

Using AI in Your Business:

A Dialpad Ai Guide to Security and Compliance



3 Dialpad + Artificial Intelligence: A powerful combination for your business

4 How to get started

- 4 Enabling Dialpad Ai features
- 5 Grant access to Dialpad Ai—for the employees who need it
- 5 Your employees have control of when they use Dialpad Ai
- 6 Setting up automatic recording and transcription
- 7 Toggling recording and transcription settings by country and area code
- 8 Manually pausing recording and transcription in call
- 9 Automatically pause recording with context awareness

10 Notifying customers of recording and transcription

- 11 Automatic notifications
- 11 Automatically detect agent notifications

12 Using analytics and keyword searching to improve agent training

13 Personal Information detection for more confident call sharing

- 14 Control over how recordings and transcripts are shared

15 Using Dialpad Ai's features

- 15 Real-time agent assistance
- 16 Summarizing calls
- 16 Tracking frequently discussed topics
- 17 Customer satisfaction (CSAT) prediction
- 17 Realtime Numeric PI Redaction

18 Compliance for specific jurisdictions and industries

- 18 Data protection laws
- 18 Data Protection Agreement
- 18 Dialpad's role as Processor and Controller
- 19 Subprocessors
- 19 Transborder transfer authorization
- 20 Data subject access requests
- 20 HIPAA
- 20 Government data demands

21 Dialpad Ai data retention

- 21 Retain data until you delete it or close your account
- 21 Customize data retention policies for each business unit

22 Data security

- 22 Secure sign-on and integrations
- 22 Encrypted calls
- 22 Demonstrated compliance

23 Dialpad Ai: How data is used

- 23 You can use Dialpad Ai—without sharing your data for training
- 24 Dialpad Ai data is stored securely in the US
- 24 We exclude specific data and industries from Dialpad Ai training
- 24 Dialpad Ai improvement is mainly automated
- 24 Access to audio and transcript data is limited to need-to-know groups
- 25 Human-reviewed data is minimized
- 25 Generative Ai training data is anonymized

26 Your information is yours



Dialpad + Artificial intelligence: A powerful combination for your business

Embedded in Dialpad's calling, conferencing, and contact center solutions, Dialpad Ai combines a proprietary automatic speech recognition (ASR) and natural language processing (NLP) engine with a custom Large Language Model (LLM) called DialpadGPT.

Built in-house from the ground up, Dialpad Ai can transcribe and analyze conversations to provide real-time insight and assistance. This includes summarizing conversations, pulling out keyword and topic trends, and even suggesting just the right answer for agents at just the right time.

This legal guide explains how Dialpad has designed its artificial intelligence with privacy and compliance in mind so your company can take full advantage of Dialpad Ai's powerful real-time business insights while ensuring compliance with applicable security and privacy laws.

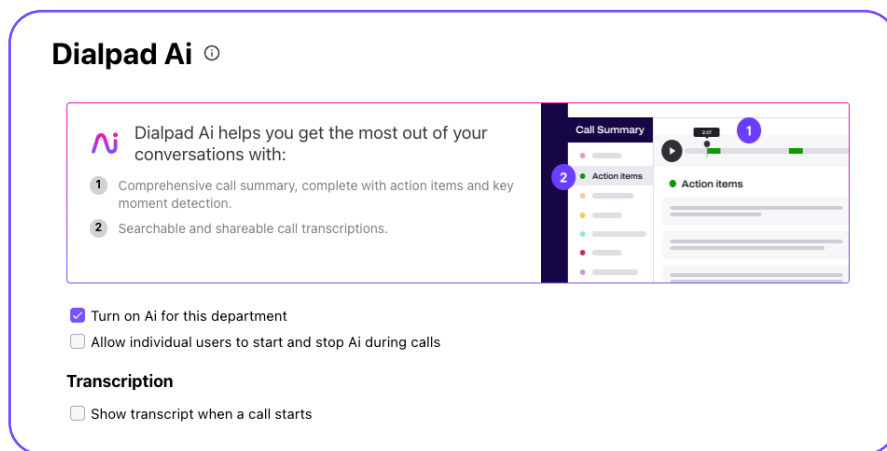
How to get started

Dialpad Ai's [transcription](#) includes all of the same compliance features you'd expect for call recording, including the option to automatically notify the other party when transcription is stopped or started. That means you can use Dialpad Ai with no change to your existing agent training if you're already using call recording.

Enabling Dialpad Ai features

At account setup and for each new business unit, we'll ask if you want to enable Dialpad Ai for individual users and if they should be able to toggle Dialpad Ai settings during a call.

You choose whether—and to what extent—your company wants to take advantage of Dialpad Ai:



You can customize your Dialpad Ai settings for the needs of every Department, Office, Call Center, or Coaching Team. ([Learn how](#) to manage these settings across your organization.)

Grant access to Dialpad Ai—for the employees who need it

Just like call recording, real-time transcriptions and the insights you can derive from them are powerful features, but they may not be appropriate for all parts of the business.

That's why Dialpad gives you the option of setting access to Dialpad Ai features at the company and office level and as granularly as by individual employee phone numbers.

Your employees have control of when they use Dialpad Ai

When you give your employees access to turn on Dialpad Ai, they can choose to enable it or disable it either for all calls, before a call, or even during one. [Get more information](#) on individual Dialpad Ai settings.

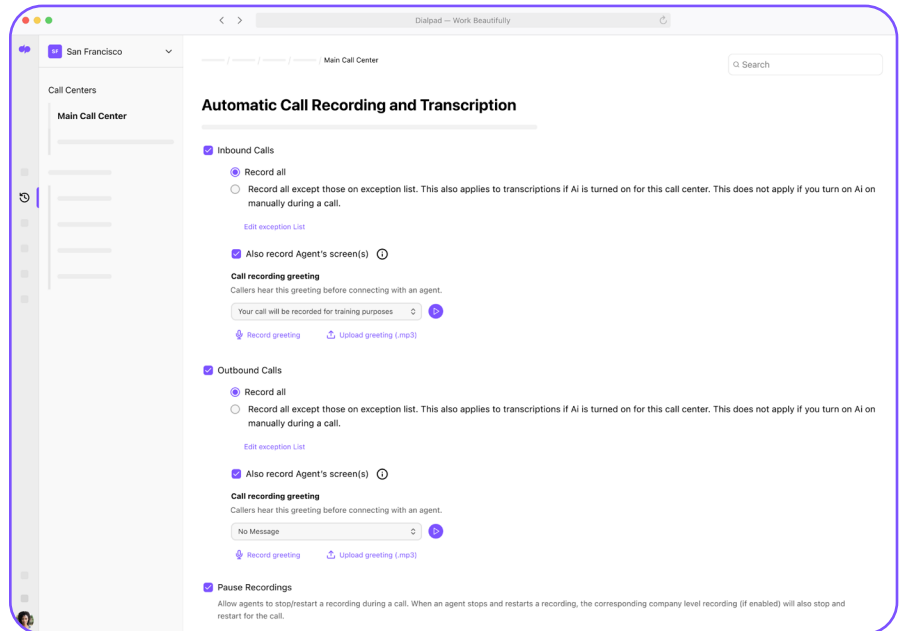


Setting up automatic recording and transcription

Automatic recording and transcription can be set at the company level, or individually by call center, office, or coaching group, based on your company's needs. Recording and transcription behavior can also be different for inbound and outbound calls:

💡 What do recording and transcription have to do with AI?

Insights start with conversations, and AI insights are no different: Like other AI and NLP engines, the first step to Dialpad Ai providing features like sentiment analysis and predictive Ai CSAT is getting the call into the system—and that means recording and/or transcription.



Toggle recording and transcription settings by country and area code

Like call recording, Dialpad Ai transcriptions adhere to pre-defined exception lists to refrain from transcribing or instead record the agent's side only. This is helpful whether you do business in a one party-consent state, an all-party-consent state or both.

[Get a list of area codes](#) in all-party-consent states, formatted and ready to add to your exception list.

The screenshot shows the configuration interface for call recording and transcription. It is divided into two main sections: Inbound Calls and Outbound Calls. Each section has a checked checkbox to enable the feature. Under each, there are radio buttons for 'Record all' (selected) and 'Record all except those on exception list. manually during a call.' Below these are links to 'Edit exception List'. There is also a checked checkbox for 'Also record Agent's screen(s)' with an information icon. A 'Call recording greeting' section follows, with a note that callers hear the greeting before connecting. A dropdown menu shows 'Your call will be recorded for training purposes' and a play button. Below the dropdown are 'Record greeting' and 'Upload greeting (.mp3)' options. The Outbound Calls section has identical settings, but the dropdown menu shows 'No Message'.

You can use an exception list to ensure recording and transcription happens on all calls except those from the specified area codes. [Learn more about how to set up an exception list.](#)



Manually pausing recording and transcription in call

There are certain categories of regulated data you may not want to record. Whether you're dealing with PCI, HIPAA, or other regulated data, Dialpad lets you stop and start both recording and Dialpad Ai while on an active call within the call by selecting the setting shown below:

 Check out [this article](#) for instructions on how to pause recording and Dialpad Ai while on an active call.

Pause Recordings

Allow agents to stop/restart a recording during a call. When an agent stops and restarts a recording, the corresponding company level recording (if enabled) will also stop and restart for the call.

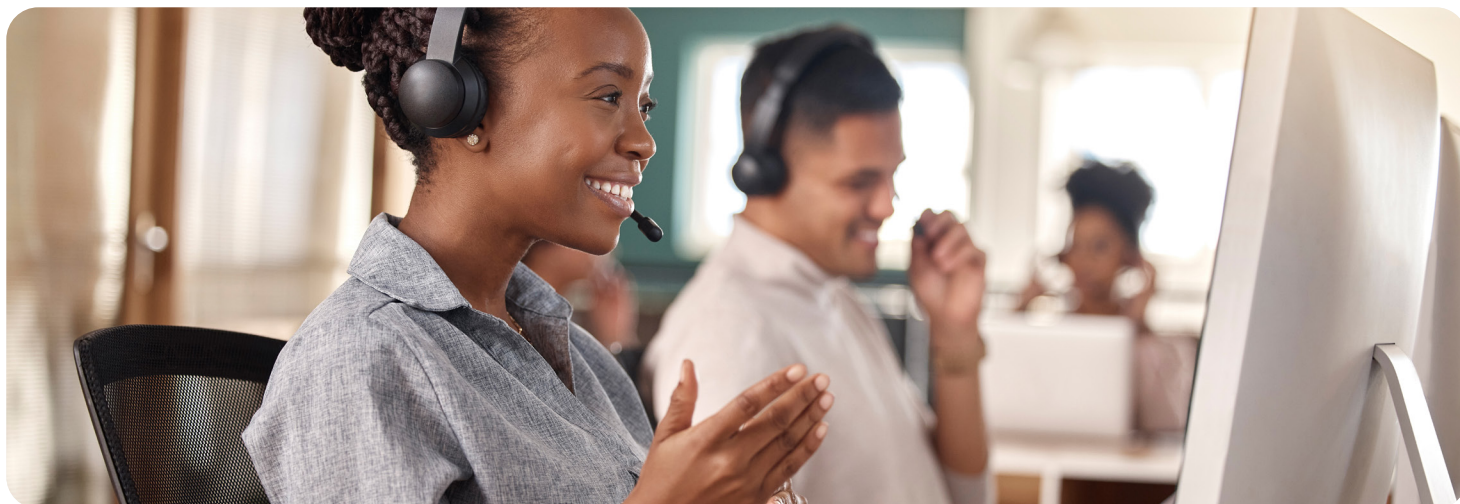
Automatically pause recording with context awareness

Using Dialpad APIs, you can configure Dialpad to programmatically pause recording and transcription when your agents take sensitive information. Dialpad's Recording and Artificial Intelligence APIs, tightly coupled with your own CRM's API, lets you [automatically toggle recording and transcription](#) when your agents open up a particular screen or field (and start again when it's closed).

Whether you're dealing with PCI, HIPAA, or other regulated data, this can help you make sure you aren't storing sensitive information that you don't mean to. With Dialpad, the ability to automatically pause recording ensures that your business is minimizing data collection and only collecting that data that is strictly necessary.

Not an API expert? Contact your Customer Success Manager to discuss low-code and no-code options to automate your recording for compliance and peace of mind.


Long story short: With Dialpad, you can take advantage of Dialpad Ai with confidence that no regulated data is improperly recorded.



Notifying customers of recording and transcription

We recommend a simple rule of thumb: Treat AI-powered transcriptions the same as you would treat call recordings.

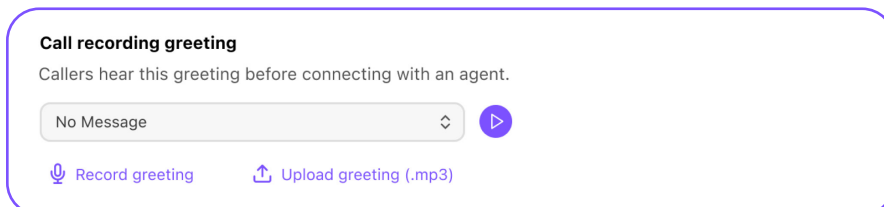
Treating recording and transcription the same means you can leverage Dialpad AI tools with no change to your existing agent training or procedures, just more benefits as you unlock the powerful additional features that become available when you've got a transcribed, analytics-ready version of your call.

 To learn more about how call recording and transcription can work for your business and tips on handling notification and consent, read our blog post on [When and How to Notify Your Customers](#).

Call recording laws differ from state to state and country to country—most don't distinguish between recordings and transcriptions, as many were created decades ago. That's why we provide a single guideline that works across regions, and customizable compliance controls. With a robust set of admin and user settings, you can easily adhere to your business's recording and transcription requirements and regional regulations.

Automatic notifications

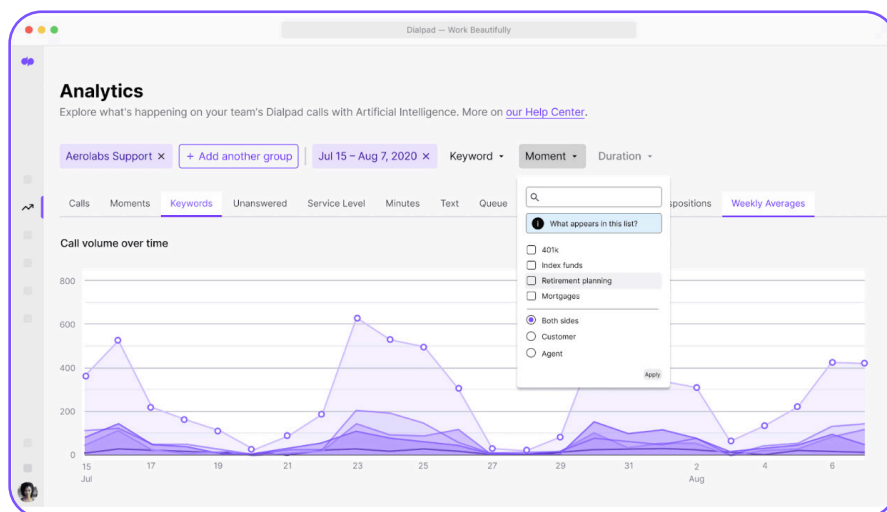
You can set a default or custom greeting to play before calls through your [call recording settings](#), which can include a recording notification when required (as defined by your exception rules). You can also configure automated notifications for inbound and outbound calls separately.



Automatically detect agent notifications

With Dialpad Ai's [Custom Moments](#) feature, you can set up moments to detect when agents give common notifications such as their name or badge number. Dialpad also comes with a built-in "[Call Recording Notification](#)" moment to detect verbal notifications from your agents.

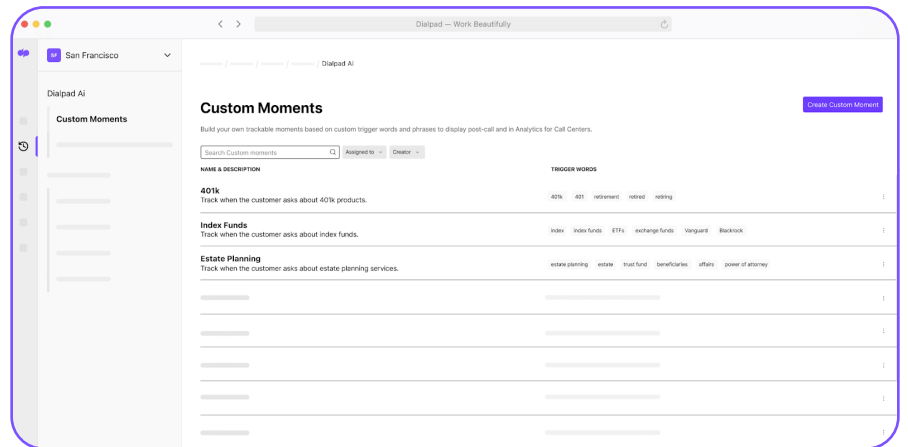
When automated notifications don't suit your use case, this moment can be used instead to ensure your agents are properly disclosing to your customers. Through the use of built-in and your own customized moments, you can easily track compliance and identify agents who may need additional coaching.



Using analytics and keyword searching to improve agent training

Dialpad Ai's transcription and analytics can help you identify sensitive data that you want to keep within the company. One way to do this is by setting a Custom Moment for terms that might be associated with sensitive data, such as when a customer mentions "credit card number."

This lets you spot trends and make your agent training responsive to what you're seeing in real calls, in real time:



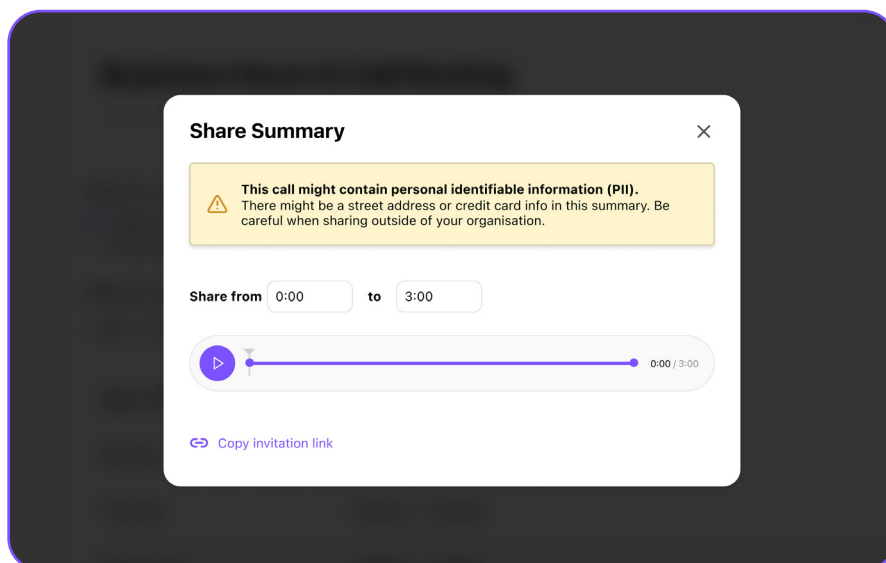
Essentially, Dialpad Ai improves your ability to protect not only your customers' information, but also the sensitive information of your business.



Personal Information detection for more confident call sharing

Humans can make mistakes—understandable! Dialpad Ai helps make sure those mistakes do not create compliance hazards.

If Dialpad Ai is enabled, Dialpad will automatically review the transcript before sharing transcripts or call recordings and flag calls that may contain Personal Information (PI). Dialpad Ai can detect street addresses, credit card numbers, and some other potentially sensitive number sequences such as SSNs (Social Security Numbers). Because it's based on transcription, it's not foolproof, but it's backed by [industry-leading transcription Ai](#), and it's a valuable part of your compliance tool kit:



Control over how recordings and transcripts are shared

By default, you can easily share call recordings, transcripts, and Dialpad Ai summaries as links, both inside and outside your organization.

When you share these resources via links, Dialpad generates a unique, lengthy, and complex URL that provides direct access to the file and can be shared conveniently (such as by email or messaging)—but is not accessible without the direct link.

If you prefer, Dialpad also gives you the option to make links accessible only to people within your organization:

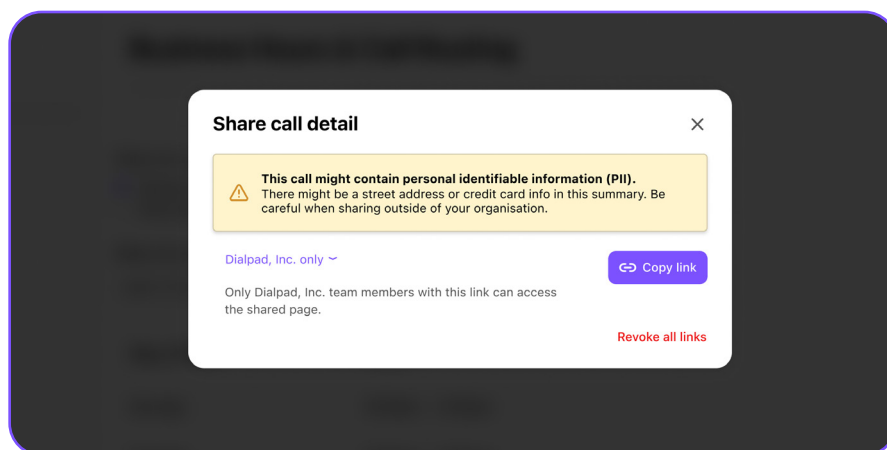
Q: Does recording need to be on for full Dialpad Ai functionality?

A: No! Sometimes you need a recording, sometimes you just want the transcripts and notes from Dialpad's Ai features. No problem—you can set Dialpad Ai and call recording settings independently. You may still wish to notify your customers that the call is being recorded, just to be on the safe side.

Further reading:

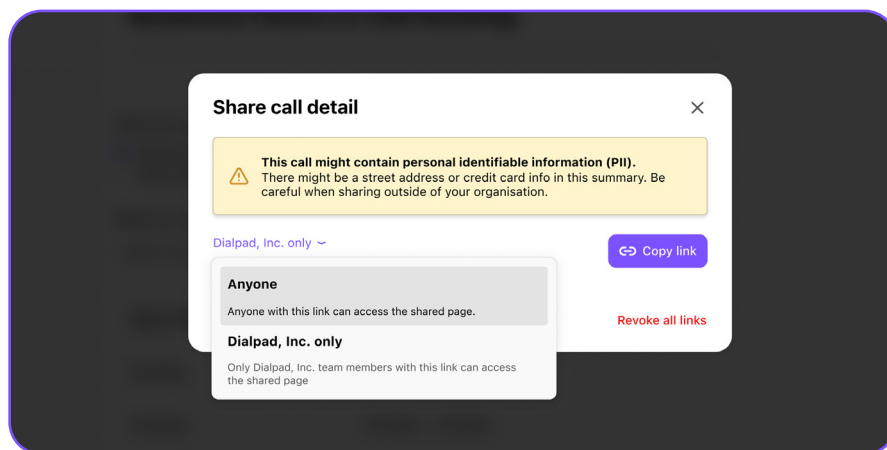
Dialpad Ai Voice: [Ai Call Summary](#)

Dialpad Ai Meetings: [Adjust Your Meetings Settings](#)



And for every shared resource, you can revoke access of any shared links, which makes each unique link unusable moving forward:

Dialpad Ai puts you in control of who has access to your information.



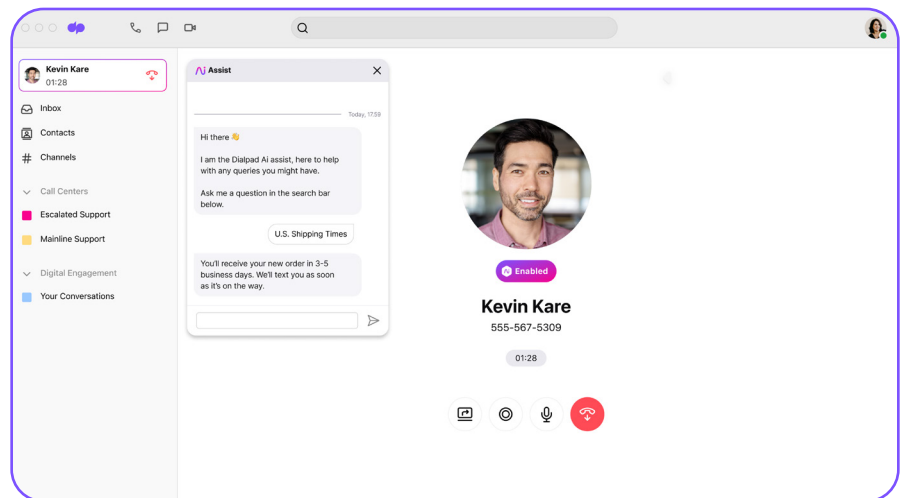
Using Dialpad Ai's features

Now that we've looked at getting your Dialpad calls configured to use Dialpad Ai, here are just a few examples of what businesses are using Dialpad Ai to do beyond transcriptions.

Real-time agent assistance

Dialpad's [Agent Assist](#) integrates with existing knowledge management tools to provide cue cards with just the right answer, in real time, so every agent can be your best agent.

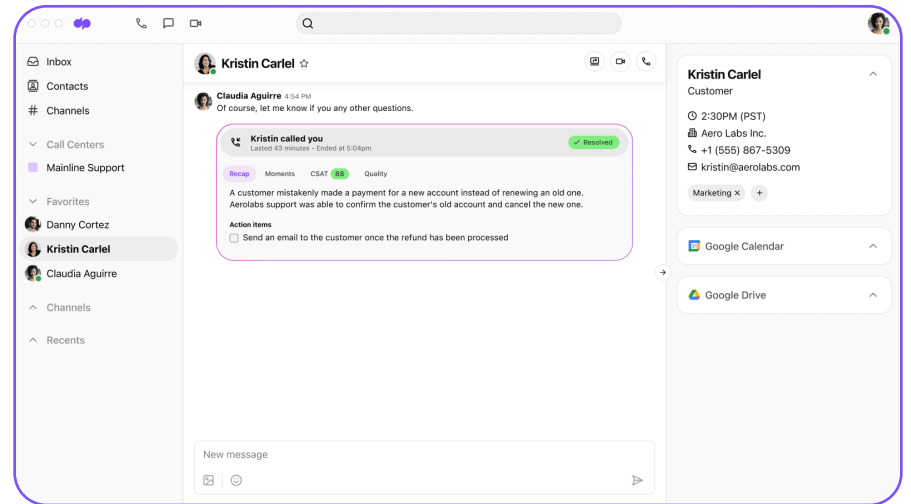
[Real-time Assist](#) (RTA) cards are a great way to ensure agent responses are standardized and current, particularly when addressing complex topics like compliance.





Summarizing calls

Dialpad's [Ai Recap](#) feature generates concise recaps for calls and video meetings in real time, along with action items and call outcomes, which makes for more productive meetings:



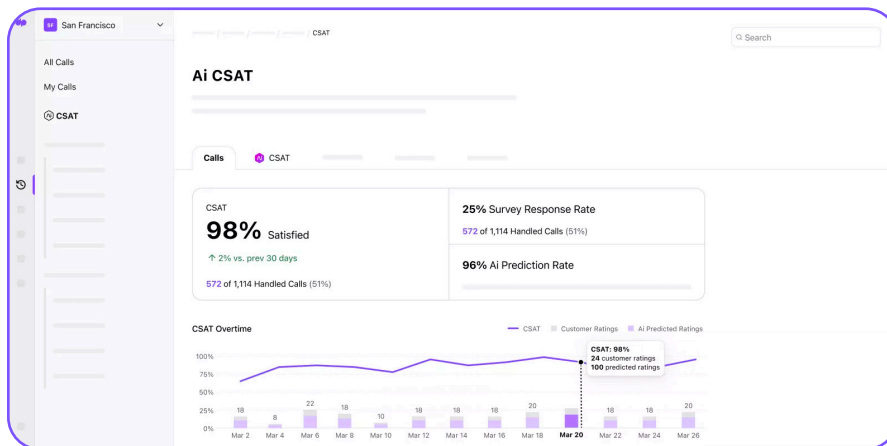
Tracking frequently discussed topics

Dialpad Ai can also help you understand how often customers and prospects bring up certain topics in conversations. For example, you could set up a “Custom Moment” for every time “pricing,” “refunds,” or even a competitor’s name comes up. This way, you can improve training materials for agents based on the topics your customers are most interested in.

Customer satisfaction (CSAT) prediction

Why wait for your customer to tell you how the call went, when anyone listening to the call already knows exactly how the customer is feeling? By combining AI-powered sentiment analysis with SMS satisfaction surveys, Dialpad's [Ai CSAT](#) can accurately infer customer satisfaction from a conversation, giving you insight into how all of your calls are going—not just when customers respond to a survey:

💡 On automated vs assistive decision-making: At this stage, the best business use cases for AI are for *assistive*, not *automated*, decision-making. Although AI is incredibly powerful and can save time and resources, from a compliance perspective, its benefits lie in its power to complement employees' work—as opposed to replacing employees altogether. Dialpad's features don't do automated decision making.

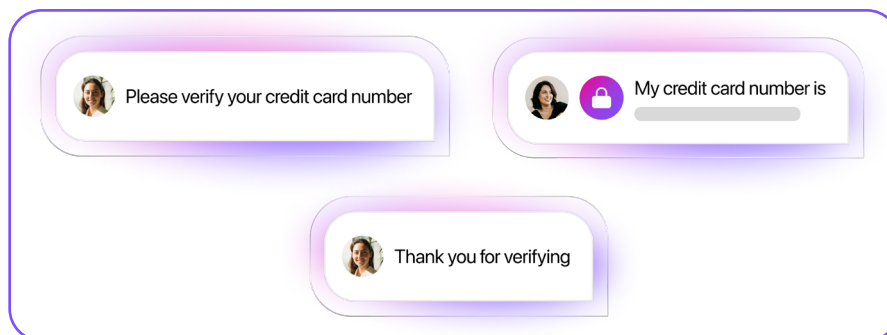


Realtime Numeric PI Redaction

Dialpad [automatically identifies and redacts certain numeric PI from transcripts](#), including credit card numbers and Social Security Numbers, to prevent unauthorized access and protect customers' privacy. Information that's redacted won't appear in any post-call interface, such as the transcript or call summary. PI Redaction is available on all products (Meetings, Talk, Sell, Contact Center, Recruit) through an [Early Access Program](#).

PI Redaction supports organizations' compliance with privacy regulations such as GDPR, CCPA and HIPAA, promoting good data minimization practices while reducing the risk of data breaches and leaks.

With automated redaction, businesses – especially those dealing with large volumes of data – can quickly and easily reduce the cost associated with manual data redaction.



Compliance for specific jurisdictions and industries

Data protection laws

All Dialpad products and features, including its artificial intelligence, come with features and security controls needed to be fully compliant with GDPR-like data privacy regulations, from Europe (GDPR) and the UK, to US states, to Brazil — and counting!

Dialpad's privacy team constantly monitors the evolution of data privacy laws to ensure that Dialpad is compliant with each new and developing privacy obligation.

Data Protection Agreement

Dialpad offers a comprehensive Data Protection Agreement (DPA) that addresses the data protection requirements of Europe, the UK, US states, and other jurisdictions.

You can easily [review the Dialpad DPA](#) and [sign a DPA with one click](#) via the admin interface.

Dialpad's role as Processor and Controller

As explained in [Dialpad's DPA](#), under GDPR, Dialpad is a data Processor for data required to deliver the service, and a data Controller for the data required to improve the Ai features. This dual role provides Dialpad customers with the assurance that their service, including Ai features, will not be affected regardless of whether they contribute to the improvement of Dialpad's Ai services. By using Dialpad's Ai features, customers are benefitting from and contributing to Dialpad's continually improving Ai models. Because of Dialpad's focus on business communications and diverse data from users around the world, our Ai transcription is [more accurate than even our largest competitors](#).

Prefer not to contribute to improving Dialpad's Ai features? No problem. You may control your data training election at any level you like, from an individual to a company. Go to Settings, or contact your customer support representative or privacy@dialpad with questions.



Subprocessors

As a proudly cloud-first company, Dialpad works with other tools in the cloud ecosystem to provide certain elements of our service. These “subprocessors” have access to certain customer data. For example, Dialpad currently uses subprocessors to provide infrastructure services, and to help us provide customer support and email notifications. Prior to engaging any sub-processor, Dialpad undertakes a thorough review to evaluate the privacy, security and confidentiality practices of potential vendors that may have access to or process customer data.

Dialpad maintains contracts with each subprocessor to limit the processing of customer data to the extent necessary to provide the specified service, to ensure levels of privacy and security at least equivalent to those provided by Dialpad, and to minimize the amount of customer data that is processed.

Our subprocessor list is available [here](#).

Transborder transfer authorization

In addition to holding certification for the EU-U.S. and Swiss-U.S. Privacy Shield Frameworks, Dialpad’s DPA includes the European Commission’s “Standard Contractual Clauses” (SCCs) to address the additional requirements applicable to exporting personal data from European jurisdictions to the United States.

Dialpad has also implemented several key supplemental measures on top of the SCCs, including encryption at rest and in transit and the absence of backdoor data access. A detailed description of Dialpad’s supplementary measures are included in the SCCs.

Data subject access requests

You can review, download, and export most of your data, including call recordings, directly from within the Dialpad app. Dialpad customers and end-users may also request to exercise their rights under applicable data protection laws (such as disclosure, export, and deletion) through Dialpad's [privacy portal](#).

Dialpad routinely monitors and follows guidance from the European Data Protection Board and national Data Protection Authorities and updates its DPA as needed. The privacy principles underlying the GDPR are of utmost importance for Dialpad, and we're working hard to make sure that you're able to use Dialpad Ai with peace of mind while staying true to those principles—and compliant under the GDPR and other data privacy laws.

HIPAA

Dialpad products and features are HIPAA-compliant, including its artificial intelligence-powered transcription and analytics. Dialpad makes it easy for US healthcare companies to use Dialpad services—you can sign a [Business Associate Agreement](#) with one click from the admin interface. With a signed BAA, HIPAA-covered entities and business associates can use Dialpad Ai just like any other company while remaining compliant with HIPAA regulations.

For more information, check out our [HIPAA Data Sheet](#).

Government data demands

Dialpad protects all customer data, including call recordings and transcripts, to the fullest extent of the law. We scrutinize each demand, require a valid legal process for each element of data requested, and notify affected customers unless prohibited by law.

For more information, see Dialpad's [Government Data Demands](#) policy.

Dialpad Ai data retention

Retain data until you delete it or close your account

When you generate data such as transcriptions and call recordings within Dialpad, Dialpad will keep your data secure and available to you until you choose to delete it or until you close your Dialpad account. (Note that depending on the products or features you use, some data storage may be subject to a fee.)

Many everyday tasks like viewing or deleting account data and managing user accounts can be done immediately by your company's Dialpad Administrator through the [administrator settings](#).

If you have fewer than five users, you can close your account through your administrator settings. If you have more than five users, get in touch with our [Support Team](#) to close your account.

Customize data retention policies for each business unit

Data Retention Policy features are available to all Dialpad plans.

Retention policies can be set per business unit, such as an Office or Call Center, and separately configured for duration and type of data, such as deleting content (like call recordings and transcripts) or personal information (including phone numbers and contact names).

Retention policies can be used to preserve data before a given date and ensure deletion after that date. With a customizable retention policy, you're in control of your data.

[Learn more](#) about Dialpad's retention policy settings.

Data security

Secure sign-on and integrations

Dialpad offers integrations for access management via SAML and SCIM from providers like Azure, Google Workspace, OneLogin, and Okta through our [App Marketplace](#), which lets you centralize user management, from single sign-on capabilities to automated user provisioning.

Encrypted calls

Encrypted with Transport Layer Security, data transfers within Dialpad use the modern standard for web communications and the same security that protects you while browsing the web.

Data at rest stays secure in the Google Cloud Platform with encryption of AES 256-bit or greater ciphers. When data is transferred during live phone calls and conferences, it's encrypted and authenticated using Secure Real-Time Transport Protocol (SRTP).

See [our security page](#) for further information around our encryption practices.

Demonstrated compliance

Dialpad is certified under SOC2 Type II and ISO standards 27001, 270017, and 270018. Dialpad has implemented controls that meet the objectives of the AICPA Trust Services Principles, as verified by a third-party audit. In addition, Dialpad runs a bug bounty program, scheduled vulnerability scanning, and regular penetration testing.

Dialpad is also a Cloud Security Alliance (CSA) Security, Trust, and Assurance Registry (STAR) member with published [CAIQ assessment results](#).

With Dialpad, you are able to harness the power of artificial intelligence to make your conversations more efficient and effective while remaining confident that no sensitive or regulated data is improperly recorded or processed and that all data that is processed is done so safely and securely.

Dialpad Ai: How data is used

Like other services such as Google Maps, Dialpad's continuous improvement of the models that support our automated speech recognition and natural language processing is the reason that [Dialpad's transcription is so accurate](#).

Our transcription and analytics are valuable for our customers because of their accuracy, which in turn is a result of the models behind them being trained on how our users actually use our products. (Mainly using portions of aggregated audio and transcripts from actual calls.)

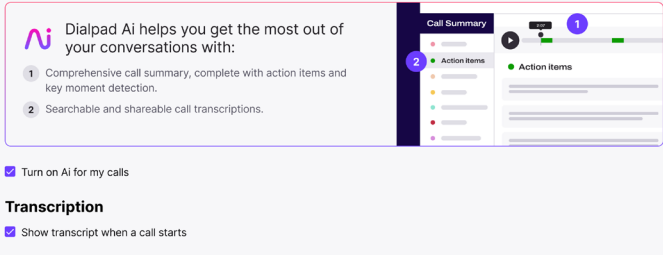
By simply doing what you're already doing—using Dialpad Ai for transcription, note-taking, business insights, and agent training—you're helping make Dialpad Ai—and the insights you get from it!—more accurate and relevant for your business.

You can use Dialpad Ai—without sharing your data for training

It's as simple as that. Yes, more data makes Dialpad Ai increasingly valuable. The real-world data from your users make Dialpad Ai transcriptions more accurate and insights more specific for how your company uses Dialpad.

However, we also offer access to all of Dialpad's powerful artificial intelligence capabilities regardless of whether you opt to help improve the services. You may control your data training election at any level you like, from an individual to a company. Go to Settings, or contact your customer support representative or privacy@dialpad with questions. And of course you can stop or pause call recording and real-time transcriptions at any time or turn off Dialpad Ai entirely for a call, which also removes that call from artificial intelligence training eligibility.

Dialpad Ai



The screenshot shows the Dialpad Ai settings interface. On the left, there is a list of features: 'Comprehensive call summary, complete with action items and key moment detection.' and 'Searchable and shareable call transcriptions.' Below this is a checkbox 'Turn on Ai for my calls' which is checked. Under the heading 'Transcription', there is a checkbox 'Show transcript when a call starts' which is also checked. On the right, a 'Call Summary' interface is shown with a play button and a list of 'Action Items'.

Company Dictionary



Dialpad Ai data is stored securely in the US

As with all other permanent customer data, all Dialpad Ai data used to improve the service is stored using AES 256-bit within Google Cloud Platform in the United States.

We exclude specific data and industries from Dialpad Ai training

Dialpad proactively removes from eligibility the data of companies within sensitive industries such as healthcare and financial services.

In addition, customer data that's used for training is automatically reviewed for certain sensitive PI like identification numbers, credit card numbers, and addresses and, if detected, the entire conversation is excluded from use in training and testing.

Dialpad Ai improvement is mainly automated

Almost all use of Dialpad Ai data for product improvement happens via automated processes. Only about 0.05% of call audio or transcripts ever get seen by a human transcriber, generally when we need a human to help make sense of unusual words like industry terms.

Access to audio and transcript data is limited to need-to-know groups

Dialpad observes strict access management, and only the engineers and data scientists who work on Dialpad Ai improvement have access to training data. Internally, identifying metadata is stored separately, and data is pseudonymized.

Human-reviewed data is minimized

On rare occasions that we may need human transcribers, Dialpad has implemented several measures to protect customer privacy. These measures include removing metadata, filtering out calls that might contain sensitive information, and breaking them into short snippets called “utterances” (about a sentence long), presented in random order.

Generative Ai training data is anonymized

Generative Ai tools are only as good as their training data, but unlike other Ai features, the “generative” part means what you put into them could come out in unpredictable ways. At Dialpad, we’ve tackled this challenge by training our own LLM, DialpadGPT, to offer generative Ai capabilities alongside Dialpad’s existing Ai features.

To safeguard customer privacy, we’ve [developed an in-house PII anonymization solution](#) that automatically removes PII from the training data. We’ve rigorously evaluated this solution to ensure that no customer PII is inadvertently mixed into DialpadGPT’s training.





Your information is yours

Dialpad Ai empowers businesses to make the most out of every conversation by automatically making voice data searchable and actionable.

When you combine Dialpad's artificial intelligence with robust privacy controls and security, you can confidently unlock the full power of the conversations that your business has every day.

Please get in touch with Dialpad's Privacy Team at privacy@dialpad.com for more information or if you have any additional questions.