



TRANSFORMING BUSINESS  
THROUGH **TECHNOLOGY**

G-Cloud

# Service Description



# Overview

## Netcall Liberty Create, Liberty RPA, Liberty Converse CX, Liberty IDP and Liberty Spark with Core

### Introduction

We believe passionately in public service and enabling the public sector to deliver great citizen-centric digital services.

Over 100 Councils and 75% of NHS Trusts/Boards currently use Netcall products as well as many more customers across the wider public sector.

We believe that the right solutions will help the public sector unleash its potential to deliver exceptional citizen and staff experiences every day. We're committed to enabling the public sector to drive digital transformation, how and when they want to, by giving them tools that support their digital autonomy.

#### These solution platforms include:

1. **Liberty Create** is a cloud-based, enterprise-grade low-code application development platform designed to help organisations rapidly build secure, scalable digital services. It simplifies the creation of case management, CRM, workflow automation and self-service applications, while also enabling seamless integration across systems, processes and operational functions. Through an intuitive, visual, drag-and-drop development environment, Liberty Create enables business users and professional developers to collaborate safely within strong governance guardrails. This approach significantly accelerates delivery, increases overall development capacity, and supports continuous iteration of applications to meet evolving service needs. Liberty Create provides a single, contextually relevant and actionable view of citizens, tenants, cases and users out of the box, improving decision-making and operational efficiency. The platform also includes access to AppShare, a curated library of pre-built, proven application templates that can be downloaded and rapidly adapted, reducing time-to-value and encouraging reuse across services. Designed for enterprise and public sector use, Liberty Create combines modern, accessible user experiences with robust security, role-based access control and auditability, making it suitable for both departmental solutions and large-scale, organisation-wide digital transformation initiatives.
2. **Liberty RPA** is an enterprise-grade intelligent automation platform delivered on a subscription basis, designed to automate high-volume, rules-based business processes across the organisation. It enables software robots (software "bots") to interact with existing applications in the same way a human user would, removing the need for complex system integrations where APIs are unavailable, impractical, or cost-prohibitive. Liberty RPA releases human workers from time-consuming, repetitive, and error-prone on-screen tasks, improving productivity, consistency, and operational resilience. By unlocking integration with legacy systems and third-party applications, it extends the life and value of existing technology estates. Combined with embedded AI capabilities, Liberty RPA supports faster task completion, improved data handling, and enhanced customer experiences—allowing human agents to focus on higher-value activities and enabling richer digital journeys where integration constraints would otherwise present a barrier.
3. **Liberty Converse CX** is Netcall's cloud-native, omnichannel contact centre platform, designed to support modern digital and voice customer engagement at scale. Delivered as a SaaS solution, it combines core contact centre capabilities with integrated AI, virtual agents, and flexible telephony options, enabling organisations to manage voice, digital messaging, and automation through a single

platform. Liberty Converse CX is telephony-agnostic, supports rapid configuration and change, and is underpinned by consumption-based pricing and optional professional services—allowing organisations to achieve faster time-to-value while scaling securely and cost-effectively.

4. **Liberty IDP (Intelligent Document Processing)** is an AI-powered solution designed to automate and optimise document-driven workflows. It focuses on high-volume, low-complexity administrative tasks, helping organisations reduce manual effort, improve accuracy, and free up staff to focus on higher-value work. By combining document capture, classification, extraction, and automation, Liberty IDP enables organisations to move from labour-intensive, paper-based or email-driven processes to scalable, digital-first operations.

At its core, Liberty IDP uses advanced AI techniques including machine learning, natural language processing (NLP), and optical character recognition (OCR) to process structured, semi-structured, and unstructured documents such as emails, PDFs, scanned forms, and images. The platform automatically identifies document types, extracts key data fields, validates information against business rules, and flags exceptions for human review. This significantly reduces manual data entry, lowers error rates, and accelerates processing times across use cases such as customer onboarding, invoice processing, claims handling, and regulatory compliance.

A key strength of Liberty IDP is its ability to integrate seamlessly into wider automation ecosystems. Extracted data can trigger downstream workflows in RPA, low-code applications, CRM, or ERP systems, enabling end-to-end process automation rather than isolated document handling. The solution is scalable and flexible, adapting to fluctuating document volumes, and provides analytics and reporting to monitor performance, identify bottlenecks, and continuously improve operational efficiency. Liberty IDP can operate as a standalone capability or as part of the broader Liberty platform, sharing common governance, security, and integration standards to support enterprise-grade digital transformation.

5. **Liberty Spark** is a process discovery, mapping, and optimisation platform that helps organisations clearly document, govern, and continuously improve their business processes without complexity. It provides a centralised, secure repository for process knowledge, ensuring processes are easy to find, consistently structured, version-controlled, and accessible to everyone involved. Through intuitive visual mapping and collaboration, Spark improves understanding, reduces the effort of maintaining process documentation, and delivers rapid time to value while laying a strong foundation for continuous improvement and automation. Spark combines intuitive, collaborative process mapping with powerful analytics and AI-driven capabilities. Users can create and refine processes using drag-and-drop tools, real-time collaboration, and rich visualisations that highlight bottlenecks, variations, and inefficiencies. AI features accelerate process creation, enable natural-language queries over process libraries, and suggest optimisation or automation opportunities, with the ability to feed “to-be” processes directly into application and automation design. Built-in security, compliance support, scalability, and integration with the wider Liberty platform make Spark a robust, enterprise-ready foundation for operational excellence and digital transformation.

## What is Liberty Create?

Liberty Create is a cloud-based enterprise low-code application development platform that enables you to rapidly build and develop game-changing applications.

Unlock new possibilities by building enterprise applications in a visual drag-and-drop interface with capabilities to suit both business users and professional developers.

Streamline operations and transform employee and customer experiences. Empower your business and IT teams to work collaboratively and create apps that increase agility, build greater resilience and deliver better outcomes.

You can transform processes, unify operations and accelerate digitisation while delivering digital experiences that make lives better for employees and customers.

**Create custom apps easily and accelerate time-to-value**

Using low-code rapid application development, Liberty Create is a game-changer. Now you can launch new apps quickly – from months to just weeks or days, without the cost and risk of hiring extra developers.

- **Empower your team:** increase the productivity of professional developers with time-saving low-code tools.
- **Increase capacity:** harness talent from across your departments and bring ‘business technologists’ into the creation process.
- **Collaborate better:** foster greater collaboration between business users and developers so that every application hits the mark.

### Create great digital experiences

Build digital journeys and applications that make citizen and employee experience more intuitive and rewarding. Unify disconnected operations and processes and deliver at the speed of changing needs.

- **Connect easily:** Create attractive and intuitive interfaces for colleagues and customers.
- **Engage anywhere:** Build applications for any touchpoint – right channel, place, and time.
- **Fast-track journeys:** Streamline and simplify digital journeys. Integrate systems, processes and data.

### Simplify system, process and operational integration

Take the time and complexity out of integration development. Connect systems, data and workflows easily – and speed up your innovation.

Applications are nothing without data – but much of developers’ time can be spent creating connectors and managing integration logic. Liberty Create relieves this pain so your developers can quickly and easily add or build connectors, web services and APIs to their apps. Data and workflow integrations can be configured and made available for re-use.

- **Unlock innovation:** Accelerate complex integrations with existing systems.
- **Launch digital services faster:** Develop with greater speed and efficiency.
- **Simplify:** Governance and security.

## What do people build with Liberty Create?

Liberty Create offers broad capabilities and development tools to accelerate development across many business use-cases. It is particularly strong for case-management, business process management (BPM) and applications where user experience across multiple channels is important.

### Team and departmental applications – case-management, workflow automation

Applications involving data collection, storage and simple workflow for a team or department. This can involve integration with underlying enterprise software to provide increased automation and raise productivity.

Client case-studies span multiple industry sectors and business functions. There are extensive application templates available within the Community AppShare for public sector clients spanning case management, grants management, onboarding and many more.

### Enterprise applications – full-stack CRM, case-management and business process management tools with internal and external user interfaces

The powerful data management, UX and workflow management capabilities of Liberty Create make it possible to build enterprise grade applications to support entire business processes. Through the Liberty on-premise adaptor (OPA) it is possible to integrate on-premise data sources and legacy systems with cloud-based applications.

Integrations can be made available to the wider organisation. Examples of enterprise applications built on Liberty Create include organisation-wide CRM systems, Grant/Benefits Application systems, Claims Management systems and Mortgage Application systems.

### Multi-experience applications

Creating web, mobile, messaging and chat applications that deliver highly engaging user experiences and



digital journeys. This typically involves integration with multiple existing business systems, providing extensive workflow automation and user interfaces for web, mobile and chat. Through integration with the wider Liberty platform, it is possible to incorporate voice, chat and messaging into rich self-service user and customer journeys.

Millions of NHS patients manage their outpatient appointments in patient engagement portals built on Liberty Create. A significant proportion of UK online mortgage applications are supported by applications built on Liberty Create.

### Business digitisation and innovation

Creating sophisticated full-stack applications with extensive data architecture, integration with documents, cases and other systems. Foundational applications support rapid delivery of b2e and b2c apps that utilise a consistent data, governance and security framework.

## How does Liberty Create work?

Liberty Create provides all the capabilities required to build robust applications in one platform. It is a highly flexible platform that has been designed from the ground up to be:

- Scalable from department level to enterprise wide.
- Secure with inbuilt IT governance structures.
- Fast for custom application builds, updates and future changes.
- Rapid and easy to deploy for end customers/users.
- Flexible hosting to align with customer requirements.
- Rich in features and capabilities to manage data, workflow and user experience.
- Powerful for professional developers – providing advanced capabilities to dive into code if needed.
- Simple and easy to learn for business users – who can master the basics in days.

### Developer Tools

Liberty Create provides functions in an intuitive interface which consists of:

1. **Liberty Create Controller** – IT and DevOps teams can control and manage many applications in their development environment – controlling access as well as provisioning new instances.
2. **Build Studio** – applications are built using drag-and-drop configuration by professional and business developers. Features enable systems architects and analysts to define multi-use data objects, API integrations, application themes/UX, workflow and to define governance guardrails.
3. **Test Studio** - Liberty Create's in-built automated testing solution allows you to effortlessly construct automated test scripts to regression test your application as well as increase the quality and stability of your application – without needing any prior knowledge in code or testing.
4. **Monitor Studio** - Enabling users to monitor the performance of an application, allowing them to dig deeper into any application errors and issues to find the problem and fix it. Dashboards and reporting provide reports on server data, messages, APIs, import and export volumes, and general application performance.

### Deployment

Liberty Create runs in a hosted environment on Amazon Web Services (AWS).

### Virtualised

Liberty Create runs on virtualised infrastructure using 'Docker' container technology which is configured to provide the machine resources sought by the customer.

### Backups

The default approach is to take daily backups, which can be configured as required. Manual rollbacks can be actioned through the solution administration interface. Backup policy when running in a customer operated environment is subject to customer configuration/set up.

### Disaster recovery/failover

Disaster recovery and failover is integral to the AWS hosting architecture:

- Failover between primary and secondary is controlled by a DNS change process.
- Automated health checks are made to assess the response of the primary facility and invoke an automatic change to the secondary in the event of any issues.
- Restoration of the primary service will be a reverse of this process.

### Performance and scale

Cloud hosting allows Liberty Create to be scaled according to performance requirements sought by the customer.

### Extend your Netcall Liberty Solution

Liberty Create is part of the wider Liberty platform. The Liberty platform extends beyond low-code application development by incorporating options such as:

- **Intelligent task automation with Liberty RPA** – automate repetitive tasks for improved productivity with intelligent robot assistance.
- **Enable the total experience with Liberty Converse CX** – next generation contact centre solutions which redefines how organisations engage with their customers. Blend digital automation with human interaction.
- **Automate intelligently with high-impact AI** – the Liberty platform is infused with business-ready AI – putting safe and simple-to-use capabilities in your hands to accelerate workflow and energise engagement.

### Industry/analyst recognition

Netcall is proud to have our technology recognised in the following ways:

1. iESE Awards 2022 – South Hams District Council & West Devon Borough Council awarded Gold for Best Transformation Team, Cumbria County Council awarded Gold for Customer Focus, Tewkesbury Borough Council awarded Bronze for Best Transformation Team.
2. LGC Awards 2020 - Adur and Worthing Councils, Council of the Year - Shortlisted Organisation using Liberty Create.
3. iESE Awards 2020 - Cumbria County Council awarded the Bronze Winner for the Best Use of Digital and Technology Award, Royal Borough of Kensington and Chelsea (RBKC) awarded the Bronze Winner for the Green Public Service Award with Liberty Create applications.
4. Forrester - Liberty Create Low-code was named a Contender in The Forrester Wave™: Low-Code Development Platforms For AD&D Professionals, Q1 2019.
5. Gartner - Liberty Create Low-code was the only UK-based provider included in the 2018 Gartner Magic Quadrant for Enterprise High Productivity Application as a Service (hpaPaaS).
6. Forrester - Liberty Create Low-code was named a Leader in The Forrester New Wave™: Low-Code Platforms for Developers, Q4 2017.

## What is Liberty RPA?

With intelligent AI powered RPA (Robotic Process Automation), you can streamline your processes and boost efficiency. Liberate your people to use their talents better by releasing them from time-consuming, mundane, repetitive tasks.

Liberty RPA provides components to build, deploy and improve automation flows, without coding. Additionally, it supports your existing desktop applications for automation purposes.

**Transform quickly:** Bridge gaps across internal and third-party systems – so everything works faster and better.

**Achieve rapid ROI:** Build workflows in minutes that can be tested, deployed and scaled at speed.

**Automate smarter:** Deliver RPA solutions at breath-taking speed – straightforward tools that can be deployed right away. Spot the problem and immediately deploy the solution.

Liberty RPA makes automation straightforward for your IT developers and business colleagues. Let teams automate repetitive tasks across online and desktop applications. Simply orchestrate workflows to schedule or enable front-line workers to trigger them on-demand to make their jobs easier.

Liberty RPA provides tools to implement your best ideas quickly and at scale.

## What challenges do people tackle with Liberty RPA?

Liberty RPA helps release human resource from mundane repetitive tasks across any organisational function where people are constrained by lack of system integration.

The capability to rapidly automate manual tasks accelerates workflow, streamlines process and improves accuracy and compliance. Common use-cases for Liberty RPA include:

1. **Data entry and extraction:** Automate how you find, gather, structure and share actionable data across systems and documents.
2. **Customer service:** Free your contact centre team from mundane tasks to devote more time to valuable human interactions.
3. **Report generation:** Gather, collate and analyse data from multiple sources to create valuable reports.
4. **Reconciliation checks:** Gather, collate and analyse data from multiple sources to create valuable reports.
5. **Account opening and closing:** Turn lengthy steps and checks across multiple systems into an automated, rule-based workflow.
6. **Customer and employee onboarding:** Manage set-up, communications and system updates – as well as ongoing progress.
7. **Customer enquiries and complaints:** Automate how you handle inbound emails and documents with rule-based triage.
8. **Exception handling:** Monitor high volumes of transactions and data, using workflow to manage exceptions simply.
9. **Document processing and validation:** Optical Character Recognition (OCR) gives RPA the ability to read and extract text from different sources into a digital format – incorporating this into a structured, rule-based workflow.

## How does Liberty RPA work?

Liberty RPA is designed to make the building, execution and control of automation simple and accessible – even for people without technical expertise. It provides an intuitive automation studio with a visual drag-and-drop interface to build automation flows.

### Developer Tools

Liberty RPA provides functions in an intuitive interface to enable rapid automation of tasks, consisting of:

- **RPA Studio:** a visual process designer to build automations quickly (with full support for Python code for seasoned automation engineers). Build automation ‘flows’ in a visual canvas with dynamic search and drop-down menus to access predefined activities e.g. if you want to automate an Excel task you can search for all Excel related activities by entering a keyword in the search bar.
- **RPA Bots:** a bot is the agent that actually performs the activities laid out in the RPA Studio. These can be ‘unattended’ – running to schedule without need for human action, or ‘attended’ – triggered by human users in single or multiple steps.
  - Unattended bots can either work on the desktop of an actual machine or in virtual remote desktop (VRDP) sessions.
- **RPA Wand:** uses machine learning algorithms to look for elements on the screen that were recorded, which allows you to build robust automations using the GUI. This is different from comparing pixels as Wand mimics the way people use elements to navigate. For example, just like humans, Wand can still find a button even if it is in a different place on the screen or if it changed slightly (e.g. screen resolution changed, button text is slightly different, colour/theme variation, etc).

- **RPA Trace:** designed to record a process as it is performed on screen in order to allow easy automation with Liberty RPA.
- **Liberty OCR:** Optical Character Recognition (OCR) converts text or images into machine-encoded text. OCR can be used to read text from any application, scanned document, photo or document and transform it into editable text.
- The **RPA Controller** offers additional functionalities to manage your robot workforce:
  - Bot management: Connect and centrally manage robots:
    - Securely connect bots to the Controller.
    - Assign bots to processes.
    - Manage licensing for your RPA Bot and RPA Studio.
  - Process management: create processes that represent automated processes:
    - Queueing: intelligent queueing to divide workload over one or more robots.
    - Scheduling: schedule processes and view schedule.
    - API integration: start processes with an API call.
    - Email triggers: start processes with a unique email address.
  - Event reporting: log actions and changes made by (team)members for a complete audit trail:
    - Version control: manage your scripts and keep track of your versions.
    - Keep an overview of development/production versions.
    - Historic overview of versions.
    - Download different versions.
  - Reporting on successful/failed jobs:
    - Overview of performed jobs both in calendar with colour codes.
    - Filter jobs based on date/outcome in overview.
    - View logs/rerun jobs.
    - Add email/SMS/Teams/Slack/Telegram notifications on job status.
  - Credential management: keep your credentials in a central secure vault.

## Deployment

RPA bots are deployed from the Liberty Controller.

RPA bots can run on Windows desktops either on a physical machine (i.e. a laptop or PC) or in a virtual remote desktop (VRDP) session.

## Extend your Netcall Liberty RPA Solution

Liberty RPA is part of the wider Liberty platform. The Liberty platform extends beyond robotic process automation by incorporating options such as:

- Rapid application development with Liberty Create – an enterprise low-code application development platform that enables transformation of processes, deployment of case management workflows and delivery of digital experiences that make lives better for employees and customers.
- Enable the total experience with Liberty Converse CX – next generation contact centre solutions which redefines how organisations engage with their customers. Blend digital automation with human interaction.
- Automate intelligently with high-impact AI (the Liberty platform is infused with business-ready AI) – putting safe and simple-to-use capabilities in your hands to accelerate workflow and energise engagement.

## What is Netcall Liberty Converse CX?

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

## Highlights

1. Fast, Robust Deployment: Achieve a quick, efficient and sustainable deployment that is built to last



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

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

## Key Features

Liberty Converse CX offers advanced features and capabilities to help enhance customer interactions, streamline operations, and improve overall efficiency and cost reduction:

- **Self-Service Options:** Enhanced self-service capabilities, allowing customers to resolve issues independently through intuitive IVR and messaging channels.

- **AI-Powered Virtual Assistants and Chatbots:** AI-driven virtual assistants and chatbots to handle complex queries, provide instant responses, look up information and assist customers 24/7. Using speech recognition and natural language processing, our automated assistants free up human team members for more complex tasks.
- **Intelligent Routing:** Algorithms that dynamically direct incoming calls and digital interactions to the most appropriate team member based on skills and issue complexity.
- **Omnichannel Communication:** Orchestrating multiple communication channels (including voice, email, SMS, chat, social media, video and integrated call-backs) into a unified platform, providing a seamless and consistent experience for customers and customer service teams.
- **Integration with CRM Systems:** Seamless integration with existing systems such as ticketing or Customer Relationship Management (CRM) systems to provide teams with a comprehensive view of customer information, enabling personalised interactions.
- **Seamless Data Flow and Unified Customer View:** Integrate rapid application development, RPA, and process-mapped workflows for a smooth data flow, providing a unified view of customer interactions for informed decision-making.
- **Payments Security:** Ensure the secure handling of customer payment information over the phone/IVR in compliance with PCI DSS requirements.
- **Co-browsing and Screen Sharing:** Collaboration tools such as co-browsing and screen sharing assist customers visually, guiding them through processes and troubleshooting in real-time.
- **Generative AI Summarisation:** Generate contact summaries to support team members during and after customer interactions, enhancing the customer experience and streamlining post-call wrap-up. Managers can leverage AI-generated summaries to analyse trends and address issues, enabling targeted coaching across the contact centre.
- **Multi-lingual translation:** Enable seamless multi-lingual communication across your chatbot and team assisted webchat channels, with the ability to translate into over XX languages.
- **Speech Analytics:** Analysis of customer-employee interactions, using speech recognition and transcription to monitor sentiment, identify keywords, and offer immediate feedback to team members for improved performance.
- **Workforce Engagement and Optimisation:** Workforce management tools help optimise scheduling and forecasting, ensuring that your contact centre is staffed adequately during the day.
- **Quality Management and Monitoring:** Tools for monitoring and evaluating the quality of customer interactions, allowing supervisors to provide real-time feedback coaching, and ensuring compliance with service standards.
- **Advanced Reporting and Custom Dashboards:** Customisable reporting and dashboards with real-time metrics, allowing organisations to pass data in and out of third-party systems (through APIs), monitor key performance indicators and make informed decisions.
- **Compliance and Security Features:** Robust security measures and compliance tools to ensure the protection of customer data and adherence to industry regulations (e.g. GDPR, Single sign-on and easy onboarding tools).
- **Robot Process Automation (RPA):** Automate routine tasks that slow down your teams, reduce workload and minimise errors for greater accuracy.

## Virtual Agents

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

### Virtual Agent Features

- **Build multiple Virtual Agents** – Virtual Agents are either digital or voice. Channels are routed to the required Virtual Agent.
- **Drag and drop designer** – Drag steps onto the canvas, connect them together, zoom in, fit to screen.
- **Triggers** – Triggers define what behaviours cause the flow to be executed, whether it be a new conversation, a message received or a web page visited.
- **Steps** – Steps represent the different types of interactions with customers:
- **Say** - Say or type a message; send an App.

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

## Channels

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

### Calls

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

- **Liberty Voice** - Customers choose to purchase their telephony (SIP channels, minutes and DDIs) from Netcall.
- **Inclusive Outbound Minutes** - Inclusive minutes to UK landlines and mobiles (subject to licence).
- **DDIs** - Add UK National DDIs, tollfree, non-geographic and golden numbers.
- **Number Porting** - Port your existing number into Liberty Voice.
- **Bring Your Own Carrier (BYOC)** - Or customers choose to connect Converse CX to their own SBC, PBX or carrier.
- **Fraud Prevention** - Calls to premium and international numbers are blocked by default.
- **Caller Presentation Numbers** - Present a different calling number per queue.
- **Embedded Agent softphone** - Agents answer calls directly in their browser using WebRTC.
- **Virtual Agents and IVR** - Route calls into Virtual Agents to provide both DTMF and Speech IVRs with Natural Language support.
- **Comfort messaging** - Design an in-queue Virtual Agent to provide an in-queue experience to callers - includes support for comfort prompts, time in queue, call back offers, SMS, as well as other advanced features.

- **Standard Call Control features** – Hold, mute, DTMF, cold and warm transfers to agents, queues and external contacts, supervisor monitoring and assist, three-way conference call.
- **QueueBuster / Callback** - Offer callers the option to be called back if the queue length is long. The caller's place is held in the queue and when the agent answers, a call is made back to the original caller. If the original caller is not available, then the agent can reschedule for later.
- **Video Assist** – when the customer is talking or chatting with an agent, the agent can invite the customer to share video with them. For phone calls, this means that the customer can show video from their mobile phone to the agent (e.g. to show a problem with the boiler); for chats, this means a two-way video call between the customer and the agent.
- **Call Transcriptions** - automatic transcription of calls in historic reports and for agent

## Email

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

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

## Web Assistant

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

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

## Social Messaging and Conversational SMS

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

- **SMS** – Supports connecting your own SMS accounts on Gov.Notify, BT Smart Messaging and Twilio.
- **Facebook Messenger and Instagram** – Connect one or more Facebook Messenger accounts or



Instagram Pages to Converse CX.

- **WhatsApp** – Connect your existing WhatsApp Business Account to Converse CX. Allows agents to respond to incoming customer messages within 24 hours .
- **Multi-service support** – Connect to different Facebook pages or different SMS accounts from the same provider and link to different Virtual Agents. Allows you to support multiple brands or different services.
- **Attachment and Image Support** – Support attachments and images and across all social channels (excludes SMS).

## Routing and Queuing

- **Skills-based routing** - Route interactions to agents based on media, skills and agent proficiency.
- **Unified omnichannel routing and queuing** - Single scalable queue that matches all interactions and tasks to the most appropriate agents.
- **Channel prioritisation** - Configure which channels interrupt other channels. For example, should calls interrupt emails in progress?
- **Media prioritisation** - Configure which medias take priority over others. For example, should calls always be presented to agents before emails that were already queueing?
- **Interaction concurrency** - Configure how many interactions of each channel can be worked on at the same time by each agent.
- **Skill templates** - Group skills into templates and assign to agents.
- **Service Level Targets** – Configure target answer times per queue and report in real-time via the dashboards and in historical reporting e.g. the target for Queue A is to answer 80% of calls in 20 seconds, or 90% of emails within 2 hours.

## Agent Productivity

**Busy Codes** – Agents can put themselves into a Busy Code to signify that they are not available to handle interactions. Busy codes can be optionally configured to expire after X minutes.

**Configurable Wrap Time** – Managers can configure max wrap time per queue.

**Activity codes** - Agents can record an outcome against any interaction. Managers can report on volumes by activity code. Activity codes can be optional or mandatory.

**Optional mandatory Activity Codes** – Agents are forced to record the activity code

**Outbound interactions** - Agents can make outbound phone calls, outbound emails and follow up on social interactions, all of which are logged against a contact centre queue.

**Supervised and blind transfers** - Agents can supervise or blindly transfer calls to other agents or back-office contacts.

**Interaction management** - Allows agents to pull up related interactions from the same contact.

**Live queue search** - Search in real-time for other interactions from the same contact - means that multiple contacts can be handled in one go, by a single agent.

**Click-to-dial** - Agents can click on a number to call it - no need to type in the number.

**Multichannel interaction alerting** - Agents are alerted of new interactions.

**Agent not responding** - If agents do not answer an interaction, then they are automatically marked as not responding. Interactions can then be routed to a more suitable agent.

**Snippets** – Provide canned responses that agents can easily include in chat responses.

**AI Chat Assist** – Uses AI to recommend responses to agents, improve their response (e.g. expand a brief response into a well written formal response), and translate into their language.

**Payments** - Agent assisted and IVR self-service payments.

**Native Co-Browse** - Native co-browse to allow the agent to help the customer browse/use your website.

**Links and Buttons** – Create custom links to external web applications (such as a CRM) that the agent can click on in the agent details panel to access relevant info from third-party systems.

**Interaction Tabs** – Add a tab to the agent interaction panel that can host an external web app (such as a CRM) in an iframe.

**Workspaces** – External web applications (such as CRMs) can be embedded into the user app via an iframe so that agents do not have to tab into different applications to do their work.

## Integrated Call Recording and Monitoring

**Integrated Call Recording** – All calls can be automatically recorded. This is configurable per queue.

**Listen to call recordings in the browser** – A waveform display allows users to quickly move through the recording (including fast forward/rewind) and see on the waveform when the customer or agent is speaking. Only authorised users can listen to call recordings. This can include Agents be able to listen back to recordings of calls they have handled.

**Call Transcriptions** - automatic transcription of calls in historic reports and for agent evaluation.

**Sentiment analysis** - Identify interactions that contain positive or negative sentiment.

**Pause/resume call recordings** – Agents can pause call recording during sensitive parts of the call; this can also be initiated via API.

**Agent assistance** - Agents can request assistance from a supervisor.

**Call Monitoring** – Real-time monitoring – Supervisors can listen-in live, on any call in progress, via the browser.

**Call Monitoring – Agent Camp On** – Supervisors can choose to automatically listen in on every call that an agent receives without having to click on every individual call.

**Supervisor barge in** - Supervisors can join the call to assist the agent.

## User Management, Authentication and Roles

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

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

## Workforce Management

### Shifts and Rotas

- **Plan Schedules** - Allows managers to plan agent schedules and breaks, eliminating the need for spreadsheets or other tools.
- **Multi-week rotas** – Create multi-week rotas that can be assigned to agents to speed up the process of creating the schedule. For example, you may want a group of agents to work a week of early shifts followed by a week of late shifts.
- **Minimum Skill requirements** - Configure agent headcounts for each skill per 15-minute interval, per day of the week. Multiple skill requirements per group can be configured.
- **Ad hoc Shifts** - Quickly create new ad hoc shifts with the drag and drop shift designer.
- **View by day or by week** - Filter by group, agent, skill and media.

- **Breaks and Activities** - Add breaks and activities using existing busy codes.
- **Absence Planning** - Add absences such holiday and sickness.
- **Shift Publishing** - Publish shifts so that agents can only see them when they are finalised.
- **Realtime Dashboard Widgets** – View upcoming changes to the schedule on the dashboard/wallboard; view the numbers of staff that will be staffing each queue/skill over the next few hours.
- **Schedule Summary Report** – Breakdown of time spent working and in each busy code and absence type, so managers can account for agent activity.
- **Next Schedule Change Widget** - Shows the expected changes to the schedule in the coming hours.

### Shift Adherence and Conformance

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

### Agent Evaluation

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

- **Scorecard Designer** - Scorecards are used to assess agents against interaction quality requirements. Multiple scorecards can be created to assess different media, queue or skill types.
- **Scorecard Sections** - Scorecards are configured into multiple sections to help identify key areas of agent performance and group questions together.
- **Screen Recording** - Record the agent's screen alongside the call recording for both quality monitoring and governance.
- **Matrix Question** - Multiple questions with the same answer options. A comments box can be added if required.
- **Multiple-Choice Question** - Allow for single questions with differing answers. Comments can be added if required.
- **Critical Question** - Multiple-choice questions can be made Critical Questions which will score the entire section or scorecard zero if the question failed.
- **Evaluation Score** – Each question and section can be assigned a user-configurable score to allow higher weight to be given to the most important questions.
- **Evaluation Profiles** – Evaluation Profiles are used to select the interactions to be evaluated. These can be configured for specific groups, queues, skills, agents, media types, activity code or interaction result. Evaluation Profiles can be configured so that they must include a customer survey or a screen recording if required.
- **Evaluation Workflow:**
  - The evaluator pulls the number of required interactions to evaluate, based on the evaluation profile.
  - The evaluator reviews and scores the interactions, using the scorecard assigned to the evaluation profile. If screen or call recordings are available, these can be reviewed by the evaluator.
  - The evaluated scorecard is sent to the agent to review.
  - The agent reviews the evaluation and adds comments.

- The evaluator reviews the comments and either discusses these further or marks the evaluation complete.
- **Evaluating specific interactions** – Managers can evaluate specific interactions from historic call reports.
- **Extensive Reporting and Realtime Dashboards** – including:
  - **Agent Performance Report** - Number of interactions evaluated and average score.
  - **Evaluation Performance Report** - Breakdown of evaluation performances by several criteria.
  - **Evaluation Scorecard Heatmap Report** - Analysis of trends in scorecard question scores over time.
  - **Evaluation Summary Report** - Evaluation summary including score, evaluator, scorecard and interaction details.
  - **Evaluation Breakdown Dashboard Widget** - Displays a table showing the number of evaluations, the average score, the highest score and the lowest score.
  - **Evaluation Count Dashboard Tile** - Displays the evaluation count based on the configured criteria.
  - **Evaluation Performance Dashboard Widget** - Displays a bar chart on the dashboard showing the number of evaluations completed and a line chart of the average score for the evaluations. Hover the mouse over the bar to reveal a pop up showing the data for average score and number of evaluations.
  - **Evaluation Ranking Dashboard Widget** - Displays a table of agents on the dashboard ranked by their average evaluation score. The widget will update once an evaluation has been marked as Completed by a supervisor.
  - **Evaluation Score Dashboard Tile** – Shows the average evaluation score on the dashboard based on the configured criteria.

## Customer Surveys

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

- **Digital and Telephone Customer Survey Designer** – Design multiple surveys across every channel. Question types include:
  - **Customer Satisfaction (CSAT)** - e.g. “How satisfied are you with the overall experience of our service?” This is measured using a 0-10 scale.
  - **Customer Advocacy Score (CAS)** - e.g. “Would you recommend our service to your family or friends?” This is measured using thumbs, smileys, stars or text with options for 2, 3, 5 or 7 responses depending on the rating type selected.
  - **Customer Effort Score (CES)** - e.g. “How easy was it for you to solve your problem today?” This is measured using smileys, stars or text with a 5-level response rating.
  - **Rating** - e.g. for agent performance, “How do you rate how the agent handled your call?” This is measured using thumbs, smileys or stars with options for 2, 3 or 5 responses depending on the rating type selected.
  - **Single Answer** - e.g. “Was the issue resolved at the first call?” This is a text answer with options for 2 to 7 responses.
  - **Free Text** - this allows the respondent to provide more information about why they have given a particular score in a free text box (or recordings for post call surveys).
- **Web Assistant Surveys** – Survey customers at the end of every chat, embedded into the Web Assistant interface.
- **SMS and Social Messaging Surveys** – Sends a link to the customer that they can open to complete the survey.
- **Telephone Survey by IVR** – Customers can stay on the line after speaking to the agent and complete the survey in IVR.
- **Telephone survey by SMS** – Customers calling on their mobile phone can be sent an SMS at the end of the call that invites them to click on a link to complete a digital survey;
- **Survey Transcription** – For telephone surveys, free-form customer responses can be transcribed



(subject to licensing).

- **Option to opt-out of telephone phone surveys** – Customers can be told about the survey in the upfront IVR and given the option to opt out.
- **Email Surveys** – Add a link to a digital survey in the email footer.
- **Target surveys on particular queues or channels** – Choose the queues, channels that you want to run surveys on.
- **Random Selection** – Configure whether to survey all customers, or just a proportion;
- Extensive **Reporting** and Realtime **Dashboards** - including:
  - **Customer Advocacy Score** – Shows percentage of Detractors, Passives and Promoters, and the overall CAS rating.
  - **Customer Effort Score** – Shows percentage of High Effort, Medium Effort and Low Effort responses, and the overall CES rating.
  - **Customer Satisfaction Score** – Shows percentage of Negative, Neutral and Positive responses. The line graph shows the CSAT percentage.
  - **Survey Question Breakdown** - Report focuses on an individual survey question showing the number of responses. The bar chart displays the percentage of responses to each of the survey options.
  - **Survey Responses report** - Shows the raw response information, with a row per survey recipient, and columns for the Contact Centre Interaction details and each question answered. Selecting a row allows you to view the transcript of the interaction, view the survey or create an evaluation.
  - **Survey Response Feed** – Shows a real-time view on the dashboard of the free text responses that are coming in from customers.

## Dashboards

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

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

## Reporting

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

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

### Agent reports:

- **Agent Status Breakdown** - Time spent in each status type.
- **Agent Summary** - Time spent in transactional and status management activity.
- **Audit Log** - All transaction changes for each agent with date and time stamp.

- **Busy Codes** - Time spent in each busy code.
- **Concurrent Agents** - The number of concurrent and unique agent logins over time.
- **Skill Requirements** - Breakdown of skills against inbound interactions for the skill.
- **Working Time** - Breakdown of time spent on statuses such as ready, active and busy

#### Agent Evaluation reports:

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

#### Interaction reports:

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

#### Survey reports:

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

#### Workforce Management reports:

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

## Integrations

### Working with the Liberty platform – rapid application development and RPA

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

- **Workspaces** – Embed a Create app into CX via a Workspace tab.
- **Quick Links** - Add custom links to Create Apps, Create pages and RPA Bots on the Interaction Details panel, pass in interaction data such as the caller's telephone number to help contextualise the integration.

- **Webhooks and APIs** – Build a fully-featured CRM integration using webhooks and the REST API.
- **Transcript Iframe** – Embed interaction transcripts into a Create app.
- **Direct JavaScript Integration** – Create Apps running inside Converse CX can communicate over JavaScript to provide a richer experience.

### Working with Microsoft Teams

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

### APIs and Webhooks

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

#### Supported APIs:

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

#### Supported Webhooks:

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

### Security:

APIs are secured by granular API Tokens.

## Extend your Liberty Converse CX Solution

Liberty Converse CX is part of the wider Liberty platform. The Liberty platform extends beyond robotic process automation by incorporating options such as:

- Rapid application development with **Liberty Create** – an enterprise low-code application development platform that enables transformation of processes, deployment of case management workflows and delivery of digital experiences that make lives better for employees and customers.
- With intelligent AI powered **Liberty RPA** (Robotic Process Automation), you can streamline your processes and boost efficiency. Liberate your people to use their talents better by releasing them from time-consuming, mundane, repetitive tasks.
- Automate intelligently with **high-impact AI** (the Liberty platform is infused with business-ready AI) – putting safe and simple-to-use capabilities in your hands to accelerate workflow and energise engagement.

# What is Liberty IDP (Intelligent Document Processing)?

Liberty IDP is an AI-powered Intelligent Document Processing solution designed to automate, optimise, and scale document-driven workflows across organisations. It enables the rapid digitalisation of high-volume, low-complexity administrative processes that traditionally rely on manual handling of emails, paper forms, PDFs, and scanned documents. By removing the need for repetitive data entry and manual classification, Liberty IDP delivers measurable efficiency gains, reduces operational costs, and allows teams to focus on higher-value, customer-centric work.

Unlike traditional document capture or rules-based automation tools, Liberty IDP goes beyond simple digitisation. It uses advanced artificial intelligence to understand documents, extract meaning from unstructured content, and apply logic and conditions to trigger downstream workflows. This enables organisations to move from isolated document handling to fully automated, end-to-end digital processes that integrate seamlessly with existing systems and wider automation platforms.

## Intelligent Automation for Document-Heavy Processes

Liberty IDP is purpose-built to handle unstructured and semi-structured data at scale. It processes a wide range of document types, including customer correspondence, invoices, forms, images, and emails, automatically identifying what each document is and what information it contains. Using machine learning and natural language processing (NLP), the platform can recognise key data fields, understand context, and suggest or extract relevant values without the need for rigid templates or manual intervention.

This intelligence allows Liberty IDP to significantly reduce the time and effort required to manage document-heavy workflows. In typical use cases, organisations can save up to 97% of processing time by automating document handling, improving turnaround times for activities such as customer onboarding, claims validation, and accounts payable processing. At the same time, accuracy is improved by removing the risk of human error associated with repetitive manual tasks.

## How Liberty IDP Works

Liberty IDP follows a structured yet flexible processing lifecycle that supports automation from ingestion through to action. Documents are first captured from multiple channels, including email, digital portals, and scanned paper sources. The platform's AI-driven classification engine then automatically identifies document types and routes them appropriately without manual sorting.

Once classified, Liberty IDP uses OCR and NLP to extract key data fields from each document, even when the layout or format varies. Extracted data is validated against business rules and conditions to ensure quality and consistency, with exceptions flagged for human review where required. Finally, validated data is integrated into downstream systems or workflows, triggering automation in low-code applications, RPA processes, CRM platforms, or ERP systems. Built-in analytics and reporting provide visibility into performance, bottlenecks, and continuous improvement opportunities.

## Core Capabilities and Benefits

Liberty IDP delivers a comprehensive set of capabilities that support enterprise-grade document automation:

- **Automated document capture and classification** across multiple channels and formats
- **AI-driven data extraction** from structured, semi-structured, and unstructured content
- **Validation and quality control** using configurable business rules
- **Seamless integration** with workflows, CRM, ERP, RPA, and low-code platforms
- **Scalability and flexibility** to handle fluctuating document volumes
- **Operational insights** through analytics and KPI reporting

Together, these capabilities enable faster processing, improved data consistency, reduced operational risk, and a more resilient digital operating model.



## Common Use Cases Across the Organisation

Liberty IDP supports a wide range of business functions and public-sector use cases. It is commonly used to automate citizen, customer, or patient correspondence by classifying incoming requests, digitising paper forms, and routing information to the correct teams or systems. In finance and procurement, it accelerates invoice and order processing, supports budget reporting, and manages supplier documentation. HR teams use Liberty IDP to process employee records, track policy acknowledgements, and automate payroll documentation.

The platform also plays a key role in regulatory and compliance-driven environments, supporting activities such as FOI request handling, audit validation, and records management. In planning, environmental services, and public consultation scenarios, Liberty IDP streamlines application processing, manages large volumes of documentation, and analyses feedback at scale.

## Part of a Wider Automation Ecosystem

Liberty IDP can operate as a standalone Intelligent Document Processing solution or as part of the wider Liberty platform. When combined with Liberty Create, Liberty RPA, Liberty Converse CX, and Liberty Spark, organisations can extend document automation into full process orchestration, customer engagement, and continuous process improvement. All Liberty components share a common governance framework, security standards, and integration-ready architecture, ensuring compliance, resilience, and consistency across the digital estate.

This modular approach allows organisations to adopt Liberty IDP incrementally, addressing immediate document-processing challenges while laying the foundations for broader, AI-driven digital transformation.

## What is Liberty Spark?

### Introduction

Liberty Spark is a process discovery, mapping, and optimisation platform designed to help organisations clearly understand, document, and continuously improve the way work gets done. It removes the traditional complexity associated with process documentation by providing an intuitive, collaborative, and governed environment where processes are easy to create, easy to maintain, and easy to consume across the organisation. Spark addresses a common organisational challenge: processes are often hard to find, quickly become outdated, and lose context once project teams disband. Liberty Spark ensures that process knowledge remains current, accessible, and valuable over time.

By centralising process information with strong governance, reporting, and version control, Spark improves accuracy, consistency, and engagement. Organisations using Spark benefit from faster time to value, immediate return on investment, and reduced administrative overhead associated with process improvement initiatives. Spark acts as the foundation layer for digital transformation, enabling organisations to identify inefficiencies, reduce duplication, eliminate errors, and prepare processes for automation.

### What is Liberty Spark?

Liberty Spark brings essential processes to life through a connected and visual approach to process discovery and improvement. It enables organisations to rapidly document, analyse, and refine processes at scale in a way that is accessible and understood by both business and technical users. Rather than static documents created for one-off compliance or project needs, Spark supports living processes that evolve as the organisation changes.

Spark empowers process owners and governance teams to take control of their process landscape, ensuring that documentation reflects real operational practice. It supports a culture of continuous improvement by making processes visible, measurable, and actionable, while also providing a clear pathway to automation and application development.

### Process Discovery and Visual Insight

Liberty Spark supports comprehensive process discovery by helping organisations identify variations, dependencies, inefficiencies, and hand-offs across end-to-end processes. Rich visualisations provide immediate insight into how work flows through the organisation, making it easier to understand decision points, resource utilisation, and bottlenecks.

These visual insights enable stakeholders to move beyond anecdotal understanding and base improvement decisions on shared, clearly articulated process models. By visualising both current-state and future-state processes, Spark helps organisations align improvement initiatives with strategic objectives.

## Intuitive and Collaborative Process Mapping

Spark provides a highly intuitive, drag-and-drop process mapping interface that enables users to create detailed process maps quickly and consistently. Hierarchical modelling allows complex processes to be broken down into manageable components, improving clarity and readability.

Collaboration is built into the platform, enabling multiple stakeholders to edit, comment on, and approve processes in real time. This ensures alignment between business users, IT teams, and governance functions, while preserving context and ownership. Collaborative workshops can be conducted directly within Spark, reducing reliance on disconnected tools and static documentation.

## Customisation and Flexibility

Liberty Spark allows organisations to tailor process maps to their specific standards, terminology, and operating models. Labels, annotations, and structures can be customised to clearly communicate process details and ensure consistency across the organisation.

As business needs evolve, Spark makes it easy to update and adapt process documentation, ensuring that process libraries remain relevant and accurate over time. This flexibility supports both incremental improvement and larger transformation initiatives without disrupting day-to-day operations.

## Analytics, Optimisation, and Process Health

Spark includes analytics and reporting capabilities that provide insight into process performance, ownership, and health. Metrics such as cycle time, throughput, dependencies, and update frequency help organisations understand how effectively processes are being managed and where improvement efforts should be focused.

A dedicated process health capability enables organisations to assess the quality and maturity of their process documentation, including consistency with standards, ownership, engagement levels, and how actively processes are being improved. This ensures that process management itself remains effective and sustainable.

## AI-Driven Capabilities

Liberty Spark incorporates AI-driven tools that accelerate process creation, understanding, and optimisation. The Process Creator enables users to generate process diagrams from simple prompts, text documents, or images, automatically producing structured process models following standard rules.

The Process Assistant allows end users to query the process library using natural language, receiving summarised answers along with direct links to the relevant processes. The Process Optimiser supports process editors by identifying improvement and automation opportunities, helping organisations move from documentation to tangible operational gains.

## From Process to Automation

Spark plays a critical role in bridging the gap between process design and execution. Using the App Designer capability, Spark can propose application designs based on future-state processes. These designs can be imported directly into Liberty Create to accelerate low-code application development, or exported for documentation and review.

This seamless connection ensures that automation and application initiatives are grounded in well-defined,

agreed processes, reducing risk and increasing delivery success.

## Security, Compliance, and Accessibility

Liberty Spark prioritises security and compliance through robust access controls, encryption, audit trails, and version management. It supports organisations in demonstrating compliance with regulatory and quality frameworks such as ISO and ITIL.

The platform is accessible from anywhere, enabling remote and distributed teams to collaborate effectively. Its scalable architecture ensures high performance and reliability, even as process libraries grow in size and complexity.

## A Foundation for Continuous Improvement

Liberty Spark can operate as a standalone solution or as part of the wider Liberty platform. This modular approach allows organisations to start with process discovery and incrementally extend into automation, communications, intelligent document processing, and customer engagement as needed.

By providing a clear, governed, and actionable view of how work is done, Liberty Spark forms the essential foundation for operational excellence, automation, and digital transformation across the enterprise.

# Necall Project Delivery Methodology

## Your critical path to project success.

Project Managers are the key drivers of successful migrations, implementations, deployments and transformations.

They are the fabric through which effective communications, coordination and collaboration come together to create positive change, and Core's Project Management team have the experience and expertise to lead that change.

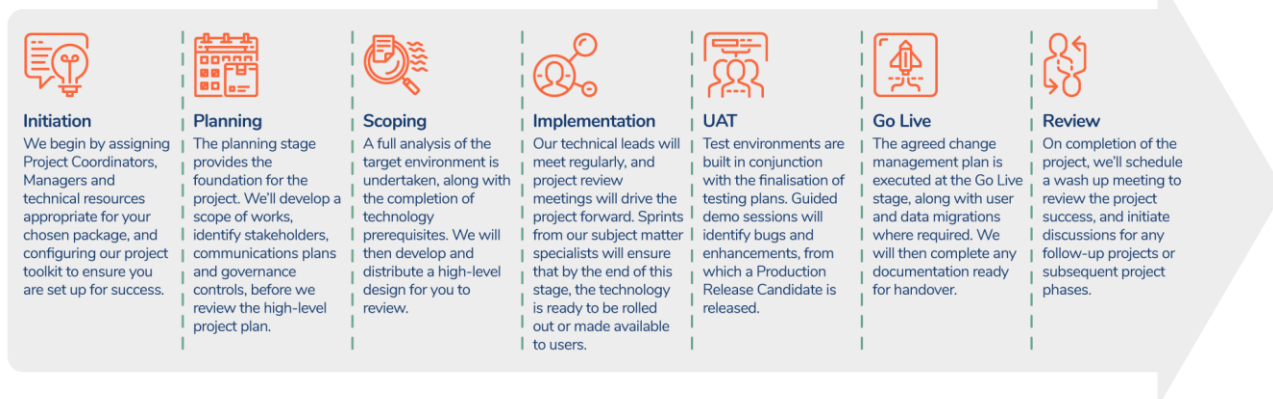
Delivering innovative, business transformation through technology and solutions can often create complex challenges. Effective planning, coordination and communication are key factors in any successful project, and our Project Management services have been developed to drive that success for you, so you can do focus on what you do best.

Whether we are managing small projects or complete programs, our experienced project managers and coordinators bring their extensive knowledge, skills, and tried and tested methodologies to the team, ensuring your project is delivered on time, within budget, and to specification.

For a true professional services engagement, we have a tried and tested approach that we have developed over 30 years to ensure we deliver consistent high value outcomes. Our approach is rooted in the Agile development method; and leverages rapid low-code development techniques to provide working automation solutions up to 78% faster\* than conventional development methods.

## How our Project Management works

Regardless of which Project Management package you choose, our team will deliver your project with the passion, energy, and expertise our customers have come to recognise as Core's professional and responsive culture.



## Project Management by Core – Benefits

- Core's Project Management team are experienced in driving positive change through technology
- Our project methodology combines the stringent coordination of PRINCE2 with the fluidity of Agile practises
- Our Project Management team works with specialists across the technology spectrum every day, and understand the challenges associated within each function; and
- With three levels of Project Management to choose from, you can be sure Core can deliver the level of management your project requires.

## Our packages

- *Project Coordination:* Project Coordination provides a basic level of governance designed for short term engagements, to ensure clear communications and successful management of project risk. Our coordination approach provides the minimum set of controls necessary to achieve a successful implementation across the project.
- *Project Management:* Our dedicated Project Manager will collaboratively lead the planning and production of the project deliverables, whilst reporting regularly to key stakeholders on the project health, scope, schedule and the status of key risks, issues, dependencies and decisions.
- *Custom Project Management:* Designed to support programs of work, and projects that are large, complex, high risk, contain multiple streams, or are conducted in regulated industries. Custom Project Management extends our standard project management offering with additional controls to manage risks and a more robust communications framework.

## Netcall Support

Support for the hosted Netcall platform follows Standard Service Hours: Monday to Friday, 9am–5.30pm (UK time), excluding UK public/bank holidays.

This support does not extend to applications running on the platform or content such as views, reports, configurations, or the customer's proprietary technology and internal infrastructure.

Critical faults on the platform (excluding deployed on-premise deployments) are addressed 24/7/365.

## Pricing

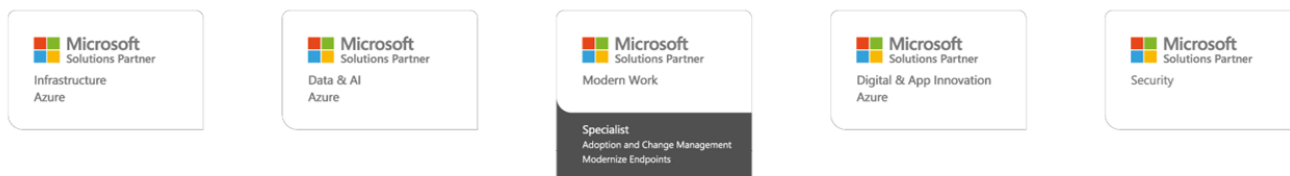
Please see our uploaded Pricing document. Invoiced monthly.



## About Core

**We have a long and distinguished record of supporting organisations with cloud first strategies, implementing successful, efficient, and safe migrations to the Cloud, driving value, productivity and security.**

As a Microsoft Solutions Partner with more than three decades of experience delivering Microsoft solutions, we understand how to unleash potential and unlock value for our customers who have invested in Microsoft technology. We help improve the transition from E3 to E5 licensing, enabling enhanced security and mobility capabilities for our customers, without the need for third-party solutions.



Your organisation deserves reliable, trustworthy, and responsive expert IT support so you can focus on what you do best. With our 35-year history, your business is in capable and experienced hands. In 2001, Core deployed the first installation of SharePoint in the UK and have continued to deliver and support Microsoft products and solutions, leading businesses to superior levels of productivity, security, and growth. From the early operating systems and intranet solutions to the advanced productivity and security tools that organisations adopt to seek efficiencies, Microsoft solutions now touch tens of millions of lives daily; and Core helps to optimise solutions for your desired outcomes.

Core is a Microsoft Advanced Partner and has been delivering Microsoft solutions for nearly three decades; transforming, enabling, and securing our customers with the evolution of Microsoft business technologies across the UK. Our focused expertise and experience, along with our long-standing relationship with Microsoft, means that when our customers invest in world-class transformation products, they are delivered by our team of leading experts, and managed personally, with competence.



### Customers

We put our customers first, taking responsibility for our actions.



### One Core

We recruit, develop, and retain the best talent in a supportive environment to best serve our customers.



### Responsiveness

We are flexible, approachable, and responsive to our customers' needs.



### Expertise

We are professional and constantly strive to achieve excellence for our customers, peers, and partners.

Core works in a spirit of partnership. We find that this helps us achieve the best outcomes for our customers, which supports our target of building long term, positive and trusting relationships with our customers. This includes offering as much value as possible and finding new way to maximise on your investment. We are proud to be:

- Winner of CRN MSP of the Year 2023. 2023 and 2024 Best Company to Work For (sub £100m) – CRN
- Cyber Essentials Plus and ISO 27001 Certified.



**WINNER**  
CSP of the Year

**CRN  
SALES  
AND  
MARKETING  
AWARDS 2023**

**WINNER**

Best Company  
to Work For  
(Sub £100m turnover)

**CRN  
SALES  
AND  
MARKETING  
AWARDS 2024**

**WINNER**

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Crown  
Commercial  
Service  
Supplier