**CallMiner**

Call Recording Encyclopedia

Why record? Who benefits? Learn more about how call recording can benefit BPOs, debt collectors, sales, marketing and more
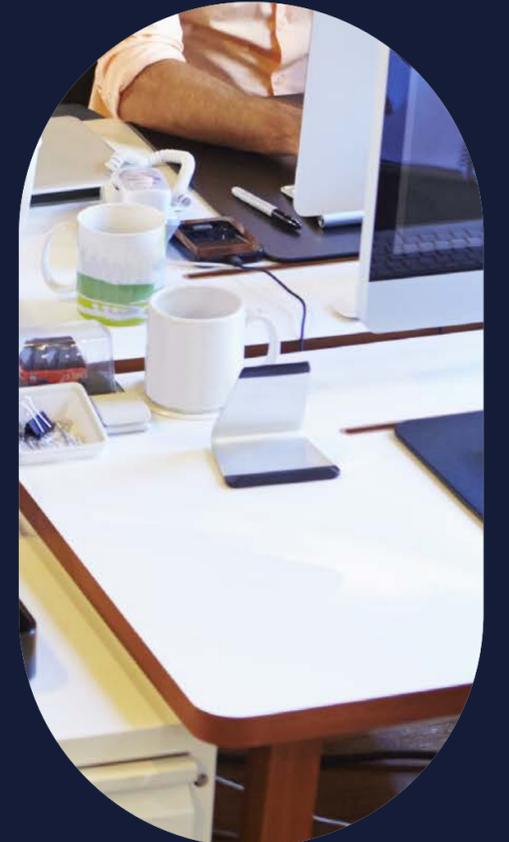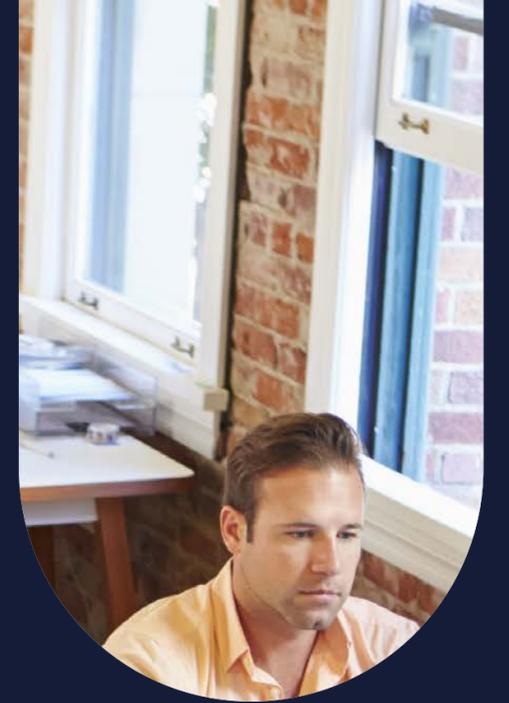
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Introduction

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While call recording solutions can provide tremendous value to enterprises, call centers and service providers, there are a slew of options and vendors to consider. This eBook will introduce many of the critical aspects of call recording you should know before making a call recording purchase decision, whether it's your company's first-ever solution or you're selecting a replacement call recording solution. All data contained in this document is based on research, validated surveys and decades of experience in the call recording industry.

Chapter 1

Why record customer calls?

Why record customer calls?

Collecting business insights

Companies of all sizes record customer interactions for a variety of reasons, including compliance, customer service performance and risk management. One area of great value that can be derived from recorded customer interactions is business insight and intelligence. When audio is captured in a dual channel, high fidelity format, it is easily and accurately transcribed. Once this occurs, whether post-call or in real time, conversation intelligence engines can mine these calls for customer experience, sales, marketing and product development insight that can impact the organization as a whole, beyond the contact center.

To achieve the best results possible with your conversation intelligence solution, it all starts with the voice files. And more specifically, the quality of your voice files. You need the best audio capture engine in order to achieve the best possible analytics results. You want a recorder that supports upper-end audio sample rate formats, including G.711, OPUS, and uncompressed audio without storage limitations, for the highest quality voice files possible. Flexible and secure access to a real-time speaker-separated audio capture platform enhances third party AI-powered conversation intelligence solutions without impacting legacy recording applications. This all leads to more accurate transcriptions, better analytics results and more informed business decisions.

Business reasons for recording

Based on customer input and interviews of organizations across social media channels:

	69%	Ensure quality service, assess agents
	56%	Dispute resolution/risk mgmt, protection
	43%	Training/coaching/development
	33%	Compliance - regulatory or internal processes
	19%	Order verification
	11%	Sales performance optimization
	10%	Staff motivation, incentivizing
	8%	Product development ideas
	4%	Identify process/system breakdowns
	3%	Note taking support so nothing is missed
	3%	Understand customer needs
	1%	Informed decision making
	1%	Branding/marketing/voice of the customer (VOC)
	1%	Customer protection

Results from 80+ industry professionals spanning many job roles, companies, industries and geographies

Quotes from survey respondents

Based on customer input and interviews of organizations across social media channels, respondents said:

"The question is not "why do we record calls," but how in the world could we possibly function without it?"

"The cost of data storage is generally nonexistent and at worst irrelevant. Even if you don't have the time or desire to listen, there's no reason not to record calls."

"A recorded call is like a written phone message, but with checks and balances."

"For your Quality and Training department, not having calls recorded is like swimming with your arms tied … it's possible but extremely difficult."

"Letting a customer service rep listen to himself/herself on the phone is the most effective method of coaching there is."

"Recording calls allows us to assess, review, calibrate, account for, monitor and improve everything."

"People overlook the fact that in a call center an employee is 95% of your value. If you have access to a tool (call recording system) that can increase the value of 95% of your company assets…it's wise to use it."

"Inspect what you expect. If driving excellence is the goal, by having recorded calls you have now harvested valuable information."

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Chapter 2

Who benefits from call recordings?

Who benefits most from call recording?

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Results from 75+ industry professionals spanning 11 countries
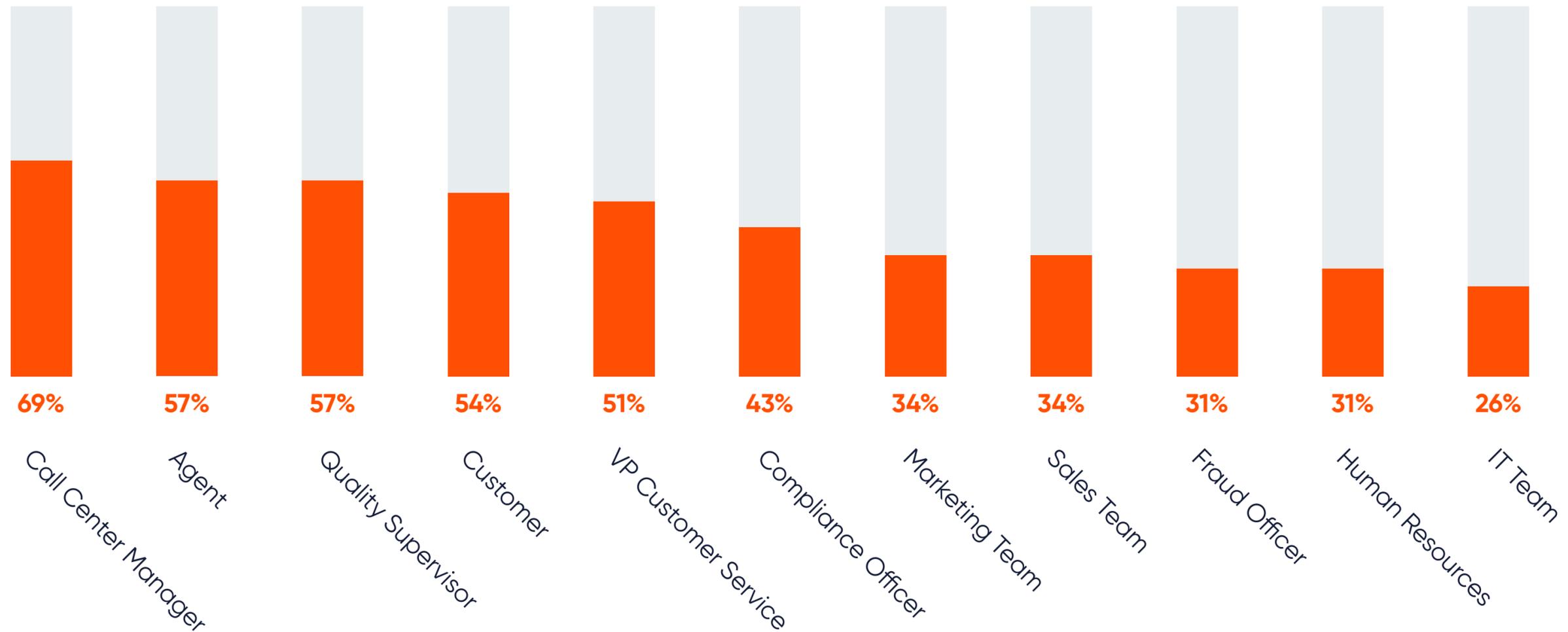
Call Center Manager	Agent	Quality Supervisor	Customer	VP Customer Service	Compliance Officer	Marketing Team	Sales Team	Fraud Officer	Human Resources	IT Team
69%	57%	57%	54%	51%	43%	34%	34%	31%	31%	26%

Results from 80+ industry professionals spanning many job roles, companies, industries and geographies

Who benefits

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Following is an insightful quote from a survey we conducted to determine who benefits most from recording customer calls:

"Call recording is a tool that can benefit every department. Each department may have a different perspective or way they contribute towards the customer experience and how they measure progress, but the goal for each department should be the same: to adhere to business values and overall objectives. For example, what a customer service manager is looking to occur over the phone is very different than what a CEO or sales manager may want to focus on. Each perspective, skill, and role they play builds and improves the "customer experience". But, they are all working towards the same end goal. The key is understanding the tools available to them so that they can leverage ALL of the intelligence within their call recordings efficiently.**"**

By recording your conversations with customers, you are generating an invaluable piece of intellectual cap- ital, which you can use to assess the customer experi- ence, ensure PCI and HIPAA compliance, resolve dis- putes, verify orders and even uncover critical sales and marketing intelligence.

Call recording can add value to almost every area of your business.

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Call center agent

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Software provider

Job description

Handle incoming tech support calls from customers.

Motivation

Jasper's team of call center agents are incentivized by their individual monthly first call resolution (FCR) scores. The higher the score, the higher the financial incentive.

Scenario

Jasper is a motivated, young, tech support specialist, who is very eager to achieve the highest levels of first call resolution so he can earn some much-needed extra cash.

In addition to reviewing a few calls each week with his quality supervisor, Jasper asks for access to all of his call recordings so he can go back and learn from each one. He makes it a practice of listening to at least five calls each week and takes notes on what he did right and wrong, to better support future customers and successfully resolve their issues.

After three months of doing this, Jasper's FCR score jumps 9%. He is handsomely rewarded with a $900 bonus. He uses the money to help buy a used car so he can stop taking the bus to work.

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Quality supervisor

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Travel company

<div style="background:orange">Job description</div>

Responsible for monitoring and assessing agent performance to identify strengths and weaknesses.

<div style="background:orange">Motivation</div>

Her bonus at the end of the quarter is tied to the call center's improvement in customer service scores.

<div style="background:orange">Scenario</div>

Tanya is responsible for the ongoing assessment of two teams of call center agents, totaling 16. She listens to a sampling of calls each week for each agent and scores them on various metrics – first call resolution, proper greeting, resolution handling, pleasantness, upselling, etc. She then has one-on-one discussions with each agent each week to review their quality scores and share best practices for immediate improvement.

Tanya uses the company's call recording and quality monitoring applications to facilitate her job. Without them, she wouldn't have the tools necessary to assess interactions nor share proper feedback with the agents.

At the end of Q1, the company's customer service score jumped 4%. She receives a nice bonus and is thrilled about it.

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Customer

34-year-old male

<div style="background: orange">Motivation</div>

Wants to have a pleasant phone experience and likes the idea of having the call recorded so he can ask the company to pull up his past call to verify what was said – if necessary.

<div style="background: orange">Scenario</div>

Jeremy calls his cable company about the high cost of his monthly bill. It is about $22 higher than usual. The agent quickly realizes the heightened cost is due to Jeremy's recent approval of adding Showtime to his account. The agent claims the records show that on a date 32 days earlier, Jeremy agreed to add the premium channel while on the phone with a representative of the cable company who called to sell him on it. He asked for that call to be accessed and listened to. It was, and it was determined he in fact declined the service. His account was credited in full.
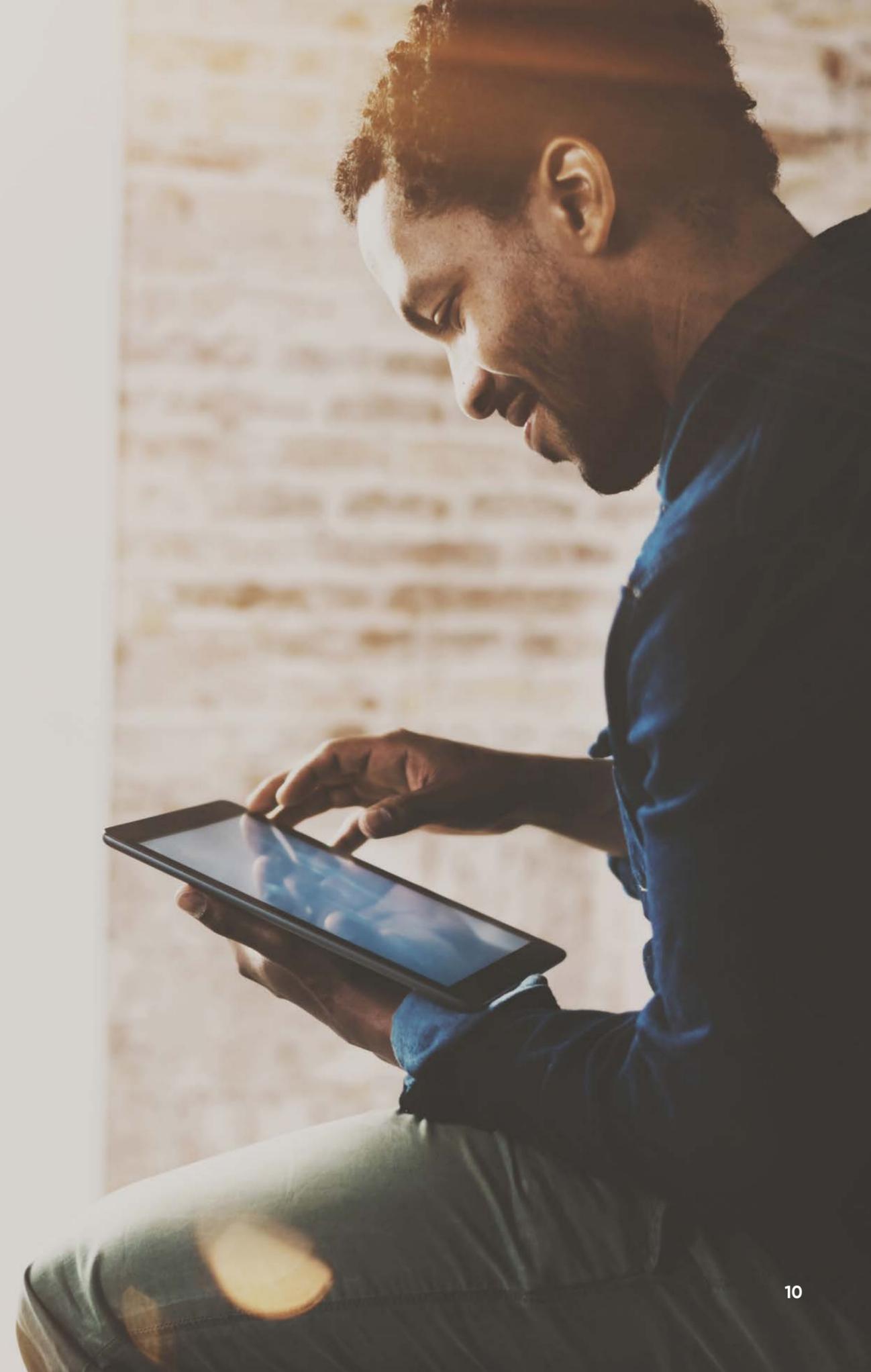
VP of customer service

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Telecommunications provider

Job description

Responsible for the customer-service strategy of the organization. This person sets the agenda for how the company interacts with customers.

Motivation

Wants to ensure customers are receiving the stellar experience they deserve so they keep coming back and refer others.

Scenario

Steve is one of those VPs of customer service that really is all about the customer. He cares deeply in his company's reputation and prides himself on the organization's consistent 94% customer satisfaction rating. He isn't shy about throwing the lofty number around at company meetings, customer lunches and even cocktail receptions with his wife and friends.

Steve and his customer service department already use call recording and quality monitoring software to assess call-center agent performance and identify best-practice calls to highlight at the team's weekly meeting. His supervisors also use the system daily to evaluate agents and identify areas for improvement. He knows his company's reputation depends largely on how well his agents satisfy his customers' needs and he is committed to ensuring his front-line agents acquire the skills they need. The call recording software the company uses serves as the basis for understanding this.

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Call center manager

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Large hotel chain

Job description

Responsible for the daily running and management of the center, for meeting customer service targets, and identifying areas of improvement or development.

Motivation

Run a smooth call center with high performing agents, high FCR rate, high customer service levels, and a low average handle time (AHT).

Scenario

Cliff is compensated strictly on two metrics – FCR and AHT – and as such, he monitors these numbers on a daily (sometimes hourly) basis. He is fanatical about the numbers, but it is understandable as his compensation is directly tied to them.

Using the company's call recording software, Cliff set up an automatic report that runs on his desktop, which shows in real time the call center's FCR and AHT rates. The report also tells him which agents are far above and far below his pre-set performance thresholds (i.e. the outliers) so he can reward and/or incentivize accordingly to keep the numbers on an upward trajectory.

Cliff is hopeful he will receive his biggest bonus check to date at this year's awards dinner.

VP of sales

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Copy/fax/scan machine manufacturer

Job description

Responsible for the direction and management of all sales and business development operations, and for driving customer acquisition and sales revenue.

Motivation

Wants to increase sales revenue and bring in more new customers.

Scenario

Jeff is one of those heads of sales that cares about one thing – keeping his current customers happy so they renew their annual subscriptions each year. This alone keeps the company's revenues healthy every year. With a recent drop in renewals, Jeff knew he had to do something, so he enacted an offer of 90 days of free machine maintenance if the client renews his/her annual contract. He has the call center agents dialing out to existing customers to make the offers.

Jeff is running a recurring report from the call recording system that shows him how many customers were offered the free maintenance and how many accepted and renewed. He's using this intelligence to assess the campaign's success. Jeff also periodically listens to calls to see how customer react to the offer. He's also contemplating running two offers simultaneously and using a similar report to measure which does better.

Jeff likes having a direct line of site to customers when running these renewal campaigns. It lets him make necessary changes quickly.

VP of marketing

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Consumer products company

Job description

Responsible for developing and executing a clearly defined marketing and communications strategy in support of sales and market-share growth.

Motivation

Wants to intimately understand the needs and concerns of the organization's customers in order to better target and engage them.

Scenario

Diane has been with the company for several years, but only recently was promoted to the top marketing position. She wants to take a very customer-centric approach to establishing a dialog with prospects and first needs to better understand what drives their decision making. To get this inside perspective on the company's target customer, she takes the time to listen in on 50 calls over a two-week period. She selects 12 new order calls, 13 cancellation calls, 12 successful up-sell calls and 12 product support calls. By listening to 50 customers in all of these different capacities, she learns several things:

- Customers find the company's products to be cheap and not well made
- Customers are reluctant to sign long-term contracts
- Almost every product support call is about the same broken part

She works with product development to fix these issues right away and then embarks on a campaign to communicate the company's commitment to product and service excellence. Two months later she listens to another 50 calls and sees that things are already starting to turn around.
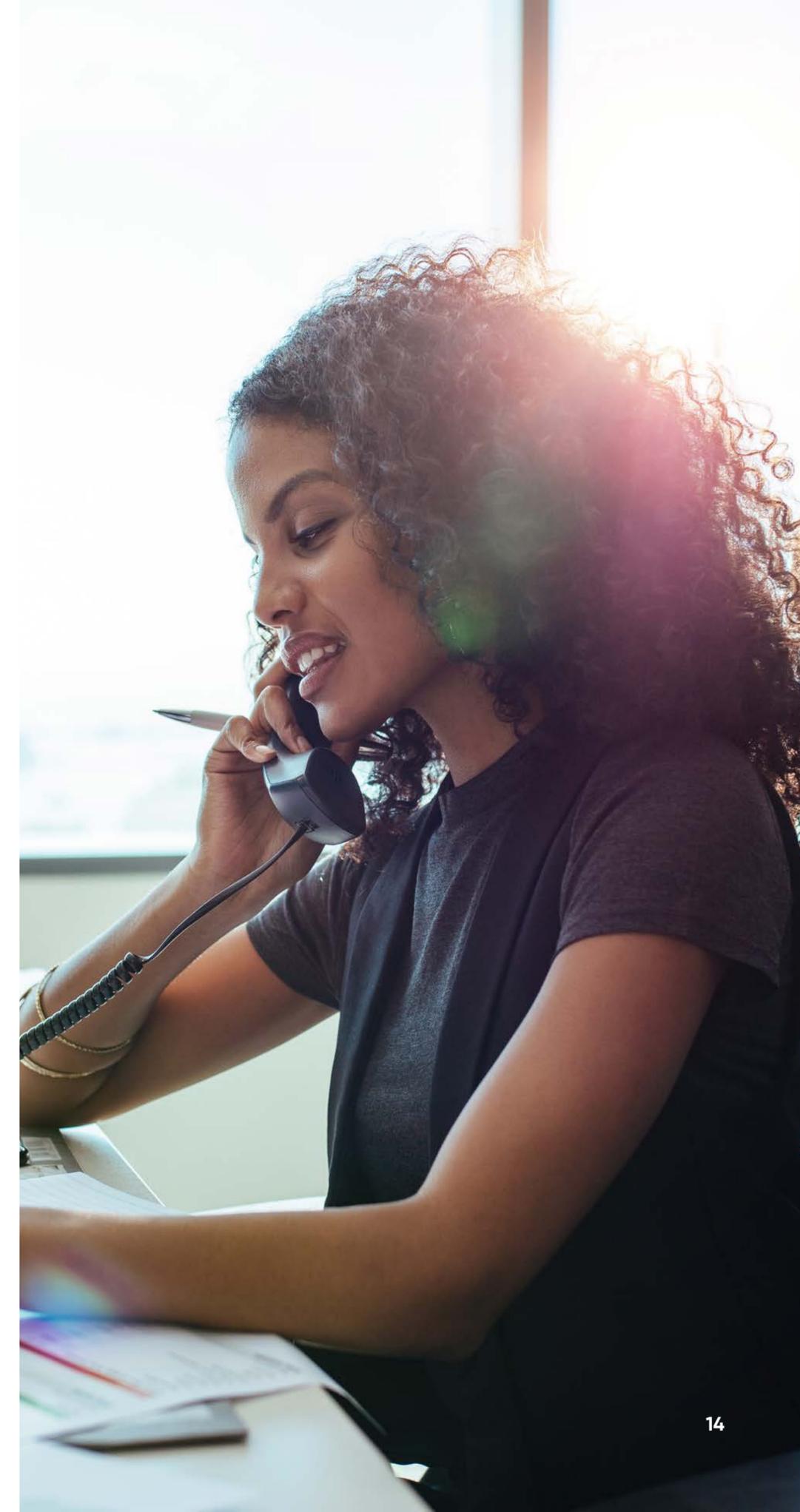
Compliance officer

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Manufacturing firm

<div style="background:orange">Job description</div>

Responsible for setting corporate compliance policy and ensuring all staff adhere to relevant governmental, industry and corporate regulations and policies.

<div style="background:orange">Motivation</div>

Ensure all staff comply with all relevant regulations so the organization avoids costly infractions.

<div style="background:orange">Scenario</div>

Wellington is a former corporate attorney and knows the company's regulatory environment quite well. Of late, the company has been receiving many complaints and lawsuit threats from customers about the organization's handling of private information.

He works with the call center manager, Tom, to find out what's going on. Tom takes a sampling of calls in which credit card information was collected and listens to those interactions. He then shares them with Wellington who also listens. They both discover the issue right away.

The call center agents' current workflow when taking credit card information is not optimal. It requires agents to dual-populate the credit card number. To do this properly, agents are opening up the Notepad app on their desktop and typing the number in there so they can re-enter it on a later screen. This type of mishandling of personally identifiable information leaves the company vulnerable. Wellington institutes corporate policy to change this right away. Soon thereafter the complaints and lawsuit threats decline dramatically.

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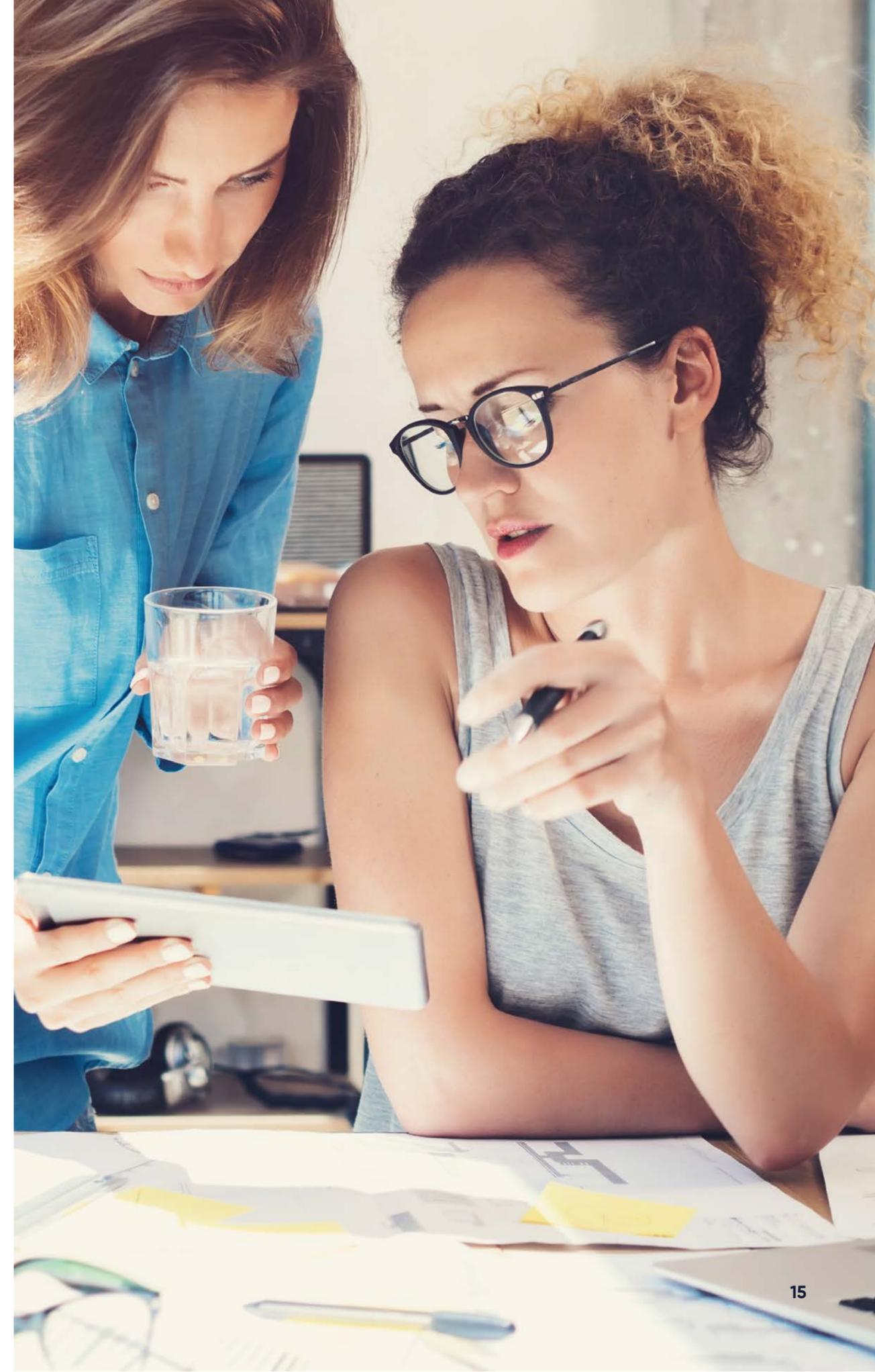
Chapter 3

Recording for business process outsourcers (BPOs) & call center outsourcers

BPO/call center outsourcing industry

Manufacturing firm

In many cases, you are taking over a role your clients cannot manage on their own or don't want to handle any longer. Therefore, you are under enormous pressure to over-perform each and every day or you risk losing business.

With the help of the right call recording, screen recording and quality monitoring software in your arsenal, you stand a far greater chance of satisfying (if not wowing) your clients. But first you need to pick the right solution(s) to fit your specific business requirements, which can be dramatically different from other types of businesses.

In short, you need solutions that offer:

- Broad functionality to meet the varying needs of your diverse client base
- Affordability, as budgets are tight in order to maintain profitability
- On-the-fly implementation, as down time is not something you can afford
- Low ongoing total cost of ownership (TCO) with minimal-to-no maintenance required
- Full, open interoperability with other systems

- Flexible, subscription-based pricing
- Graphical user interface (GUI) customization
- Open file format so you can share recordings with your client(s)
- Multi-tenancy

REPRESENTATIVE SAMPLING	ENCRYPTION	ARBITRATION	STANDARD DEVIATION
CALIBRATION	RECONCILIATION	RIGID SLAs	STRUGGLES TO TRAIN & RETAIN

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BPO/Outsourcer specific

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Call and screen recording

Centralized management

Centralized management of all recording data (voice and screen)

Open platform (i.e. open API)

Open platform (i.e. open API) so you can easily integrate the recorder with your clients' existing applications (CRM, ERP, SFA)

Multi-tenancy

Multi-tenancy so you can manage multiple clients independently, yet simultaneously

Compliance-ready

Ensure the system has masking or muting capabilities to protect personally identifiable information for PCI-DSS and HIPAA

Precise search querying

Precise search querying to find the exact call recording you need to prove compliance, share with your client, settle a dispute and so on

Subscription-based, affordable pricing

Subscription-based, affordable pricing so you can activate and terminate licenses when necessary to support your dynamic project workload

Scalable

Scalable to thousands of seats (whether through one logger/server or by linking multiple devices)

Same-day installation

Same-day installation so you can be up and running immediately in support of your new accounts; this serves as a competitive differentiator for your business

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BPO/Outsourcer specific

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Quality monitoring

Customizable evaluation forms

Customizable evaluation forms so you can tailor them to your clients' specific and varying requirements

Custom coaching agreements

Custom coaching agreements commensurate with specific agent performance goals

Calibration tables

Calibration tables to standardize service level expectations and measure quality across sites, teams and agents

Ability to attach recordings (voice and screen) to agent evaluations

Ability to attach recordings (voice and screen) to agent evaluations so they can hear what went right and wrong

Report filtering

Report filtering (e.g. by date, group, department, agent, supervisor, etc.) so you can extract meaningful intelligence to improve performance

Detailed reporting

Open platform (i.e. open API) so you can easily integrate the recorder with your clients' existing applications (CRM, ERP, SFA)

Standalone product or it includes simple and multiple integration points

Standalone product or it includes simple and multiple integration points to the call/screen recorder

Open API so you can pull data from your CRM system

Open API so you can pull data from your CRM system into the quality monitoring system

Open file exporting

Open file exporting to share reports and recordings with agents and clients

KPI tracking

KPI tracking to measure service level, customer satisfaction, average handle time, calls handled per hour, first call resolution, adherence to protocol and others

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Recording for debt collection

Debt collection regulations

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As a collection agent or agency, you fall under the auspices of many regulations depending on country, including:

U.S.	Canada	United Kingdom
Fair Debt Collections Practices Act, Telephone Consumer Protection Act, Do Not Call List	Manitoba Consumer Protection Act, Collection Agency Act, Business Practices and Consumer Protection Act, Collection Practices Act, Collection Agencies Act and Debt Collectors Act, Act Respecting the Collection of Certain Debts	Administration of Justice Act (Agencies fall under guidelines more than regulations, and they are used to determine if the agency is fit to hold a credit license.)

You also face potential consumer-driven personal lawsuits claiming the agency did not accurately introduce or represent themselves, or the agent was misleading in the information given about the debt.

Some of the many mandates these laws stipulate include:

- Agent must identify him/herself accurately and notify the consumer that he/she is a debt collector
- Agent must accurately disclose the name and address of the original collector
- Agent must not falsely represent or implicate that the consumer committed any crime in order to disgrace the consumer

- Agent can't use obscene or profane language
- Agent can't mention legal action will be taken, unless the agency really plans to do so

Monitor agent screen activity...to ensure compliance

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In the United States alone, over 700 lawsuits are filed every month against collections agencies

The easy answer to abiding by all of these regulations is to make sure your agents are doing what they are supposed to do. Call recording software that will capture every single call your agents are involved in and store it for you to recall later.

You can recall any call regarding and can search through the database of recorded calls according to agent name, customer, date, phone number, time of day and so on. Search queries are customizable so you can be sure to get your hands on that very specific call you need to settle a dispute, demonstrate an issue to an agent, and so on.

A nice add-on to compliance recording software is screen recording software which integrates with the call recorder to also capture the agent's screen activity during every interaction. You can easily identify compliance infractions or errors of any kind and quickly address them so no further violation occurs.

Value of call recording...to debt collection firms

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Compliance and agent performance

If your agents are violating one of the regulations you must follow, you can pull those calls and review them to determine where the infraction occurred. You can then work with the agent to correct the erroneous behavior to ensure it doesn't happen again. You also have actual recordings to share with regulators to prove a violation may not have occurred, if that is the case.

If a customer decides to sue your firm because they claimed one of your agents cursed at them, you can access that call and share it with all parties to prove what was really said or not said.

Dispute resolution

By recording every call that comes in or goes out, you have an automatic record of exactly what was said during each interaction with individuals you are collecting from. The invariable "I never said I'd pay" will likely come up and now you'll be able to access the call and replay it if necessary.

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Who benefits from call recording?

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Supervisors, lawyers, agents and even payers have something to gain from call recording software

Supervisors	Lawyers	Agents	Payers
Have a record of every interaction to access if necessary.	If litigation arises, have a legal record of the interaction in question to thwart a lawsuit or penalty.	Listen to other, more successful agents' calls to learn how to improve their own collection rate.	If a dispute arises, the consumer can ask for the debt collector to replay the specific interaction.
Use best-practice calls for training new or under-performing agents.	If necessary, a lawyer could replay the call in question during testimony for slam-dunk evidence.	As a protection measure, a call in question can be accessed in which the consumer claimed harassment from the collector.	
Listen to calls to identify issues or infractions by struggling agents.			

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Chapter 5

Recording for sales departments

Improve sales success by better understanding customer needs

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Recording customer calls can provide sales value in a number of ways, including:

- Hearing the actual 'voice of the customer' to better understand their needs, hot buttons, pain points, desires

- Sales best practices training

- Sales performance monitoring by supervisors

- Sharing customer calls with others working the deal

- Understanding competitor strengths/weaknesses

- Understanding which cross-selling/upselling offers are working

What if your contact center representatives could tag calls in which the customer said things like:

- What I really need is...

- What really bothers me is...

- I need to find a way to...

- I want to be able to...

Wouldn't those calls give you invaluable customer insight into your buyers' wants and needs, which you could then use when selling to other prospects?

Improve sales skills by monitoring agent performance

There is no better way to learn how well your phone- based staff is performing than to listen to your agents interacting with customers. You can then measure how well each salesperson is:

- Referring to the caller by name to personalize the experience

- Adequately trying to understand the potential buyer's challenges and needs so they can address them in a consultative manner

- Effectively cross-selling and upselling the individual

- Asking for the purchase to close the deal

- Detailing any current promotions that are going on

- Capturing the credit card information to complete the purchase

- Appropriately handling claims about your competitors

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Bring others up to speed on a deal easily

In B2B selling in particular, we often see an inside salesperson handling the initial outreach call to a prospect, with the goal of setting up an appointment for the more senior sales rep to follow-up. What happens typically is the inside sales rep has the initial call and then relays pertinent details to the account executive via email or phone. This approach is less than ideal and often important details are left out in the transfer of information.

By sharing a recording of the initial prospect call, the account executive can here first-hand what the prospect said word-for-word.

This exciting approach to sales communication is not necessarily new, but hardly ubiquitously adopted. By recording inside sales calls you can take your sales department to new heights – a level that your competitors haven't likely risen to yet.

Chapter 6

Recording for marketing teams

Customer insight leads to effective, targeted campaigns

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In a survey by CMO.com, Chief Marketing Officers revealed some of their most pressing challenges. Not surprisingly, things like "asking the right questions" and "understanding our customers" ranked near the top of the list.

By recording customer calls and corresponding agent screen activity, you can derive insights into the minds of your customers and prospects in the areas of:

- Business/personal challenges
- Pressing needs
- Competitive intelligence
- New product ideas/existing product updates

Think of how valuable this insight would be to your marketing team for creating new campaigns to derive sales leads. Recorded customer calls provide even richer insight for CMOs and the entire marketing department.

5%

U.S. businesses will spend on average 5% more in the next 12 months on "marketing research and intelligence".

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CMO Marketing Survey, Feb. 2017 – Deloitte, AMA, DUKE University

Uncover critical customer insight

In order to ensure your marketing team is capturing value from recorded customer calls, instruct your call center agents to ask customers/callers the following two questions:

1. May I ask what drove you to consider purchasing XYZ?

2. What specifically are you looking for XYZ to help you do?

When this information is uncovered during the interaction, the marketing team can listen to the call recording and derive the intelligence needed to better understand key buying drivers.

Consider segmenting calls by:

> New order calls

Understand the reasons why the person is purchasing your products/ services

> Cancellation calls

Learn the root causes of someone's dissatisfaction

> Up-sell-calls

Understand what features and capabilities are of most interest to callers so you can highlight those in upcoming campaigns and promotions
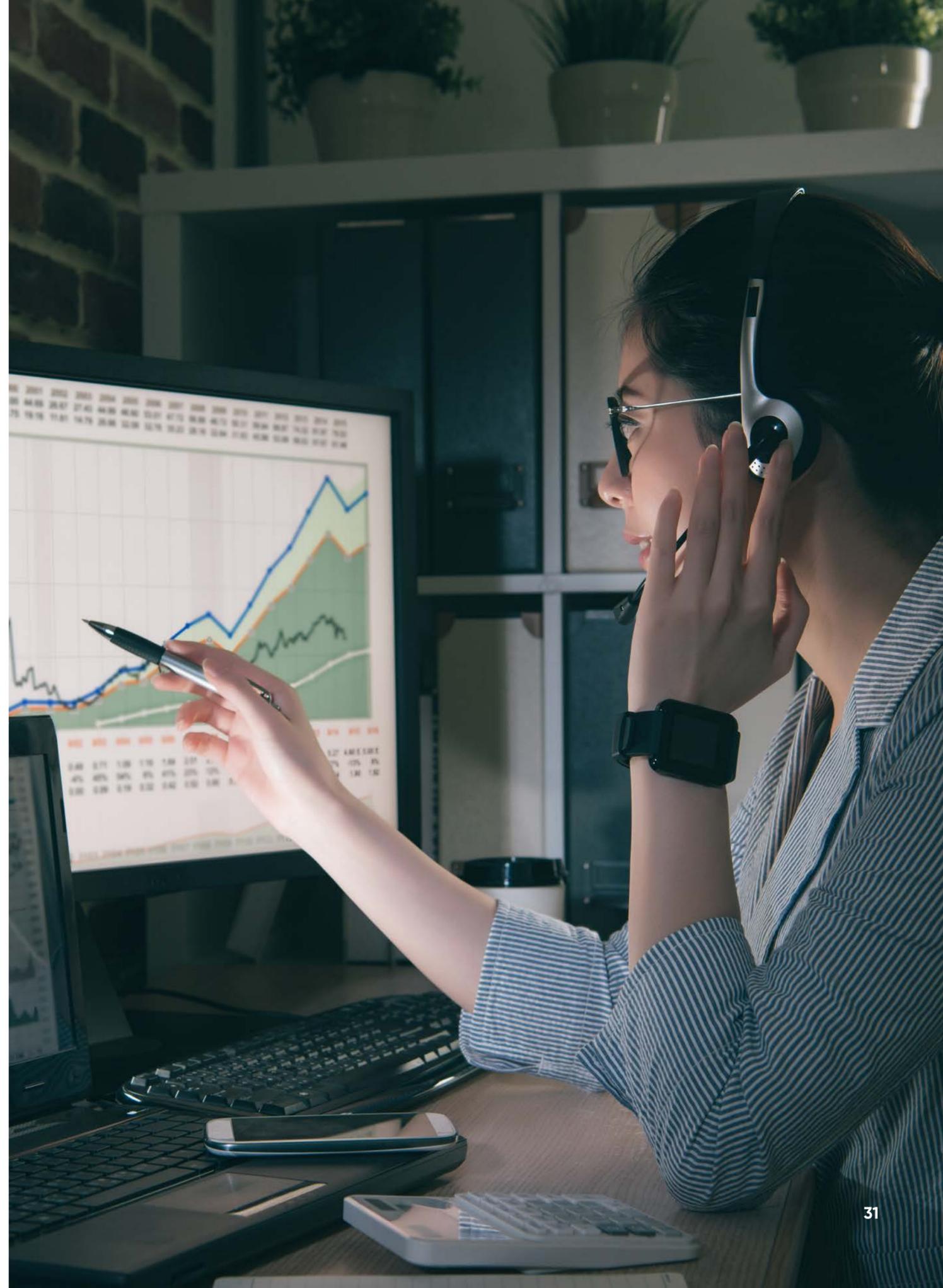
Top 20 questions to ask recording vendors

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1. Is the solution designed to address my specific industry and regulatory requirements?

2. How long have you been in business?

3. Who are some of your similar customers?

4. What makes your business/solution unique?

5. Is the solution designed primarily for my size of company?

6. Am I going to pay for features really designed for a different size organization?

7. Does your product(s) support multi-site and multi-tenant capabilities in case I need them?

8. Can the solution scale to support my organization's growth?

9. What does the implementation process look like? Does it cost anything?

10. What is required to manage and maintain the system?

11. How open and interoperable is the solution, given my current IT environment?

12. How easily can I customize the solution? What is customizable?

13. What specific capabilities does the solution have to support my regulatory and industry requirements (e.g. HIPAA, PCI- DSS, Telemarketing Sales Rule, etc.)? Mask/mute?

14. Does the recording solution come with all the functionality I need or do I have to purchase separate modules for each business requirement?

15. What are the costs for implementation, training and support?

16. Which PBX switches do you support?

17. Does your solution offer centralized administration and data management?

18. Are your call recording, screen recording and quality monitoring solutions fully integrated or modular?

19. How much training is required for my staff to become proficient with your product?

20. How many seats can your system support? Is it multi-site?

Discover the value of high-quality call recording and stereo separation of each speaker, and set the stage for powerful conversation intelligence.

[Request a free trial of CallMiner Record today!](#)
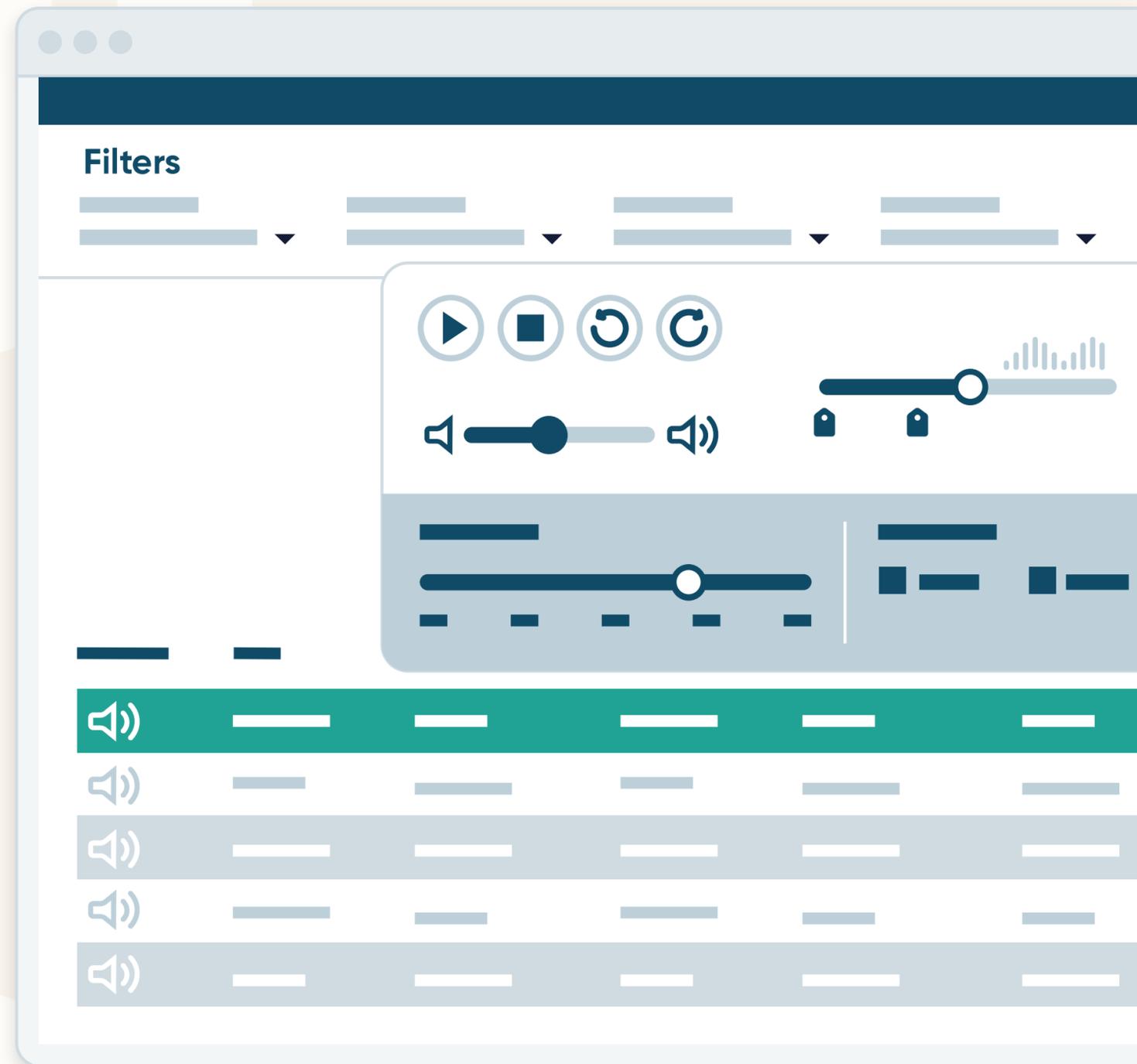
About CallMiner

CallMiner is the global leader in conversation intelligence to drive business performance improvement. Powered by artificial intelligence and machine learning, CallMiner delivers the industry's most comprehensive platform to analyze omnichannel customer interactions at scale, allowing organizations to interpret sentiment and identify patterns to reveal deep understanding from every conversation.

By connecting the dots between insights and action, CallMiner enables companies to identify areas of opportunity to drive business improvement, growth and transformational change more effectively than ever before. CallMiner is trusted by the world's leading organizations across retail, financial services, healthcare and insurance, travel and hospitality, and more.

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