touch
Call Recording

Case study
March 2023

Efficient service migration

Lessons from a major Nordic bank

Increasingly rigorous legislation and a growing diversity of media channels has led many businesses to evaluate their call recording solutions. As one leading Nordic bank discovered, its legacy platform was no longer fit for purpose and could not adapt to new requirements.

As a result, it selected a new, more flexible, managed call recording service that could evolve to support its business for many years to come. However, finding a new call recording solution is just part of the challenge. The bank had a significant repository of historic call recordings, which it had to maintain to ensure compliance with storage obligations included in legislation, such as MiFID II.

As well as securing a new, state-of-the-art call recording solution, the bank also had to ensure that these existing recordings could be migrated to the new platform, so that they could be accessed through a single interface.

Find out how this was achieved in this case study.

The challenge

Finding a flexible call recording as a service solution

After a period of evaluation, the bank approved the technical solution proposed by Touch, which included compliance to the SLA and service delivery capabilities necessary to operate the service according to expectations. Touch was invited for contract negotiations and risk assessment.

Call recording is not just for compliance

For businesses that routinely record conversations with customers, keeping an eye on the changing market landscape is essential.

Legislation can change, while new media channels can also rapidly gain popularity. And global events can lead to changes in work practices. All of which means that it may be necessary to evaluate recording solutions to ensure that programmes can be maintained.

A leading Nordic bank – publicly listed and with revenue of more than €4 billion – ran a fixed call recording solution for many years. However, the solution lacked flexibility and was not aligned with future evolution plans. As a result, a new solution was sought.

The Compliance Officers tasked the IT management team with the job of modernising the call recording infrastructure – but without adding new Full Time Equivalent employees (FTEs) to the organisation.

Touch was one of the providers that was contacted. The IT team explained that a managed service offer was required, which could be delivered with stringent SLAs and continuous quality assurance.

After a period of evaluation, the bank approved the technical solution proposed by Touch, which included compliance to the SLA and service delivery capabilities necessary to operate the service according to expectations. Touch was invited for contract negotiations and risk assessment.

As a result, it was decided to adopt Touch Call Recording as a Service for compliance recording and to capture customer conversations. The bank runs Mitel's MX-One PBX solution for voice telephony, which is widely deployed. Touch Call Recording Service has native compatibility with this, ensuring a smooth integration with the bank's voice infrastructure.

The solution

Mobile recording for true multi-channel recording

The solution was to move all historic recordings to the new Touch solution as part of the delivery of the new service. The Touch team converted the legacy proprietary files to an open, standardised format and ensured that all relevant metadata was a part of the resulting file.

Call recording is not just for compliance

In addition to covering recordings from the fixed voice infrastructure, the bank also needed to cover conversations and customer interaction via mobile devices.

Touch included mobile call recording, with a network-based approach. Telenor is used as the mobile operator for this delivery, so the solution was integrated with its mobile network.

The mobile call recording service delivered by Touch does not require software and enables seamless capture of relevant calls and messages, with no user intervention. As a result, a truly multi-channel recording service was realised.

Ensuring all historical data and handling of the entire recording repository

However, securing the future is one thing, protecting the past is another. The bank had a significant repository of call recordings that had been captured with the legacy solution. It was recognised that maintaining several solutions would be costly and inefficient from an IT point of view, and hard to operate from the perspective of the Compliance Officers.

The solution was to move all historic recordings to the new Touch solution as part of the delivery of the new service. The Touch team converted the legacy proprietary files to an open, standardised format and ensured that all relevant metadata was a part of the resulting file.

As a result, the entire repository of historic call recordings could be imported into the Touch Storage Centre, accessible through Touch Web-Portal to the bank.

Flexible access control

Access was carefully controlled, so that each registered user could access calls made to their designated customers and contacts, while compliance officers had access to recordings for their department – or for the whole company – depending on their role in the organisation.

Challenges of integrating with Mitel MX-One:
Encryption and On-demand

In this case, conversations between users of the Mitel MX-One were encrypted, end-to-end (SRTP). Touch had to ensure that the resulting recordings could both be captured and made accessible, in the event that access is required. This was achieved as part of the delivery process. In addition, while for most users, always recording was the default setting, for some, only selected calls needed to be recorded. As a result, Touch enabled an on-demand, selectable call recording option for selected users. This enabled authorised personal to initiate recording when required. The solution offered ease of use and delivered high levels of customers satisfaction.

Touch call recording

A complete managed service offer

Touch is more than a solution provider. Yes, the service ensures all recording goals are met, but it is also delivered with performance guarantees and is optimised for the needs of the customer.

Call recording is just one part of such projects. Ensuring consistent service performance and visibility of all records are equally important.

So, in addition to performing the migration of the existing records, Touch also provides active service monitoring of the complete recording solution. This provides quality assurance reports that are used to support the overall reporting goals of the bank and compliance with the agreed SLAs

The project proceeded smoothly. From signature of the contract to launch, the service activation, performance validation and historic data migration took just four months. Years of recordings were transformed, giving the bank a seamless record that covers all applicable years.

At the same time, the flexibiity of Touch will enable future adaptations to be made, depending on new requirements. It's a future-proof solution that is deeply integrated with the compliance processes, and which meets rigorous performance metrics.

As has been proven, repeatedly and over many years, Touch is more than a solution provider. Yes, the service ensures all recording goals are met, but it is also delivered with performance guarantees and is optimised for the needs of the customer. In this case, a leading bank not only depends on Touch but also on the integration and migration skills provided to ensure smooth adoption of the new service, effective migration from a legacy platform. This was combined with the integration of a large history of recordings to the new solutions, backed by controlled access through a single service portal.

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Touch Technology AS

St Olavs Plass 3

0165 Oslo

Norway

touchcallrecording.com