



What to ask a call recording supplier (and yourself!), when considering buying call recording

These pointers may help you choose the right type of call recording system for your business. There are two sections, focussing on different aspects.

These questions may help your operational or financial considerations:

Do I really need call recording? What do I want to use it for? What am I aiming to get from call recording? Where will call recording add value to my business?

Recording calls just for the sake of recording is not a valuable use of your resources. Work with your potential supplier to identify benefits to your business and to determine whether you are going to see a speedy return on your investment.

How can my trainers/supervisors use recording to good effect?

Ask your supplier to show you how your trainers or supervisors can improve your staff performance by using call recording. Insist on seeing just how simple their product is to use: you want minimal training overheads so that your trainers are effective immediately.

What costs are involved?

Be sure you factor in installation, hardware, planned upgrade costs, and (crucially) total support and maintenance payments over the expected life of the system (say five years).

What if I only want to record some of my staff's calls, or (say) just one team?

Make sure you are in control of which individuals or teams are recorded. If you don't want to record any calls to (say) the HR team or to the Managing Director, ensure your supplier can target precisely which people are recorded, and (crucially) which are not. Make sure you're recording internal calls too, if that's important.

What happens if your company/team gets larger or smaller and you need to change the number of seats recorded? And what costs will I incur?

Make sure you are not required to pay in advance for capacity you may not use in the future. In other words, avoid over-purchasing. Also, be sure you can increase recording in small chunks, preferably one person at a time, and not (say) 30 lines at once. A flexible true rental contract with your supplier will allow you to match capacity with your call recording needs.

How quickly can I find and play-back calls?

One of the critical things about any call recording system is how fast it can find and play calls. Do ask your supplier to show you that finding and playing back specific calls (say, "all of Mr Smith's calls to us in August") will not take more than about five seconds. Any longer and you're going to waste time, every time, and this will cumulatively impact on operational productivity.

What to ask a call recording supplier – continued

How easy is it to use a call recording system?

During any demonstration, ask your supplier to 'let you drive', so you can quickly see for yourself.

How long will it take, from saying 'go' to having fully operational call recording?

Make sure your supplier can deliver a fully working system to you in a short time, with minimal disruption to your staff and working environment. You should include time for contract documentation, technical surveys, configuration, rollout and testing. Do ask for references from other customers, to hear their experiences.

How will your call recording system comply with any future changes in legal regulations or codes of practice?

It's important that any call recording system bought now can cope with future changes in the law, or industry codes of practice. Recent changes in the PCI DSS credit card processing guidelines have exposed some types of recording system as incapable of adapting to change (they need replacing in their entirety).

You need to be sure that you won't be forced to throw out your recording system in the future. Have your supplier prove that regardless of any constraints or changes the government, Financial Services Authority or any other body may impose on call recording, their system is flexible enough to adapt almost instantly.

How does your system help us comply with the PCI DSS credit card processing guidelines? How does it automatically remove sensitive credit card data from recorded calls?

If you take credit card details over the phone, ask your supplier to prove that they are "PCI DSS compliant" and to explain how they remove the 3-digit credit card

security codes from their recordings, automatically (with no manual intervention by your staff). Apart from not recording calls at all, any other suggested solution to PCI DSS (such as encryption), will not be compliant.

Can I listen to calls from one site, on another site?

If your business has more than one site, or if your managers ever travel off site, make sure you have multi-site capability for recording and listening to calls, with relevant security/authorisation policies in place, so that only the users who should be able to listen to a particular team's call, can.

What operational support or help can I get, immediately?

Make sure you can telephone a support desk (and talk to a person not a machine!) with any questions you have. Ensure you can talk directly to the manufacturer of the call recording system, and not a reseller or outsourced support agency. And make sure the support staff can (with your permission) view your screen remotely, to aid in diagnosis or training.

How long before I have to update or replace my call recording system?

Ask about the average lifespan of your supplier's system, and make sure you know what guarantees/warranties are offered for performance. Find out what ongoing updates (both in terms of increased functionality and also resolving problems) are included.

What management information can you get out of the call recording system?

What standard management information is available? And how easy is it to tailor these reports for your specific requirements? What automatic labelling or segmentation will the system do, to easily allow you to categorise your calls or identify key areas for performance improvement?

What to ask a call recording supplier – continued

These questions may help your technical or telephony considerations:

How long does deployment take, and what disruption will it cause to your systems?

Do make sure your supplier gives you concrete assurances about the amount of downtime you can expect for your telephony equipment, including diallers, switches, ported numbers, and non-geographic numbers. And ask the same question about your IT setup: databases, CRM systems, desktop PCs, etc. Finally, identify what changes are required to any of those systems, which will take your team's time to implement.

What desktop applications or websites do you integrate with, to allow us to label/tag calls with business-related data?

Make sure your supplier's system is generic, and works with any desktop application or website (such as payment processing sites, CRM systems and in-house booking applications) which you may choose to use, now and in the future. And be sure this integration is simple and easy – ask where similar work has been done before, and ask to talk to that customer to get their feedback

Will call recording work with our existing systems and in our environment? And in the future?

Will the prospective recording system interact seamlessly with your current desktop applications or websites (for the purposes of labelling or segmenting calls automatically)? What happens if you decide to change these systems in the future – will the recording system continue to work without extra integration work?

If I change my phone system, will I need to change the call recording system?

You don't want to be forced to change call recording systems if you ever change your switch (for example, on moving to VoIP). So make sure that can't happen. Also consider: what if you were to move only part of your digital switch to VoIP? Will your proposed call recording system work in transition and in a hybrid mode?

If one part of your call recording system fails, does call recording stop everywhere?

Redundancy is clearly important, so make sure that a single failure cannot possibly stop all call recording. Do have your supplier explain what happens if a failure occurs in (say) their core call recording hardware or server.

What about multi-site recording, storage and playback?

If you're interested in multi-site recording, make sure your supplier has the ability to store calls where you want them – either at one site or a mixture – and handle security/permissions for staff at remote locations seamlessly.

What technical support can I get, immediately, for any questions or issues I have?

Do make sure your call recording system comes with a support contract. Make sure you can telephone a support desk (and talk to a person not a machine!) with any questions you have. Ensure you can talk directly to the manufacturer of the call recording system, and not a reseller or outsourced support agency. And make sure the support staff have (with your permission) remote access for rapid diagnosis or training, rather than having to send somebody to your site (which necessarily induces large delays and potential costs).

What to ask a call recording supplier – continued

Is the system secure? Does it actively prevent information theft? Does the system offer easy users/groups setup to define specific privileges for different staff?

You need to be 100% comfortable that the call recording system you buy will meet your current and future security requirements. Consider whether you need encryption, and how that is handled across multiple users. And will the system “bleep” or “blank” sensitive data from the call, to ensure this information is simply never recorded in the first place, regardless of security permissions?

Is the system compliant with the Data Protection Act, Financial Services Authority requirements, and the PCI DSS credit card processing guidelines?

And how will this change with tightening or changing laws or industry guidelines in the future? Recent changes in the PCI DSS credit card processing guidelines have exposed that some types of recording system simply cannot be modified to comply. Have your supplier prove that regardless of any constraints or changes the government, Financial Services Authority or any other body may impose on call recording, their system will adapt almost instantly.

What effort is required from our IT staff to tailor standard reports? Can we draw report data from other internal sources too?

Find out what standard database formats are supported. Do these align with your internal choices? Are the underlying call recording data sources and recordings themselves open and freely available for your own reporting tools? Are the recordings in a

format that can be easily played on any device or computer (for example MP3)?

Where is the data stored?

There is a philosophical difference between whether recorded calls and associated data are stored offsite, or at your site. And, if stored at your site, are they stored on proprietary hardware/devices, or on your standard servers or NAS devices? Do make sure the data storage location fits your company’s information security and data storage policies.

What about data backups and longer-term archiving – who takes care of that?

You need to be comfortable with the supplier’s recommended process for data backups and archiving.

What are the options for disaster recovery?

If you need to move to a disaster recovery (DR) site quickly, what happens to call recording? Do you have to purchase an entirely separate recording system, to sit ready but unused at your DR site? And on return to your main premises, how are the DR recorded calls merged back into the main site’s call library? Do you have access to recordings from your main site, while at the DR site? (If not, business continuity may suffer.)

About Veritape

Veritape makes call recording simple. We pride ourselves on our fresh, no nonsense approach. Sold through a low-risk rental model, we offer a cost-effective, flexible alternative to traditionally expensive fixed hardware solutions.

Please visit www.veritape.com for more information.