

# Service Definition Document

## Beam Talk

Beam Talk is a specialist AI-powered virtual assistant designed for social care services. It works over phone or web chat, manages inbound contact from residents or clients, collecting or sharing info as needed, and triaging effectively, reducing the pressures on front door teams and contact centres.

Beam Talk can be fully customised for each customer, including service information, phone call routing flow and tone of voice. Unlimited iterations are included as standard.

### How it works

- Beam Talk is a natural voice agent which provides information to callers tailored to local services, policies and processes.
- Beam Talk integrates with organisation phone lines and website chat bots, automating routine enquiries and freeing up human staff from repetitive routine enquiries.
- Beam Talk is informed by data taken from policies and processes uploaded during implementation and managed by customers.
- When customer calls are connected to Beam Talk, it gathers information (including initial pre-assessments, screening questions) and triages customers to the right place, including smart escalation of safeguarding risks and urgent risks to human staff.
- To ensure human-in-the-loop, Beam Talk creates a structured Magic Notes summary for every call, which is reviewed and logged by the required staff member.
- Beam Talk retains a recording and summary of the conversation, which is stored within the Magic Notes web application.
- Beam Talk works 24/7, in 30+ languages, over phone calls and web chat. Beam Talk can handle all calls at the same time without timing out or needing to hang up, and is able to deal with high demand volumes of calls.

### Benefits of Beam Talk

- Consistent, quality advice to customers tailored to local services, policies and processes
- Customers get the care or support they need from council services more quickly
- No missed calls or calls waiting in queues
- Human expertise and resource used effectively for calls where it is needed most
- Detailed data capture from every call

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## Onboarding

Beam provides an onboarding programme to all new customers as a part of implementation, including support to develop the data library and customising the natural voice. The implementation period is on average 8 weeks and includes:

## Pilot

- **Pre-work:** Beam can provide guidance on completing or updating your DPIA, aligning on the best service area for testing, and running initial demonstrations to key stakeholders.
- **Discovery:** get everything ready to launch live testing, including setting up key meetings, aligning on evaluation criteria and building the custom bot.
- **Initial Trial:** training the testing team and getting them set up if they do not already have Magic Notes accounts. Initial internal testing will run concurrently with phone line integration.
- **Formal Testing:** Practitioners use the tool for 4-6 weeks. The project team and practitioners meet weekly to discuss usage and feedback. Any emergency changes will be escalated and changed within 1 working day.
- **Evaluation:** collecting data and feedback from the testing team, and sharing a full report of the findings.

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- **Go-Live:** Beam's Account Manager supervises rollout, with initial fortnightly monitoring calls. Monitoring calls move to monthly after 3 months.

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All users will be provided with a training document and video covering set-up, FAQs, and basic troubleshooting. Additional support can be requested from within Magic Notes, through the “Get Support” feature or by emailing the Service Desk.

If customers have any serious technical issues with the bot, or any major identified issues with the service it is providing, this would be escalated immediately within Beam.

## Support

Users have access to email and telephone support from the Beam Service Desk, available 9am-5pm UK time, Monday to Friday.

The support options available to users are:

- Live chat: integrated into Magic Notes platform, links users directly to a Beam customer support specialist via webchat, available 9am-5pm Monday to Friday
- Unlimited 121 support sessions, requested via webchat, email, online form or via Account Manager
- Email support: available 9am-5pm UK time, Monday to Friday at [beam@magicnotes.ai](mailto:beam@magicnotes.ai)
- Online support centre: a bank of support articles available 24/7, for self service
- User guides and FAQs: these are shared during onboarding and user training, and regularly updated as product changes are made.
- Join a group training or refresher session

## Security and Privacy

As a social services provider, Beam has a deep understanding of the data protection requirements applied to special category data. Security and data protection are embedded in the foundations of Beam’s AI product suite design, to ensure confidential conversations between caseworkers and clients remain secure. Measures include:

- All data is securely stored and processed in the UK or EEA.
- Beam is ISO270001 and Cyber Essentials Plus Certified and operates in strict compliance with UK GDPR.
- Data Protection Impact Assessments are co-created and signed off as part of any new partner onboarding.
- Customers retain complete control over their data and Beam does not use reports or source materials for any purpose without customer consent.
- There are two login options available:

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- Code: identified users enter their work email address and are sent an email with a code, which logs them in to Magic Notes.
- Single Sign On (SSO) using Google Workspace or Azure Active Directory. SSO enables an option to enforce Multi Factor Authentication (MFA) via SMS, email or authenticator app.