both parties.

4.2. Technical Requirements and Client-Side Requirements

Technical Requirements

Calabrio WFM is delivered as a cloud-based SaaS solution and requires the following:

- Internet Connectivity:

  A stable, high-speed internet connection with sufficient bandwidth to support voice, video, and data traffic for contact centre operations.
- Supported Browsers:

  Latest versions of Google Chrome or Microsoft Edge for accessing the Calabrio WFM web interface.
- Secure Access:

  TLS 1.2 or higher for encrypted communication between client endpoints and Calabrio WFM servers.
- Authentication & Identity Management:
  - Supports SAML 2.0 for Single Sign-On (SSO) with Identity Providers (e.g., Okta, ADFS).
  - IdP must provide issuer ID, SSO URL, certificate, and metadata file.
  - Assertions must include user email matching Calabrio WFM credentials.
- SSL Certificate Requirements (for on-prem components):
  - Base64 format (.cer or .crt) with private key (no password).
  - Signature Algorithm: SHA256, 2048-bit Public Key.
  - Key Usage: Digital Signature, Key Encipherment; Enhanced Key Usage: Server Authentication.
- Hosting & Compliance:
  - UK-based data centres for G-Cloud deployments.
  - Fully aligned with UK GDPR, Cyber Essentials, and GDS Service Standards.

Client-Side Requirements

To ensure optimal performance and compliance:

- Hardware & OS:
  - Modern desktop or laptop with updated operating system (Windows 10 or later, macOS latest version).
  - Minimum 8 GB RAM and dual-core processor recommended for analytics-heavy tasks.
- Network Configuration:
  - Reliable VPN or secure network for remote/hybrid teams.
  - Open required ports for Calabrio WFM services (details provided during implementation).
- User Environment:
  - Access to supported browsers (Chrome, Edge).
  - Audio devices (headsets) certified for VoIP quality.
- Security & Access Control:
  - Enforce MFA for user accounts.
  - Ensure endpoint security with antivirus and OS patching.
- Training & Enablement:
  - Users should complete onboarding workshops for WFM, Quality Management, and Analytics modules.
  - Access to Calabrio Success Centre for self-service resources.

4.3. Browsers

Calabrio WFM is accessible via modern web browsers, including

- Google Chrome
- Microsoft Edge (Chromium-based)
- Mozilla Firefox
- Safari (for macOS)

The latest stable versions are recommended to ensure compatibility and optimal user experience.

4.4. Outcomes/Deliverables

The deliverables/outcomes of this service will be aligned with the specific scope of work that will be provided to the buyer whilst awarding the contract.

Typical deliverables include:

- Documented customer experience vision and strategy.
- Documented customer journey maps and prioritised friction points.
- A solution prototypes.
- Documented implementation plan.
- Documented reports on the performance of the change on key performance measurement.
- Successful fulfilment of the agreed requirements.
- Documented change management plan.
- Documented training plan and training content.

4.5. Development Life Cycle of the Solution

The specifics of the development Lifecycle of this service will be aligned with the scope of work and agreed upon with the buyer whilst awarding the contract.

4.6. After Sales Account Management

Once you become a TTEC Digital Customer, you will be assigned a Client Success Manager (CSM), who will be responsible for the relationship with your organisation. Your CSM will act as your trusted advisor and will get to know you and your business and help you to identify key strategic objectives to meet your organisational goals. Your CSM will also run regular business/service reviews with you to make sure that we are helping you to deliver effective solutions and will also help you to roadmap your journey to digital transformation. Your CSM is your first point of escalation in times of need. Whilst our teams will align directly with your teams (Project &

Programme Management, Service, Support, Procurement, Finance, etc), your CSM will take overall responsibility for the relationship and communication with your organisation. TTEC Digital's Account Strategy is to make sure that we meet and exceed your expectations. We see the role as a key function to ensure smooth service delivery and to educate, benchmark and challenge the status quo, helping you to drive efficiencies and outstanding Customer Experience wherever possible.

We see effective Account Management as a way to build a long term and valuable partnership with your organisation.

4.7. Termination Process

TTEC Digital is open to entertaining reasonable termination mechanisms as part of the contract negotiation that will account for the specificities of the individual business opportunity and the associated commercial terms.

5. Other Messaging Services

Not applicable for this service.

6. Environmental Action and Social Value

6.1. Environmental Action

Global Environmental Governance and Strategy

TTEC manages its environmental impact through a structured governance and operational framework. Oversight is provided by a dedicated Board committee and an Environmental, Social, Governance (ESG) Executive Council. We operate under a formal Climate Change and Environmental Responsibility Policy and align our disclosures with recognised frameworks, including SASB and TCFD. Our environmental strategy includes initiatives focused on energy efficiency, waste reduction, and emissions tracking, with progress informed by regular materiality assessments.

UK-Specific Environmental Action and Net Zero Commitment

TTEC Consulting (UK) Limited is committed to environmental sustainability and achieving net zero emissions by 2045, ahead of the UK Government's 2050 target. Our UK Executive Team has formally endorsed and published a comprehensive Carbon Reduction Plan that fully complies with PPN 06/21 and its associated guidance. The plan includes transparent disclosures of Scope 1 and Scope 2 emissions, as well as relevant Scope 3 categories, and is reviewed annually to ensure continued alignment with evolving regulatory standards and net zero objectives. This proactive approach reflects our leadership in climate responsibility and our dedication to supporting public sector clients in meeting their sustainability goals.

6.2. Social Value

Creating Positive Impact for Customers and Communities

At TTEC Digital, we are committed to creating lasting social value that benefits both our clients and the communities they serve. Our efforts focus on tackling economic inequality, advancing equal opportunities, and expanding digital inclusion throughout the UK.

To support this mission, every UK-based TTEC Digital employee is encouraged to participate in corporate social responsibility (CSR) initiatives, with one paid day annually reserved for volunteering and community engagement.

Empowering Youth Through Digital Skills

At TTEC Digital, we believe in leveraging our expertise and partnerships to create opportunities for the next generation. One example is the Digital Dev Academy, a collaborative programme that equips students from underserved communities with essential digital and technology skills. The programme is delivered in partnership with TTEC Digital and its network of clients, with support from local authorities and education stakeholders. Its goal is to create inclusive pathways into technology careers by providing hands-on learning experiences and exposure to real-world digital environments.

We work closely with clients to co-design the curriculum, ensuring it reflects current industry needs and emerging technologies. These partners also contribute mentorship, resources, and opportunities for students to engage with professionals across sectors. Their involvement helps bridge the gap between education and employment, making the learning experience both practical and aspirational.

In parallel, we collaborate with county councils to identify eligible schools and students, coordinate logistics, and ensure the program is accessible to those who need it most. This partnership is vital for community engagement and helps embed the academy within local development strategies. It culminates in a showcase event where students present their work and explore career opportunities with participating partners. The Digital Dev Academy is a powerful example of how cross-sector collaboration can drive social impact and digital inclusion.

Promoting Fair Employment and Economic Resilience

TTEC Digital is a Living Wage accredited employer in the UK, reinforcing our commitment to fair pay, community resilience, and inclusive growth. This milestone reflects our broader mission to empower future talent, support public sector innovation, and create lasting social impact.

At TTEC Digital, we believe that fair pay fosters a positive and collaborative work environment. By ensuring our employees feel genuinely valued, we strengthen relationships across teams and empower individuals to thrive. This leads to better outcomes for our clients, including:

- More engaged teams focused on solving customer challenges.
- Technical experts who go the extra mile to deliver innovative solutions.
- Project managers who build stronger, more trusting relationships.
- Consultants who invest their full expertise in transforming businesses.

7. Our Experience

7.1. Case Study 1

UK CITY COUNCIL

The Challenge

The City Council provides over 700 services to local residents in its community. Like many government entities facing budget pressures, they have been tasked to do more with less, a difficult proposition with their previous technology stack. They needed a system that streamlined citizen journeys, offered channels of choice, and provided self-service capabilities to achieve operational efficiency and improved citizen experiences as part of their wider digital transformation strategy.

The Solution

The City Council partnered with TTEC Digital due their rich expertise in contact centre optimisation to assist in identifying an alternative platform aligned to their needs. Through the initial assessment, TTEC Digital identified an integrated omnichannel approach to customer service, bringing together customer data across various business line applications and digital channels such as chatbot, voice, and social into a single cohesive platform to deliver a connected experience.

The Result

With TTEC Digital, The City Council has seen the following benefits:

- Full visibility across customer journeys.
- Improved call handling time and advisor workflow.
- Ability to identify repeat calls with improved insights.
- Enhanced self-service capabilities through Chatbot & IVR.

7.2. Case Study 2

GLOBAL ADVISORY AND BROKERAGE FIRM

Objective

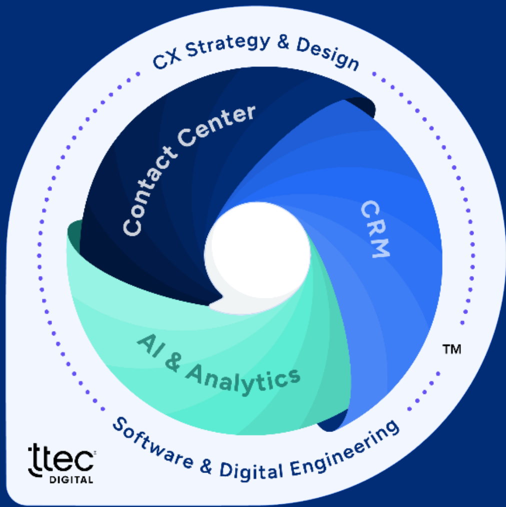
To deliver robust IT support and managed services that ensure operational excellence, infrastructure reliability, and strategic alignment with the client's business goals.

Scope

- Service Management: Full lifecycle management of incidents, problems, changes, and service requests.
- Infrastructure Support: Monitoring, maintenance, and optimisation of servers, storage, networks, and cloud platforms.
- End-User Services: Service desk operations, desktop support, and device lifecycle management.
- Security & Compliance: Patch management, vulnerability remediation, and regulatory compliance.
- Governance: Performance reporting, service reviews, and continuous improvement initiatives.

Delivery

- Hybrid delivery model combining on-site and remote support.
- SLA-driven performance with defined KPIs.
- Embedded continuous improvement and proactive issue resolution.
- Strategic collaboration with client stakeholders to evolve service delivery.



About TTEC Digital

TTEC Digital is a global leader in customer experience orchestration, combining technology and empathy at the point of conversation. Today customer conversations, and the contact centre technologies that support them, are inseparable. We bring decades of innovation experience across the world's leading contact centre technology platforms – and blend it with in-house expertise in CX strategy, data and analytics, AI and more – to help organisations maximise their technology investments and create truly exceptional customer experiences.

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