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Crown Commercial Services

Service Definition – Liberty Converse CX

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NETCALL

Contents

1 Introduction

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

In our 20+ years, we have built a track record of trust across the public sector. Over 100 Councils and 75% of NHS Trusts/Boards currently use our 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.

Introducing Liberty Converse CX, Netcall's next-generation AI-powered cloud contact centre as a service (CCaaS) 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.

2 What is Liberty Converse CX?

Liberty Converse CX is a cloud contact centre for voice and digital that brings **conversation, automation and action** together in one place. It is feature-rich and undergoing continuous development; this service definition describes the features currently available, and capabilities may be added, changed or retired over time.

Converse CX is part of the **Liberty Platform** – a unified and AI-enabled set of capabilities that you can compose to solve real-world service problems without disruption. There is no technical overhead or lock-in: Converse CX can run standalone and connect to the capabilities you need, when you need them, to modernise incrementally and maximise existing investment.

Capabilities at a glance:

- **Connected Customer Experience**: omnichannel conversations across voice, email, chat, SMS and social, with virtual agents and Web Assistant for seamless digital-to-human hand-off.
- **Workforce Enablement**: unified agent desktop, skills-based routing, workforce management, quality monitoring and coaching - everything in a **single browser**.
- **CRM and Unified View**: surface the right context in the agent desktop at the right time, without forcing a CRM change (CRM capabilities can be extended, modernised or even created using the rapid application development capabilities of Liberty Create where appropriate)
- **Embedded Intelligence and Decisioning**: intent recognition, generative summaries, translation, speech analytics and sentiment, all **governed** with role-based access and audit information.

- **Operational Efficiency and Process Automation**: orchestrate work and remove repetitive tasks through governed workflows and integrations to your existing systems (enabled by Liberty Create low-code application development and Liberty RPA, where useful).
- **Case, Incident and Request Management**: raise, look up and progress cases against your **Systems of Record** with clear hand-offs, audit trails and SLA tracking (enabled by rapid application development using Liberty Create where useful and appropriate).
- **Legacy Extension and Modernisation**: extend what you already have using secure APIs/webhooks and automation, avoiding "rip and replace" and **sweating existing assets** (supported and enhanced by rapid application development using Liberty Create where useful and appropriate).

The result: people get help on their channel of choice; teams have the right context at their fingertips; and the mundane is automated so staff can focus on higher-value work - **safely, accessibly and accountably**. Accessibility is designed-in (keyboard navigation, screen-reader compatibility and high-contrast support).

3 Highlights

- **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.
- **Elevate Scalability:** Seamlessly scale your contact centre operations to meet dynamic business demands without the hassle of traditional infrastructure constraints.
- **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.
- **Cost Efficiency at Its Best:** Maximise your return on investment by optimising resource allocation and reducing operational costs.
- **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.
- **Intelligent CRM and system Integration:** Seamlessly integrate 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.
- **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.

- **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.
- **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.
- **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.
- **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.
- **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.
- **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 Agents
- **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.

4 AI and Agentic Capabilities

Converse CX includes embedded AI features and an **agentic** execution model. The system can understand, summarise and assist - with the right permissions, it **takes safe actions** through your approved tools and systems.

4.1 Core AI capabilities

Understanding, insight and coaching

- **Sentiment analysis and call transcription**: evaluates tone and turns speech into text for quality monitoring, coaching and trend analysis. https://www.netcall.com/platform/contact-centre/ai/
- **Summarisation**: condenses long interactions or documents into clear, accurate summaries to reduce after-contact work.
- **Keyword extraction**: pulls out key terms from text to help agents and workflows spot critical information quickly.
- **Agent guidance (AI Agent Assist)**: suggests and refines replies, adjusts tone and structure during live interactions to help advisors handle complex queries.

Natural conversations and accessible experiences

- **Virtual Agents (voice and chat)**: automate routine queries using natural language, route to the right queue/agent, and hand off smoothly to people when needed.
- **Text-to-speech and speech-to-text**: enable natural IVR/virtual-agent experiences and inclusive interactions for customers.
- **Live translation**: auto-detects languages and translates in real time so teams can converse in the customer's chosen language.

Quality of written communication (Text Enhancement)

- **Spelling and grammar correction**: fixes mistakes automatically to keep communications clear and professional.
- **Expansion**: turns shorthand notes into complete sentences (e.g., making medical notes understandable in records).
- **Tone adjustment**: shifts from abrupt to friendly, or informal to professional, to match your service style.

Knowledge-grounded answers (Ask/Set Liberty AI)

- **Ask Liberty AI**: in calls, chat, virtual agents and Agent Assist, returns answers grounded in approved **Documents and Collections** from Knowledge Management, shown conversationally alongside sources.
- **Set Liberty AI**: a virtual-agent step that prompts Liberty AI and stores the result in a variable for use later in the flow (display, decisioning or hand-off).

Intent and routing

- **Intent lookup and conversational understanding**: detect what customers need, triage, and either self-serve or route to the best queue for resolution.

4.2 Agentic execution

Agentic means the AI does more than answer questions: it can **take the next step** safely when policy allows.

- **Tool use:** Trigger approved workflows (e.g., raise or look up a case against your **Systems of Record**), start automations (e.g., update a legacy record), and call **secure APIs/webhooks** or **third-party connectors** (e.g. CRM updates, scheduling, directory lookups).
- **Human-in-the-loop controls:** You decide which actions **require agent confirmation** and which can run unattended.

- **Clear transitions and required variables:** Define when to **end**, **offer further help**, **transfer to a specialist queue**, or **hand off to a human** based on intent and context. Before a transition, the AI can **collect required details** (e.g., customer name, case/reference number) so actions execute with the right context.
- **Shaping behaviour (kept simple):** Set **instructions** that describe role, objective, greeting, escalation rules and tone (friendly/formal/professional) to match your communication style. Point the assistant at approved **Documents and Collections** for accurate answers. Control the **initial question** used at hand-off between virtual agents so the conversation continues smoothly.
  Tune **Speed vs Accuracy** (fast replies vs deeper retrieval) and **Reasoning level** (quick answers vs more thoughtful responses) per use case.
- **Outcome tracking:** Dashboards and reports show where AI assists, resolves or hands off, so you can tune flows and confidence thresholds.

Practical examples

- Confirm a category, **collect a reference number**, and route to the correct queue.
- **Look up a case**, provide a status, and offer a callback at a suitable time.
- **Update a record** in a legacy system via RPA, with an agent approval step for safety.

4.3 Security, safety and governance

AI in Converse CX is governed by design. Controls run across identity, access, data and audit.

- **Identity and access:** Single Sign-On via OpenID Connect (e.g., Microsoft Entra ID) and **SCIM** provisioning. **Role-based access** and **fine-grained permissions** restrict AI features and actions to authorised users and queues.
- **Data protection: Redaction** options for transcripts and summaries; **pause/resume recording** for sensitive moments; domain allow-lists for Web Assistant; malware scanning for uploads.
- **Auditability:** Interactions, summaries, actions and approvals are **logged** for compliance, quality monitoring and post-event review.
- **Policy and guardrails:** Confidence thresholds, **grounding to approved sources**, human-in-the-loop for high-risk actions, and **tool-use restrictions** ensure safe operation within organisational policy.
- **Model flexibility:** Supports Netcall-managed defaults and customer-approved model policies where required, under your governance.

4.4 Outcomes you can expect

- **Faster resolution** of routine enquiries through safe automation and assist.
- **Lower effort** for advisors with accurate summaries and grounded knowledge.
- **Better consistency and coaching** via sentiment and speech analytics.
- **Inclusive experiences** with natural speech interfaces and multi-lingual translation.

5 Converse CX Key Features

Liberty Converse CX offers advanced features and capabilities to help enhance customer interactions, streamline operations, and improve overall efficiency and cost reduction. The key features listed are subject to continual improvement and revision as part of the Netcall development roadmap. Information regarding the latest features is available from Netcall on request.

- **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.
- **Secure Payments:** Integration to your secure payment service to ensure the secure handling of customer payment information over the phone/IVR or digital channels 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 75 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.

5.1 Virtual Agents

The Virtual Agent 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.

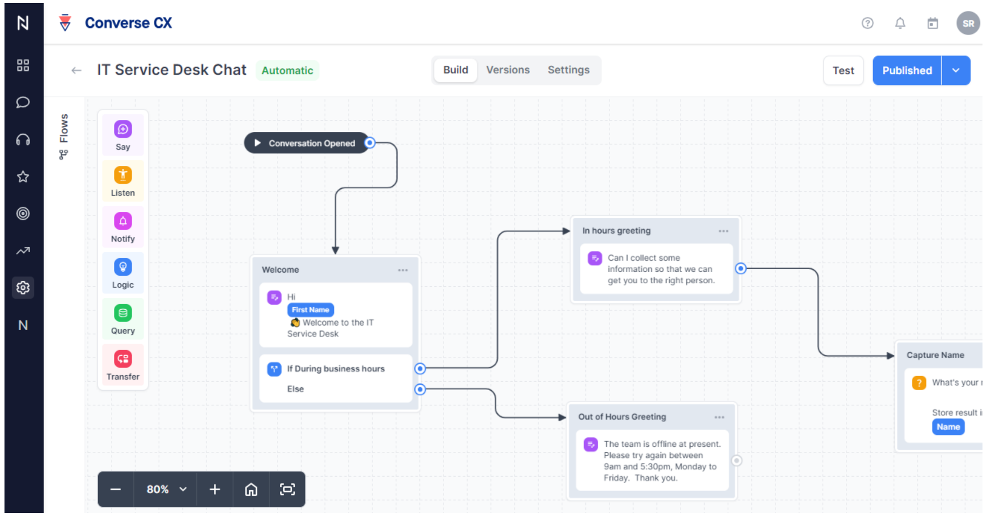

Figure 1111~~1~~ - Screenshot of the visual flow designer

5.1.1 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 garden bin"*, *"I would like to order a garden bin 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.

5.2 Channels

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

5.2.1 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 evaluation.

5.2.2 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 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.

5.2.3 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.

5.2.4 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[1].
- **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).

5.3 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.

5.4 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.

[1] Converse CX does not provide WhatsApp numbers or support templated outbound messages

- **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.
- **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.

5.5 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 in progress call, 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.

5.6 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.

5.6.1 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.

5.7 Workforce Management

5.7.1 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 and Management:** 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.

5.7.2 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.

5.8 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.

5.9 Customer Surveys

Customer Surveys allows 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 Promotors, 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.

5.9.1 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.

5.10 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.

5.10.1 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

5.10.2 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.

5.10.3 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.

5.10.4 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.

5.10.5 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.

5.11 Integrations

5.11.1 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.

5.11.2 Working with Microsoft Teams[2]

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.

[2] Converse CX does not natively support calling in Microsoft Teams. This is achievable by routing calls via Liberty SIP or connecting Converse CX to a customer SBC that supports Microsoft Teams Direct Routing.

5.11.3 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.

5.11.4 Security:

APIs are secured by granular API Tokens.

6 Delivery Services

6.1 Delivery Model Overview

All Converse CX deliveries follow the same core methodology. Adjustments are made should the customer chose an **Engagement-led** or **Project Management-led** model.

The model follows a number of key phases from Sales through to contract lifecycle.

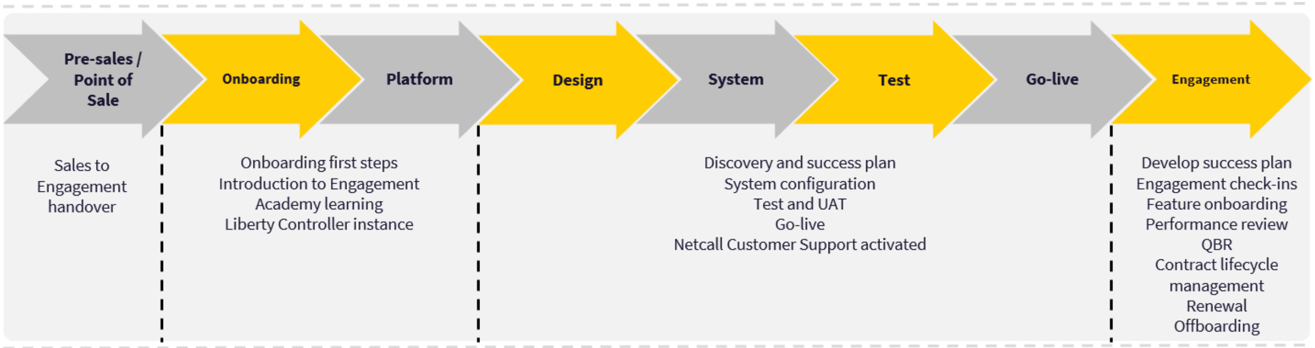

Figure ~~22222~~ - Delivery lifecycle

6.1.1 Engagement-led

The end-to-end experience is managed by the Customer Engagement Manager and as a general approach the customer is expected to complete Design, System, Test and Go-live phases with no consultancy or technical mentorship input from Netcall unless associated packs are purchased.

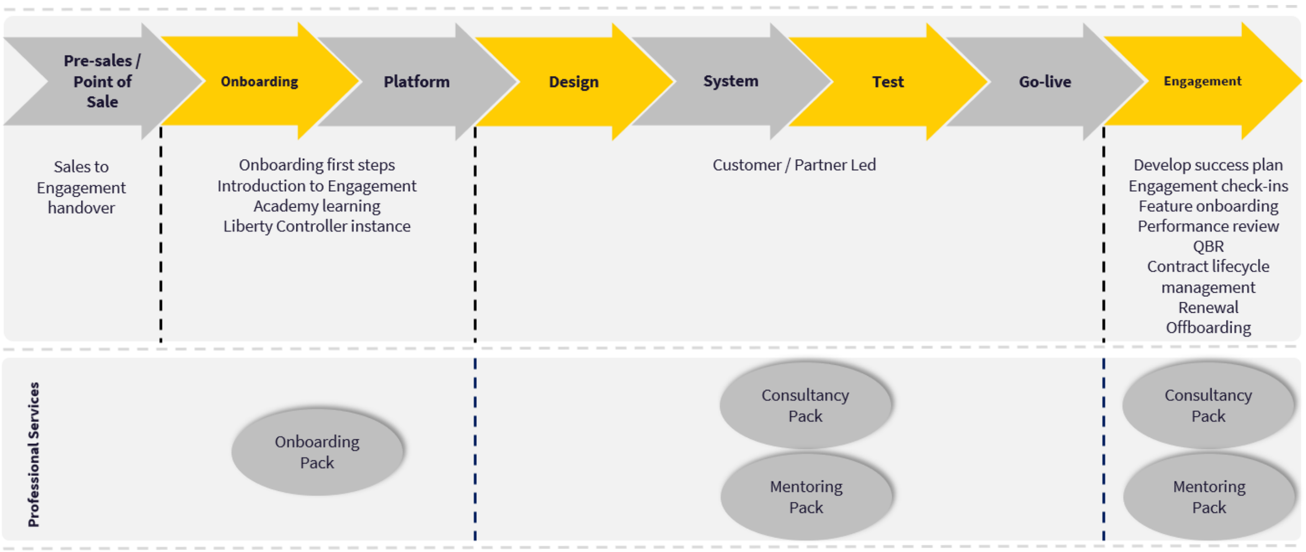

Figure 33333 - Engagement-led delivery lifecycle

6.1.2 Project Management-led

The end-to-end experience is managed by the Customer Engagement Manager and the Project Manager during specific stages. As a general approach the customer should expect the Design, System, Test and Go-live phases to be scoped, managed and fulfilled by Netcall.

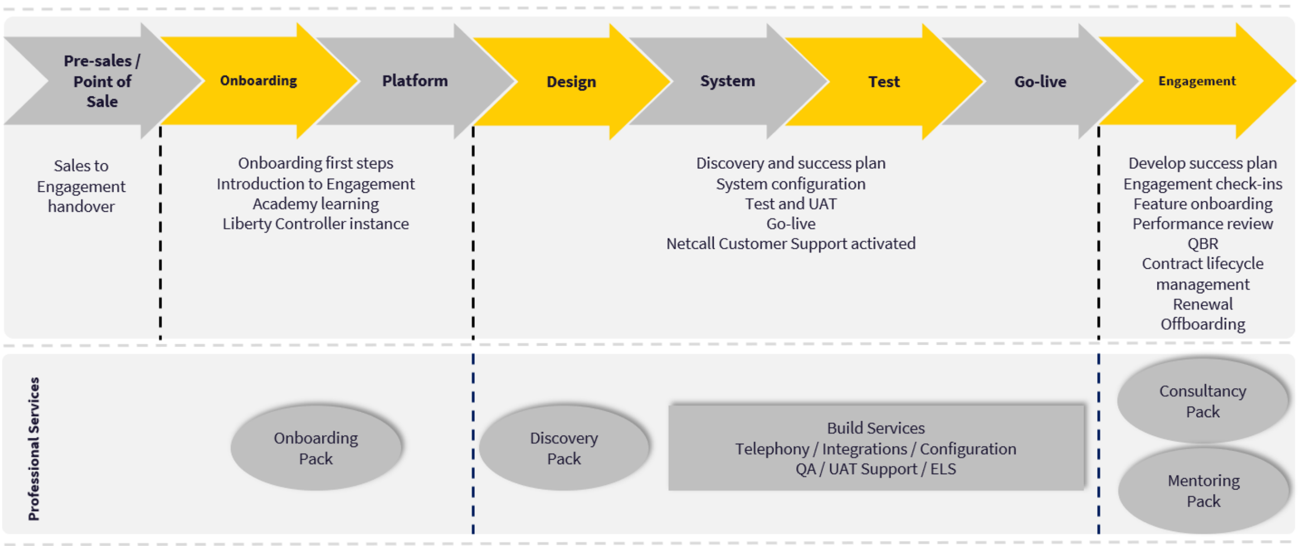

Figure 44444 - Project Management-led delivery lifecycle

6.2 Governance to Go-Live

Converse CX includes the following governance:

Table 1111~~1~~- Governance items, descriptions and phases

What	Why	Phase
Statement of Works / Project Initiation Document	Formal description of the project's requirements, defining the project scope, contractual obligations, project-specific activities, deliverables and timelines. Initiation Governance is completed with PMO.	Design
Technical Architecture	Confirmation that all technical interoperability requirements have been installed, configured, tested and are ready for use.	Design
Configuration and Integration Quality Assurance	Confirmation that all configuration and integration requirements have been configured, tested and are ready for service.	System
UAT and Ready for Service	Signed confirmation document from the customer stipulating all required Converse CX services are tested and ready to commence.	Test
Change Advisory Board approval	Confirmation from Netcall Customer Support that the Converse CX services are ready to commence and are supportable. Deployment Governance is completed with PMO.	Go-live
Project Closure certificate	Signed confirmation document to formally complete and close the project delivery.	Closure > Engagement
Engagement Handover certificate	Signed confirmation document that a Netcall Engagement Manager will continue your success planning, rollout / expansion and help you move into operational business as usual.	Closure > Engagement
Risks and Issue Register	To log, track and manage all risks and issues requested and/or identified in the delivery of the project.	End to End
Change Control Form	To log, track and manage when a change to the project is required or requested and to track associated costs and impact to the project.	End to End

6.2.1 Project Checkpoints

To ensure your project is progressing as expected regular checkpoint reviews are performed, the cadence of which is agreed during your project initiation. The review will track the project's progress and identify and manage any risks and/or dependencies that may impact a successful project completion. Project budget also is also regularly reviewed and included in Project Checkpoints to assess resourcing budget and contractual obligations.

6.2.2 Programme or Project Board

The Project Board represents the most senior level of management within the Converse CX project delivery. Netcall recommend the board meet periodically to provide a unified goal and direction, commit resources to the project, delegate tasks, support the delivery team, act as a point of project escalation and provide effective decision making. Netcall will provide resource to attend the project board.

6.3 Training

All Converse CX Training is provided as eLearning via the Community Academy. As this is self-learning content, there are no charges for customer users wishing to access the Converse CX Training.

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 2222~~2~~ - 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 3333~~3~~ - 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 Converse CX can operate as a standalone omnichannel contact centre or integrate with the wider Liberty Platform to extend functionality when required. This modular approach allows organisations to add automation, AI 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.
- 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.

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

9 Contact

Should further information be required, please contact:
bid.team@netcall.com