

# UC for Business - Backup & Redundancy



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## Table of Contents

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<b>Introduction</b> .....	<b>3</b>
<b>Overview</b> .....	<b>3</b>
Key Business Benefits.....	4
<b>Features</b> .....	<b>4</b>
UCB Record & Evaluate Features Overview .....	5
<b>UCB Record</b> .....	<b>6</b>
Key Features .....	6
Recording Options.....	6
All Calls Recording.....	6
Selective Recording .....	6
Deployment Options.....	7
Trunk-side Recording.....	7
Extension-side Recording .....	7
Summary .....	7
Search and Retrieval .....	10
Playback.....	11
Archiving .....	11
<b>UCB Evaluate</b> .....	<b>12</b>
Templates.....	12
Coaching-Based Development.....	12
Reporting.....	16

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## Introduction

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When you have a legal compliance, an archiving requirement or a need to sample and measure enterprise service quality, NEC's UC for Business (UCB) Record module can be a critical resource for business success.

Add the UCB Evaluate module and you will be able to upgrade staff skills to deliver a better, more cost-effective customer experience.

NEC's UC for Business Record and Evaluate solutions enable contact centers to run more smoothly. The modules record and archive agent and enterprise conversations; retrieve conversations for investigation or evaluation and training purposes; help meet legal or statutory business practice requirements; or screen out potentially malicious activities.

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## Overview

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UCB's Record and Evaluate modules provide compliance or security for all telephone archiving. These modules also raise the bar across the entire enterprise with recording, evaluation and coaching in your most critical areas to help improve customer experience and increase revenue.

The certainty or even the potential of being recorded provides a constant incentive for quality and effort among all staff. Add to that the opportunity to highlight optimum performance or identify areas for development with consistent company-wide measurement and you have a valuable resource for ongoing improvement.

UCB Record is a smart, competitively priced Microsoft® Windows®-based telephone-recording tool. It is available in all calls and selective recording configurations, and offers both extension-side (for selective recording) and trunk-side recording options (for any or all calls)<sup>1</sup>.

UCB Record stands out when compared to other applications due to the simplicity of its auto-registration of extensions. There are no complicated import or setup requirements. Extensions are simply added as they are recorded.

For enterprises wishing to record all calls, UCB Record offers both extension-side and trunk-side options. UCB uses the industry leading Ai-Logix SmartTAP technology as the interface between the telephone system and the recording system.

When an enterprise wants to record a sample of calls received, a simple Scheduler is available, enabling managers to roster recordings at pre-determined times for up to two weeks. Everybody can work their normal duties without the need to laboriously 'plug in' to monitor sample calls.

Recordings are saved to the hard drive as portable .wav files to enable smart multimedia possibilities. You can easily re-distribute move voice clips, redirect a conversation across your LAN, or even attach the clip to an email and send it anywhere in the world to any computer equipped with Windows and a sound card.

UCB Evaluate works with Record or other recording packages or can be applied to live, monitored calls.

More than 350 pre-defined industry standard evaluation templates help managers and team leaders get up to speed quickly with this valuable business improvement strategy.

Improve performance and rapidly gain return on your investment with this package. Higher first call resolution, better understanding of customer needs, increased agent competence, superior product knowledge and an enhanced grade of service are just some of the gains you'll get from UCB's Record and Evaluate.

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<sup>1</sup> Available recording options for UCB Record are dependent on PBX platform, line type and telephone hardware.

## Key Business Benefits

- Enhanced customer experience
- Increased sales
- Reduced handle times
- Fewer escalated calls
- Reduced process deficiencies
- Improved call control
- Lower agent churn
- Lower customer churn
- Focused training
- Accelerated new recruit development
- “Model call” examples
- Reduced costly “ramp-up” period
- Self-evaluation
- HR/disciplinary
- KPI Metrics
- Rapid ROI
- Security
- Future/ad hoc reference
- Enterprise benchmarking

## Features

People buy UCB Record and Evaluate for these reasons:

- **Off-the-Shelf Templates** – Reduce both the administration and the ‘ramp-up’ time for the new modules. Adoption is quick, straightforward and painless. This means ROI starts on day one.
- **Template flexibility** – Existing templates can be modified to retain the originals, while extending their function for your own needs.
- **Ease of Use** – Contact center managers and team leaders at all UCB sites can easily understand and maximize the applications and hit the ground running.
- **Integration with UCB Contact Center** – Means more flexible configuration, e.g., exclusions are an important aspect of any recording. UCB integration means you can provide selective recording, even when recording by Trunk. For example, you don’t have to record the CEO’s conversations, which could be sensitive. Many recording products can only offer this flexibility by recording all calls via extension instead of trunks – a costly solution for large businesses.
- **Record and Evaluation integration** – Make evaluations from the same screens where recordings are visible and available; there is no need to import and upload files to start evaluating.

## UCB Record and Evaluate Features Overview

Feature	Description
All Calls Recording	UCB Record utilizes industry leading Ai-Logix technology to enable extension and Trunk-side or IP recording in environments where all calls are to be recorded.
Selective Recording	Schedule based and on-demand selective recording options are available from four to 30 ports.
Team Management	UCB Record enables customer service representatives (CSRs) to be allocated to specific teams. Team leaders can schedule and replay recordings for their team members.
Replay Options	Recorded calls can be replayed using the embedded player or Windows® media player on any PC equipped with a sound card and speakers.
Playlists	The playlist feature enables consultants, team leaders and managers to create libraries of calls to be saved for future reference. These could be calls of a specific type or simply a list of calls that are of interest. The ability to add notes to calls added to a playlist means they can be easily identified for future use.
Security	UCB Record and Evaluate utilize multi-level security with various privileges associated to each level. For example, a manager can view and play all consultants calls, while team leader can only access calls for their own team members. Security privileges can be applied at an individual or role level.
PBX integration	UCB Record is supported on NEC's SV8100, SV8300 and SV8500.
Archiving and Storage Management	UCB Record and Evaluate provide flexible, automated archiving and storage management facilities. Recordings can be deleted or transferred to back up media based on a number of parameters, including age of recording and recording status. Archiving can be undertaken globally or at an individual level.
Call Evaluation and Coaching	UCB Record is a flexible behaviors-based call evaluation and coaching module that enables agent calls to be assessed against customizable assessment templates and focused coaching provided where available.

## UCB Record

### Key Features

UCB Record provides the following:

- **Trunk- or Extension-Side all or selective call recording, utilizing Ai-Logix Trunk or Extension TAP (various solutions are available depending on site requirements, current PBX, line types and telephone handsets).**
- **Recordings identified and searchable by extension number.**
- **Tight integration to the UCB Contact Center solution.**
- **Auto Agent Creation – The first time a new user logs into UCB, they are automatically created as a user within UCB Record, saving double entry/upload of users.**
- **Flexible search and retrieval based upon**
  - Time and date
  - Agent/User Id
  - Caller Line Id
  - Dialed number
  - User input data (two fields available for manual user input)
  - Customer Name (if directory server module is implemented)
  - Queue Name and/or Number
- **Multi-routine archiving enabling**
  - Separate archive and purge, allowing recordings to be immediately archived to off-line storage, such as DVD or tape, while still being available for reply via the online system. Typically, queries occur soon after a call; this capability significantly reduces the requirement to restore recordings from the off-line media for replay.
  - Separate archive routines for evaluated calls, enabling these to be retained for training and coaching (and potentially HR purposes) for extended periods.
- **Open System – UCB Record and Evaluate are based on open standards and use industry standard PC servers and Microsoft® operating systems.**

### Recording Options

UCB Record offers two primary options for recording:

- All Calls
- Selective Recording

#### All Calls Recording

Typically, trunk recording is the most feasible and efficient option, particularly for a large site, as no configuration is required. All calls are simply recorded.

#### Selective Recording

On-Demand and Scheduled recording can be performed by using any of the deployment options available for the site. It is important to identify a business' exact requirements and environment before attempting to provide a solution.

The deployment options available for recording are:

- **Trunk-side recording using T1 trunk digital TAP**
- **Extension-side recording using:**
  - Digital extension line TAP
  - VoIP recording utilizing Ai-Logix NetTAP architecture.

## Deployment Options

There are two main deployment options for recording telephone traffic into and out of your enterprise:

- **Trunk-side recording simply records all activity on one or both channels on the PRI.**
- **Extension-side recording will record activity on a per-extension basis.**

Both methods use hardware cards or devices that are either plugged into the physical PSTN line in front of the PBX or attached to the telephone handset.

### Trunk-side Recording

Historically, Trunk-side deployments have been less preferred, as recording solutions were only able to store trunk information against each conversation, making search and retrieval problematic.

However, with UCB Record's tight integration to its CTI architecture (housing both user and telephony information), a Trunk-side solution is now able to give the best of both worlds. Search and Retrieval is made simple as the interface between the recording infrastructure and the CTI infrastructure presents relevant information to the user, e.g., matching the PRI channel that a call came in on with the queue, extension and specific agent to whom it was delivered.

At a higher hardware cost than extension cards, Trunk-side recording is typically used for compliance or all calls recording, as full coverage is automatically provided. However, this solution becomes very cost effective for selective recording for larger sites, compared to purchasing hardware for each extension.

This approach also enables configuration of the users, extensions and/or queues on which the recording will be activated. Even with the ability to record every extension in the building, you can use UCB Record's secure administration module to define specific users for on-demand recording.

### Extension-side Recording

An Extension-side deployment can be a less expensive solution, particularly at smaller sites, but options can be constrained by factors such as PBX platform and telephone handsets. Also, IT infrastructure requirements may change as the environment changes or grows (as the physical architecture is directly associated with the extension).

There are three types of Extension-side recording:

1. **Intrude – records concurrent calls using the PBX “Intrude” feature + Dialogic cards. Note that with this method the very beginning of the conversation is not usually recorded due to the PBX response time to implement the intrusion.**
2. **NGX “TAP” boards – one port per extension. This is a permanent configuration, not concurrent.**
3. **VoIP – requirements for VoIP are complex. It is critical the discovery questionnaire is used in order to identify and reconcile resources and requirements**

### Summary

Please note these variables:

- **Not all Telco lines can be recorded**
- **Not all PBXs support all recording options**
- **Not all telephone handsets are compliant for NGX and VoIP recording**

A thorough survey of your environment is critical to identifying both preferences and constraints for your proposed deployment and to find the optimum solution for your enterprise.

Your NEC account manager will cover a series of points with you and request your IT team to complete a qualification questionnaire.

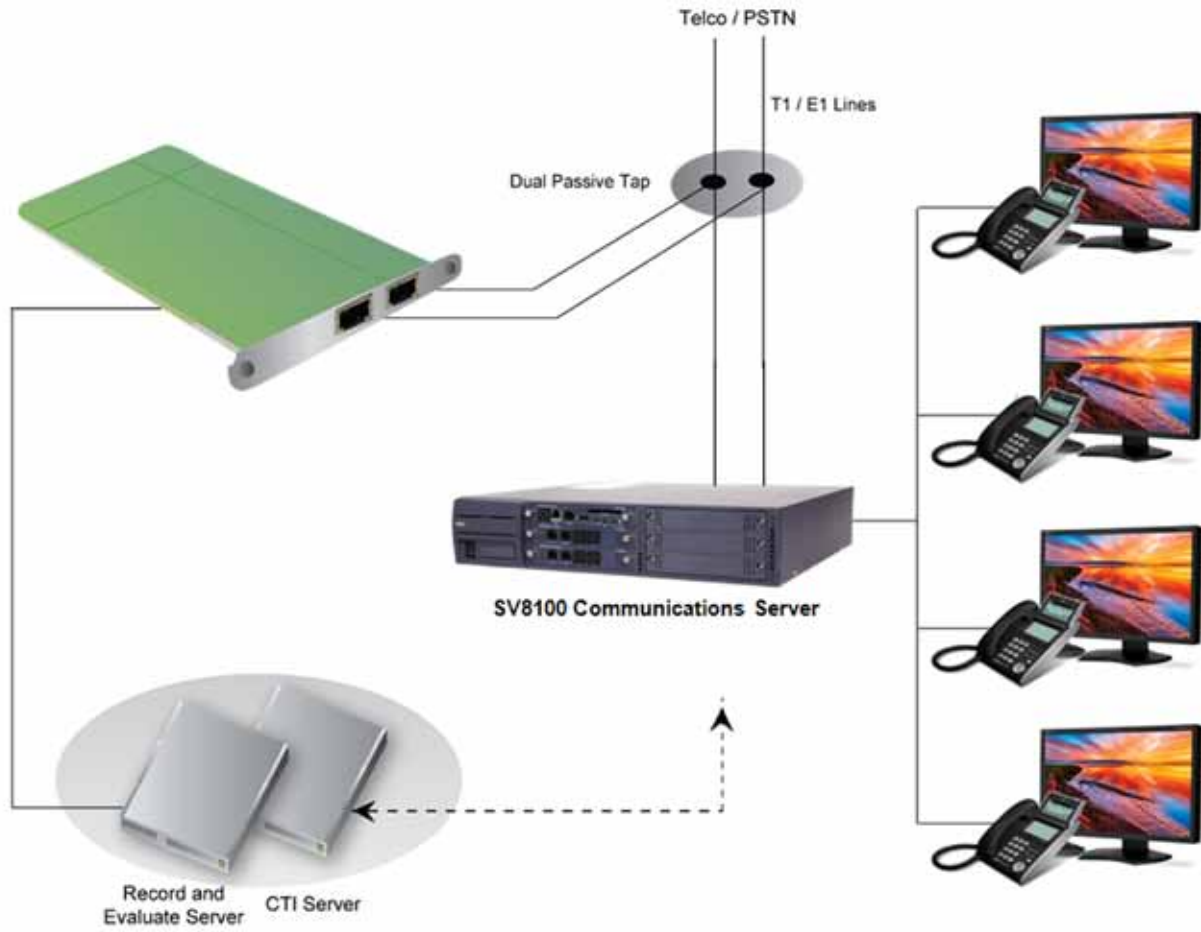


Figure 1. Trunk-side Recording Architecture

## NGX Application Model

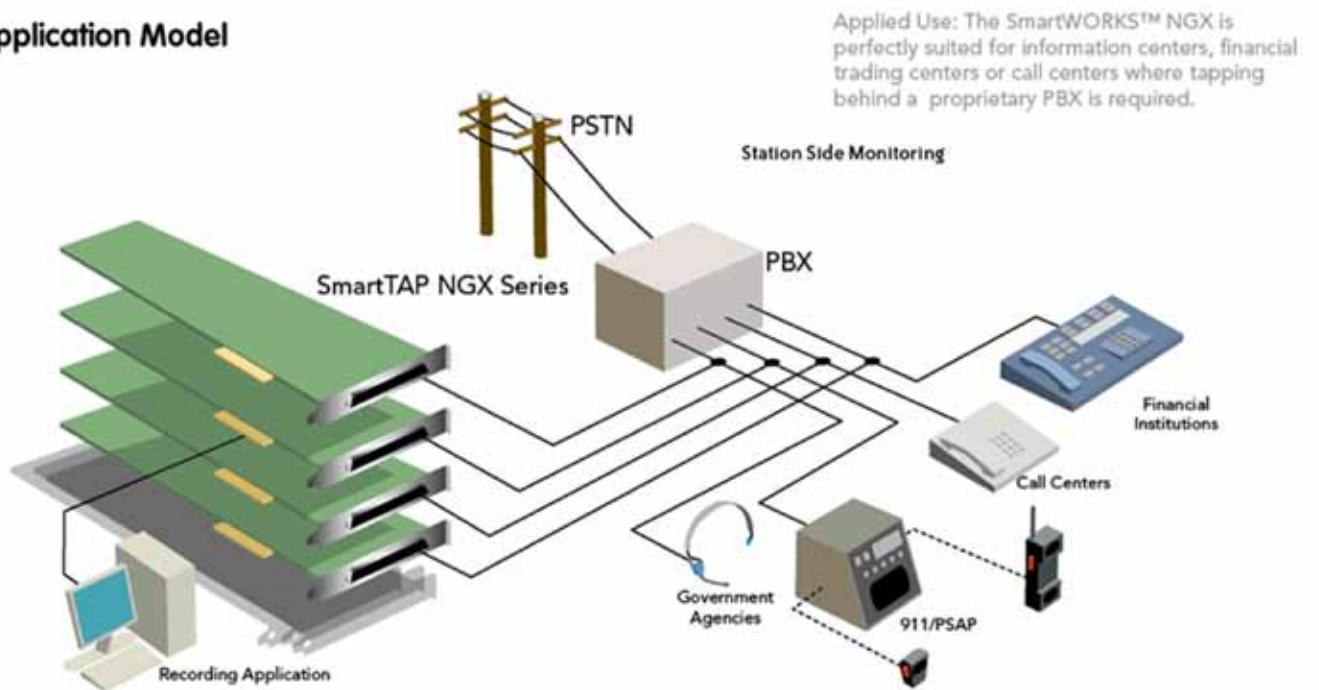


Figure 2. Extension-side Recording Architecture

## Search and Retrieval

UCB Record offers a comprehensive search and retrieval capacity, enabling recorded conversations to be easily identified and retrieved.

Search options include:

- Time and date range
- Agent
- Caller Line Identification
- Dialed Number
- Queue Name and Number
- 2x user input fields (if used)
- Caller Name/Company Name

The screenshot displays a software interface for searching and retrieving recorded conversations. The interface is divided into several sections:

- Search Criteria:** Includes options for Record Criteria (Active, Archived, All), Users (All Users, This User), Record Type, Date/Time Range (From: 5/05/2009 12:00:00 a.m., To: 8/05/2009 9:48:51 a.m.), Phone Number (Caller Number, Called Number), and Search Criteria (Duration, Queue Details, Reference Fields).
- Filter:** A section with icons for filtering the results.
- Table:** A table listing search results with columns: Date, User, New, Caller Number, Called Number, Queue Name, Extension, and Date Archive. The table contains 30 rows of data.
- Active Recording:** A section with a Playback button and a green audio waveform visualization.
- Summary:** A box at the bottom left showing 'Total Records Found: 692', 'Scheduled Recordings: 679', 'On Demand Recordings: 5', and 'Evaluations: 8'.

Date	User	New	Caller Number	Called Number	Queue Name	Extension	Date Archive
8/05/2009 9:47...	Catherine Johnson	New			800	89566	
8/05/2009 9:44...	Catherine Johnson	New			800	89566	
8/05/2009 9:40...	Catherine Johnson	New			800	89566	
8/05/2009 9:16...	Matthew Schofield	New	+1 (349) 8945327		800	89618	
8/05/2009 9:14...	Catherine Johnson	New			800	89566	
8/05/2009 8:58...	Catherine Johnson	New	+1 (349) 3646716		800	89566	
5/05/2009 4:50...	Matthew Schofield	New	+1 (349) 4154409		Operator	89618	8/05/2009 12
5/05/2009 4:26...	Catherine Johnson	New	45503			89566	
5/05/2009 3:57...	Catherine Johnson	New			800	89566	8/05/2009 12
5/05/2009 3:52...	Matthew Schofield	New	+1 (349) 2571633		800	89618	8/05/2009 12
5/05/2009 3:52...	Catherine Johnson	New	+1 (349) 2571633		800	89566	8/05/2009 12
5/05/2009 3:49...	Catherine Johnson	New			800	89566	8/05/2009 12
5/05/2009 3:48...	Matthew Schofield	New			800	89618	8/05/2009 12
5/05/2009 3:41...	Catherine Johnson	New	+1 (349) 3500534			89566	8/05/2009 12
5/05/2009 3:36...	Matthew Schofield	New	+1 (349) 2750000			89618	8/05/2009 12
5/05/2009 3:28...	Matthew Schofield	New	+1 (349) 2571633		800	89618	8/05/2009 12
5/05/2009 3:23...	Catherine Johnson	New			800	89566	8/05/2009 12
5/05/2009 3:10...	Matthew Schofield	New			Operator	89618	8/05/2009 12
5/05/2009 3:08...	Catherine Johnson	New	+1 (349) 8616850		Support	89566	8/05/2009 12
5/05/2009 3:03...	Catherine Johnson	New	+1 (349) 3500534		Support	89566	8/05/2009 12
5/05/2009 2:50...	Catherine Johnson	New		89656		89566	8/05/2009 12
5/05/2009 2:48...	Matthew Schofield	New			800	89618	8/05/2009 12
5/05/2009 2:40...	Catherine Johnson	New			800	89566	8/05/2009 12
5/05/2009 2:29...	Matthew Schofield	New	89569		Operator	89618	8/05/2009 12
5/05/2009 2:19...	Matthew Schofield	New	+1 (349) 8780800			89618	8/05/2009 12
5/05/2009 2:15...	Catherine Johnson	New	+1 (349) 8672044			89566	8/05/2009 12
5/05/2009 2:05...	Catherine Johnson	New	+1 (349) 3531120		Support	89566	8/05/2009 12
5/05/2009 1:42...	Catherine Johnson	New	+1 (349) 3096691		Operator	89566	8/05/2009 12
5/05/2009 1:21...	Catherine Johnson	New			Operator	89566	8/05/2009 12
5/05/2009 1:21...	Catherine Johnson	New	+1 (349) 3020279		Operator	89566	8/05/2009 12
5/05/2009 1:08...	Matthew Schofield	New	89569			89618	8/05/2009 12
5/05/2009 12:4...	Catherine Johnson	New	+1 (349) 5792029		Support	89566	8/05/2009 12
5/05/2009 12:1...	Matthew Schofield	New	+1 (349) 8616850		Support	89618	8/05/2009 12
5/05/2009 12:1...	Catherine Johnson	New	+1 (349) 2623141		Support	89566	8/05/2009 12
5/05/2009 11:5...	Catherine Johnson	New	+1 (349) 3501818		800	89566	8/05/2009 12
5/05/2009 11:5...	Douglas Stevens					0	

Figure 3. Search and Retrieval Parameters and Filter

## Playback

Team leaders and managers can play recordings simply by selecting the desired agent from a drop down list and then selecting calls to be played.

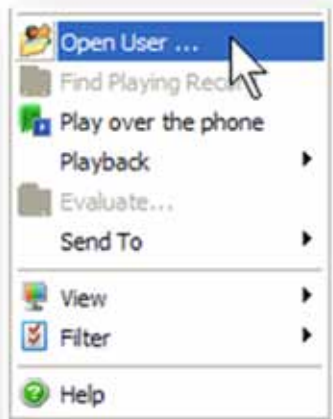


Figure 4. Locate a Recording by User

Simply double clicking on the desired recording will launch the embedded player and play the recording.

## Archiving

UCB Record uses a multi-routine archiving process. This enables:

- A flexible approach to archiving, where recordings can be archived to off-line media, such as DVD or tape, and also retained on the UCB Record server for a predetermined time. After this time has elapsed the recordings are then automatically purged. Most disputes or queries on interactions usually happen within a short period of time after the conversation. Keeping a copy on the online server allows quick search and retrieval without the need to find and restore off-line media.
- Evaluated calls and evaluation scores are treated separately, and can be retained on the online system for extended periods of time.

Choose an “Archive” action, i.e., whether to archive or just to delete certain records.

Decide:

- Which users to act on (or archive all)
- Which type of records to act on
- When to act (after x days)

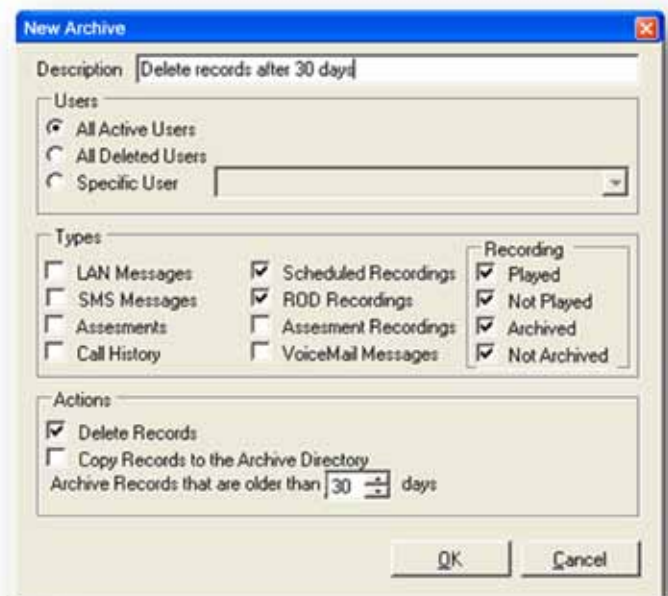


Figure 5. Archiving

## UCB Evaluate – Call Evaluation and Coaching

Whatever your industry, your staff will benefit from employing a conversation evaluation tool.

Sales calls, support calls, customer follow-ups, planning discussions and interviews can all be enhanced by examination and constructive dissection.

Create mock-up samples or record actual conversations to stand as models of ideal behavior or less than ideal situations.

Apply benchmarking to different teams to ensure consistent measurement across the board.

### Templates

Build evaluation criteria from UCB Evaluate’s customized templates, or simply use any of the relevant behaviors from a database of more than 350 industry-standard behaviors available with the application.

UCB Evaluate customers consistently advise that one of the things they like best about the product is the list of pre-defined behaviors.

Use the behaviors as they stand or pick and choose behaviors relevant to your business from the pre-defined list to create custom templates for your managers and team leaders.

Motivated staff can perform self-evaluations.

### Coaching-Based Development

Training is fundamental to building quality and efficiency in any environment. However, training can only go so far. There will always be a need for ongoing management and coaching of individuals.

This is why we recommend implementing UCB Evaluate with UCB Record to measure the impact of training delivery and to ensure learned skills are translated into workplace practice on a long-term basis.

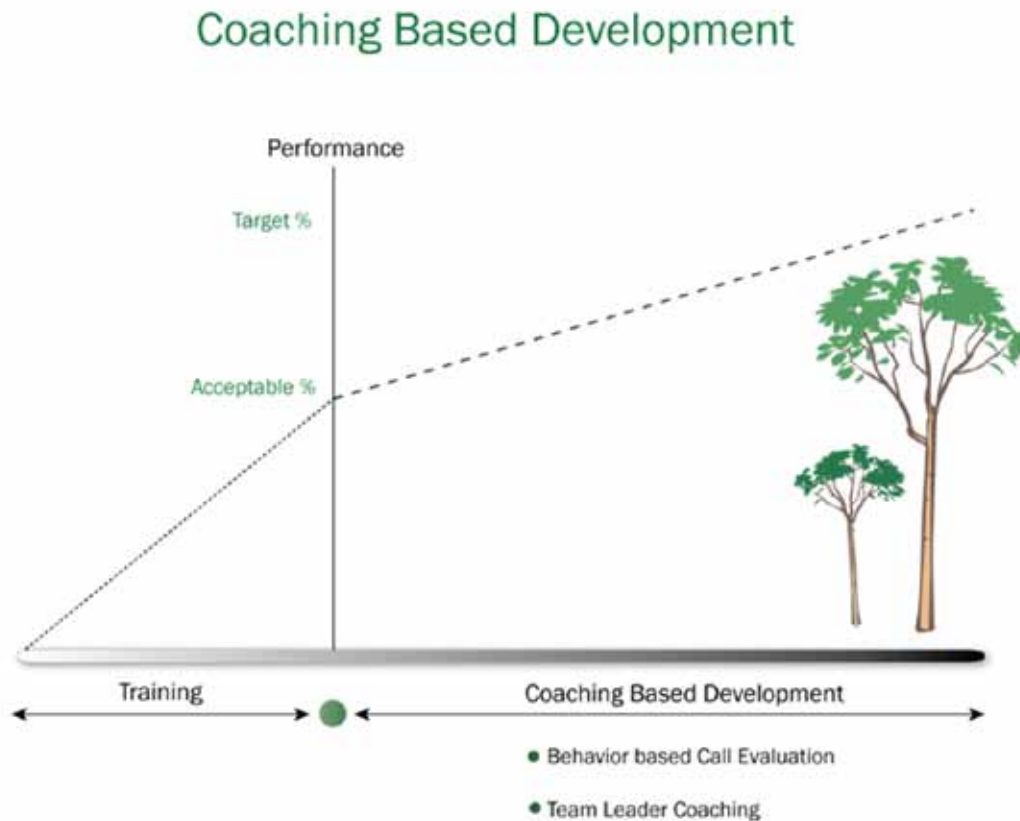


Figure 6. Performance Improvement with Coaching

Undertaking assessments will often identify coaching requirements where individuals require additional assistance in specific areas. It will also catch any minor slippages in performance before they become habitual practice, ultimately extending the value of the training. Ongoing evaluation will often identify the next step – how the team can be developed to the next level of service to further satisfy and delight the customer.

The evaluation program utilizes a user customizable library of behaviors to enable recorded calls to be evaluated with the CSR and

focused coaching to be provided on those areas where improvement can be achieved. An additional benefit is that areas where performance is high can also be identified and recognition shown. This helps to motivate the staff to strive for excellence.

Multiple evaluation matrices can be created to reflect the range of call types received within your center. There is also the option to create multiple assessment types, e.g., QA assessment for frequency and overview or coaching assessments, which are highly detailed and require both the coach and agent to be present.

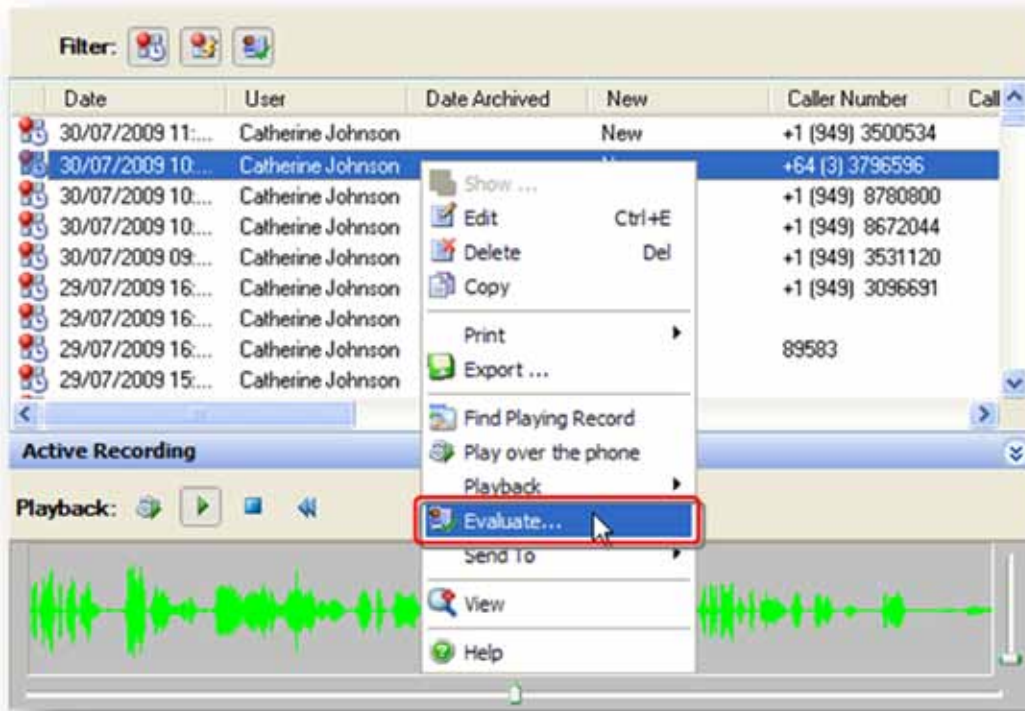


Figure 7. Choose a Conversation to Evaluate



Figure 8. Choose the Template to Mark Against



Figure 9. Choose the Appropriate Assessment Type

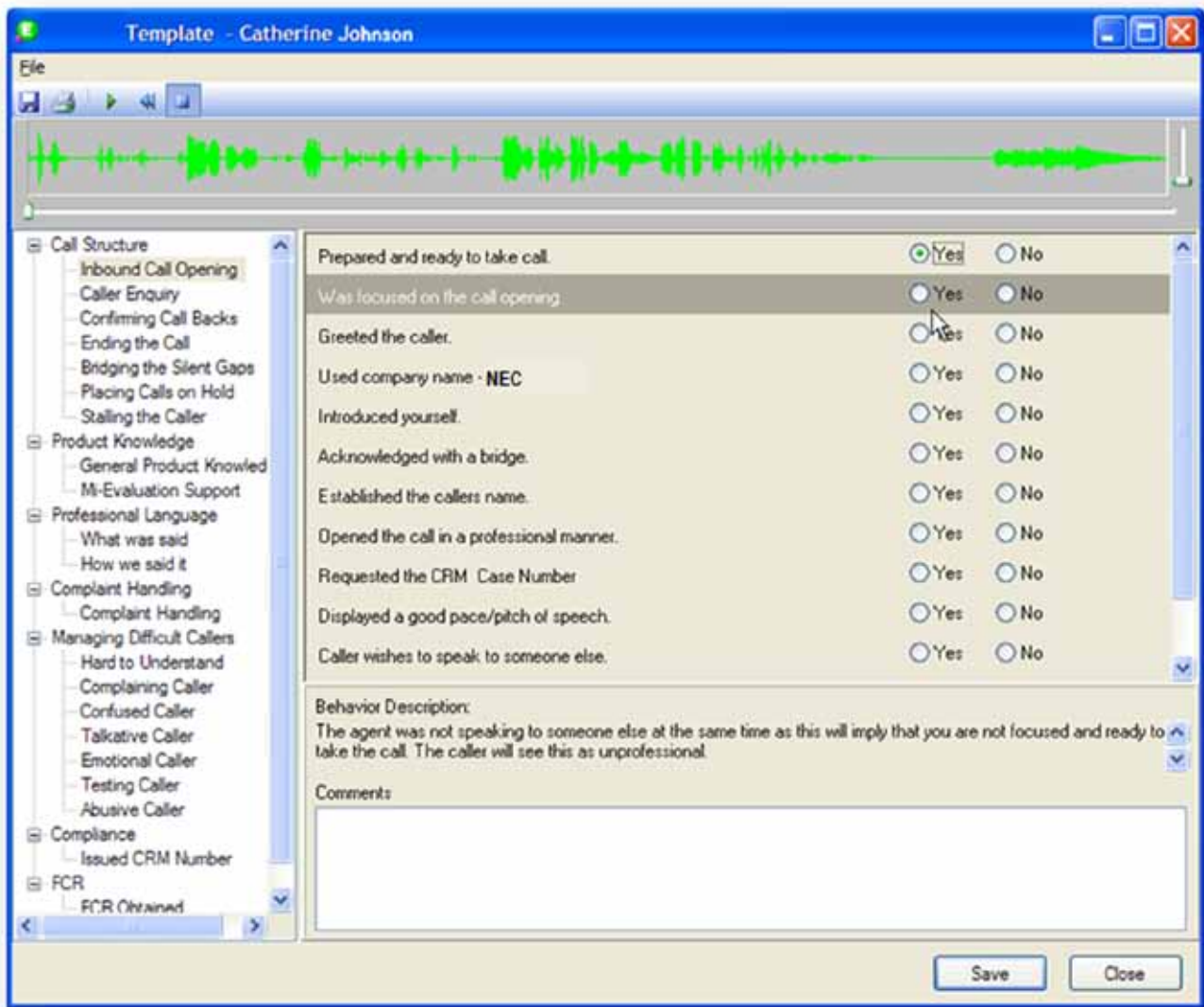


Figure 10. Choose the Appropriate Assessment Type

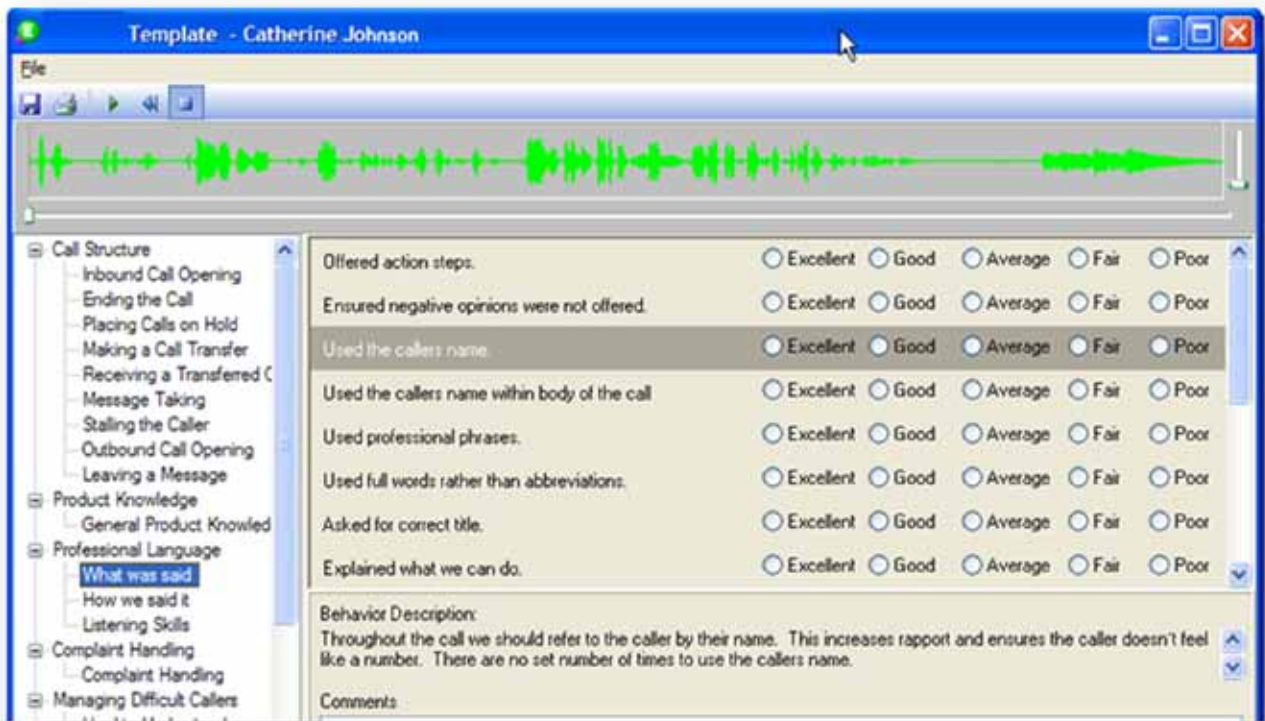


Figure 11. Behaviors can be scored as Yes/No (previous image) or in a numeric range.

## Reporting

A range of standard reports in graphical and tabular format is provided.

Reporting is on Evaluations only; queue and non-queue reporting for all calls is available inside UCB's standard Reports application.

Team leaders can generate Reports prior to saving to check them. After saving, Reports are tamper-proof, i.e., cannot be changed.

Reports can be saved as a PDF for export/emailing.

<b>Personal Assessment</b>		<b>Page 1</b>
Name: Peter Brown		
Date Evaluated: 08/06/2009 10:07:24		
Type: Coach	Template: Inbound Calls	
Pass Mark: 75		
<b>Inbound Call Opening</b>		<b>85%</b>
Prepared and ready to take call.		Yes
Was focused on the call opening.		Yes
Introduced yourself.		Yes
Acknowledged with a bridge.		No
Try to remember the bridge, this helps to give you control of the call		
Established the callers name.		Yes
Opened the call in a professional manner.		Yes
Displayed a good pace/pitch of speech.		Yes
<b>Caller Enquiry</b>		<b>80%</b>
Agent controlled the call.		Yes

Figure 12. Sample individual assessment report. Detailed Reports evaluate a specific conversation



<b>Development Plan Based On Ref #:000000</b>		<b>Page 1</b>
Name: Doug Stewart		
Date Evaluated:		
Type: QA	Template: In-Bound Calls	
Pass Mark: 75		
<b>Inbound Call Opening</b> <small>Introduced yourself. Acknowledged with a bridge. It is important to use a bridge; this reassures the customer that we will help them</small>	<b>77%</b>	
<b>Caller Enquiry</b> <small>Questions rephrased for understanding.</small>	<b>90%</b>	
<b>Confirming Call Backs</b>	<b>100%</b>	
<b>Ending the Call</b>	<b>100%</b>	
<b>General Product Knowledge</b> <small>Were any future action steps explained?</small>	<b>85%</b>	
<b>What was said</b> <small>Checked spelling of names.</small>	<b>88%</b>	
<b>How we said it</b>	<b>95%</b>	
<b>Overcoming Objections</b>	<b>100%</b>	
<b>Complaint Handling</b>	<b>100%</b>	

Figure 14. Development Plan highlights each behavior criterion in which the agent received a “fail” grade

A Development Report can be a useful tool to assist managers and team leaders to create a training plan to target any specific weaknesses. Even the best agents appreciate the chance to improve behaviors that do not meet their standards.

The agent is presented with the results in a positive manner so they and their team leader can focus on the areas that need improvement.

Report Evaluation scores for each team:

- By evaluator
- By team member

Swap teams to compare evaluation standards, or use a single report to compare how evaluators use the same evaluation template, promoting consistency of scoring and standards.

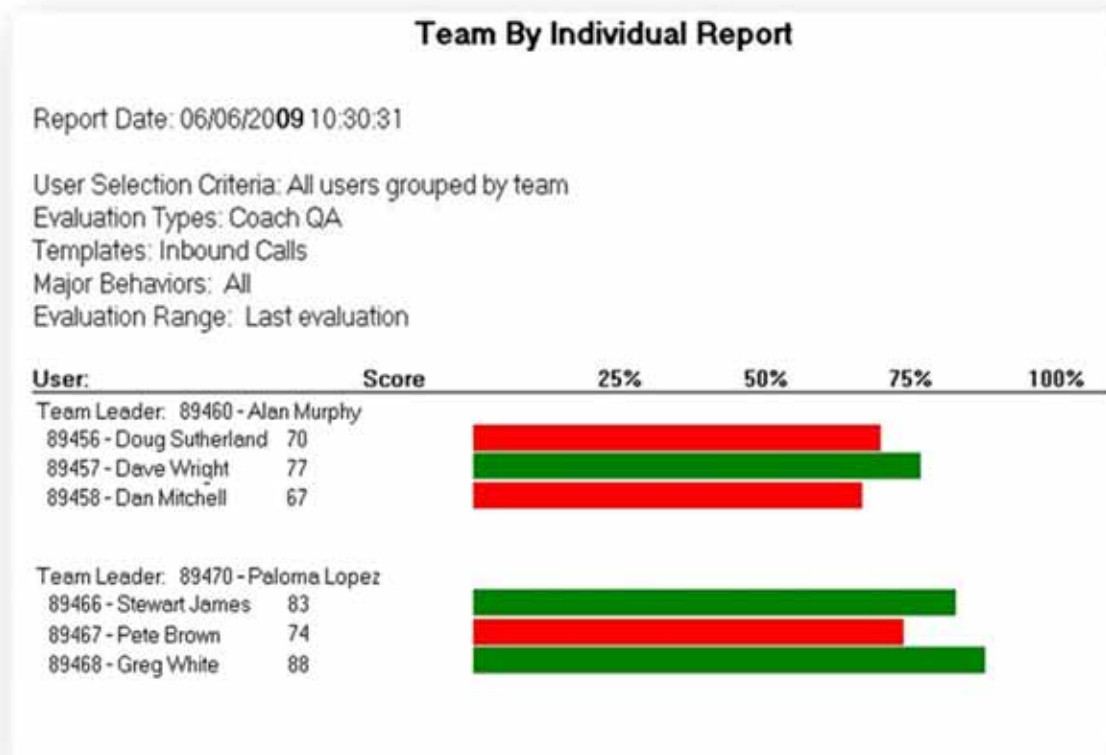


Figure 15. Sample Team Report

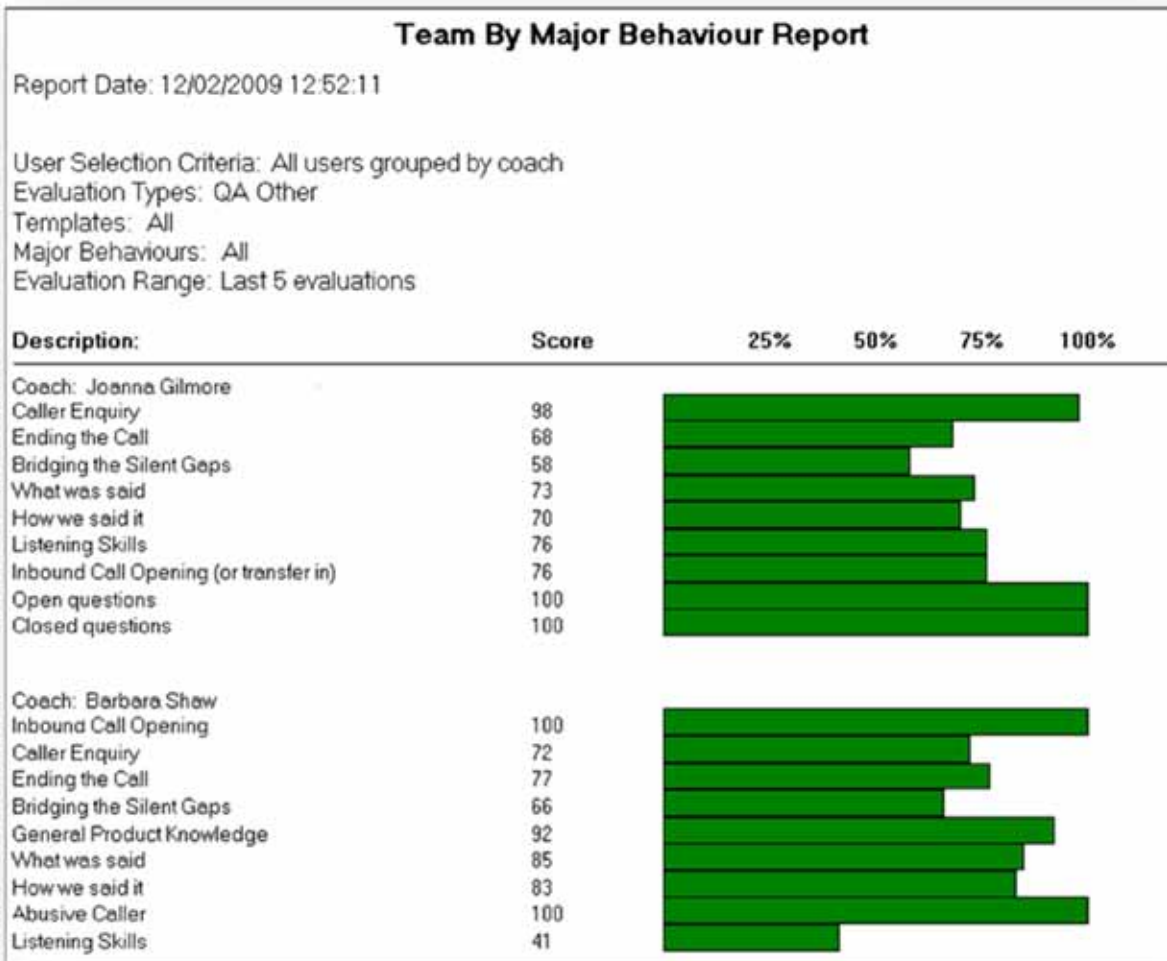


Figure 16. Compare evaluation techniques between two or more evaluators

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