CALL RECORDING

Speech Analytics

Admin

Quick Reference

MOMENTUM

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Introduction to Speech Analytics and Transcription

The typical contact center collects and stores a vast amount of data in the form of customer interactions. It is widely recognized that these customer interactions contain information about the root causes of key business issues. Designed to deliver valuable intelligence that business users readily understand and use, Call Recording Speech Analytics can help reveal the cause/effect relationships that underlie performance and business outcomes across the enterprise, without the complexity usually associated with advanced analytical technologies.

By revealing both what is happening and why, Speech Analytics helps equip organizations to make better-informed decisions, maximize strengths, address deficiencies, and make the most of market perceptions and opportunities. For instance, mining information from contact center calls using Speech Analytics, can be an early warning system, before an issue escalates to negative social media.

The goal is to analyze information that can help a company improve customer service, get reactions to new products or policies, and so on. That is, Speech Analytics can help companies turn thousands of calls into actionable data.

The Call Recording application uses speech-to-text technologies to transcribe recorded customer interactions and to transform them into a searchable database. It helps organizations enhance customer retention and satisfaction, increase first call resolution and improve sales and self-service effectiveness.

The Speech Analytics application automatically prioritizes transcribed interactions based on specific business issues relevant to your contact center. The Speech Analytics application then enables you to access the transcribed contacts for playback, enabling you to hear the context in which the words were said and thus identify issues critical to your business needs.

With Speech Analytics you can:

- ✓ Gain insight from recorded calls to help you improve products, processes, competitive advantage, and the overall customer experience.
- ✓ Use advanced search capabilities to research any hypothesis and quickly receive a prioritized list of results out of millions of calls.
- ✓ Surface trends that might otherwise go undetected without listening to thousands of calls.

Transcription

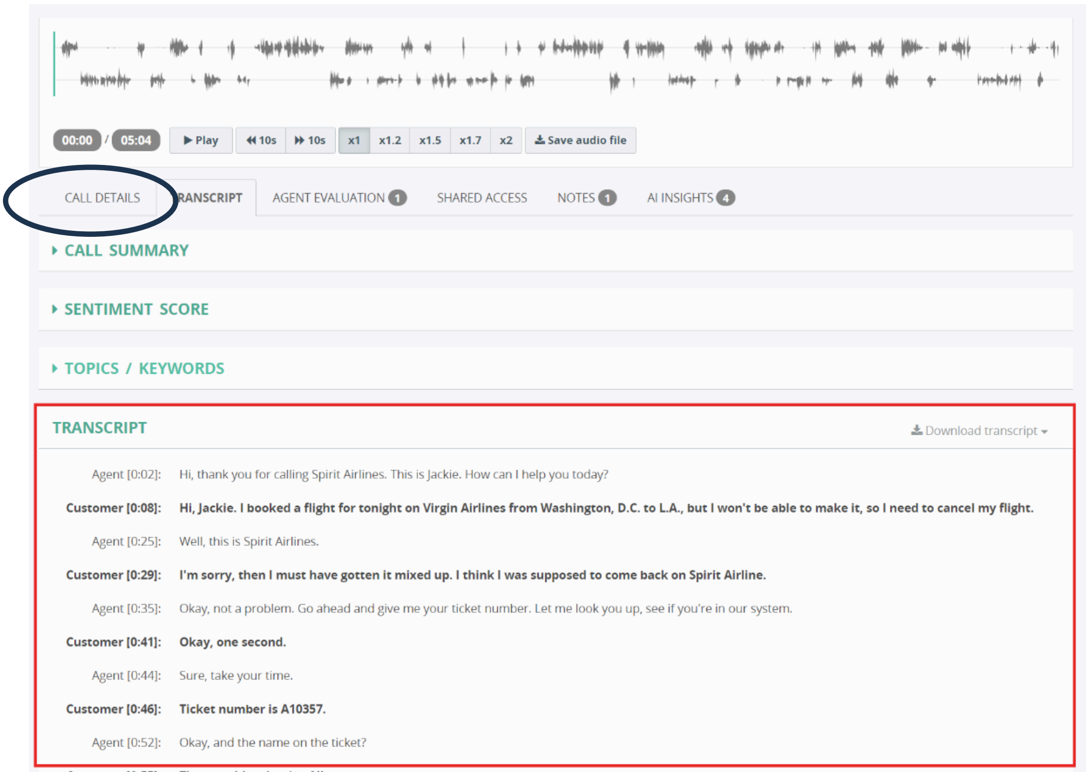
When the Speech Analytics and Transcription license is assigned to a user, Call Recording automatically transcribes the audio it hears during calls into text, allowing viewers to quickly review the transcription results once rendered and search for keywords or phrases. Key features of Call Recording Transcription:

- **Automatic**. Every call is being transcribe automatically
- **Accurate**. Call Recording uses the latest technologies to provide exceptional transcription accuracy, even in noisy environments and accented speech.
- **Speaker separation**. See in transcript who said what. In case the phone platform doesn't provide dual-channel audio, the Call Recording platform automatically detects speakers using a *speaker diarization* model.
- **Multilingual**. Call Recording can transcribe calls in different languages. And it can even transcribe calls with intermixed languages in the same conversation.
- **Full-text search**. You can search through all your calls using a text.
- **Post-call**. Transcription is provided after the call is completed.
- **Inline comments**. A reviewer can add inline comments in the transcript as feedback to an agent.

A call transcript is a key feature add-on for the Call Recording solution. It is useful on its own, but more importantly, a transcript is used as the fundamental data source for other AI-powered analytic tools in the Call Recording application, like Call Summarization, Sentiment Analysis, Topic Analysis, AI Insights extraction and Auto QA (agent evaluation).

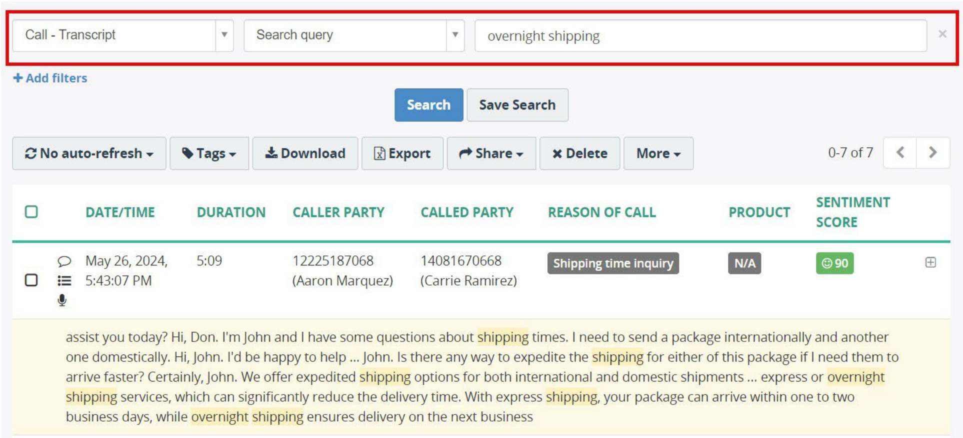
View a Transcript in Recording Call Details

To view a call transcript, open call details and navigate to **Transcript tab** below the audio tracks.



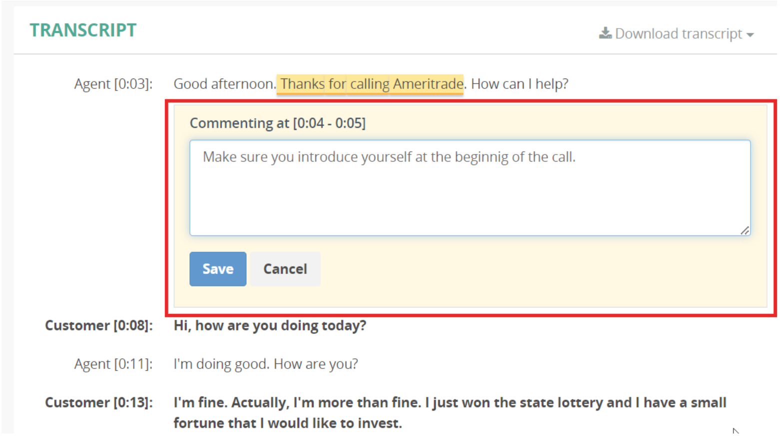
Full-text Transcript Search

Under **Recordings > Advanced Search**, you can select **Call - Transcript** parameter to search the conversations using text.

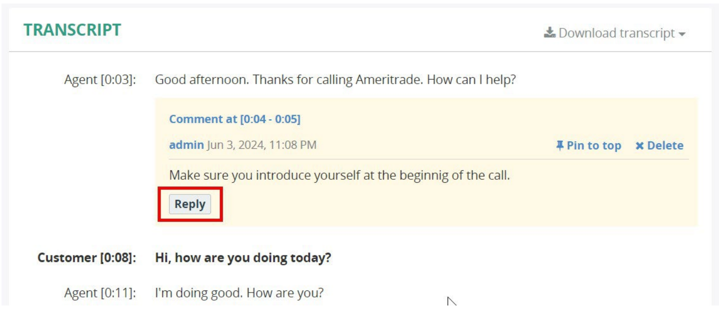


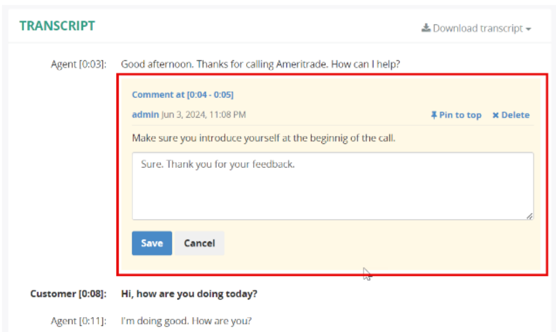
Inline Comments

You can select a portion of transcript with a mouse to add an inline comment.



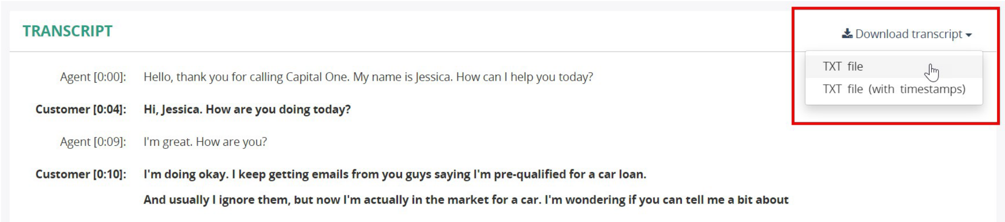
Such inline comments are very useful for providing feedback to an agent (if they have the Self-View role).
After reviewing the comment, the Self View user can click **Reply** button and write a response to the reviewer's comments.





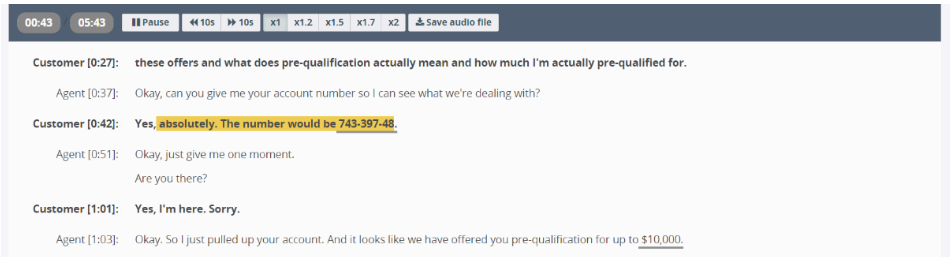
Download a Transcript

To save a transcript as a text file onto your computer (if your Role allows):
Click on the **Download transcript** button in the right top corner of the transcript.
You can choose to save the transcript with or without timestamps.



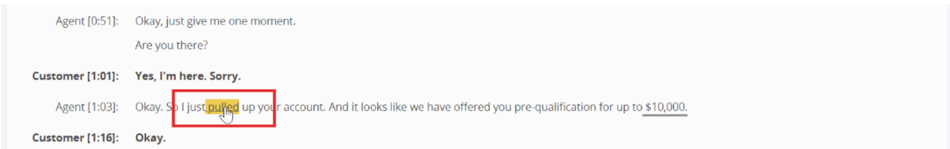
Highlight Spoken Word During Playback

When you play back a recording, you will see the spoken words highlighted in the transcript as they are reached within the call, allowing you to easily follow the heard audio and transcript.



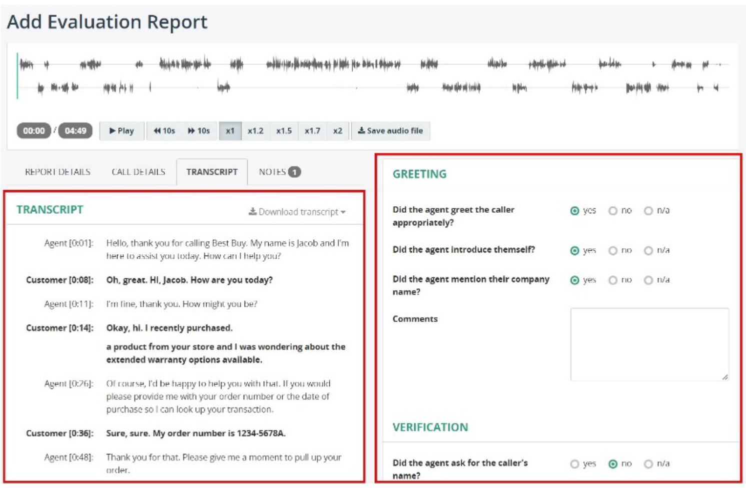
Click in Transcript to Fast Forward Audio

You can click on any word in a transcript to fast forward (or Skip) the audio player to that moment.
You will hear what was spoken at that time in the conversation.
This is a very handy feature to significantly speed up the review process.



Review Transcript During an Evaluation

When performing an evaluation manually, the Supervisor or Admin can open the Transcript tab to view the call transcript.
This saves a significant amount of time during the review process and reduces the need to sit and "listen" to the call to answer simple questions like "Did the agent introduce themselves?".



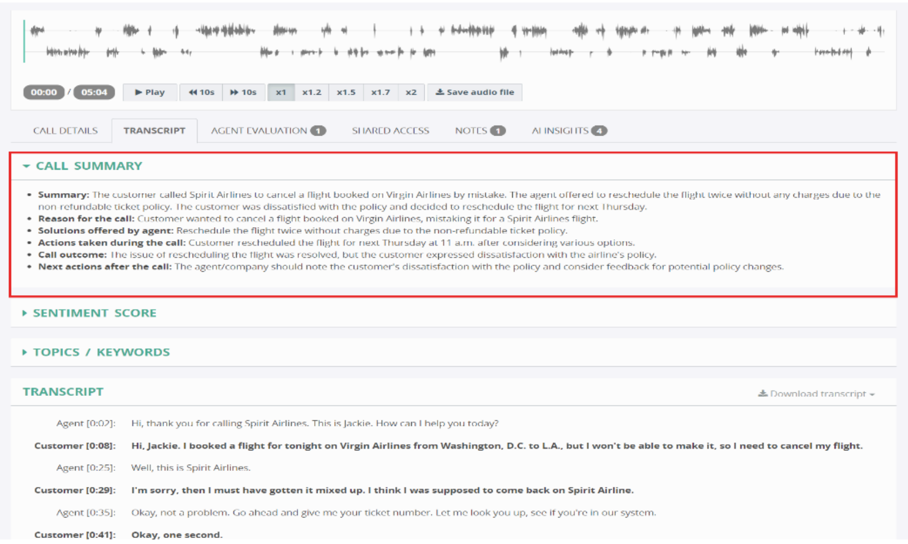
Call Summary

The Call Summary feature allows you to see a compressed version of the conversation in easy to read format.
During a call review, a summary of the call saves a lot of time of the reviewer, which would be otherwise wasted on listening an audio recording. The key information about the conversation is recorded in a call summary, which allows the reviewer to quickly assess the call and, either move to the next call or dig deeper into the review.
Key features of Call Summary:

- **Automatic**. Call summary is created automatically by AI.
- **Customizable**. You can use the AI Prompt Designer to customize the call summary structure by instructing AI to include certain things into a call summary
- **Editable**. The authorized users can edit the call summary if necessary.

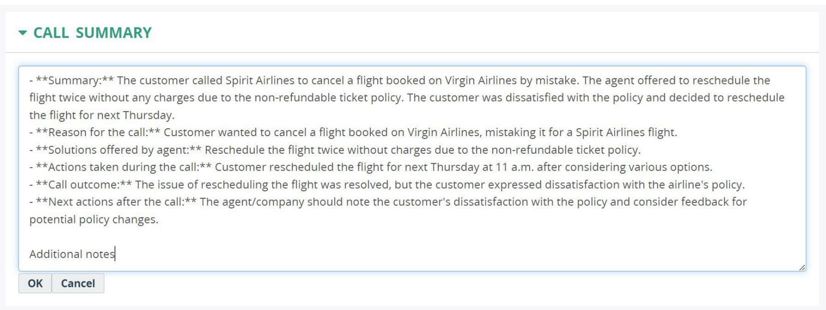
View a Call Summary

To view a call summary, open the call details and navigate to the **Transcript** page.



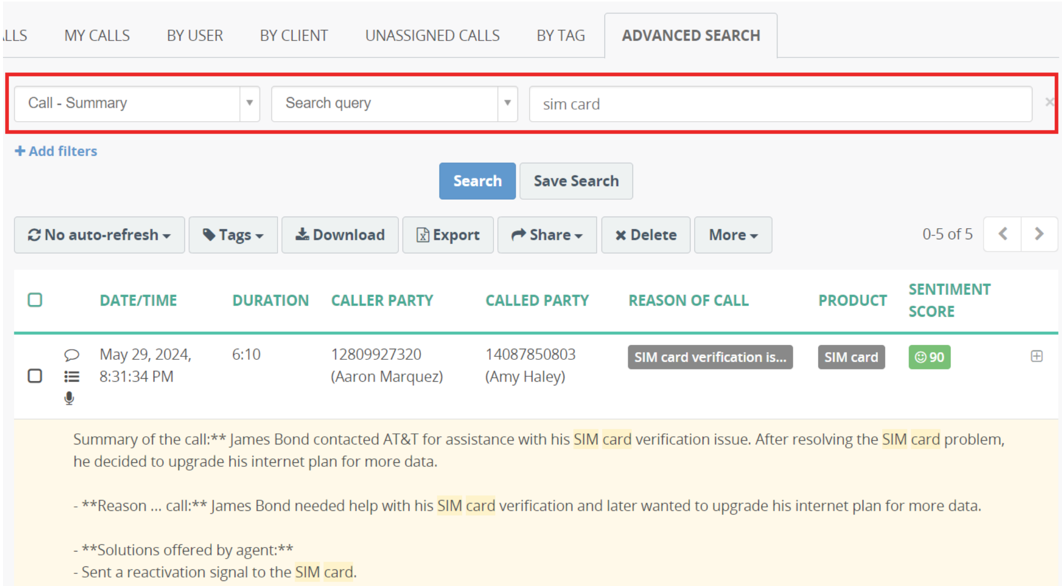
Edit a Call Summary

If permitted by configuration and by role permissions, you can edit a call summary by clicking on it.
In the editor panel, make the desired changes to the call summary and click **Save** button.
The editor supports Markdown syntax, which you can use to improve the readability of a summary but may take up more processing time/tokens.



Full-text Search in Call Summary

You can use search under **Recordings > Advanced Search** tab to find all calls where certain word or phrase appears in a call summary. This can be done across all calls displayed in the Recordings list.
Select **Call - Summary** in the parameter list, enter the searched phrase and press **Search** button.



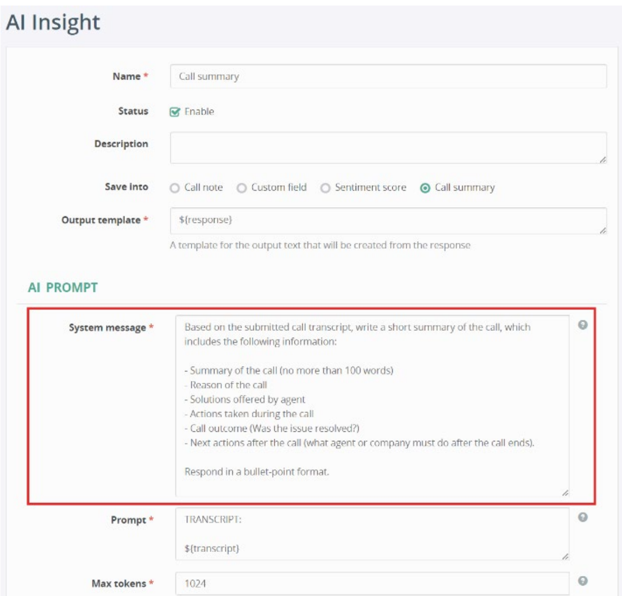
Custom Format for a Call Summary

The call summary format is flexible. A sufficiently authorized Admin can use the **Prompt Designer** to instruct the AI to produce a summary in the specific format.

> **Note**
>
> You need to have the appropriate Admin credentials to edit a prompt for the Call Summary in your organization.

For example, if your organization is a legal firm, you may want to see in a call summary a name of the client, type of the case (motorcycle accident, medical malpractice, etc.), date of the incident, and so on.
If your organization is a travel agency, you may want to see in a call summary the travel destination, dates of the trip, the requested services, etc.

To customize the call summary format, navigate to **Administration > Speech Analytics > Generative AI > AI Insights**. Locate the **Call Summary** AI Insight and click **Edit**.
In the **Edit** page, change the **AI Prompt** as you like.

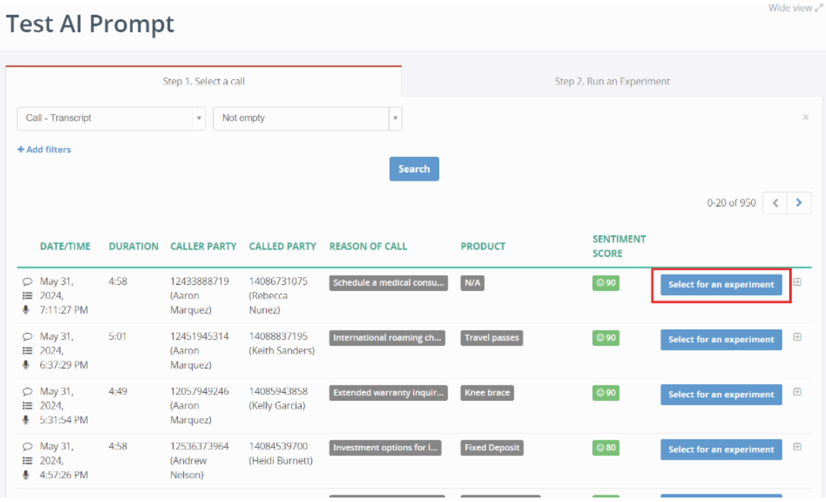


Test Call Summary Prompts (for AI)

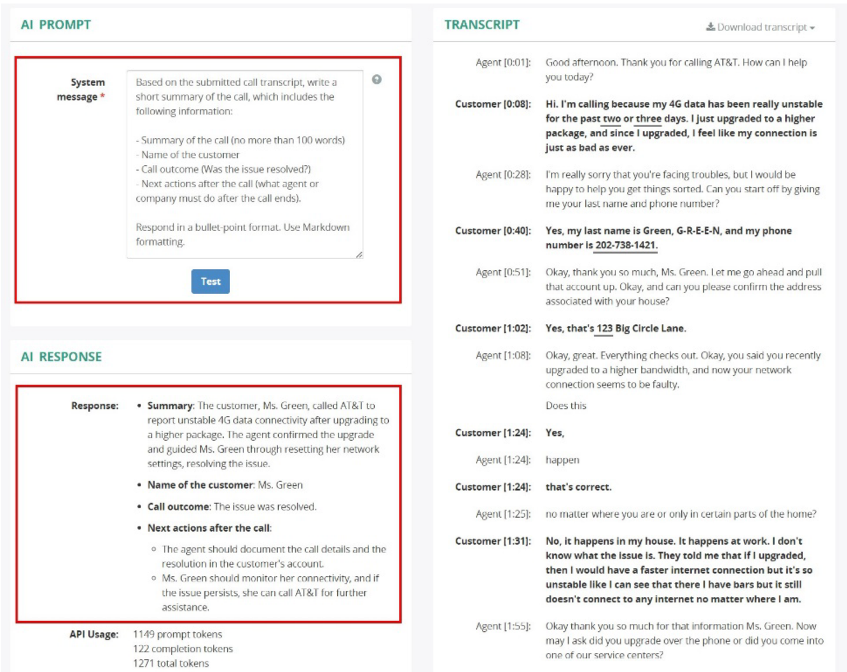
An Admin may use the AI Playground test bed to quickly test Call Summary prompts and make sure what was entered produces a summary in the format you need with the data required.

> **Not**
>
> You need to have the appropriate admin credentials to test a prompt for the Call Summary in your organization.

To test a prompt for the Call Summary, navigate to **Administration > Speech Analytics > Generative AI > AI Insights**.
Locate the **Call Summary** AI Insight and click **Test** button.
Step 1. Select a call, choose one of your actual calls for testing the prompt. In this step, you can use filters to search for specific call in your organization that you would like use for testing. Once you locate the desired call, click on the **Select for an experiment** button.



Step 2. Run an Experiment
Edit the AI Prompt as needed to check the results and click on the **Test** button.
You will see a response from the AI in the **AI Response** panel.
You can run multiple experiments with different prompts in order to see what works the best for your needs prior to saving and using live.
Once you are satisfied with the results, you can save the prompt, and it will be applied to all the upcoming calls (that meet your criteria) in your organization.



Sentiment Analysis

Sentiment Analysis detects the underlying emotion in customer calls and classifies it as positive, negative or neutral.

Key features of Sentiment analysis:

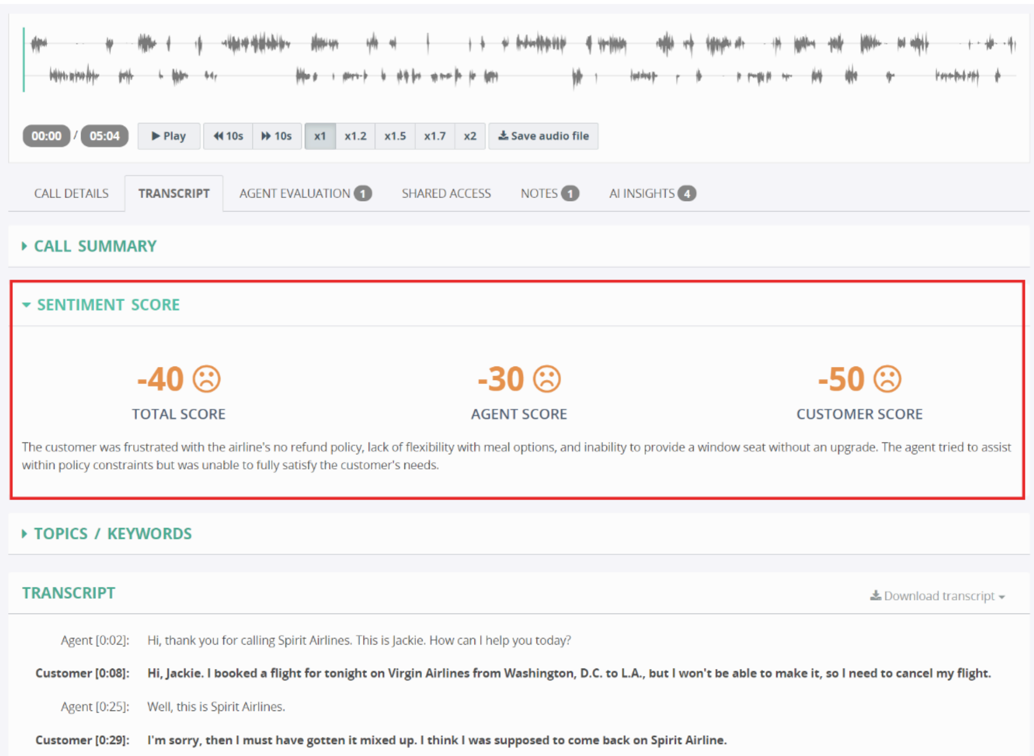
- **Highly accurate**. Call Recording uses Large Language Models to analyze a whole conversation to provide an accurate sentiment score.
- **Separate agent and customer score**. A sentiment score is provided separately for both sides of the conversation, agent and customer
- **Explanation of a score**. Each score is provided with an explanation why it a call was assigned such a score.
- **Highlight negative phrases**. The most negative phrases that lead to a negative score are highlighted in the transcript
- **Customizable**. Using the AI Prompt Designer, you can instruct AI scoring engine to score negatively calls that match certain criteria for you, like problem was not resolved on the first call, etc.

View Sentiment Score

To view a sentiment score, open the call details and click **Transcript** tab. In the **Sentiment score** panel, you can see 3 numerical values:

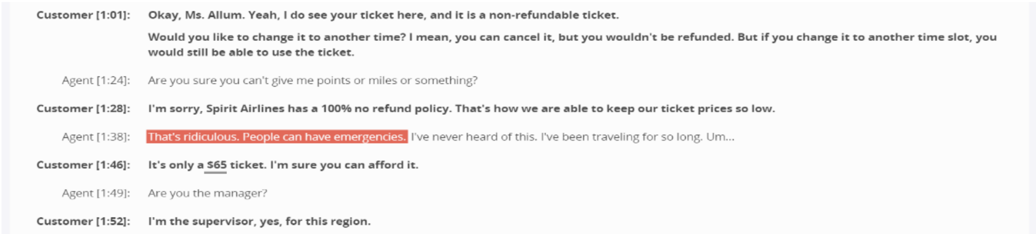
- Overall sentiment score for the call
- Agent-side sentiment score
- Customer-side sentiment score

A numerical value is in a range from -100 (negative) to +100 (positive).
The sentiment is color coded (red for negative and green for positive) and is also represented using an emoji.
Besides a numerical value, the explanation of the score is provided as evidence. This explanation helps the reviewer to understand why the conversation was classified that way.



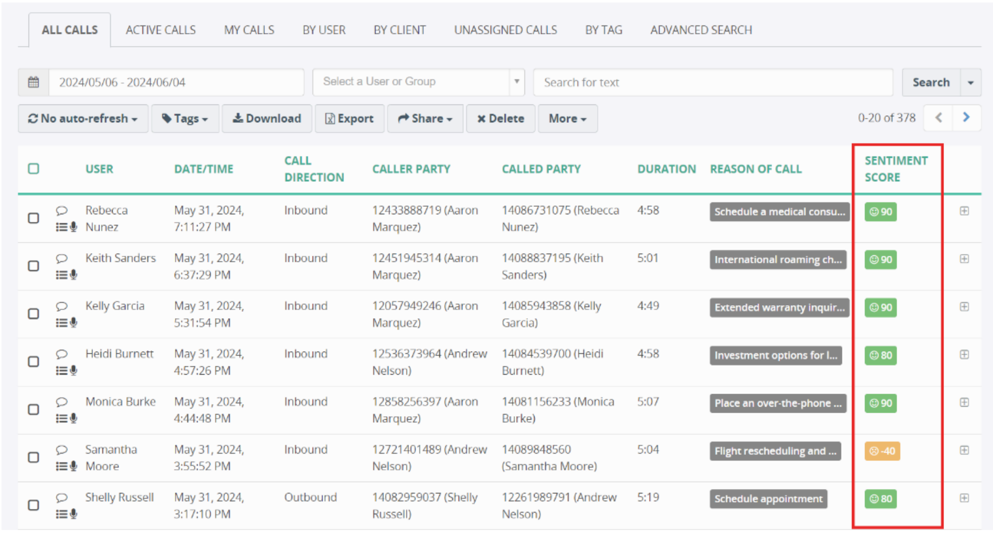
Review Phrases with Negative Sentiments

When a call is classified as 'negative', the phrases that most represent the negative emotions are highlighted with red color in the transcript. This highlighting allows you to quickly spot problem moments in the conversation.



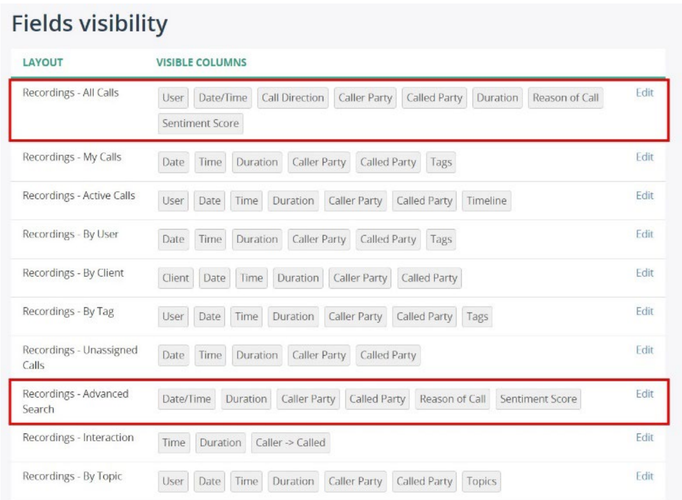
Show Sentiment Score Column in Recordings Page

The sentiment score value can be displayed as a column in the **Recordings** page.



An Admin may set the display of the *Sentiment Score* column in the **Recordings** page.

1. Navigate to **Administration > Customization > Field Visibility**.
2. Click **Edit** next to the corresponding layout.
   Note: It is recommended to edit at least the **Recordings - All Calls** and the **Recordings - Advanced Search** layouts.
3. In the Edit Layout page, add the *Sentiment Score* column to the **Visible Columns** list.



4. The Admin may also drag and drop to place the Sentiment Score in the preferred display order. (higher listings = first columns to the left).

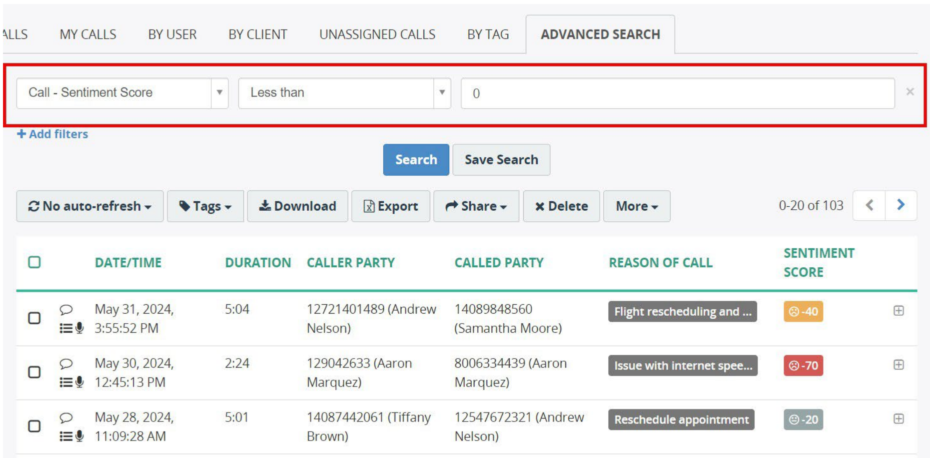
Once saved with the Sentiment Score column now added to the Visible Columns, it will display to viewers the Recordings page. Repeat for any other columns you wish to add and for any other available views where tables display.

Search Calls by Sentiment Score

You can use the Sentiment Score in search criteria.

For example, to locate all calls that have a sentiment score lower than 0:

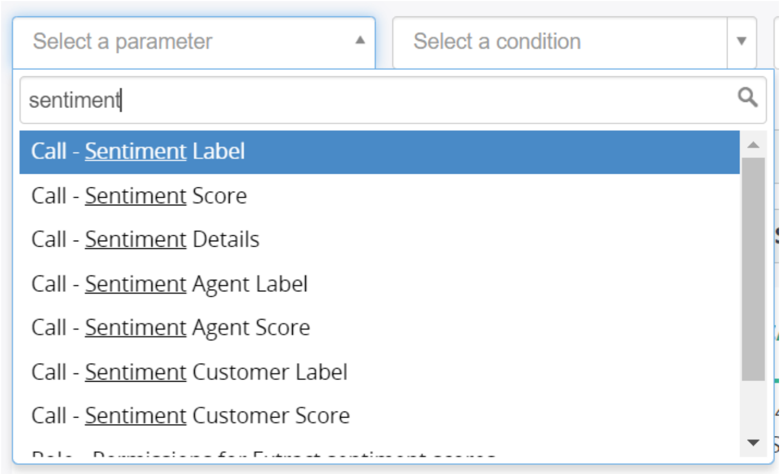
1. Navigate to: **Recordings > Advanced Search**
2. Select the **Call - Sentiment Score** as a parameter and the **Lower than** as an operator with `0` as a value.
3. Then, press the **Search** button.



Additionally, the following attributes are available as search criteria:

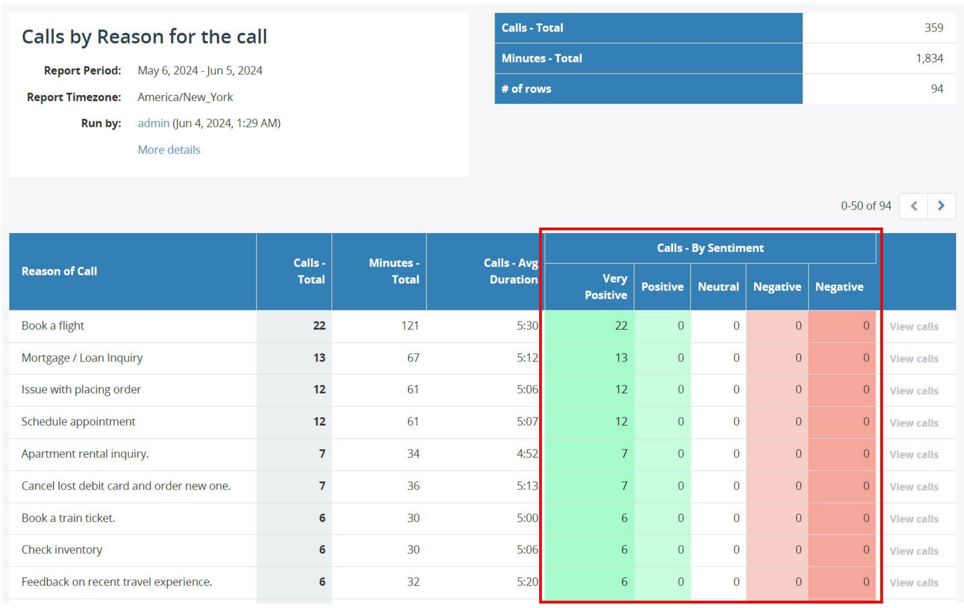
- **Sentiment Label**. The labels are `Very Positive` (score 60 to 100), `Positive` (score 20 to 60), `Neutral` (score -20 to +20), `Negative` (score -60 to -20) and `Very Negative` (score -100 to -60).
- **Sentiment Details**. A full text search in the sentiment explanation field.
- **Sentiment Agent Label**. A sentiment label for the agent side
- **Sentiment Agent Score**. A numerical score for the agent side

- **Sentiment Customer Label**. A sentiment label for the customer side
- **Sentiment Customer Score**. A numerical score for the customer side



Use Sentiment Scores in Reports

The Sentiment Score column can be added/included for display in various Call Summary and Call Detail reports. The following screenshot demonstrates the Call Summary report with the total calls in each Sentiment category.

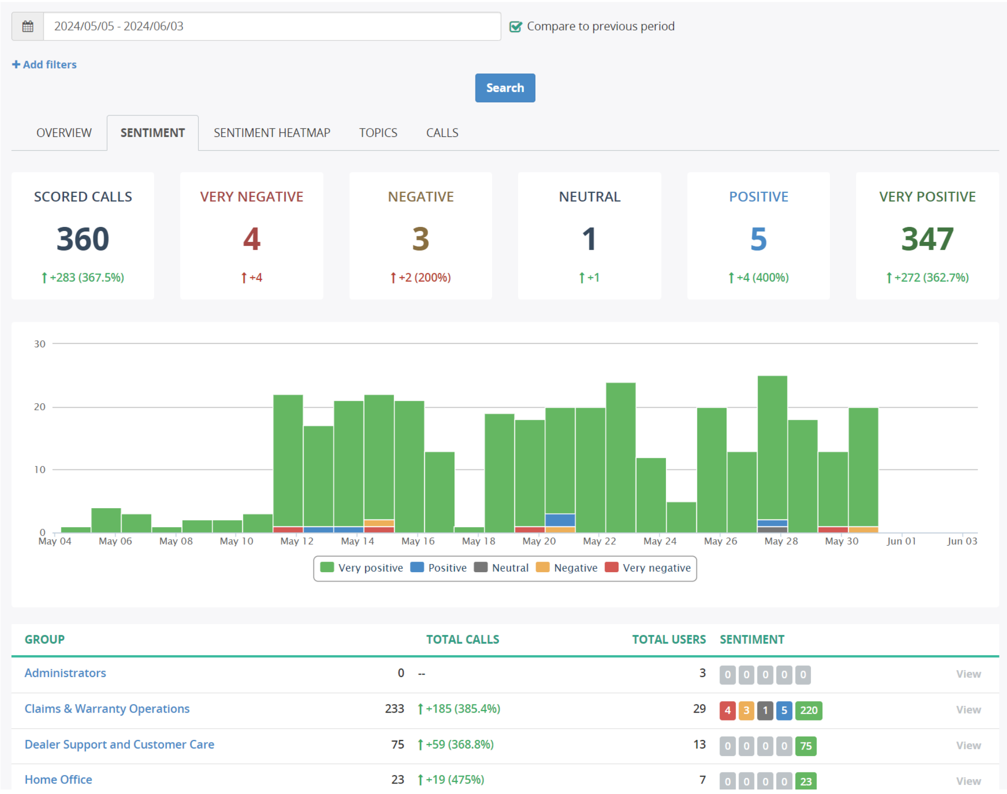


Reason of Call	Calls - Total	Minutes - Total	Calls - Avg Duration	Calls - By Sentiment: Very Positive	Positive	Neutral	Negative	Negative	
Book a flight	22	121	5:30	22	0	0	0	0	View calls
Mortgage / Loan Inquiry	13	67	5:12	13	0	0	0	0	View calls
Issue with placing order	12	61	5:06	12	0	0	0	0	View calls
Schedule appointment	12	61	5:07	12	0	0	0	0	View calls
Apartment rental inquiry.	7	34	4:52	7	0	0	0	0	View calls
Cancel lost debit card and order new one.	7	36	5:13	7	0	0	0	0	View calls
Book a train ticket.	6	30	5:00	6	0	0	0	0	View calls
Check inventory	6	30	5:06	6	0	0	0	0	View calls
Feedback on recent travel experience.	6	32	5:20	6	0	0	0	0	View calls

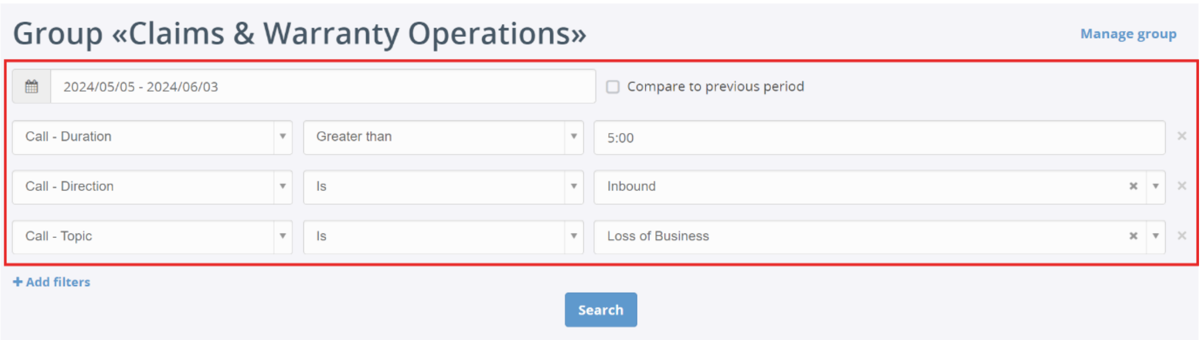
Sentiment Dashboard

Navigate to **Dashboard > Sentiment** to see a high-level view of the sentiment scores for a period of time.
If the option ***Compare to previous period*** is selected (checked), then the variance is shown in each metric between the current period and the previous one.

The dashboard supports top-down analysis. At the top level, you can see sentiment scores for all calls in your organization, then you can go down to the group level, and finally to the agent level.



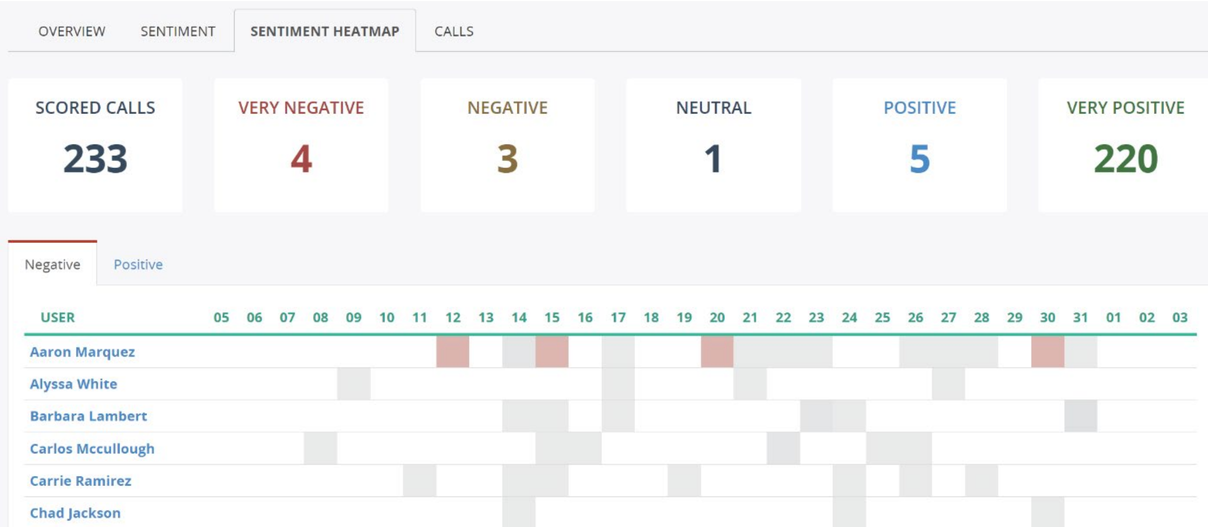
The search panel at the top of the dashboard offers tools to filter calls as necessary, for example, you can filter data to inbound, duration more than 5 minutes and with the assigned topic "Loss of Business".



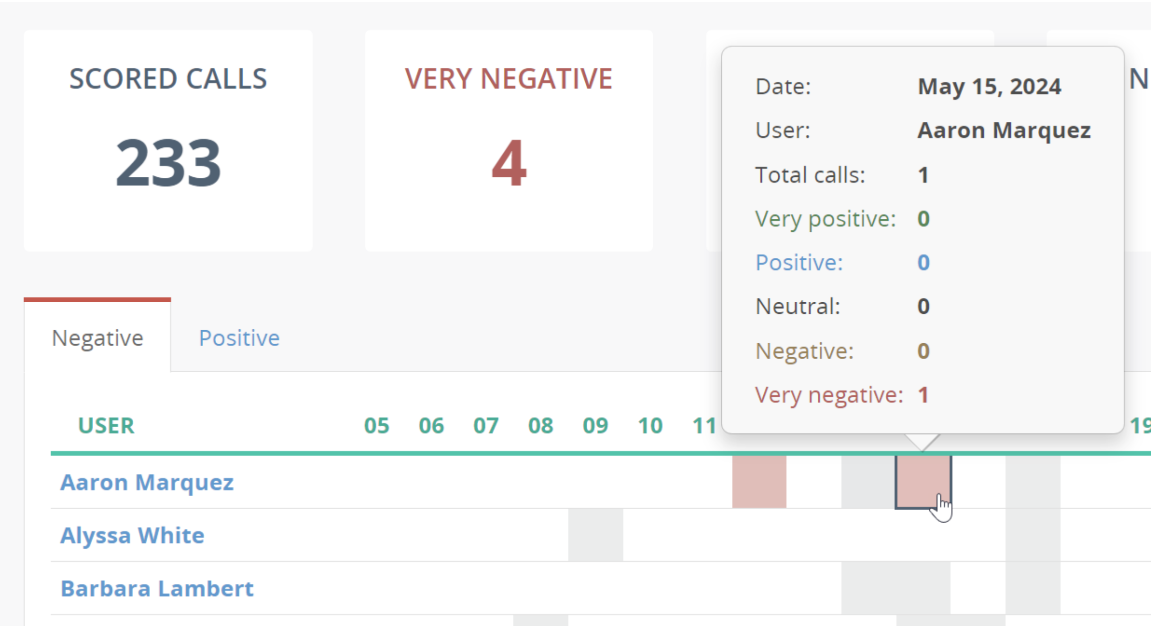
Sentiment Heatmap

Navigate to **Dashboard > Sentiment Heatmap** to see a heatmap of sentiment score on a timeline per group or user level. Such a heatmap dashboard allows you to identify spikes in sentiment scores or call volumes.
A color in the heatmap diagram depends on an overall volume of calls as well as a total calls in negative or positive category (depending on selection).

> **Note**
>
> The sentiment heatmap diagram shows only last 30 days of data for the selected period.
>
> If you would like to see data for the past period, change the date range in the filters criteria at the top of the dashboard.



To see the call metrics for a specific day in the Sentiment Heatmap, hover with your mouse over the certain user/day cell.



Customize Sentiment Score Prompts

Sentiment Analysis engine uses Large Language Mode (or Generative AI) to analyze every call and classify into positive, negative or neutral category. With the Call Recording platform, it is possible to customize the prompt that is sent to AI during sentiment scoring. An Admin with sufficient access can change the definitions the AI uses for "negative calls" and "positive calls".
The default definitions are:

- Score the conversation as positive when the customer was satisfied with the service, all their questions have been answered, and all issues resolved during the call.

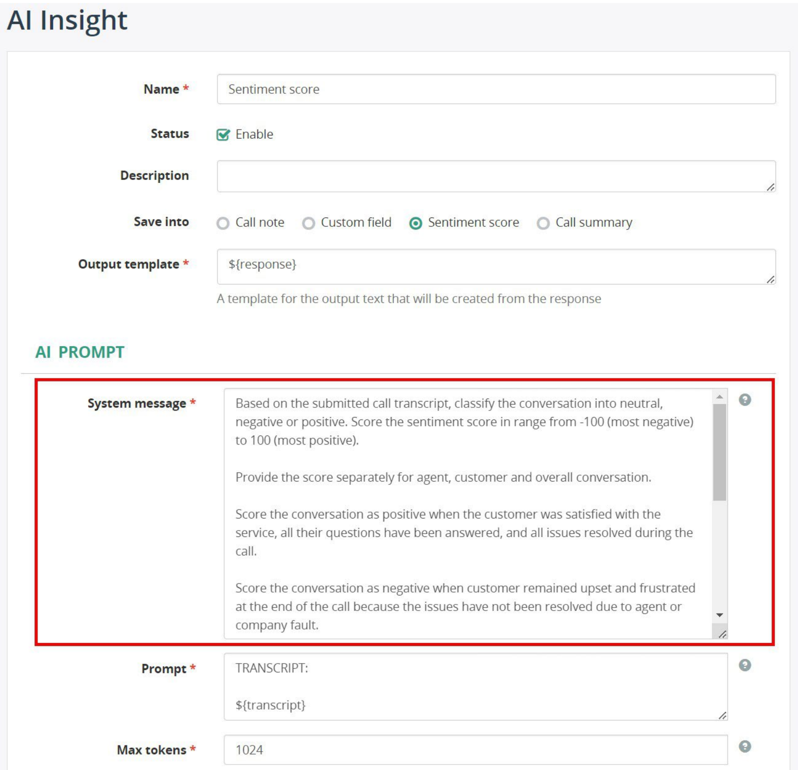
- Score the conversation as negative when the customer remains upset and frustrated at the end of the call because the issues have not been resolved due to agent or company fault.

By changing these definitions to refine them to your organization's need, sentiment scoring will be improved in your specific scenarios.

To edit the Prompt for Sentiment score:

1 Navigate to Administration > Speech Analytics > Generative AI > AI Insights.
2 Click Edit next to the Sentiment score insight.

> **Note**
>
> An Admin needs to have the appropriate credentials to edit an AI prompt for the Call Summary in your organization.



Test Sentiment Score Prompts (for AI)

Always test new prompts in the AI Playground on real calls to make sure the verbiage works as expected when the AI uses the prompt. To test the prompt, click on the **Test** button on the Sentiment Score in the **AI Insights** page to open the test area.

Topics Analysis

Call Recording analyzes call transcripts to identify topics of conversation, like "Service cancellation", "Escalation to manager", "Credit card declined", "Issue with phone", "Reschedule appointment", etc.
Key features of Topic analysis:

- **Multiple topics per call**. Multiple topics can be assigned to the same call
- **Quick search and filter by topic**.
- **Trend analysis**.

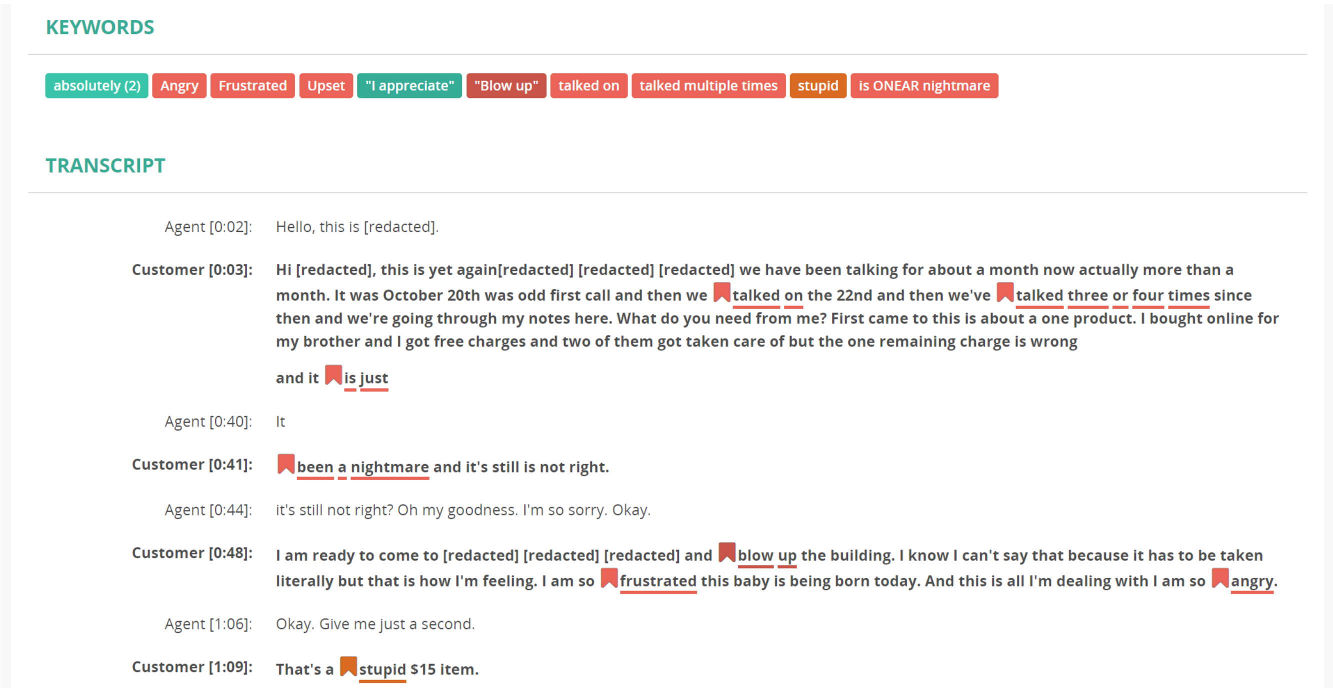
Topic analysis is based on keyword spotting.

Keyword Spotting is a subset of speech analytics, is the ability of a monitoring system to recognize predefined words and phrases in interactions. For example, you are interested in knowing when customers use the word "*frustrated*" or other words during an interaction with one of your agents. You define the keywords in the Call Recording application and then put it into operation. Examples of keywords / phrases:

- "frustrated"
- "upset"
- "cancel my account"
- "angry"
- "you're not listening"

Call Recording identifies who spoke the spotted keywords, agent or customer. Some keywords may have different value or even meaning depending of who, agent or customer, speaks them. For example, phrases like "thank you so much", "excellent", "fabulous" are
more valued if they are spoken by customer rather than by agent, who is trained to be polite during a call.

Call Recording shows the spotted keywords above the transcription as well as highlights them within a transcription.



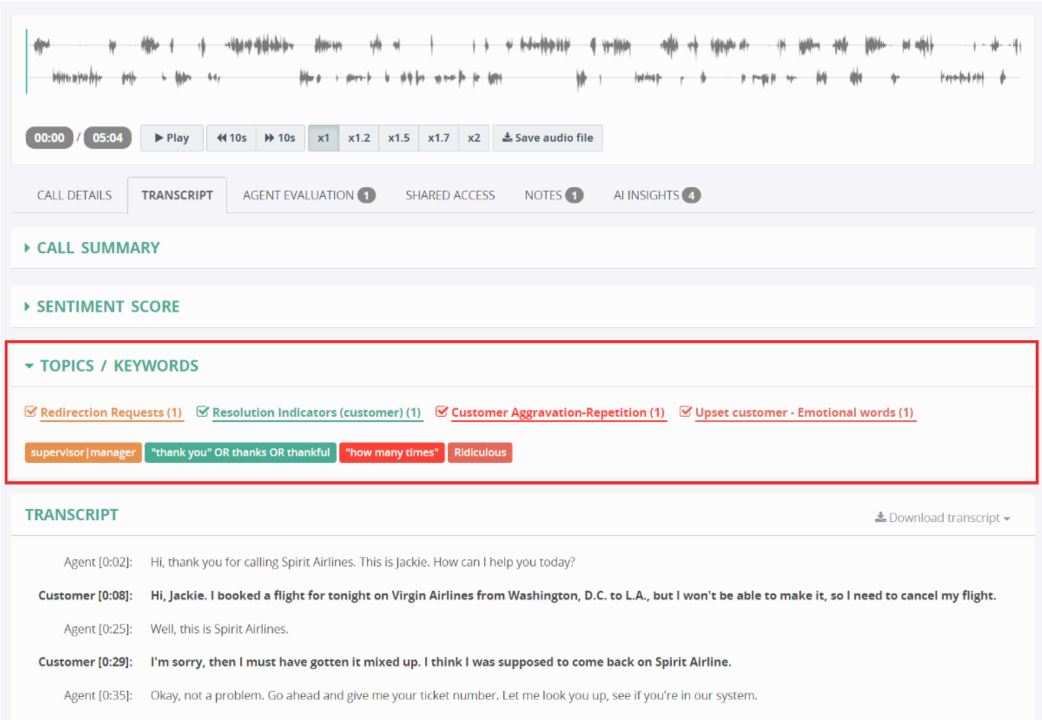
Topic Extraction

A topic is a set of similar or related keywords that fall into the same category. For example, a topic "Repeated calls" may consist of phrases like "called before", "called twice", "called last week", "never heard back" etc.
Examples of topics:

- Upset customer
- Account cancellation
- Repeated calls

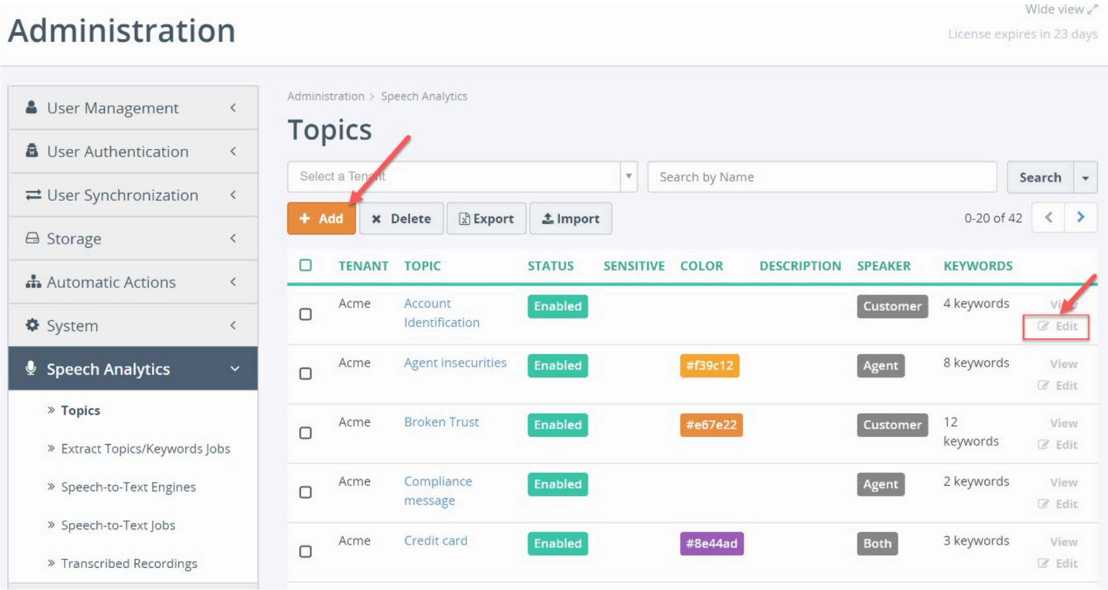
View Topics in Call Details

To see the extracted topics, open the call details and navigate to **Transcript** tab.



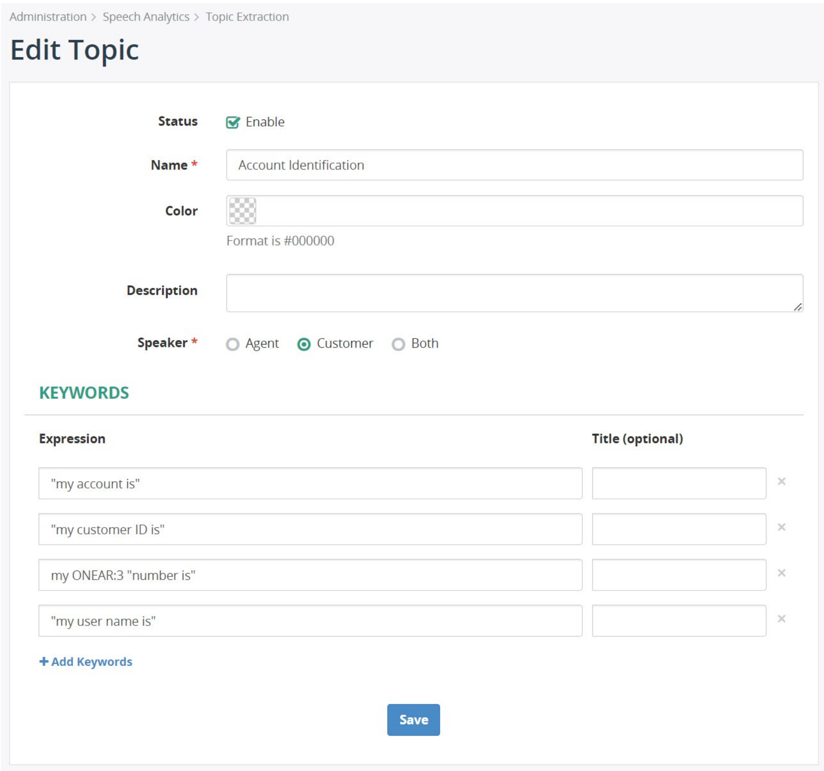
Configure Topics

Navigate to **Administration > Speech Analytics > Topics** page, click **Add** button to create new topic or **Edit** button to modify the existing topic.



In the **Edit Topic** page, you can configure:

- Name for topic
- Color, which helps to visually distinguish different topics
- Optional description to assist others with the purpose of the topic setup
- Speaker side, where the keywords will be searched for. Keywords can be searched in either agent side, customer side, or both.
- A list of keyword expressions defined and more may be added as needed.



Keyword expressions can be as simple as an exact phrase like "cancel account" or more complex expressions like "(cancel OR canceling OR cancelled) NEAR account". Each matching instance of a keyword (or keyword expression) that is defined here will be noted and highlighted.

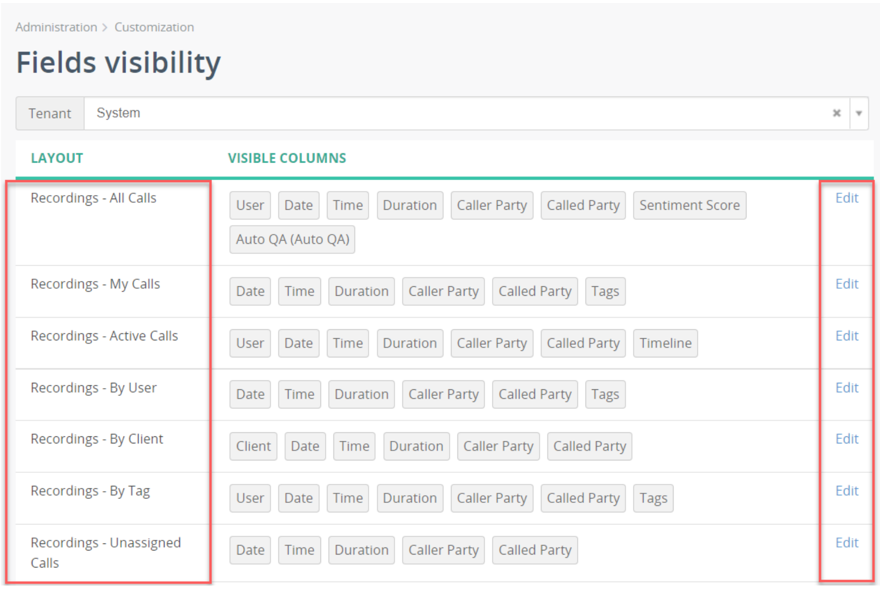
Review the *MQL Quick Reference Guide* to learn more about working with MGL Moments Query Language.

Note: The **Title (optional)** attribute can be left blank; however, it is very useful to use this field to give your Topic's keywords a short and easy to read title to display – especially when complex expressions like **"(close*|closing) NEAR account"** are used. The title entered here will be displayed instead of the expression. For example, the expression **"(close*|closing) NEAR account"** could look like "Close Account" in call details and other areas where the Topic keyword title can display.

Configure Topic Column Display in Recordings Lists

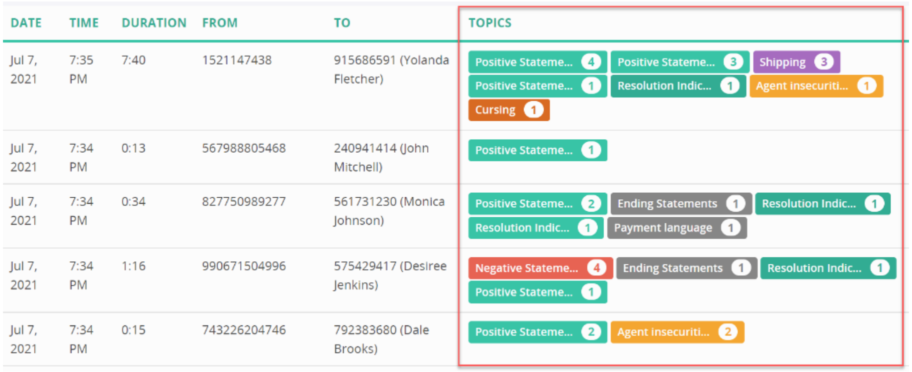
To display topic information in call recordings lists:

1. Navigate to **Administration > Customization > Fields Visibility**
2. Click on **Edit** adjacent to the area you wish to update **f**or the corresponding Recordings layout.
3. These layouts correspond to the tabs shown in the *Recordings* page.



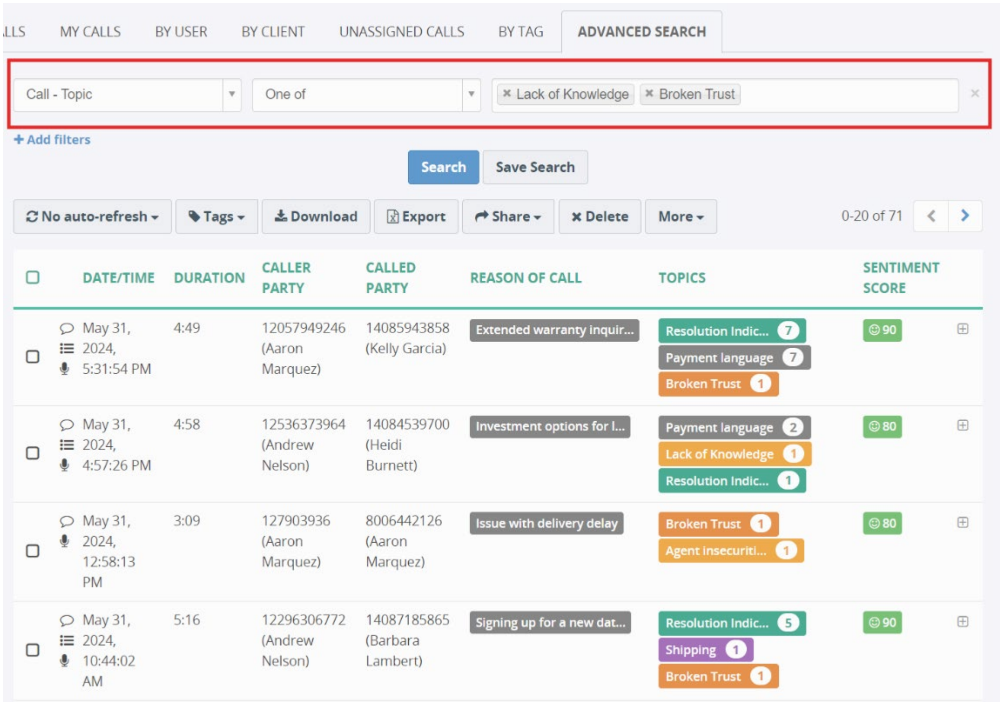
4. In the **Hidden Columns** list, locate **Topic** column and click **show** link or drag-n-drop it to **Visible Columns** list.

5 After you save the layout configuration, it will display the **Topics** column in recordings list.



Searching Topics

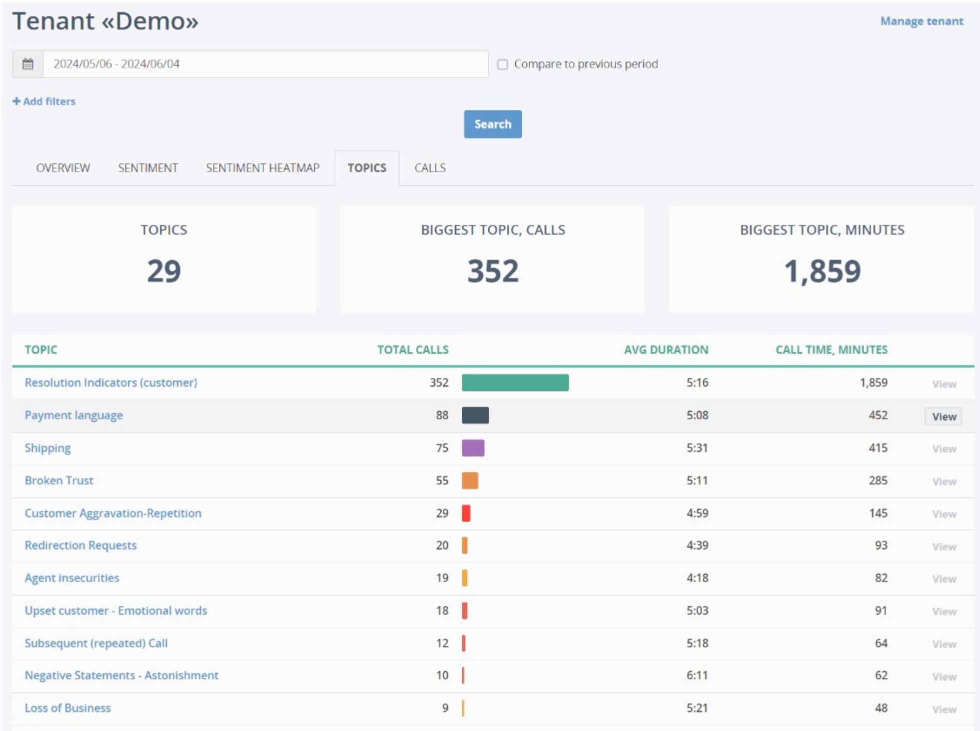
You can search calls by any Topic or Score value.
For example, you can use this search capability to find "critical" call recordings for review.



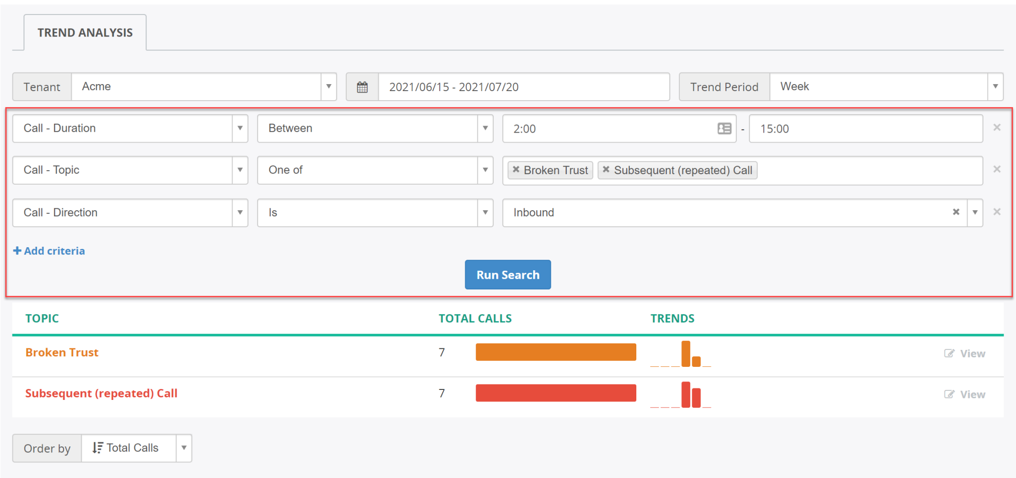
Topics Dashboard

In the Topics dashboard you can see how many calls you have for each topic for the certain period of time. Navigate to **Dashboard > Topics** to see the dashboard.
You choose a different period for analysis by changing a date range in search panel and clicking **Search** button. In **Topics** dashboard, you can see:

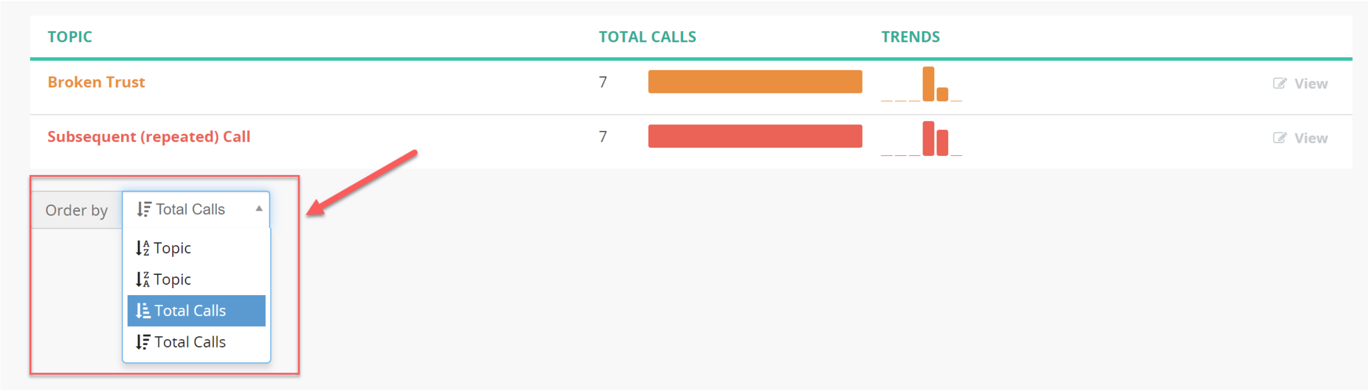
- Total number of calls for each topic for a whole period (column **Total Calls**)
- Average call duration
- Total call time, in minutes



A search can be focused to find particular calls, like those shown in the following example:



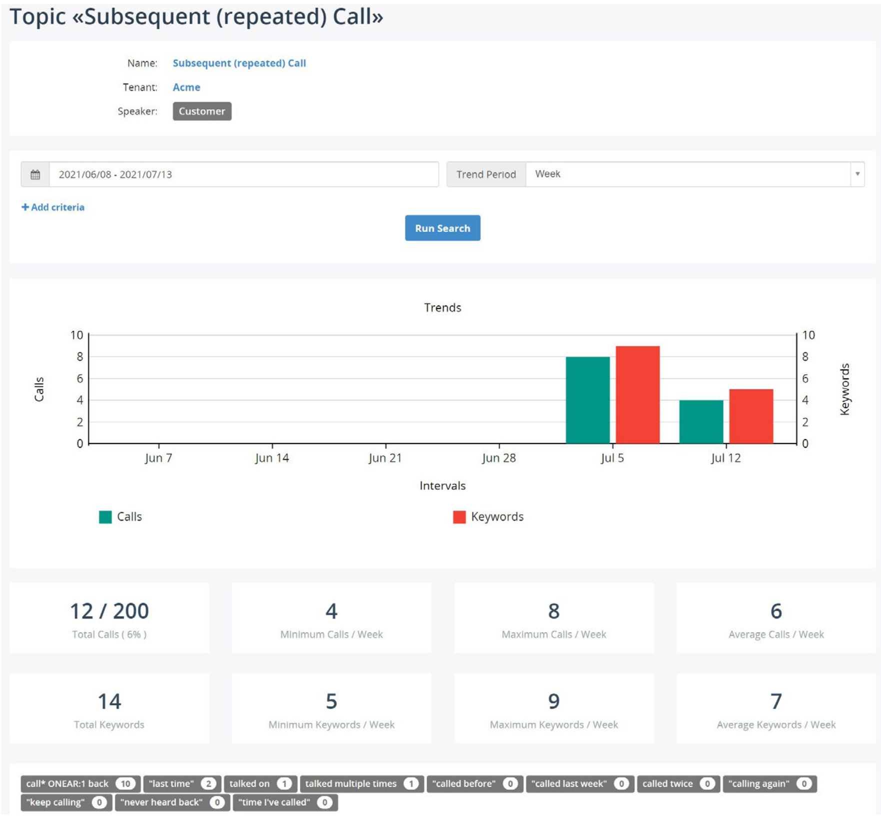
By default, topics on **Trend Analysis** page is ordered by Total Calls, with topics with highest number of calls shown at the top. You can change the order by clicking **Order By** select box in the bottom of table:



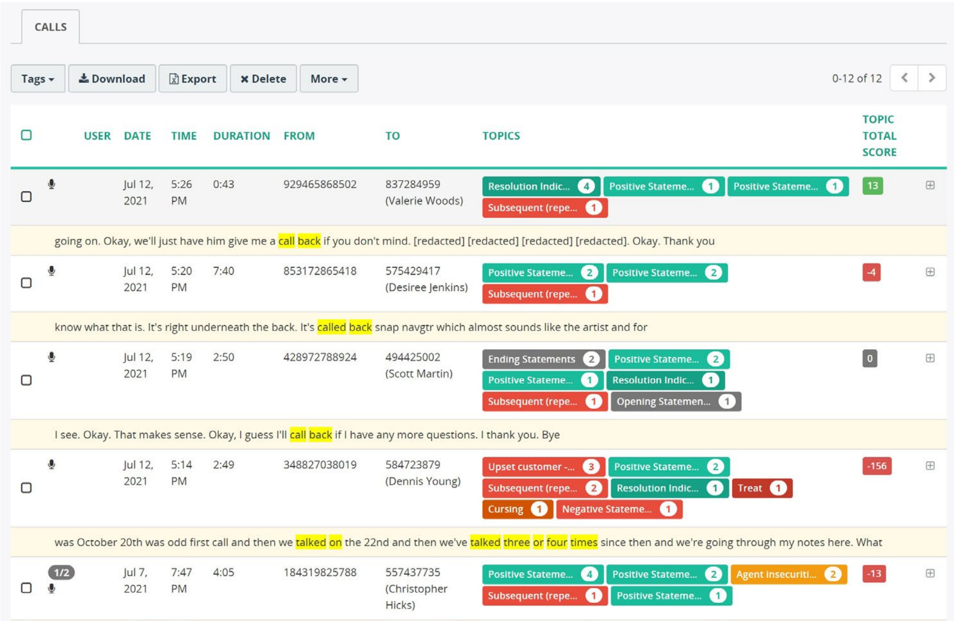
Trend Analysis for Individual Topics

Click View link for a topic to see metrics for this topic only. The following screenshot demonstrates metrics for topic **Subsequent (repeated) calls**.
On this page, you can see:

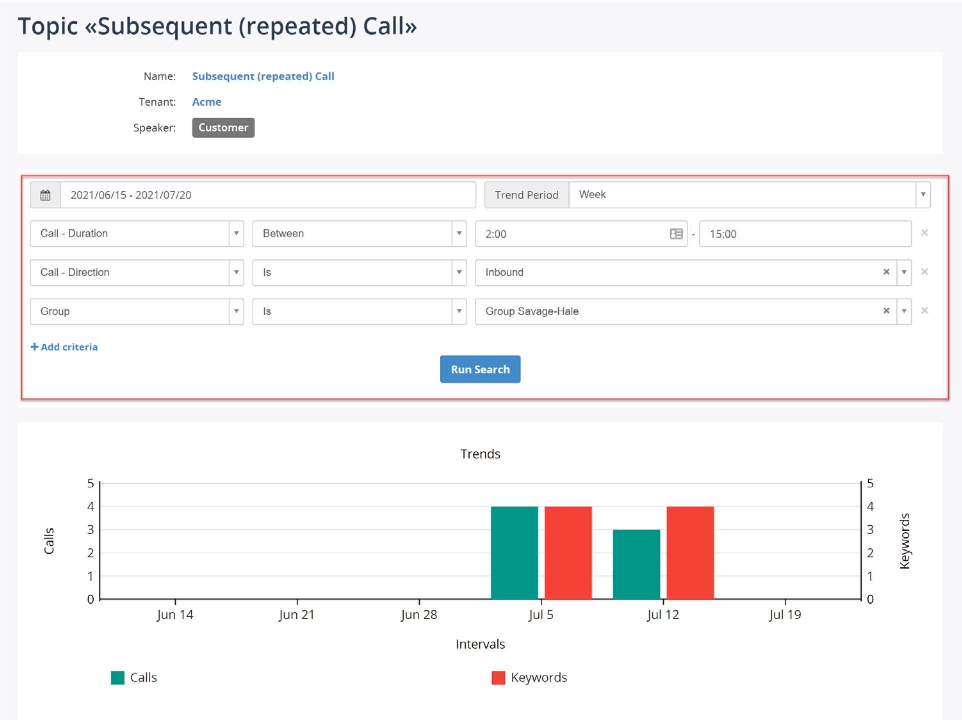
- A chart, displaying trends of topics over the selected period of time. You can change the period of time in the search panel and click **Search** button to re-calculate trends.
- Various metrics, like minimum, maximum and average calls per period, total/min/max/avg keywords etc.
- A list of keywords in the topic. Each keyword shows a numeric value, representing how many times it was spotted in calls for this period of time.



At the bottom of this page, call recordings matching the search criteria display.



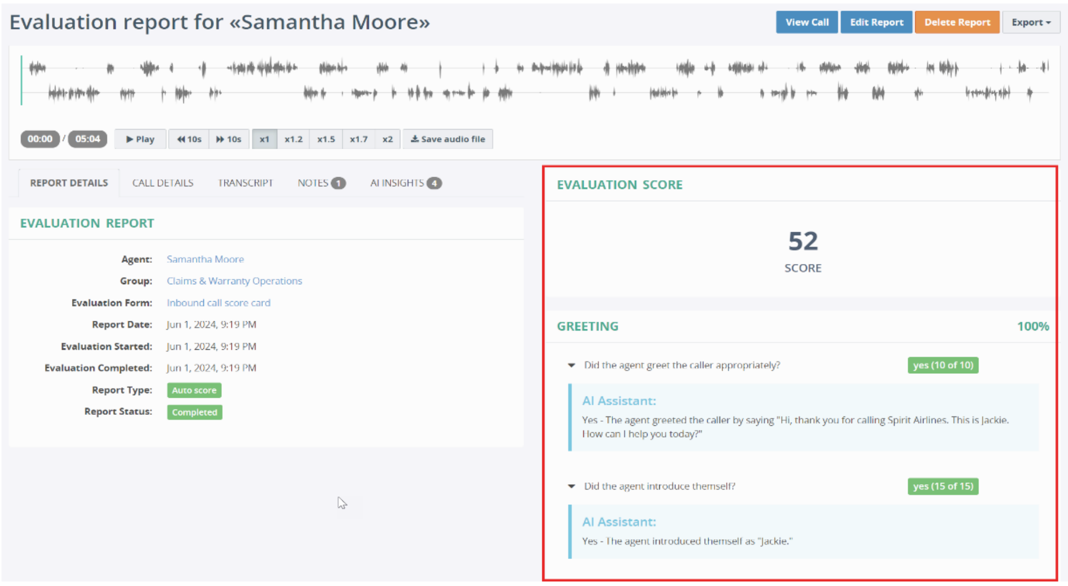
You can narrow down search by selecting criteria in the search panel and clicking **Search** button.
For example: Select Group, Call duration, Call direction, and other attributes as need to filter data sufficiently.



Auto QA

Call Recording uses AI to automatically score calls using agent evaluation form. Key features of the Call Recording Auto QA:

- **Easy and intuitive configuration**. You can specify the scoring criteria in plain language, like "Did the agent introduce themselves properly?". Optionally, you can provide some clarification in a description, for example, explain that "appropriately" means thanking the caller for calling, asking how they are doing, offering a help, etc.
- **Evidence for each answer**. AI Assistance provides an evidence of its answer for each question. It explains why it choose certain answer.
- **Override score if necessary**. A reviewer can manually override the AI answer to recalculate the score.



For additional descriptions of each of the features (where used in other areas), check the corresponding sections in this document.

AI Insights

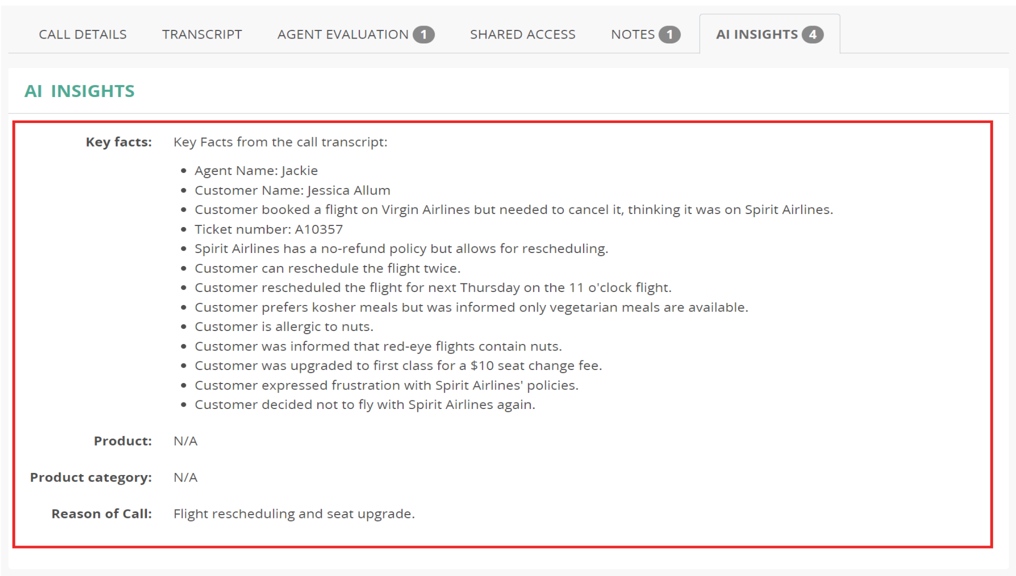
Call Recording AI Insights module allows you to analyze every calls and extract any insights from the conversation. Example of AI insights:

- **Reason for the call**. AI Assistant can choose from one of the pre-defined options, or it can optionally create new options if the call doesn't fall into one of existing categories.
- **Product information**.
- **Action items**. What the agent must do after the call.
- **Knowledge gap**. Identify the questions that the agent was struggling to answer with certainty.

In fact, Call summary, Sentiment analysis and Topic analysis are subsets of AI Insights.
The key features of Call Recording AI Insights:

- **Customizable**. You can customize AI Prompt to instruct AI to process the data the way you want.
- **Prompt designer**. You can use the Call Recording AI Playground to test different prompts on your own data.

AI Insights allow an Admin to mine the data that is hidden in the conversation.
If something was discussed during conversation, it can be extracted from within the transcript using the AI to provide Insights.
The extracted insights can be used for building the reports or loaded into the external BI tools for further analysis.



Use AI Insights in Reports

An Admin can set up AI Insights prompts for use to extract and display AI Insights in the reports, for example, build a report show a total of received calls for each reason for the call defined.