

# Service Definition Document

## Beam Talk

Beam Talk operates as a part of the Beam Platform tools for frontline teams. Talk is an AI virtual assistant for local government, the NHS, and public sector teams. Operating via phone and web chat, it handles inbound and outbound resident, patient, and client contact, including gathering information, triaging, and escalating cases to reduce contact centre pressure.

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.

### 1.1 What Beam Talk Offers

Beam Talk provides the following features and benefits:

- Provides tailored, consistent information to callers based on consolidated and customer-owned local services, policies, and processes.
- Integrates with organisation phone lines and website chatbots to automate routine enquiries and free up human staff.
- Informed by policy and process data uploaded during implementation and managed by customers.
- Gathers information (including pre-assessments and screening questions) and triages customers, with smart escalation for safeguarding and urgent risks.
- Supports 'warm transfer' by sending human staff a short conversation summary note while continuing call recording for continuity.
- Creates a structured Beam Notes summary for every call for human review and action, with options for automatic export to case management/EPR, manual copy/paste, or PDF/Word export.
- Retains conversation recordings and summaries stored securely within the Beam Notes web application.
- Operates 24/7 across 30+ languages over phone calls and web chat, handling high demand volumes without timing out or hanging up.
- Conducts proactive outbound calls for waiting list check-ins, annual reviews, and care assessments, delivering triaged, auto-tagged summaries.
- Sends SMS conversation summaries to consenting callers.

### 1.2 Benefits of Beam Talk

Key advantages of implementing Beam Talk include:

# Service Definition Document

- Consistent, quality advice tailored to local services, policies, and processes.
- Enhanced risk management through AI-enabled safeguarding.
- Faster access to care and support services for customers.
- Eliminates missed calls and waiting queues.
- Optimises human expertise for high-priority and complex cases.
- Detailed data capture and reporting from every call.
- Handles routine contact to reduce cost per interaction.

## 1.3 Onboarding

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

The standard implementation rollout involves the following phases:

- **Pre-work:** Aligning on service area selection, and demonstrating the platform to key stakeholders.
- **Discovery:** Preparation for live testing, including key meetings, aligning evaluation criteria, and configuring the custom bot.
- **Initial Trial:** Setting up and training the testing team; internal testing runs concurrently with phone line integration.
- **Go-Live:** Rollout supervised by a dedicated Account Manager, with fortnightly monitoring calls for 3 months, moving to monthly thereafter.

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 Beam 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.

## 1.4 Beam Talk Pilots

Alternatively, a structured pilot process can be followed, which includes the following steps:

- **Pre-work:** Aligning on test service areas and running stakeholder demonstrations.
- **Discovery:** Setting up meetings, aligning evaluation criteria, and constructing the custom bot.

# Service Definition Document

- **Initial Trial:** Training test teams alongside concurrent phone line integration.
- **Formal Testing:** Staggered live rollout over 4–6 weeks with weekly project team reviews; emergency changes implemented within 1 working day.
- **Evaluation:** Collecting team feedback/data and presenting a comprehensive findings report.

## 2. Unlimited Training

All training and adoption support is included in implementation at no additional cost and is delivered as facilitated group sessions with 1:1 support as required.

Training sessions are tailored by role and cover the following areas:

- **Best practice** - Consent, appropriate use, and audio capture setup.
- **Practical use** - Logging in, recording management (pause/resume/save), and template selection.
- **Customisation** - Editing outputs, AI refinement, error correction, and structural adjustments.
- **Manager training** - Access permissions, caseload tracking, usage analytics, and governance.

All users receive written guidance and video training covering set-up, FAQs and basic troubleshooting. Group and refresher sessions remain available throughout the contract term, as do unlimited 1:1 sessions, and materials are updated as the product changes.

## 3. Unlimited Support Options

Support is included in the subscription at no additional cost.

| Channel                | Availability            | Detail                                                                                               |
|------------------------|-------------------------|------------------------------------------------------------------------------------------------------|
| Live chat              | 09:00–17:00 UK, Mon–Fri | Integrated into the application and connects the user directly to a Beam customer support specialist |
| Dara, AI Support Agent | 24/7                    | Dara is our intelligent AI agent, delivering instant support, answers, and guidance for all users.   |
| Email                  | 09:00–17:00 UK, Mon–Fri | Email <a href="mailto:support@beam.org">support@beam.org</a>                                         |

# Service Definition Document

|                              |                 |                                                                                                                                                                    |
|------------------------------|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| In-application request       | 24/7 submission | Directly inside the product interface, users can click the "Get Support" button (located on the homepage or navigation menu) to submit a ticket or support request |
| Online support centre        | 24/7            | Self-service article library, continuously updated                                                                                                                 |
| 1:1 support sessions         | Unlimited       | Requested via chat, email, online form or the account manager                                                                                                      |
| Group and refresher training | Ongoing         | Available throughout the contract term                                                                                                                             |
| Named account manager        | Contract term   | Fortnightly monitoring calls for the first three months, monthly thereafter                                                                                        |

## 4. Information Security, Data Protection and Compliance

With over eight years of experience working alongside the NHS, government bodies, and the voluntary sector, Beam brings deep expertise in managing special category data. We build robust security and data protection measures directly into every level of our AI product suite.

Key security, privacy, and compliance provisions 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.
- Compliant with NHS DSPT (Data Security and Protection Toolkit) with a 'Standards Exceeded' rating, alongside DTAC compliance.
- Registered as a Class I Medical Device for the Beam Platform suite.
- Supervised by an appointed Clinical Safety Officer (CSO) maintaining compliance with DCB0129 standards (Clinical Safety Case Report and Hazard Logs available on request).
- 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.

# Service Definition Document

- There are two login options available:
  - Code: identified users enter their work email address and are sent an email with a code, which logs them in to Beam 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.
- Data Encryption and Security Standards: All data in transit is encrypted using TLS 1.3, and data at rest is encrypted using AES-256. Regular third-party penetration testing is performed to maintain security integrity.
- Role-Based Access Control (RBAC): Strict permission models ensure that caseworkers, managers, and administrators have granular, role-appropriate access to data.

Full details of our security posture are available on: <https://trust.beam.org/>