

## Benefits and Advantages of Recording and Archiving Calls

Discussing the value of call monitoring and introducing the ECHO digital recording solution.



## Introduction

Record keeping has become an indispensable part of our culture. As the number of daily transactions and interactions a business performs has gone up, so too has the burden of proof on all parties involved. There was a time when a good word and a handshake would move a business deal forward, but in today's world a handshake – while certainly an important step – is only the beginning.

It is the nature of human beings to discuss and debate, and also for each to believe he or she has the right version of any story. Starting from playground days, people engage in conversations that boil down to, “yes, you did --- no, I didn't...” This characteristic provides the basis for self-determination and strong decision making, but also opens the door to situations with no resolution. To go back to our playground example – we all know what happens next: the adult says “I don't want to hear another word” and everyone leaves the situation without conclusion. Since business interactions need to have conclusions, what's the adult resolution?

We believe the answer is the ECHO digital recording solution. Suddenly it's not a matter of who is loudest or can use the biggest words – or who is 'most important' – now there's a documented, indisputable record of the discussion. This brings a whole host of advantages, including dispute resolution, liability management, evaluation support, and more.

## Why Record Calls

Every individual and corporation will have different uses for call recordings. The obvious example is the call center, where clients or government regulations often require recording. In some call centers the recordings are used only for quality assurance, in others they are used in weekly or monthly client briefings, and in some cases they assist in resolving contention. ECHO's synchronized voice and screen recordings – complete with quality monitoring and CRM – take the benefit of recording beyond the call center.

### The Marketing Industry

Direct marketers have an obvious need for recorded calls – to verify a sale was agreed to and to provide a record of the terms of said sale. Indisputable evidence that a process has been authorized is a necessity rather than an advantage. ECHO has other uses in the marketing industry. Think of the benefits of being able to listen to the inception meeting on a project while viewing the storyboard weeks later. Being able to produce the precise specifications the client requested could be useful in numerous ways. ECHO On Demand can be used to selectively record only those calls that might be useful later, thus offering



the ability to create a knowledgebase by design, and add to it in the middle of a phone call.

### **The Finance Industry**

There are very basic reasons for banks, credit unions and similar businesses to record phone calls – any call that involves the use or movement of money has the potential to be disputed later. It's only logical for financial institutions to record all calls in the wire transfer department, but what about other areas? High-end brokerages don't have to rely on clients' memories regarding whether transactions were or were not requested. Perhaps it could be useful to have a record of how many inquiries come in to a local branch regarding the certificate of deposit rates posted in the window. Advertising and posting decisions for other local branches could be much more well-informed. Evaluating initial calls to lending assistants could both improve customer service and determine what the average prospective homeowner is looking for in a mortgage. ECHO provides the ability to record calls to different departments (and even extension by extension) under different plans, thus breaking out reporting according to any desired criteria.

### **The Insurance Industry**

It's easy to see why calls in the claim department should be recorded – those are the most likely calls to be analyzed later for proof of contact and/or proof of compliance. It's also clearly beneficial to record calls for direct sales. In addition, insurance companies could benefit from recordings of inter-corporate calls, especially now that many insurance companies have interconnections with other agencies and corporations. Having a record of occurrences that can be transmitted between arenas is key to controlling communication and cooperation. ECHO's Web Services provide a truly Service-Oriented Architecture, allowing information to be retrieved and integrated with any web services enabled platform.

### **The Public Service Response Industry**

Emergency calls (911) in most areas of the country are required by law to be recorded for liability issues and as a matter of public record. Other similar public response calls are coming under scrutiny for similar reasons. Many major metropolitan areas have or are developing "311" (non-emergency help) call centers to aid in times of severe weather, power outages, potential dangers to the public, and so on. As these centers are used more often, the need to implement recording solutions grows exponentially. Litigation will always be an issue where public health and safety are concerned, particularly where tax dollars are involved. In addition, many offices connected to such call centers are held by elected officials, and documentation can be key to averting scandals that

might influence future events. The ECHO digital recording solution provides the ability to select individual calls, encrypt them with a client-secured password, and email them to any recipient for proof of a given call.

## **The Health Care Industry**

HIPAA regulations and the strict concern regarding PHI have made recording in all health care arenas virtually a requirement. It's imperative that every agency be able to prove they are safeguarding patient information to the fullest extent of their capability. With the trend going more and more toward overbooking appointments and rushing through paperwork, having a recording of all lab requests and checkout suggestions could be invaluable – just pull up the call and check what the required information was. Customer retention is also a concern in the health care industry and quality assurance using recorded calls is one of the best tools for making changes that promote customer satisfaction. ECHO's included evaluation module is completely customizable and modular – each section can be assigned to different plans and/or different evaluators – and sections can be combined in different formats to create the perfect evaluation for each situation.

## **Why Archive Calls**

Once a call has been recorded, it should be stored and remain accessible as long as possible. There are a number of reasons that having this record could be useful, if not mandatory, a year, five years, even further in the future.

### **Compliance**

With HIPAA, Sarbanes-Oxley, SAS 70, and other standards affecting the vast majority of businesses today in one way or another, there will always be issues of compliance. Having all calls recorded and keeping those recordings available is one of the surest ways to prove your adherence to restrictions should it ever come into question. As more regulatory bodies are added, the time frame for keeping proof and maintaining records is likely to continue to grow. Having an easy-to-use archive solution can make the difference between days of searching for information and minutes spent retrieving a conversation.

### **Dispute Resolution**

There will always be customers who are unhappy, sometimes with good reason. It's easy enough for an irritated customer to say, "I've called seven times in the past six months". With ECHO archives in place, it's also easy enough for a company to verify whether or not that's true. Many organizations also find that the occasional customer service or sales representative will make promises that the company does not endorse. Even after that representative has been

retrained or let go, it is infinitely valuable to be able to track down the problem situations and use the information to be proactive. The ECHO archives can be searched using a variety of components as criteria, including date, agent, ANI, call length, campaign, and many more.

## **Data Mine of Market Information**

Market information is always available... for a price. Market research studies can be purchased or great amounts of company time can be spent compiling research from the Internet or alternate information venues. A company that has a complete archive of calls placed and received has an additional option – use the market information your own customers have brought to you. Particularly if calls are classified according to department or campaign, listening to the calls and comparing between old and new calls can provide a unique and highly focused set of goals and concerns for your market segment. The ECHO system comes with reports that can be run against archived calls based on evaluations, comments, agent, etc., and those reports can also be customized to your information retrieval needs.

## **ECHO Makes Archiving and Retrieving Easy**

The ECHO archiving process is designed to be user friendly. The ECHO server can be configured for DVD archiving, one-step shuttling to an alternate server, or integration with some alternate storage solutions. In any case, the archive search and results are available through the browser-based front end, making an archive search just as easy as a current call search. Once the recording is located, the user will be prompted to insert the appropriate media and then the call can be reviewed just as though it were a current call still stored on the ECHO server. Best of all, the ECHO audio-visual file is only 1 - 2 MB per average 4 minute conversation, optimizing server and removable media usage. ECHO's integrated archive system makes call retrieval simple and quick, and archived calls can be heard and evaluated in the same fashion as current calls.

## **Why Doesn't Everyone Record and Archive?**

Some organizations take the position that it's not necessary or useful for them to record calls. With the current trend toward regulation and litigation, that attitude is becoming more and more dangerous to have. Every company can benefit from having a complete record of interactions and can make use of the added value of improving quality and applying focused market information.

Many companies don't record calls because they feel the cost is prohibitive. The ECHO system interfaces directly with existing Avaya or Cisco switches, reducing the need for costly phone system upgrades. In addition, this direct integration



removes all costs for connection to separate extensions, phones, or workstations, since everything is handled directly at the switch. Retraining inaccurate agents or providing proof of client agreement can pay for the cost of the ECHO system in very little time.

Finally, enterprise-level and future planning is daunting. It can be hard to make decisions about an organization's long term direction while taking into account that all future solutions will need be integrated with a minimum of hassle. ECHO is completely scalable to accommodate growing business models or additional recording needs. The available ECHO Web Services modules provide the ability to integrate with any web services based platform or CTI capabilities.

## In Summary

The changing culture that businesses operate in today has brought forth a necessity for documentation. One of the clearest and simplest forms of documentation is call recording. Employees who know they are being recorded will perform better, customers who know they are being recorded will feel secure that they are receiving accurate information, and regulatory bodies who know that recordings are taking place will approve the security of the institution. ECHO from Teleformix provides a user-friendly, wide-ranging, customizable tool to assist any business in navigating today's business world. Now when cries of "He said, she said..." are heard, it's easy to log in to ECHO and say, "Let's see what really happened."

Teleformix, LLC  
2100 Golf Road, Suite 460  
Rolling Meadows, IL 60008  
800-513-4000  
[www.teleformix.com](http://www.teleformix.com)

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