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Service Definition – Liberty for Health

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1 Introduction

Liberty for Health is a unified platform designed to improve patient access through digital engagement, intelligent scheduling and optimise clinic utilisation. It combines **digital self-service** and **rules-driven booking automation** to reduce DNAs, accelerate rebooking, and maximise capacity usage across diagnostics and outpatient services.

Key Outcomes

- Improve patient experience through proactive Digital Engagement
- Low Time to Value and provable ROI
- Reduce DNAs through predictive AI modelling, proactive reminders and patient self-service.
- Optimise clinic utilisation with smart slot management and short notice fill.
- Streamline scheduling for diagnostics and outpatient appointments.
- Improve patient experience with secure, accessible digital channels.
- Enable measurable operational improvement through real-time dashboards and KPIs.

2 What is Liberty for Health?

Liberty for Health enables patients to manage their appointments through secure self-service, while applying intelligent scheduling rules to maximise capacity and reduce DNAs. By automating reminders, rebooking workflows, and eligibility checks, Liberty for Health streamlines operational processes, improves access, and delivers measurable efficiency gains—all within a clinically safe, accessible, and integrated solution that works seamlessly with existing hospital systems.

Digital Patient Engagement

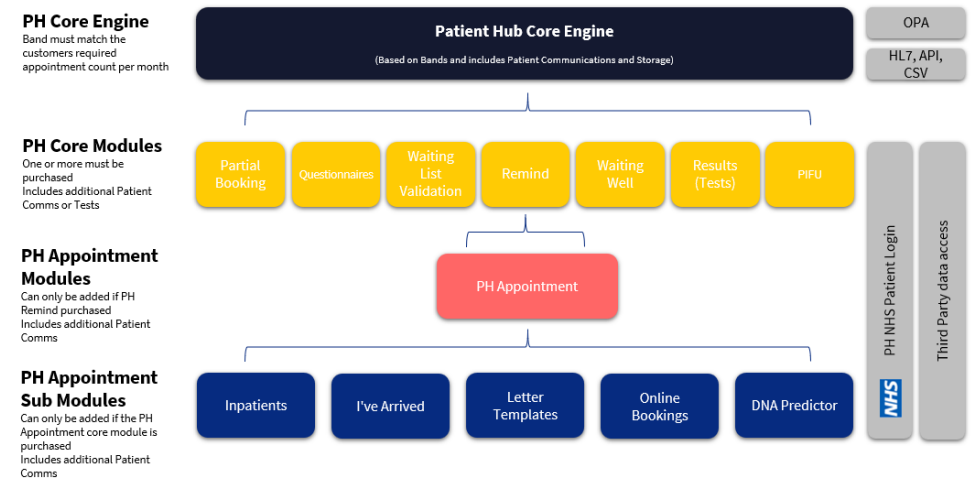
- **Digital Letters and Messaging:** NHS App, SMS, email, and paper fall back with delivery tracking.
- **Self-Service Portal:** Secure login for appointment view, confirm/change/cancel, directions, prep instructions, questionnaires, and contact consent capture.
- **Preferences and Accessibility:** Language, channel, accessibility support, and reasonable adjustments recording.
- **Workflow Automation:** Rules engine for reminders, escalations, DNA follow-up, and short-notice fill.
- **Content Management:** Clinic-specific content, pre-procedure instructions, and policy links.
- **Audit and Reporting:** Comprehensive reporting including message delivery status, engagement rates, worklists, and patient activity logs.
- **Modular Design:** Enables NHS organisations to implement digital patient engagement solutions, whether a full end to end patient solution, to complement existing technologies, or expand capabilities over time.

Liberty for Health currently comprises three primary integrated components: Patient Hub, Diagnostic Booking and Clinic Utilisation. These can either be purchased and delivered separately as stand-alone solutions or combined as an integrated patient engagement platform. The solution is being constantly developed with additional features and functions being applied.

2.1 Patient Hub structure

Patient Hub is provided with a Core Engine plus a series of mandatory and optional modules (see Figure 1). The Core Engine provides the foundation of the solution, including secure and accessible digital interfaces for patients and trust staff and integrations to trust systems. Patient Hub modules provide the key patient engagement functionality and workflow supporting full patient journeys.

Figure 1 - Liberty for Health module structure



2.2 Patient Hub modules

Patient Hub consists of a series of core modules and Appointment sub-modules that deliver the functionality required to deliver exceptional patient engagement. By providing this modularity we enable customers to create the solution to meet the specific needs.

- **Remind:** Helps to reduce the number of patients missing their appointments to improve DNA rate (Did Not Attend). Send patients reminders about their upcoming appointments using their preferred channel, NHS App, SMS, email, or voice call¹.

¹ Voice calling requires customers to purchase or be already licenced for Netcall's Liberty Converse or Converse CX contact centre software. Information and pricing regarding Converse CX are available on GCloud 15 Digital Marketplace or can be provided on request.

- **Waiting Well:** Supports Trusts in managing referral-received patient engagement. Create workflows to engage with patients from this initial referral and to promote health and wellbeing during their waiting period.
- **Waiting List Validation:** Whilst on a waiting list, proactive contact is made to patients to confirm if their appointment or treatment is still required, reporting this gathered information to the Trust staff, and resulting in reduced contact into patient booking services.
- **Questionnaires:** Design pre- and post-appointment surveys, capturing and reporting on the responses provided by patients. Questionnaires can be defined by the Trust with support for multiple response types. Questionnaires can be manually sent to lists of patients or will also form part of an appointment workflow such that a survey can be sent x days before or after an appointment.
- **Partial Booking:** Notify patients when it is time for them to book their appointment and enable the patient to choose and agree a slot that better suits them, increasing their likelihood to attend.
- **Results:** Designed to reduce unnecessary contact to the Trust and access test results securely, Patients are notified when their test results are ready allowing them to then view these digitally.
- **PIFU:** Digitise the PIFU process and accelerate the transition of more patients onto follow up pathways. Patients are informed of this via existing Patient Hub notifications, providing a process to request a follow-up with a clinician, capture of information for assessment, all without recourse to their General Practitioner.
- **Appointments:** Provide detailed information to patients regarding their outpatient's appointment, including digital letters, specific information regarding the appointment and treatment being provided, useful content

about visiting the hospital, and the ability to confirm their intent to attend, re-book or cancel. Automated callbacks for re-book and cancellation requests can be processed to booking agents using Liberty Converse or Converse CX, driving efficiency through reductions in call handling times and improved clinic utilisation.

- **Inpatients:** Adding support for inpatient procedures providing detailed information to patients regarding the treatment they will receive. As with Appointments, patients will access specific content including digital letters and be able to confirm their intent to attend.
- **Letter Templates:** Rationalise all current appointment letters and enable support for digital letters in multiple accessibility and language choices. Trust users are empowered to create and amend letter templates including any associated appointment specific materials. Supporting integrations to in house print services and multiple third-party print and post providers
- **PIFU:** Digitise the PIFU process and accelerate the transition of more patients onto follow up pathways.
- **Online Booking:** Support for patients to book, amend and cancel their own appointments online through integration with the Trust PAS/EPR. Within the Patient Hub Appointment workflow, based on rules defined, new and/or changes to booked appointments are updated directly into your PAS/EPR².
- **DNA Predictor:** AI models analyse data, including the Trust appointment attendance records, to predict and minimise patient's likelihood to DNA. Assigning DNA risk profiles and adjusting the Patient Hub contact methods and frequency based on these predictions.

² Online Booking is subject to scoping and the provision by the Trust of all third-party APIs and services to support bi-directional integration.

2.3 Diagnostic Booking

- **Multi-Modality scheduling:** Support for scheduling of slots for Imaging and other diagnostic and modality services.
- **Patient self-serve on-line booking:** Integrated with the clinical systems, referred patients are automatically sent an SMS to access and securely login to the on-line patient booking system. Completion of eligibility checks and self-service booking with safe slot allocation.
- **Integration to clinical systems:** Write back booked slots into your RIS and other clinical systems using secure integrations.

2.4 Clinic Utilisation³

- **Smart Slot Management:** Define contact campaigns to support automated patient contact and drive more efficient filling of available clinic slots.
- **Integrating patient data:** Simply upload CSV files into your campaigns containing only the contact data for those relevant patients as extracted from your waiting lists. Lowering deployment timescale and complexity.
- **Scheduled patient contact:** Integrated to Netcall's Liberty Converse or Converse CX solution, virtual agents will call patients on their mobile or landline numbers to confirm the identity of the patient, provide information regarding the appointment, and transfer them to a Trust booking agent to complete the booking.
- **Contact workflow:** Patient contact rules including the sending of text messages to better inform patients before and during active Clinic Utilisation campaigns.

³ To operate Clinic Utilisation it is a requirement for customers to purchase or be already licenced for Netcall's Liberty Converse or Converse CX contact centre software. Information and

2.5 Accelerating efficiency and productivity with Liberty for Health

Liberty for Health transforms how NHS organisations manage outpatient, inpatient and diagnostic services by combining **digital patient engagement** with **intelligent clinic utilisation tools**. By automating appointment workflows, enabling patient self-service, and applying rules-driven scheduling, the platform eliminates manual bottlenecks and reduces administrative overhead.

Key Efficiency Drivers:

- **DNA Reduction:** Automated reminders and self-service rebooking cut missed appointments, freeing capacity for additional patients.
- **Smart Slot Management:** Dynamic hold/release policies and short-notice fill ensure every available slot is utilised.
- **Paperless Communication:** Digital letters and messaging reduce print costs and speed up patient engagement.
- **Process Automation:** Built-in rules engine streamlines triage, prep checks, and eligibility validation, reducing staff workload.

The result is **higher throughput, lower cost-to-serve, and improved patient experience**, all delivered through a single, clinically safe platform that integrates seamlessly with existing EPR, PAS, and modality systems.

pricing regarding Converse CX are available on GCloud 15 Digital Marketplace or can be provided on request

2.6 What are the benefits of Liberty for Health?

Improve patient Experience Give patients control and convenience with secure, accessible digital channels. From appointment confirmations to pre-procedure instructions, Liberty for Health makes the process simple, transparent, and stress-free.

Maximise Clinic Utilisation Ensure every available appointment slot is filled with intelligent scheduling and short-notice optimisation, reducing wasted capacity and improving throughput.

Cut DNAs and Missed Appointments Automated reminders and easy self-service options empower patients to manage their appointments, dramatically lowering Did Not Attend rates.

Accelerate Backlog Recovery Real-time dashboards and automated rebooking workflows help you tackle waiting lists faster and meet RTT targets with confidence.

Enhance Patient Experience Offer secure, accessible digital channels that make it simple for patients to confirm, change, or cancel appointments—anytime, anywhere.

Reduce Administrative Burden Streamline processes with automation for triage, prep checks, and eligibility validation, freeing staff to focus on patient care.

Deliver Cost Savings Go paperless with digital letters and messaging, cutting print and postage costs while improving speed and efficiency.

2.7 Proven in practice:

The Liberty for Health platform combines mature, widely deployed technologies for digital patient engagement and clinic utilisation, which have been successfully implemented across multiple Trusts and Health Boards. These deployments have demonstrated:

- **High patient engagement and response** supporting improved patient experience and operational efficiencies.
- **DNA reductions of up to 30–40%** through automated reminders and patient self-service.
- **Improved clinic utilisation** with short-notice fill workflows and dynamic slot optimisation.
- **Faster backlog recovery** using real-time capacity dashboards and automated rebooking.
- **Operational savings** from reduced manual administration and paper-based communication.

Liberty for Health leverages the same clinically safe, DCB0129/0160-compliant architecture and integration patterns that are already live in NHS environments, ensuring reliability, scalability, and compliance.

3 How does Liberty for Health work?

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

Deployment and operations:

- Secure UK-based cloud hosting on HSCN Amazon Web Services (AWS) with ISO and Cyber Essentials certifications.
- Hosting resources sized to customer requirements and to optimise performance.
- Disaster recovery/failover: automated backups, health checks and DNS-controlled failover between primary and secondary hosting.

Integrations:

- NHS App integration to support app notification and messaging, extending access for patients to digital services, and aligning to the NHS England roadmap.
- Secure on-premises systems integration supported via Liberty On-Premise Adaptor (OPA)
- Integration methodologies: support for HL7/FHIR/CSV/REST, secure batch/file drops, event-based hooks.
- Open API approach to support integrations with existing Trust systems including:
 - EPR/EMR/PAS & TIE: Appointments, demographics, encounters, alerts.
 - RIS/LIS & Modality Systems: Orders, schedules, results references, where applicable.

- Messaging & Print: NHS SMS, email gateways, and print fulfilment partners
- Analytics/BI: Data exports to Trust BI; embedded dashboards.
- Document and data import/export, IDP for intelligent capture.
- Directory & SSO: Integration to Entra ID (Azure AD) SSO and role-based access controls.
- MPI/Identity: NHS number, unique identifiers, deterministic/probabilistic matching.

Security, governance and accessibility:

- Role-based access, audit trails and configuration guardrails for safe collaboration.
- Support for penetration testing, vulnerability scans and Operational Acceptance Testing.
- Accessible UI aligned to WCAG; accessibility testing and reporting available.
- Clinically safe, DCB0129/0160-compliant, and fully integrated with your existing EPR, PAS, and diagnostic/modality systems for seamless adoption.

4 Extending patient experience with Netcall's Liberty Converse CX

Liberty for Health applications are fully integrated into Liberty Converse CX. **Liberty Converse CX** is a cloud contact centre for voice and digital channels that brings **conversation, automation and action** together in one place.

Liberty Converse CX offers advanced features and capabilities to help enhance patient interactions with the Trust, streamline operations, and improve overall efficiency and cost reduction.

- **Self-Service Options:** Enhanced self-service capabilities, allowing patients 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 patients 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.
- **Omni-channel 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 patients and your patient service teams.
- **Integration with Liberty for Health:** Seamless integration with Liberty for Health solutions to provide teams with a comprehensive view of patient information at point of contact, enabling personalised interactions, and supporting the application workflows, for example connecting patients in

real-time from the Patient Hub patient interface to enable a re-booking of their appointment.

Netcall customers with existing Liberty Converse licencing may already be able to support integrations to Liberty for Health applications. Information and pricing regarding Converse CX are available on GCloud 15 Digital Marketplace or can be provided on request.

5 AI Capabilities in Liberty for Health

Liberty for Health utilises key AI features such as predicting **DNA Risk**, identifying patients most likely to miss appointments and intervene early to reduce wasted capacity, and **Automated Patient Engagement** enabling conversational messaging for confirmations, reminders, and FAQs—reducing manual workload.

AI Enhancements form part of the Netcall continual improvement of our solutions and when developed will extend the functionality of Liberty for Health. Use of AI is being considered across multiple aspects of the Liberty for Health solutions, examples include **optimised clinic utilisation, eligibility and safety checks, and capacity forecasting.**

As part of the wider Liberty platform, additional AI solutions can be purchased. Details on these capabilities are available on GCloud 15 Digital Marketplace or can be provided on request.

Key Liberty AI capabilities:

- **Ask Liberty AI:** Configure applications to analyse content and return answers to user questions using defined personas and moderation settings.

This enables embedded virtual assistants that make information more accessible and reduce reliance on staff for routine queries.

- **Knowledge management:** Automatically group related data and documents into dynamic collections. Liberty AI learns from these collections to provide accurate, curated answers via an integrated chat feature—using Ask Liberty AI—reducing pressure on teams and improving response times.
- **NLP services:** Apply Natural Language Processing tools to automate text-based tasks, including:
 - Sentiment Analysis to interpret tone and feedback.
 - Text Summarisation to condense lengthy communications.
 - Keyword Extraction to identify and store key information.
 - Text Enhancement to correct and refine written content.
 - Language translation.
- **Machine Learning and Predictive Models:** Build custom predictive models within Liberty AI using your own datasets. These models allow organisations to predict outcomes, automate decisions and improve operational efficiency without complex coding. Supported model types include:
 - Data classification
 - Data regression
 - Text classification
 - Text regression
 - Time series forecasting.

6 Delivery Services

Netcall provides Professional Services to support Liberty for Health projects. The mix of roles depends on scope, technology, configuration and delivery method and quoted in line with the SFIA Rate Card. Typical implementations take 4-12 weeks and include the following activities:

- Project Mobilisation
- Technical Infrastructure and Integration
- User Acceptance Testing and Training
- Preparation for Go-Live/Go-Live
- Early Lifecycle Support (ELS) and Onward Rollout.

6.1 Onboarding

On-boarding services includes the following deliverables:

Welcome documentation:

- Project initiation and establishing project governance
- Initial data protection impact assessment
- Netcall Community registration and access to eLearning.

Infrastructure operations:

- Commissioning hosting environments and Liberty for Health applications
- Providing networking support to establish connectivity to third party resources
- Establish billing mechanisms and milestones
- **Training:** Liberty for Health training is provided as self-paced eLearning.

6.2 Engagement Management

Engagement services are aimed at supporting the user to ensure successful delivery of their project. These services are offered on an annual basis to support for ongoing services. Engagement typically includes the following:

- Stakeholder engagement to ensure successful introduction and acceptance of the Liberty for Health solution and all associated services
- Provide an annual success plan including support for on-boarding staff and supporting the successful deployment of the solution
- Support the development of ideas for the application/service roadmap
- Quarterly reporting and account meetings to understand service performance metrics and proposed improvement plans.

6.3 Integration Services

Typical activities included in these services and where applicable are:

- Liberty On-Premise Adaptor (OPA) setup and integration to applicable Trust systems
- Single sign on for user access
- Converse / Converse CX integration
- Integration (where applicable) to any other third-party interface including print service provider, SMS and email gateways, and the NHS App.

6.4 Delivery Services

Supporting the initial configuration of your Liberty for Health solutions, including discovery, setup of the agreed configuration, and supporting activities for your user acceptance testing (UAT).

6.5 Operational Acceptance Testing

Operational Acceptance Testing (OAT) includes the primary services required for service acceptance and pre-go live services including:

- Support for third-party security checks (penetration testing and vulnerability scans)
- Operational failover and recovery testing.

6.6 Project Management

Project Management is responsible for the delivery of the contracted obligations and overall solution/services to agreed specification/scope, quality, budget and time.

Project management runs across the project lifecycle and is responsible for managing issues, change requests, risks and dependencies and reporting on progress at agreed intervals and escalating any items which present a risk to the project's success.

6.7 Training

All customer users have access to online training via the Netcall Academy. eLearning courses and programmes support self-paced learning based on the user's role.

7 Standard Support

Netcall provides a service desk through which all incident and service requests can be raised, together with a fault resolution service.

These requests are made via:

- Phone: Call the Service Desk directly on 0330 363 0300
- Email: to support@netcall.com, or
- Submission via the [Netcall Community Support Portal](#).

Our dedicated support team staffing our Service Desk comprises:

- 1st/2nd line team, skilled in the platform and software user-support, diagnosis, advanced application troubleshooting, upgrades and configuration.
- Escalation is to dedicated resolver groups and/or 3rd line team experienced with in-depth troubleshooting.
- For higher level analysis at the software debug level, the support team escalates to a software development engineering team.

Netcall's support personnel are trained to support the full range of Cloud Hosted solutions offered by Netcall.

Netcall's service desk processes all requests in accordance with ITIL Incident Management Practices, which are embedded within the Netcall helpdesk.

Netcall logs, categorises and prioritises each incident within the initial triage process according to the agreed priority definitions, in consultation with the customer. Netcall will use reasonable endeavours to correct material, reproducible and documented errors in the Cloud Hosted solution (whether by fix, workaround or new release). All reported incidents are prioritised according to the following definitions and associated matrix.

Impact

High: Total loss (unavailability) of the service, or suspected information security issue, or data breach has been identified.

Medium: Service operable but with loss of substantial system functionality or performance, but workaround available.

Low: Minor or cosmetic issue with no material impact to service operation.

Urgency

High: Critical business operations cannot function.

Medium: Critical business operations are operating in limited manner.

Low: Business operations not materially impacted.

Having assessed the impact and urgency of an incident, the Priority of the incident is allocated based on the following matrix:

Table 1 - Priority levels by impact and urgency

		Impact		
		High	Medium	Low
Urgency	High	P1	P2	P3
	Medium	P2	P3	P4
	Low	P3	P4	P4



The following table shows the target response and resolution times based on the Priority:

Table 2 - Incident Response and Resolution Targets by Priority

Priority	Operating Hours	Incident Response Target	Incident Resolution Target
P1	24/7	15 minutes within Operating Hours	6 Operating Hours
P2	Standard Service Hours	15 minutes within Operating Hours	2 Business Days
P3	Standard Service Hours	4 Operating Hours	10 Business Days
P4	Standard Service Hours	4 Operating Hours	20 Business Days

All response and resolution targets are based on time during Operating Hours and are estimates which Netcall is obliged to use reasonable endeavours to achieve.

Operating Hours means the time period during which incidents will be actively worked upon and which is used for the purposes of measuring performance against incident resolution and response targets.

Standard Service Hours are (UK local time) Mon-Fri 08:00-18:00 (exc. UK bank holidays).

Support and Maintenance Services only covers the standard Cloud Hosted solution and do not cover customer created applications (including applications built by Netcall on customer’s behalf) and/or customer’s own technology and/or internal infrastructure, nor does it provide free training and/or provide consulting on customer created applications (including

applications built by Netcall on customer’s behalf) and /or content such as views, reports, configurations and/or third-party technologies and/or services.

8 Extend your Liberty Solution

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

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

Optional extensions include:

- Rapid application development with **Liberty Create** – an enterprise low-code application development platform that enables transformation of processes, deployment of case management workflows and delivery of digital experiences that make lives better for employees and customers.
- **Jadu** helps organisations deliver accessible digital services through web content management, online forms and customer relationship management tools that require no coding.
- 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.
- 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.
- Analyse, understand and manage business processes with **Liberty Spark** – the effective and connected way to rapidly document, analyse and

continuously improve business processes at scale. Accessible and understood by everyone in an organisation.

- Turn unstructured content into structured, usable data – fast with **Liberty IDP**. With our AI-powered intelligent document processing solution, that data can then drive applications, trigger workflows and power smarter decisions across the Liberty platform.
- No longer worry about keeping your contact details up to date, secure and efficiently managed with our **Directory**. As a secure, centralised digital address book, it stores, manages and organises up-to-date contact details for employees, sites, and departments.
- Streamline and optimise demand management in social care with **Liberty for Social Care**. By leveraging advanced technology and AI-driven insights, it empowers local authorities to manage resources efficiently, provide proactive care, and enhance communication with citizens.

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

9 Industry / analyst recognition

9.1 Industry Recognition:

- **Health Tech Awards 2024:** University Hospitals Sussex Foundation won *Partnership of the Year* for work on Liberty Create based application for Waiting List Validation
- **HSJ Digital Awards:** digital innovator of the year - The Rotherham Hospitals were shortlisted for their transformation work using Netcall's diagnostic booking software
- **HSJ Awards:** Patient Engagement and Experience Initiative of the Year – University Hospitals of Sussex shortlisted for their engagement work utilising Netcall's Liberty for Health
- **SOCITM Awards 2025:** Newcastle City Council won *Transformation Initiative for Digital Innovation* for their work with Citizen Hub. Netcall win Partner of the Year.
- **SOCITM Awards 2024:** Lancashire County Council and Netcall recognised for their work with Citizen Hub.
- **iESE Awards 2022:** multiple councils recognised for transformation using Liberty Create.
- **LGC Awards 2020:** Adur and Worthing Councils, *Council of the Year* – shortlisted organisation using Liberty Create.
- **iESE Awards 2020:** Cumbria County Council and RBKC recognised for digital and green services with Liberty Create.

9.2 Analyst Recognition:

- The Digital Process Automation Software Landscape, Q2 2025
- The Low-Code Platforms For Professional Developers Landscape, Q4 2024
- The Task-Centric Automation Software Landscape, Q3 2024
- The Robotic Process Automation Landscape, Q3 2022
- The Forrester Wave™: Low-Code Development Platforms For AD&D Professionals, Q1 2019
- Gartner 2018: Liberty Create included in Magic Quadrant for Enterprise High Productivity aPaaS.
- Forrester New Wave 2017.

10 Contact

For further information, please contact: bid.team@netcall.com