



Accelerate performance.
Elevate experiences.

Calabrio Proposal



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Executive Summary

Calabrio is a trusted leader in workforce engagement and optimization, purpose-built to elevate customer experience while driving long-term business growth. At the heart of this transformation is Calabrio ONE®, an integrated, cloud-native software suite that unifies call recording, quality management, workforce management, interaction analytics and bot analytics into a seamless, user-friendly platform. This comprehensive suite empowers contact centers to automate key processes, optimize performance, and generate meaningful insights with minimal operational effort.

With a customer base of over 4,500 organizations worldwide, Calabrio is a proven partner for companies seeking to modernize their contact center operations. Its cloud-first architecture enables faster deployment, seamless upgrades, and lower maintenance requirements, allowing businesses to scale quickly and remain agile in a constantly evolving environment. This flexibility makes Calabrio an ideal choice for forward-thinking organizations committed to delivering superior customer service.

Calabrio's philosophy is deeply human-centered—we believe technology should empower people, not replace them. Our solutions are designed with agent experience in mind, offering intuitive tools, personalized coaching, and self-service insights that boost both individual performance and job satisfaction. As a result, Calabrio delivers not only a lower total cost of ownership, but also a higher return on investment.

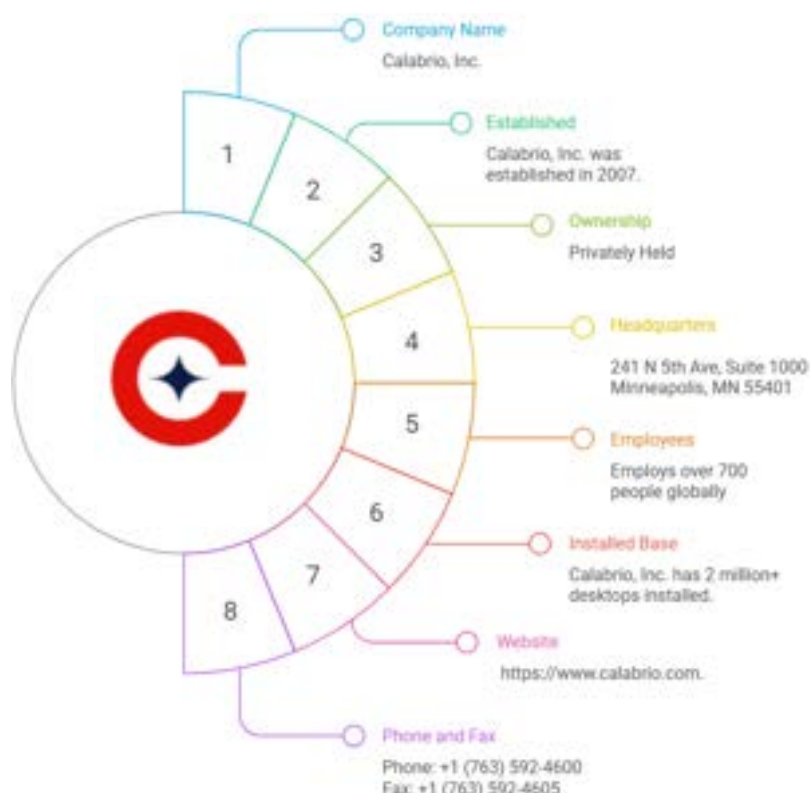


Our leadership and innovation have been recognized across the industry, with accolades including G2's 2024 Leader in Workforce Software and the 2023 CCW Excellence Award for Workforce Innovation. These honors underscore our commitment to delivering value-driven, transformative solutions that turn contact centers into engines of strategic growth, customer loyalty, and employee engagement.

Calabrio stands out for its ease of use, scalability, and ability to turn raw interaction data into actionable workforce strategies. We are excited about the opportunity to work with you and demonstrate how Calabrio can help your organization thrive in a competitive, customer-centric world.

Calabrio Company Background & Information

General Information



Calabrio History

Calabrio has been developing and deploying customer engagement-focused solutions since the mid-90's and spun out in 2007 to provide software for organizations across industries with 5 to 50,000+ seats. In a big market that is only getting bigger, Calabrio has emerged as a definitive player in the new world of customer engagement. Developed from the ground up, the integrated Calabrio ONE suite is elevating workforce optimization software from a commodity focused on call recording to mission critical technology for the entire enterprise.

Financial Information

Calabrio is a privately held company and as such does not release financial information. We can share that Calabrio is beneficially owned by private equity funds that are managed by Thoma Bravo, L.P., which is an SEC-registered investment adviser. For information, please see here: [USA SEC Filing Link](#)

Executive Leadership Team

Calabrio is led by a seasoned executive team with experience in technology, operations, finance, legal, and success. The leadership's combined expertise ensures strategic focus, operational excellence, and continued innovation in delivering workforce engagement solutions for contact centres globally. See bios and qualifications of the team [here](#) on our website.

David Rhodes Chief Executive Officer	Joel Martins Chief Technology Officer	Frank Ciccone Chief Revenue Officer	Carl Gillert Chief Financial Officer	Dillon Nugent Chief Marketing Officer	Joshua Geller Chief Legal Officer
Alexis Zotalis Chief Admin Officer	Robert Rivera Chief Sales Officer	Tim Klein SVP, Corporate Development	Dave Orstad SVP, PS and Support	Ryan Toben SVP, Customer Success	Nicole Mewes VP, Business Operations

About Calabrio

Calabrio is a leading provider of workforce optimization solution tailored for contact centers. At the core of Calabrio's offerings is a comprehensive suite of cloud-based tools that empower contact centers to optimize their operations and enhance customer experience. The integrated Calabrio software suite—including call recording, quality management, workforce management, analytics, and business intelligence reporting—empowers contact centers of all sizes to optimize agent performance and liberate the data that provides true insight into the voice of the customer.

References

Calabrio has approximately 4,500 customers with more than 2 million seats of workforce optimization deployed globally. We have an active user group community, and a robust reference program that matches the interest of our prospects with the expertise of our existing customers. Out of respect for our customers' privacy and time, it is our policy not to provide reference contact information as a part of the RFP process. Calabrio welcomes the opportunity to provide contact information for references should we progress to the next steps in the RFP process. Featured case studies can be found on our corporate web site, [here](#).

Partners

Calabrio is committed to providing the best solution for our customers, which includes partnering with the businesses you rely on to create a truly inclusive solution. Not only does Calabrio partner with the best and most secure cloud providers in the world, Amazon Web Services and Microsoft Azure, but Calabrio's Technology Partners consist of companies who make a strategic impact in Calabrio's ability to go to market with unique offerings, through integration and relationships. Most Technology Partners have direct integrations between their solution and one or more Calabrio products. This could include ACD, CCaaS, CRM, third party ISVs, and system integrators.

Platform Partners: Cisco, Avaya, Five9, RingCentral, Twilio, Genesys, Amazon, Talkdesk, Glia and more all provide integrations for ACDs and CRMs, OEM agreements, and joint go to market strategies.

Compliance

The Calabrio Information Security Program is based on security frameworks: NIST Cyber-Security Framework, the CIS CSC Top 20 control set. Additionally, the compliance frameworks for AICPA SOC2 Type II, ISO27001, and PCI DSS are incorporated into Calabrio's Common Control Framework. At Calabrio, safeguarding customer data and maintaining regulatory trust are foundational to our operations. Our compliance strategy is rooted in internationally recognized security and privacy frameworks and continuously verified through independent audits and certifications.

Industry-Recognized Standards

Calabrio's Information Security Program aligns with the NIST Cybersecurity Framework and the CIS CSC Top 20 Controls. We have also integrated rigorous industry compliance standards, including



Regulatory Readiness

Our solutions are built with compliance configurability in mind. Calabrio ONE enables organizations to align with a broad range of global and industry-specific regulations, such as:



Data Privacy & Protection

Calabrio prioritizes privacy by design. Key privacy-enabling features include:

- System-wide auditing
- Configurable data retention and purge settings
- Flexible storage configurations
- Call pause/resume functionality during sensitive data exchanges

Calabrio publishes a Data Privacy Overview, Sub processor List, and Transfer Impact Assessments, all accessible via our [Trust Center](#)

Data encryption is enforced at rest and in transit using AES-256 and TLS 1.2, with FIPS-140 compliance for AWS environments and Transparent Database Encryption (TDE) in Azure.

Operational Resilience

Calabrio is a true multi-tenant solution, and all tenant data is isolated in separate databases, unavailable to other tenants. Our internal Network Operations Center monitors the cloud environment 24x7x365, supported by advanced protections including anti-malware, intrusion detection, DDoS defenses, and IP whitelisting. BC/DR plans are tested and updated annually. Calabrio defines availability through our 99.9% uptime guarantee, as stated in the Calabrio Cloud MSA.

Comprehensive backup strategies across AWS and Azure environments ensure secure, versioned, and geographically resilient data storage.

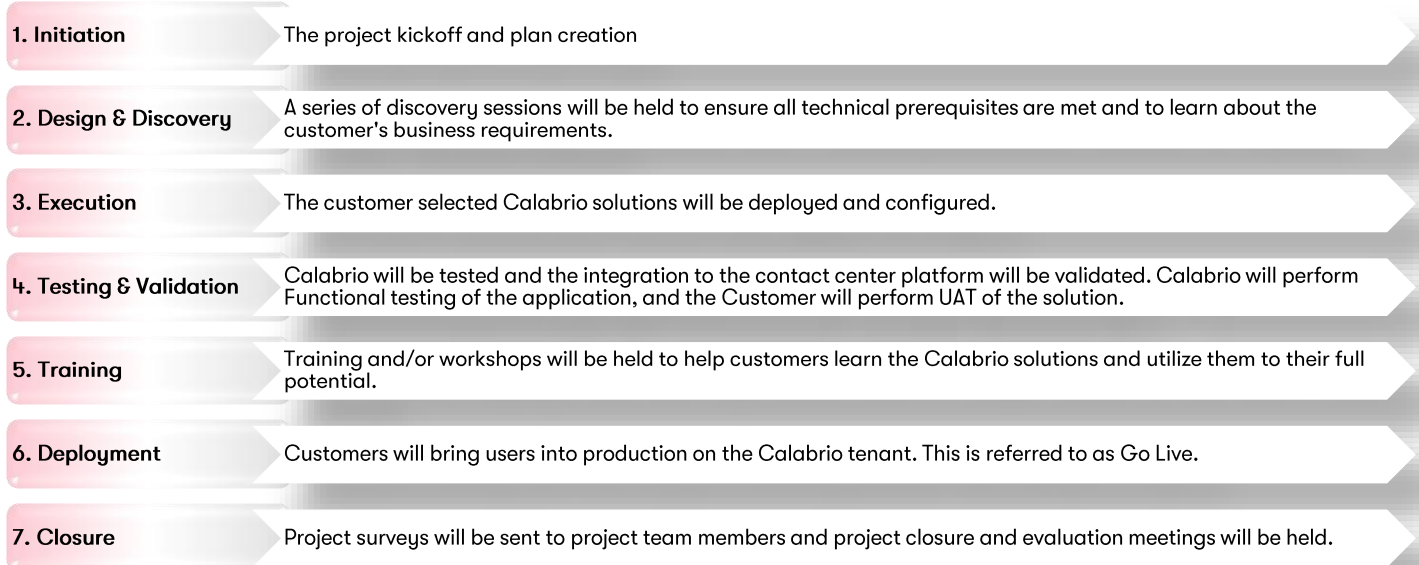
See additional information security and data protection details on our

[Calabrio Trust Center](#)

Calabrio Services

Implementation Methodology

The implementation of Calabrio is divided into seven phases in a standard waterfall methodology. The responsibility for the completion of project activities in each phase lies with the Customer, Partner and Calabrio together. The customer is responsible for the sign-off of deliverables to complete each phase before the next phase begins.



Project Resource Roles

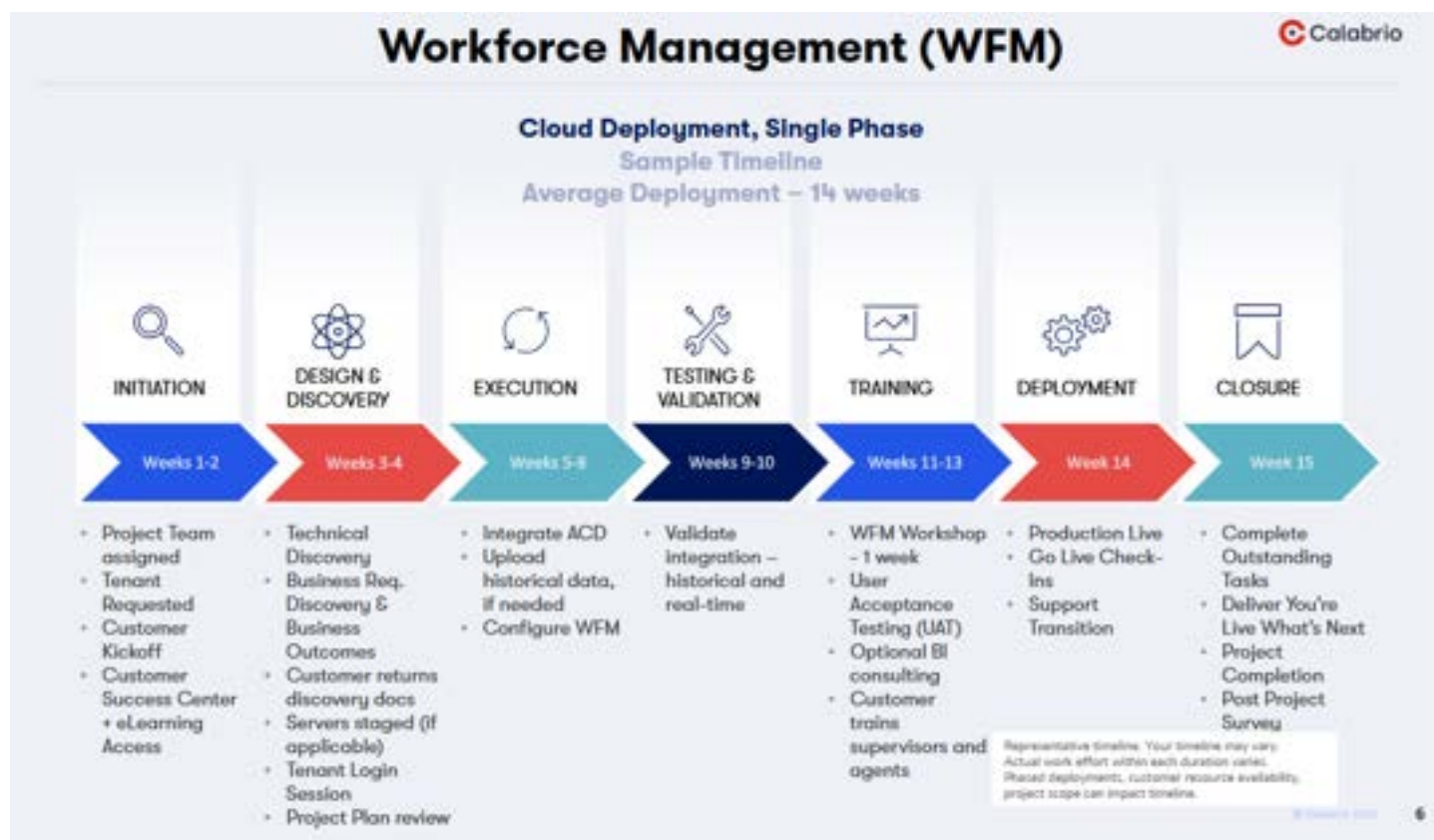
To ensure a smooth implementation, Calabrio will dedicate a Team alongside your Sales Representative and Sales Engineer. This team will comprise specialists who will work closely with your teams. See below for both Calabrio and customer roles.



Upon successful implementation, Calabrio can assign a Customer Success Manager (CSM) to act as your guide, advocate, and advisor, throughout your Calabrio journey. Dedicated to making you successful with Calabrio, Calabrio's CSM will offer responsiveness and world-class follow-up and are the go-to contact for daily account needs. Their role is to be: driving ROI, keeping you informed, being your internal advocate, and connecting you to all things Calabrio such as the [Calabrio Success Center](#), [Calabrio Champions](#) program, [Calabrio Customer Connect](#) and [Calabrio user groups](#).

Implementation Timelines

Please see the implementation timelines below:



Integrations

Calabrio has native integrations with most modern contact center and telephony systems such as ACD/PBX, CCaaS, HRMS, CRM, Payroll, and many more. For any custom integrations our solution has an Open API infrastructure, utilizing RESTful API, for simple integration into external systems. Calabrio also has a dedicated custom development team in our Professional Services department to map out and assist with any custom integrations.

Support Services

Calabrio creates innovative software solutions that are easy, personalized, and smart. Not only are our solutions simple, but we also pride ourselves on being easy to work with. We're committed to providing our customers with support.

Coverage: All hours - 24 x 7 x 365

Contact: Phone, email, web portal

Support response times:

- Severity 1 - 30 minute phone response time
- Severity 2 - 4 hour response time
- Severity 3 - 24 hour response time
- Severity 4 - 24 hour response time

Support resolution times:

- Severity 1 - 8 hour resolution
- Severity 2 - 4 business day resolution
- Severity 3 - 20 business day resolution
- Severity 4 - 2 month resolution

Premium Customer Care

Calabrio offers Premium Customer Care as an add-on to our Support Services. The PCC offering includes, but is not limited to, the following types of monitoring and support. See attached "Calabrio Premium Customer Care" document for more details.

Platform monitoring, updates, and maintenance: 24x7 platform monitoring by realm with all platform maintenance and application updates included

Cloud status notifications: Communication of notifications of known issues and solution timelines

Integration Update Companion: Prepare for upcoming updates to your ACD platform or other systems integrated with Calabrio, with expert guidance to align resources and ensure a smooth, supported transition during your upgrade window.

Product & External Integration Monitoring: Consult with the proactive team to define, scope, and validate custom monitoring both within the Calabrio products and across external integrations.

Technical Support: 24x7 break/fix support and web case management via the Calabrio Success Center (CSC)

Proactive Monitoring: We set up tenant-level monitoring based on your business and historical usage, with monitoring specialists watching your tenant 24/7, 365. Standard Monitoring watches your:

- Media Ingestion (voice & screens)
- Transcription
- Login
- WFM real-time data
- WFM historical data

Differentiation

Ease of Use

- Intuitive UI reduces training needs by 60–75%.
- Embedded analytics in the media player for zero-context switching.
- Translated onboarding tours in 15+ languages.
- Fewer implementation hours due to seamless workflows.

Higher Business Impact, Lower TCO

Transparent pricing: No hidden fees for connectors or APIs.

Simple non-committed user licensing to scale at your pace.

ROI in as little as 3 months.

Available via AWS Marketplace and partner programs.

Contact Center Integration

Unified WFO suite: WFM, QM, VoC, Analytics fully integrated, single user interface.

Open API structure supports CRM, HRIS, CCaaS, and ERP systems.

Desktop analytics reveal application usage, idle time, real-time back office adherence.

Centralized admin for multi-site and remote teams.

Smart + AI-Powered Platform

Auto QM for 100% interaction evaluation.

Trending Topic detection via AI.

Near real-time Interaction Summaries.

AI-assisted forecasting, scheduling, and adherence.

R&D reinvestment 30% annually.

Agent Empowerment

Mobile app for self-scheduling.

Vacation Planning for fair, automated time-off bidding.

Gamification and coaching loops.

Activity Requests for flexibility.

Enterprise-Ready Cloud Platform

True cloud-native architecture (not just ported from legacy).

Seamless transition path from on-prem to cloud.

Always-on availability, updates with zero disruption.

Additional Resources

Calabrio ONE Demo Center: <https://www.calabrio.com/resource-center/demo-center/>

Calabrio ONE Case Studies & Testimonials: <https://www.calabrio.com/resource-center/customer-success-stories/>

Calabrio ONE Whitepapers & Reports: <https://www.calabrio.com/resource-center/white-papers-reports/>

Calabrio ONE Infographics & Tip Sheets: <https://www.calabrio.com/resource-center/infographics/>

Calabrio ONE Solution

Calabrio ONE, a unified suite—including Call Recording, Quality Management, Analytics, Workforce Management, and Business Intelligence—equips you with a complete toolset to unlock the tremendous value buried within your contact center and to transform your entire business. One seamless solution combines workforce optimization tools with powerful voice-of-the-customer analytics tools.

This tightly integrated—and easily scalable—suite of products captures every customer interaction across all channels, extracts insights, elevates the customer experience, improves employee engagement, and increases operational efficiency. The contact center can share customer-centric strategies across the business to accelerate sales, drive innovation and move your business forward.

Calabrio ONE Suite



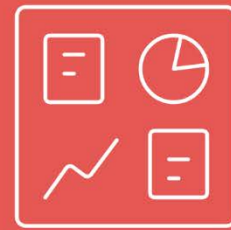
Workforce Intelligence

Provides forecasting, scheduling with intraday updates and real time adherence.



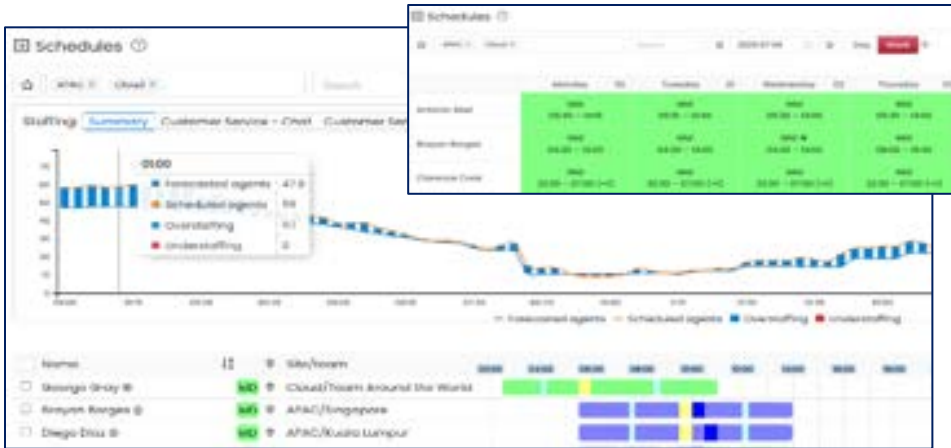
Conversation Intelligence

Interaction Recording
Quality Management
Interaction Analytics



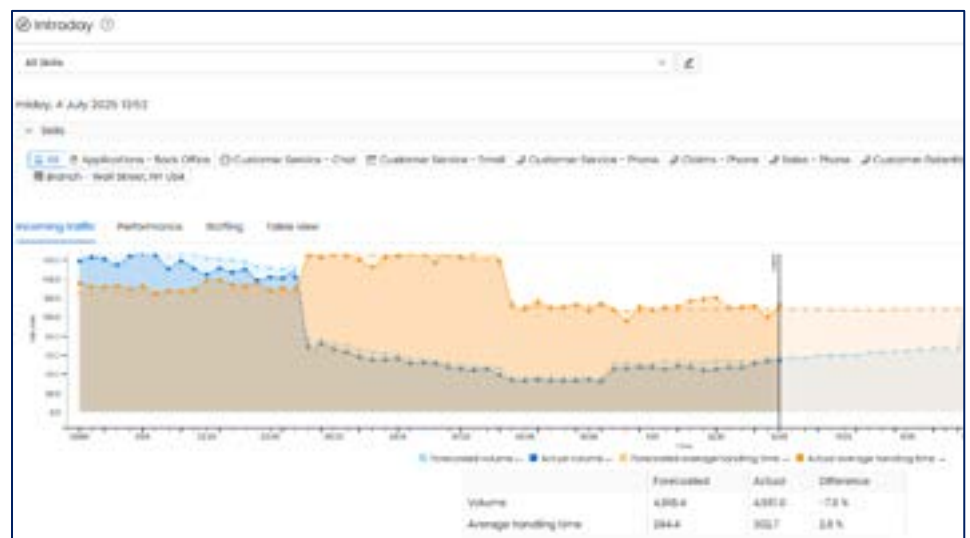
Business Intelligence

Offers dashboards, visual KPIs, and advanced measures for decisions.

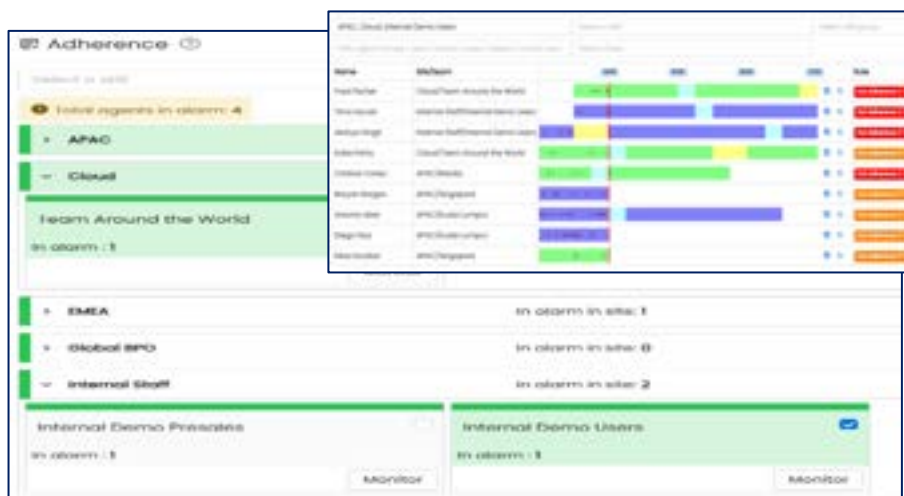


Schedules: The Schedules module delivers efficient resource planning and scheduling. It allows for the creation of agent schedules that adhere to contractual obligations and work rules, utilizing both automatic scheduling and optimization processes to align with forecasted needs. Users can manually adjust schedules to accommodate known absences, meetings, and other activities.

Intraday: The Intraday module provides near time visibility into contact center operations. It compares forecast versus actual metrics such as volume, average handling time, and service levels across four key tabs: Incoming Traffic, Performance, Staffing, and Table View. The module calculates "Required agents" for past intervals & "Reforecasted agents" for upcoming intervals, helping managers proactively address staffing gaps. It also allows for on-the-fly schedule adjustments, including activities, and absences.



Adherence: This offers real-time and historical monitoring of agent activity compliance with schedules, using customizable rules to flag deviations. It includes visual alerts and supports adherence reporting. RTA Snooze temporarily pauses alerts during specific scenarios. Real-Time Desktop Analytics (an add-on module) tracks agent activity based on desktop usage, identifying productivity patterns and training needs, especially for back-office tasks like email or document processing.

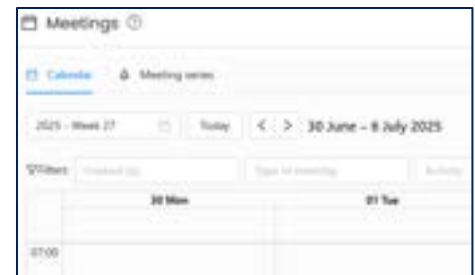


Configurable Settings: The WFM Settings screen is the central configuration hub, enabling administrators to define organizational hierarchies, contracts, activities, and absence types. It supports setting validation and adherence rules, configuring bank holidays, and managing integration and notification preferences. These settings ensure the system aligns with operational policies.

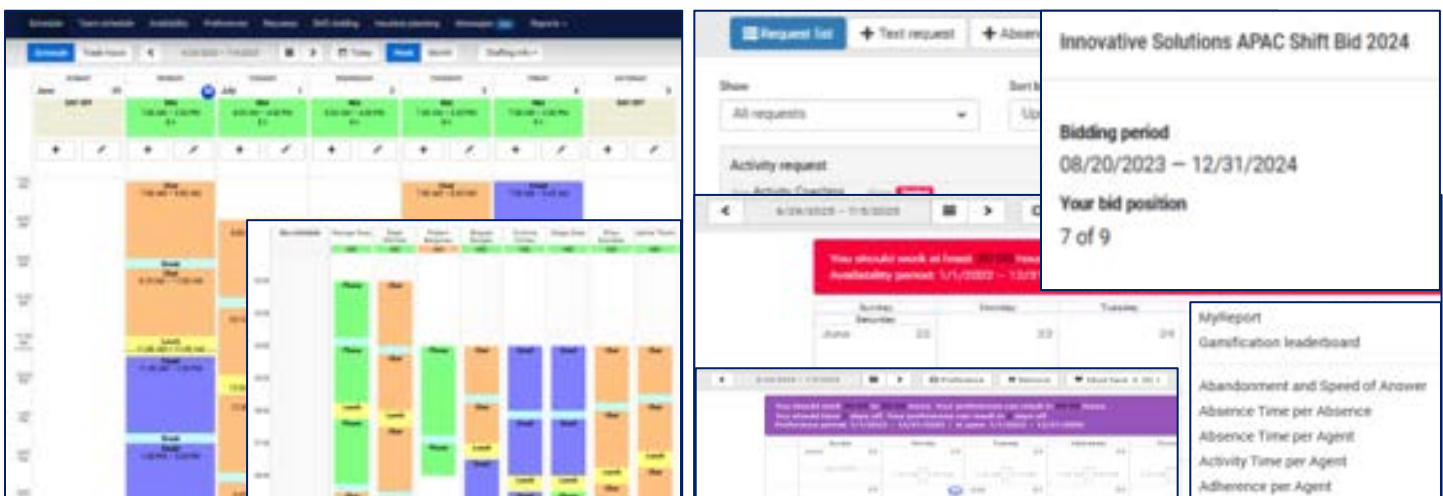
Sessions: The Sessions screen enables efficient scheduling of individual activities such as e-learning, coaching, or training—for one or multiple agents. It distributes these activities evenly over a specified date range, ensuring balanced workloads and adherence to staffing thresholds. Sessions can be optimized to minimize impact on service levels, and administrators can easily view, edit, or remove sessions.

Requests: This allows agents to submit schedule-related requests—such as absences, shift trades, and overtime through the MyTime interface. Requests may be automatically approved based on configured rules or manually reviewed by team leaders using the web Requests tool. Absence and text requests can be filtered, sorted, and reviewed in detail, including via time zone filters and customizable columns.

Meetings: Meetings enables schedulers to efficiently plan and manage various meeting types, including one-time, recurring, 1:1 session, and e-learning activities. Meetings can be scheduled for individuals or groups, with options to define time zones, durations, and internal notes visible only to authorized users. The module ensures meetings are integrated into agents' schedules without disrupting staffing levels and provides visual indicators and tooltips within the Schedules tool for easy identification and access to meeting details. Additionally, it supports importing participant lists from external sources and offers filtering capabilities to view planned meetings based on specific criteria.



MyTime: MyTime empowers agents with self-service capabilities to manage their schedules and preferences efficiently. Agents can view their schedules, request time off, trade shifts, and move breaks or lunches directly within the platform. The module supports self-scheduling, allowing agents to add work hours based on staffing needs, with visual indicators guiding optimal times. Additionally, agents can subscribe to their schedules via external calendar apps. Notifications for schedule changes are available through the MyTime mobile app time. The module also facilitates activity requests for tasks such as training or administrative duties, with configurable approval workflows.

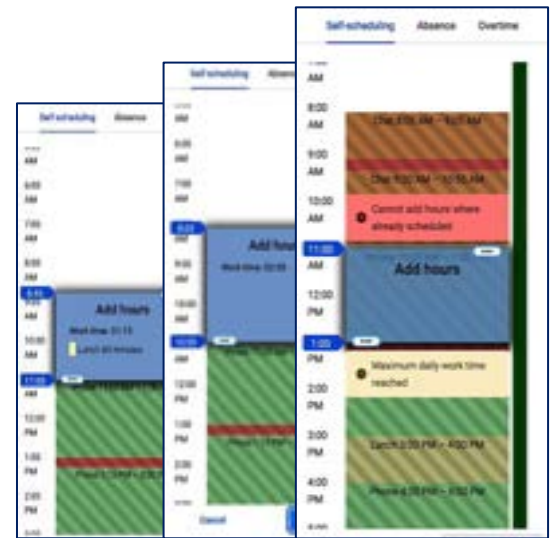
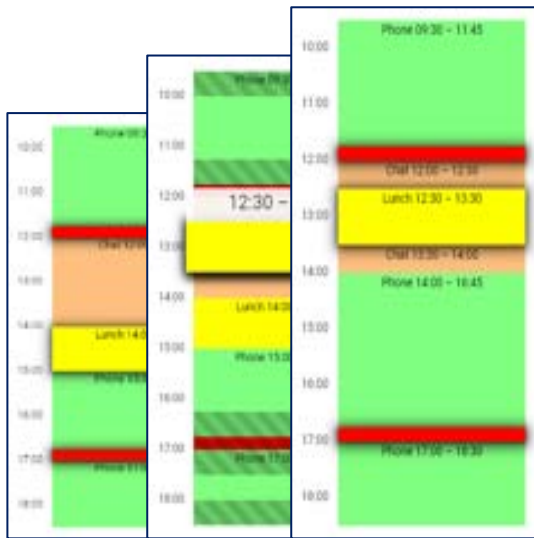


MyTime Breakdown

View Schedules: This allows agents to access their schedules, request time off, and manage shift preferences. Team leaders can not only view their own schedules but also those of their entire team, making it easier to manage shifts, monitor staffing levels, and ensure proper coverage. Agents can also view the schedules of their teams.

Move Breaks or Lunch: This allows agents to independently adjust their scheduled breaks or lunch within predefined guidelines. Agents can move their breaks in 5-minute intervals, ensuring flexibility while maintaining compliance with staffing levels, shift durations, and overlap restrictions. The system enforces validation checks to avoid overstaffing.

Schedule Own Work Hours: This allows agents to independently manage their work schedules within set guidelines. Agents can select and adjust shifts via a user-friendly interface, with visual indicators to highlight optimal times and conflicts. Admins can configure rules to comply with staffing thresholds, work durations, and regulations.



Shift Trading: The Shift Trade module allows agents to propose and manage shift exchanges, including partial trades, providing flexibility for both full and partial shift swaps. Administrators can set rules for auto-approval or manual validation, ensuring compliance with contract terms like rest periods and work limits. Shift trades are audited for transparency, and the system supports flexible scheduling, including gap enforcement and lunch hour management. This module enhances workforce flexibility while maintaining operational compliance and efficiency.

Request Time Off: Agents can submit absence requests for full or partial days through the MyTime tool. Agents can select the day(s), choose the type (e.g., vacation, personal day), and specify the time if it's a partial day. The system may display a probability indicator (green, yellow, or red) to show the likelihood of approval based on staffing levels. Requests can be automatically approved, pending, or denied, depending on settings. Once submitted, agents can track the status and make cancellations if needed.

Request Extra Hours: This allows agents to submit requests for additional overtime beyond their scheduled shifts. Agents can easily request extra hours via the MyTime interface, with visual indicators showing the likelihood of approval. Requests can be managed through automated or manual approval processes, and agents can track the status of their requests. This feature ensures flexibility in staffing, helping organizations meet dynamic operational needs.



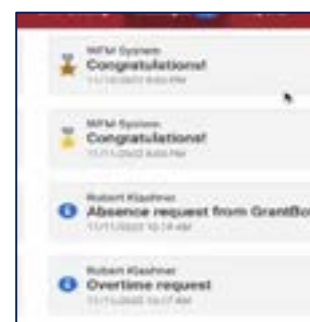
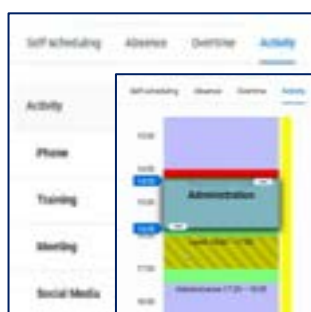
Preferences: Agents can specify preferences for shift timings, days off, and absences (e.g., vacation) through the MyTime interface. These preferences are then considered during the scheduling process, subject to organizational policies and staffing requirements. Administrators can configure the availability of shift categories, days off, and absence types in the Workflow Control Set within the Options module.

Availability: This allows agents to specify their available work hours, helping to streamline scheduling. Agents can input availability for multiple days, ensuring compliance with their contracts, and adjust as needed.

Activity Request: This allows agents to request specific activities, such as training or administrative tasks, outside their regular shifts. Administrators can configure approval rules, such as automatic or supervisor approval, and set flexible timing options for requests. The feature supports team-specific activity assignment and provides an audit trail.

Shift Bidding: This allows agents to select and rank their preferred weekly shift patterns during an active bid process. Agents can view available patterns, rank them according to their preferences, and submit bids within a timeframe. Administrators can monitor the progress of the bid process, preview results, & finalize assignments.

Handle Messages: This allows agents to efficiently manage and respond to messages from supervisors, planners, or system-generated notifications. Agents can read and acknowledge messages, reply with predefined responses or custom text, and access related requests for more details



Change Settings: This allows users to customize their interface and system preferences. Key options include managing passwords, selecting language and date formats, and more.

Agent Schedule Messenger (ASM): ASM is a compact window that allows agents to monitor their schedules while working in other systems. It provides real-time notifications for schedule changes, upcoming breaks, and transitions.

CalendarLink: CalendarLink enables agents to subscribe to their schedules using third-party applications such as Microsoft Outlook, Google Calendar, and Apple Calendar.

Manage your notification settings: Calabrio gives agents and managers control over notification preferences, ensuring they receive timely alerts for critical events like shift bidding, adherence, absence, overtime, and shift trades. With flexible delivery options including desktop, in-app, and mobile teams can stay aligned and respond quickly to changes.

View Reports: This allows users to access performance reports to track individual and team progress over time. Using the MyReport dashboard, agents can view key performance metrics such as readiness adherence, average handling time, talk time, after-call work, and the number of calls answered. Additionally, users can check the Leaderboard to see top performers based on badges earned. Reports can be customized and accessed for both personal and team-level performance, with historical data available for deeper insights.

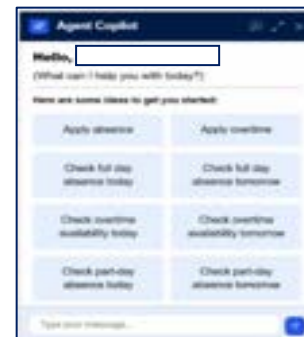




Mobile App Access: The MyTime mobile application is dedicated to agents, specifically. It allows agents to access their schedule information from anywhere, ensuring they have the most up to date schedule information. Employees can easily view their schedule, set their schedule preferences, submit and manage time-off, bid on shifts, and sign up for OT/VTO – allow for a more flexible scheduling environment. However, Calabrio WFM is a browser-based solution so all of the functionalities can be accessed from a mobile device browser in the same manner as it would on a desktop/laptop device.

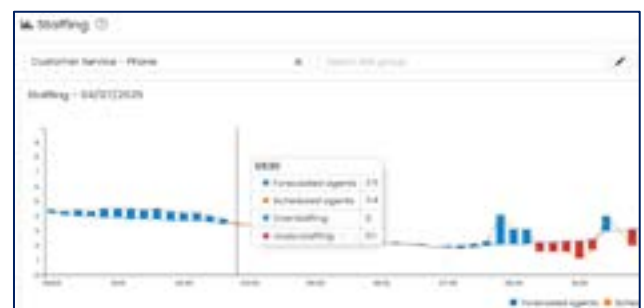
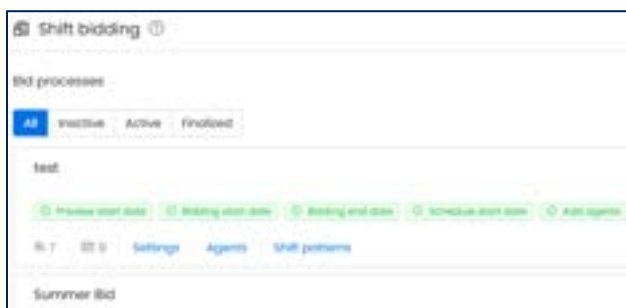
- ✓ **Easy to Deploy:** Web-based setup with simple configuration and strong security.
- ✓ **Mobile-Optimized Desktop Version:** Responsive design for mobile-friendly access on any device.
- ✓ **Schedule Requests:** Request time off or sign up for OT/VTO; get instant change notifications.
- ✓ **iOS and Android Compatible:** Accessible via iOS/Android apps or any web-enabled device.
- ✓ **Full Schedule Visibility:** Everyone shares the same up-to-date schedule view—agents to planners.
- ✓ **zEfficiently Streamline Communications:** Quickly send updates to keep your team informed and aligned.

WFM Agent Assist: Calabrio Agent Assist is a GenAI-powered assistant embedded directly into the WFM experience, designed with an agent-first approach. It enables conversational, real-time self-service for daily scheduling needs such as checking shifts, requesting time off, or volunteering for overtime, all while adhering to business rules and policies. Context-aware and policy-driven, it ensures accurate, actionable responses, and with its mobile-friendly, globally scalable design, it empowers agents to manage their schedules seamlessly.



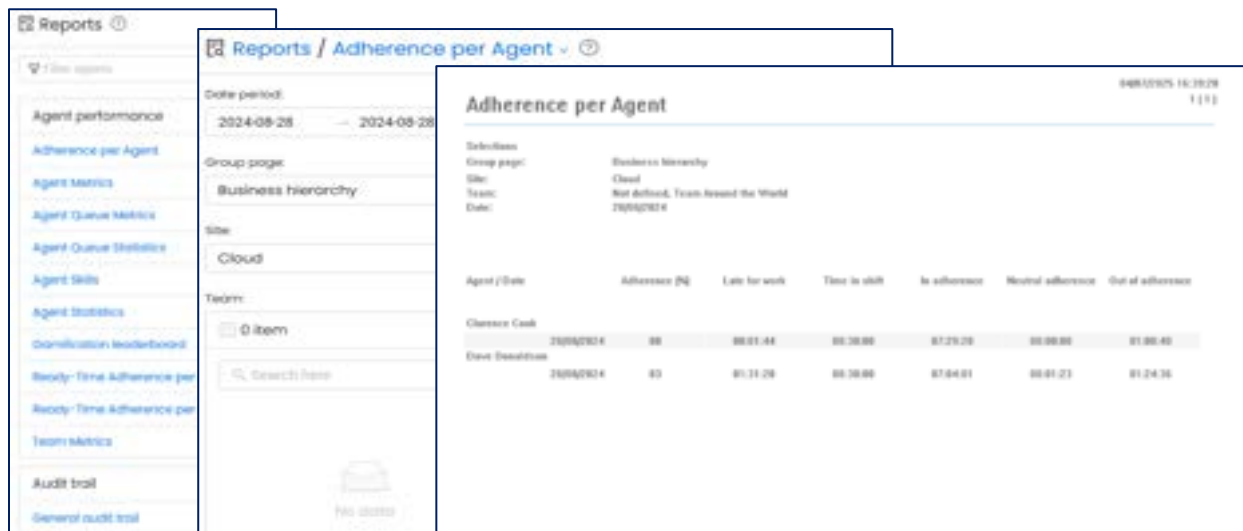
Shift Bidding: The Shift Bidding empowers organizations to align employee preferences with operational requirements by enabling agents to bid on preferred weekly shift patterns. Administrators can configure bid processes by selecting eligible agents, defining ranking criteria (such as seniority or performance metrics), and specifying available shift patterns. The module supports a preview phase, allowing agents to review shift options before bidding, and provides tools to monitor bidding progress and finalize assignments. Once finalized, agents are scheduled.

Staffing: Staffing provides a view of staffing levels by comparing forecast agent requirements with scheduled agents for specific skills or skill groups. It enables monitoring of overstaffing or understaffing situations, allowing for immediate adjustments to maintain optimal service levels. The module also supports the inclusion of shrinkage factors to account for variables like absences. Additionally, staffing data can be exported for further analysis or shared with external partners, facilitating collaborative planning during peak periods or when utilizing external resources.



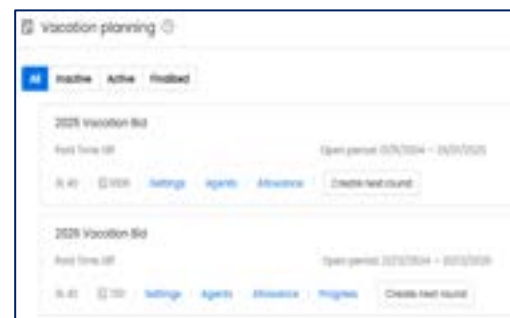
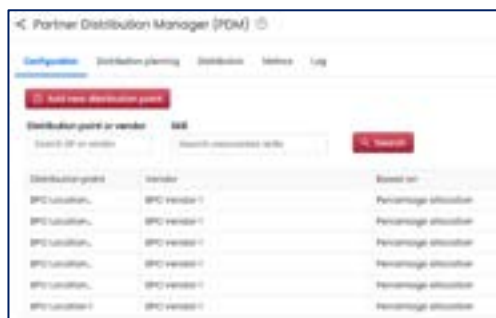
Reports: The Reports offers a suite of standard reports that provide insights into various aspects of contact center operations. These reports cover key areas such as agent performance, scheduling, forecasting accuracy, service levels, and adherence. Administrators and team leaders can generate reports in formats like PDF, Excel, or Word, with options to filter data by date ranges, teams, skills, and other criteria. The module supports scheduled report generation and email distribution. Access to specific reports and data is governed by user roles and permissions.

Additionally, Calabrio offers [Insights](#), a business intelligence tool that extends the reporting capabilities of WFM. Insights let you create custom dashboards and reports. With a user-friendly interface, drag-and-drop functionality, and support for data visualization, Insights empowers users to analyze trends, monitor KPIs, and make data-driven decisions across workforce operations.



BPO Exchange: The BPO Exchange facilitates seamless collaboration between organizations and their outsourcing partners. It enables the secure sharing of staffing forecasts, schedules, and performance data, ensuring alignment across all parties. By providing a centralized platform for data exchange, the module enhances transparency, streamlines communication, and supports efficient workforce planning.

Vacation Planning: The Vacation Planning module in Calabrio WFM automates and simplifies the vacation request process. It allows administrators to configure planning periods, set ranking rules, and define vacation allowances. Agents submit ranked vacation preferences, which are processed fairly based on set criteria. The module supports flexibility through change requests and ensures efficient, transparent time-off management.



Gamification: Gamification module is designed to enhance agent engagement and performance through structured, game-like elements. It enables administrators to set up weekly or monthly game periods, during which agents earn bronze, silver, or gold badges based on key performance indicators such as the number of answered calls, average handle time, and ready-time adherence. These badges are awarded using predefined thresholds or ratio conversions, and the system supports the import of up to ten external performance measures for badge calculations. Gamification rules can be assigned to specific sites and teams, allowing for tailored motivational strategies across the organization. Additionally, the module includes features for recalculating badges and provides leaderboard reports to recognize top-performing agents.

Payroll Integration: This streamlines the process of exporting payroll-related data by allowing administrators to extract information on scheduled activities and absences. It supports three standard export formats; activities, time, and detailed exports and offers the flexibility to create customized exports tailored to specific payroll system requirements. The module ensures accurate compensation calculations by incorporating multipliers for extra compensation scenarios, such as shift allowances and overtime.

Notifications: Notifications enable alerts for key workforce events. Calabrio enables administrators to centrally manage notification settings for their business units, ensuring agents, supervisors, and team leaders receive timely alerts for critical events such as shift bidding, adherence, absences, overtime, and shift trades. With flexible configuration and role-based controls, organizations can streamline communication, reduce missed updates, and maintain operational alignment.

Absence Attributes: With Absence Attributes, administrators can tag different types of absences (e.g., sick leave, emergency leave) for better categorization and analysis. This allows for more granular tracking, forecasting, and reporting, which is essential for effective absence management and operational planning.

Integration Self Service: The Integration Self-Service module in Calabrio WFM allows administrators to independently manage and deploy integrations with external systems, such as CCaaS platforms and HRMS. It features a comprehensive dashboard for monitoring the status of active integrations, flexible configuration options for syncing agent data and other relevant information, and a structured deployment process for historical and real-time integrations. Additionally, the module offers integration health monitoring, role-based access control, and color-coded status updates to quickly identify issues. This self-service approach streamlines integration management, enhancing operational efficiency and control for administrators.

Dynamic Scheduling: *This is an add-on feature* that empowers agents to influence their schedules while ensuring organizational staffing needs are met. Administrators can create availability templates with specific hours of operation and validation rules, which are then used to generate availability forms for agents. Agents submit their availability through these forms, and a point system encourages selection of less popular shifts, such as early or late hours. Schedulers can then use this information to create optimized schedules that align with both agent preferences and business requirements. This approach enhances flexibility and agent engagement in the scheduling process.

Performance Management: Calabrio allow supervisors to track key metrics such as daily adherence, number of interactions handled, and average handle time. These metrics are displayed on customizable KPI Dashboards and can be filtered by agent, team, or group. The system helps ensure agents are adhering to their schedules, improving efficiency, and enabling better coaching based on performance trends. Performance management is an **add-on module**.

Insights (Business Intelligence Tool)

Calabrio has a standard reporting tool called Insight, that is built into the standard user interface. This suite-wide feature delivers added business intelligence, integration, and flexibility across Calabrio ONE. In addition to a robust set of pre-built visualizations, it provides users with the ability to easily create—and customize—personalized reports and dashboards. Because Insights utilizes an integrated data model that supports blended, non-siloed reporting, users can easily combine QM, WFM, as well as Analytics data into a single report or dashboard and use these comprehensive sources of workforce optimization information to fuel better decision making.



Dashboards can also be utilized as a user's homepage. The tool offers thresholding, configurable and customizable KPIs, export in standard file formats (xls, csv, pdf, jpeg, png, html) and a variety of formats.

You'll enjoy the benefits of a robust, scalable, and user-friendly BI solution that will empower your organization to make data-driven decisions and gain a competitive edge in the market.

Insights allow users to create reports and dashboards that provide the specific information they need. Users can decide which type of chart or table best displays their data and can customize the chart to show only the measures they want to see.

Insight Data Export Service: This Service allows organizations to export data from Calabrio's Insights data lake to their own Amazon S3 buckets, enabling seamless integration with external systems. It provides a manifest file for each export, detailing status, row counts, and metadata. Additionally, Calabrio can provide a Datamart and/or database views of the Calabrio solution data for use in other reporting tools or export datasets via API.

