

CALL RECORDING eBOOK

Call Recording Considerations and Pitfalls

Selection Criteria

Making a decision about a call recording provider is an important undertaking. If used correctly, a call recording system can provide substantial benefits across your organization, in the areas of customer service, operational performance, understanding buying behavior, PCI/HIPAA compliance, dispute resolution and more!

So, to say the least, you want to be sure you are buying the very best call recording software for your needs. You want to be sure it works well in your environment and has all the tools and capabilities you require to capture and analyze customer calls.

But with so many providers out there (over 50 now!), how can you be sure you're making a wise decision – and getting the most out of the provider you select?

Here are some variables to help you distinguish between the huge selection of call recording solutions out there:

- ❑ **Scalability** - Some systems can only record up to a few hundred channels or employees. You want a solution that can capture as many as you have plus room for more as you grow. You really want a solution that can handle 1,000 or more.
- ❑ **Feature Stripping** - Some solutions offer all-in-one offerings with call recording, quality monitoring, screen recording and mobile recording all bundled together. These typically offer the biggest bang for the buck. Others sell a core call recording product and then charge a small fee for added capabilities. Still, others sell you call recording functionality and then charge an arm and a leg for all added capabilities. Beware of these types of offerings as you may wind up buying things you don't really need (and that are very expensive) just because they sound good at the time of purchase. On the other hand, you also don't want to go with a vendor that strips away some of the core features in their "basic" version.

Selection Criteria (Cont'd...)

- ❑ **Speech Analytics** - You want to be sure your call recording system can work smoothly with ANY onsite or cloud-based speech analytics system. Some recording solutions lock you in to their speech analytics tool, which may be limited in scope and focused primarily on the call center, not the enterprise. You need access to the best enterprise analytics tools.
- ❑ **Interoperability** - This is really a big one. The word "proprietary" should never come up in any conversation you have with a call recording provider. If they mention it, run. You want a call recording system that is "open" in its architecture and that can interoperate with virtually any third party software (CRM, Sales Force Automation, ERP, etc.) or hardware (i.e. PBX switches, ACDs). Some recording vendors tout the five or 10 switches they have interoperability with. In today's world of best-of-breed contact centers, why would you want to paint yourself into a corner? What happens if you add a new switch that isn't supported by the vendor? This is why it is imperative to go with an "open" system that has an "open" API so you can work seamlessly with any existing or new application, hardware, switch, etc.
- ❑ **Installation** - some companies take weeks to even get to your installation and then weeks or even months to facilitate and complete it. You don't have time for this. You want to start recording calls now, not next quarter. Don't be fooled by one of these providers. There is nothing they offer that is worth waiting months for. Don't select a provider that takes more than a couple days to get to and complete your installation. Better yet, choose a solution you can install all by yourself, in mere hours.

Common Buying Mistakes

There are some common pitfalls or mistakes businesses commonly make when considering the purchase of call recording software.

Buying Mistakes

- Neglecting to “Try Before You Buy”
- Not considering all of the areas in the organization that can benefit from call recordings
- Not confirming that the software has an open API or is easily integrated with your PBX or CRM
- Not ensuring the software has the capabilities you need to meet your regulatory compliance needs

Mistake #1:

Not Trying Before Buying

Face it: You certainly wouldn't buy a car without test driving it. Right? Before committing your financial resources to a purchase, you need to know how the vehicle handles the road, whether all the electrical gadgets are working, and whether there are any suspicious knocks or rattles that indicate there's an underlying problem.

The same holds true for call recording software. It seems only logical, but it's important to install it in your environment and take it for a test run before committing to a full purchase. That way, you can see how the system actually works in your specific situation and determine if it realistically meets your needs.

Unfortunately, not all call recording software providers offer such a trial, but some do. Look for ones that offer this feature and demand that you get to "test drive" the software up front. Otherwise, you might be purchasing a round peg that doesn't fit into your square hole, and this can prove very problematic and costly.

Mistake #2:

Not identifying everyone that can benefit, and how

You may not realize it, but chances are most if not all of your staff can reap benefits from listening to recorded calls.

These calls can bring your staff closer to truly understanding what your customers want and need: There's simply no better way to tie your entire staff directly to your customers than by having them hear the actual voice of the customer.

Before you purchase your new call recording system, be sure to clearly identify who in the organization can benefit directly or indirectly from call recordings, and how they will benefit. This may drive some specific requirements you may not originally thought of – such as ensuring the recordings are available in standard MPEG format, for example, so you can share them across the business. Or perhaps, you'll want to restrict access to specific personnel and will need password-protection administrative capabilities to protect your recordings from unauthorized users.

Mistake #3:

Not confirming software interoperability

The last thing you want is a call recording solution that's difficult to integrate into your current environment.

One of the most common pitfalls for many organizations is failing to understand how well the software works with popular PBX switch vendors such as Avaya, Cisco, Fonality, Mitel, Siemens, ShoreTel, BroadSoft, etc.

Call recording vendors frequently promise that their system can integrate seamlessly with any PBX. In truth, this integration often proves a complicated, arduous, and time-consuming process.

Avoid this hassle – it slows down implementation, drives up your costs and can cause unnecessary headaches.

You also want to make sure the software has an open API so that can pull data from your CRM system, for example.

Mistake #4:

Not considering all compliance needs

Most companies must adhere to certain regulatory requirements, such as one or more of the following. Be sure your new software supports these requirements with call masking/muting, restricted recording access and so on, so that you can protect customers' sensitive information.

HIPAA (Health Insurance Portability & Accountability Act):	Protects the confidentiality and security of personal healthcare information.
Dodd-Frank Wall Street Reform & Consumer Protection Act:	Protects consumers from abusive financial services practices by large banks.
PCI-DSS (Payment Card Industry-Data Security Standard):	Protects consumers from misuse of their credit card information. Ensures all organizations, including online retailers, properly store, process and transmit their customers' credit card data.
Fair Debt Collection Practices Act:	Limits the behavior of debt collectors by restricting the means and methods by which they can contact the debtor, as well as the time of day that contact can be made.

OrecX

Open Source Recording



#1 Call Recording Vendor
on the List

To learn more about OrecX call
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<http://www.orecx.com/products.php>

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