



CALL RECORDING

Speech Analytics Admin Quick Reference

 **MOMENTUM**

Powered By:  **MiaRec**

1. Overview

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 offers speech-to-text technologies add-on services that can transcribe recorded customer interactions and transform them into a searchable database with additional helpful information. This is designed to *help* organizations find the data that allows them to 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 the Speech Analytics and transcription add-on (\$) in your Call Recording 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.

2. Speech Analytics and Transcription at a Glance

At a glance provides a quick introduction to the AI-powered analytics in the Call Recording platform. The Call Recording platform then automatically analyzes every call to provide the following (if defined):

- Transcription.
- Call Summary.
- Sentiment score.
- Topic analysis
- AI Insights (key facts, next actions, reason for the call, etc.)
- Auto QA (AI-powered automatic agent evaluation)

Info

Some of the features may not be available to you due to the permissions and licensing set up by the administrator.

Transcription

Every call is being transcribed automatically in the Call Recording platform. Key features of Call Recording Transcription:

- Automatic. Every call is being transcribed automatically
- Accurate. Call Recording uses the latest technologies to provide exceptional transcription accuracy, even in noisy environment and accented speech.
- Speaker separation. See in transcript who said what. In case of 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 call is completed.
- Inline comments. A reviewer can add inline comments in the transcript as feedback to an agent.

The screenshot displays a call recording interface. At the top, there is a waveform of the audio recording. Below the waveform is a playback control bar with a progress indicator showing 00:00 / 05:04, a play button, skip 10s buttons, and speed controls (x1, x1.2, x1.5, x1.7, x2), along with a 'Save audio file' button. Below the playback bar is a navigation menu with tabs for 'CALL DETAILS', 'TRANSCRIPT', 'AGENT EVALUATION 1', 'SHARED ACCESS', 'NOTES 1', and 'AI INSIGHTS 4'. The 'TRANSCRIPT' tab is selected. Below the navigation menu are three expandable sections: 'CALL SUMMARY', 'SENTIMENT SCORE', and 'TOPICS / KEYWORDS'. The 'TRANSCRIPT' section is expanded and highlighted with a red border, showing a list of call segments with speaker names and timestamps. A 'Download transcript' button is located in the top right corner of the transcript area.

TRANSCRIPT Download transcript ▾

Agent [0:02]: Hi, thank you for calling Spirit Airlines. This is Jackie. How can I help you today?

Customer [0:08]: Hi, Jackie. I booked a flight for tonight on Virgin Airlines from Washington, D.C. to L.A., but I won't be able to make it, so I need to cancel my flight.

Agent [0:25]: Well, this is Spirit Airlines.

Customer [0:29]: I'm sorry, then I must have gotten it mixed up. I think I was supposed to come back on Spirit Airline.

Agent [0:35]: Okay, not a problem. Go ahead and give me your ticket number. Let me look you up, see if you're in our system.

Customer [0:41]: Okay, one second.

Agent [0:44]: Sure, take your time.

Customer [0:46]: Ticket number is A10357.

Agent [0:52]: Okay, and the name on the ticket?

Call Summary

The Call Recording platform can be set up to automatically create a short summary of each call.

Key features of Call Recording Call Summary are:

- 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.

00:00 / 05:04 [Play] [10s] [10s] [x1] [x1.2] [x1.5] [x1.7] [x2] [Save audio file]

CALL DETAILS | **TRANSCRIPT** | AGENT EVALUATION 1 | SHARED ACCESS | NOTES 1 | AI INSIGHTS 4

▼ CALL SUMMARY

- **Summary:** The customer called Spirit Airlines to cancel a flight booked on Virgin Airlines by mistake. The agent offered to reschedule the flight twice without any charges due to the non-refundable ticket policy. The customer was dissatisfied with the policy and decided to reschedule the flight for next Thursday.
- **Reason for the call:** Customer wanted to cancel a flight booked on Virgin Airlines, mistaking it for a Spirit Airlines flight.
- **Solutions offered by agent:** Reschedule the flight twice without charges due to the non-refundable ticket policy.
- **Actions taken during the call:** Customer rescheduled the flight for next Thursday at 11 a.m. after considering various options.
- **Call outcome:** The issue of rescheduling the flight was resolved, but the customer expressed dissatisfaction with the airline's policy.
- **Next actions after the call:** The agent/company should note the customer's dissatisfaction with the policy and consider feedback for potential policy changes.

► SENTIMENT SCORE

► TOPICS / KEYWORDS

TRANSCRIPT [Download transcript](#)

Agent [0:02]: Hi, thank you for calling Spirit Airlines. This is Jackie. How can I help you today?

Customer [0:08]: **Hi, Jackie. I booked a flight for tonight on Virgin Airlines from Washington, D.C. to L.A., but I won't be able to make it, so I need to cancel my flight.**

Agent [0:25]: Well, this is Spirit Airlines.

Customer [0:29]: **I'm sorry, then I must have gotten it mixed up. I think I was supposed to come back on Spirit Airline.**

Agent [0:35]: Okay, not a problem. Go ahead and give me your ticket number. Let me look you up, see if you're in our system.

Customer [0:41]: **Okay, one second.**

Sentiment Analysis

Sentiment analysis detects the underlying emotion in customer calls and classifies it as positive, negative or neutral. Every call is assigned a sentiment score value (in a range from -100 to +100) and a short explanation of the score is provided as an evidence. In case of a negative score, the transcript highlights the phrases that lead to that score.

Key features of Call Recording 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.

The screenshot displays a call transcript interface. At the top, there is an audio waveform and a playback control bar with a 'Save audio file' button. Below this is a navigation menu with tabs for 'CALL DETAILS', 'TRANSCRIPT', 'AGENT EVALUATION 1', 'SHARED ACCESS', 'NOTES 1', and 'AI INSIGHTS 4'. The 'TRANSCRIPT' tab is active, showing a 'CALL SUMMARY' section with a 'SENTIMENT SCORE' subsection. This section features three score cards: 'TOTAL SCORE -40' with a sad face icon, 'AGENT SCORE -30' with a sad face icon, and 'CUSTOMER SCORE -50' with a sad face icon. A descriptive paragraph follows: 'The customer was frustrated with the airline's no refund policy, lack of flexibility with meal options, and inability to provide a window seat without an upgrade. The agent tried to assist within policy constraints but was unable to fully satisfy the customer's needs.' Below the scores is a 'TOPICS / KEYWORDS' section. The main 'TRANSCRIPT' section includes a 'Download transcript' button and a list of call segments with speaker and time indicators.

00:00 / 05:04 [Play] [10s] [10s] [x1] [x1.2] [x1.5] [x1.7] [x2] [Save audio file]

CALL DETAILS | **TRANSCRIPT** | AGENT EVALUATION 1 | SHARED ACCESS | NOTES 1 | AI INSIGHTS 4

▶ CALL SUMMARY

▼ SENTIMENT SCORE

-40 😞
TOTAL SCORE

-30 😞
AGENT SCORE

-50 😞
CUSTOMER SCORE

The customer was frustrated with the airline's no refund policy, lack of flexibility with meal options, and inability to provide a window seat without an upgrade. The agent tried to assist within policy constraints but was unable to fully satisfy the customer's needs.

▶ TOPICS / KEYWORDS

TRANSCRIPT [Download transcript]

Agent [0:02]: Hi, thank you for calling Spirit Airlines. This is Jackie. How can I help you today?

Customer [0:08]: **Hi, Jackie. I booked a flight for tonight on Virgin Airlines from Washington, D.C. to L.A., but I won't be able to make it, so I need to cancel my flight.**

Agent [0:25]: Well, this is Spirit Airlines.

Customer [0:29]: **I'm sorry, then I must have gotten it mixed up. I think I was supposed to come back on Spirit Airline.**

Customer [1:01]: Okay, Ms. Allum. Yeah, I do see your ticket here, and it is a non-refundable ticket.
Would you like to change it to another time? I mean, you can cancel it, but you wouldn't be refunded. But if you change it to another time slot, you would still be able to use the ticket.

Agent [1:24]: Are you sure you can't give me points or miles or something?

Customer [1:28]: **I'm sorry, Spirit Airlines has a 100% no refund policy. That's how we are able to keep our ticket prices so low.**

Agent [1:38]: **That's ridiculous. People can have emergencies.** I've never heard of this. I've been traveling for so long. Um...

Customer [1:46]: **It's only a \$65 ticket. I'm sure you can afford it.**

Agent [1:49]: Are you the manager?

Customer [1:52]: **I'm the supervisor, yes, for this region.**

A high-level view of sentiment scores is provided in the Dashboard, where you can narrow down your search to group, user, sentiment, etc.

Topic 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 Call Recording Topic analysis

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

00:00 / 05:04 Play 10s 10s x1 x1.2 x1.5 x1.7 x2 Save audio file

CALL DETAILS **TRANSCRIPT** AGENT EVALUATION 1 SHARED ACCESS NOTES 1 AI INSIGHTS 4

▶ CALL SUMMARY

▶ SENTIMENT SCORE

▼ **TOPICS / KEYWORDS**

Redirection Requests (1) Resolution Indicators (customer) (1) Customer Aggravation-Repetition (1) Upset customer - Emotional words (1)

supervisor | manager "thank you" OR thanks OR thankful "how many times" Ridiculous

TRANSCRIPT Download transcript

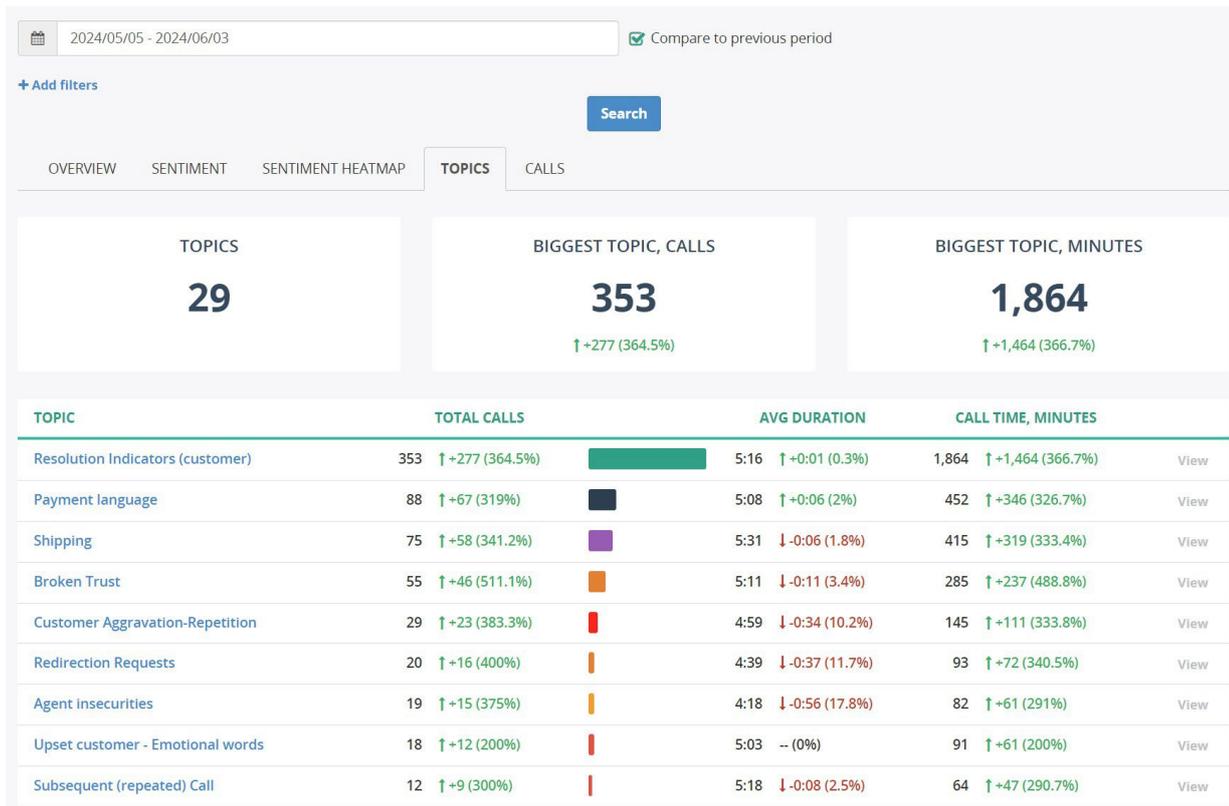
Agent [0:02]: Hi, thank you for calling Spirit Airlines. This is Jackie. How can I help you today?

Customer [0:08]: Hi, Jackie. I booked a flight for tonight on Virgin Airlines from Washington, D.C. to L.A., but I won't be able to make it, so I need to cancel my flight.

Agent [0:25]: Well, this is Spirit Airlines.

Customer [0:29]: I'm sorry, then I must have gotten it mixed up. I think I was supposed to come back on Spirit Airline.

Agent [0:35]: Okay, not a problem. Go ahead and give me your ticket number. Let me look you up, see if you're in our system.



AI Insights

Call Recording AI Insights module allows you to analyze every call 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.

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.

- CALL DETAILS
- TRANSCRIPT
- AGENT EVALUATION 1
- SHARED ACCESS
- NOTES 1
- AI INSIGHTS 4

AI INSIGHTS

Key facts: Key Facts from the call transcript:

- Agent Name: Jackie
- Customer Name: Jessica Allum
- Customer booked a flight on Virgin Airlines but needed to cancel it, thinking it was on Spirit Airlines.
- Ticket number: A10357
- Spirit Airlines has a no-refund policy but allows for rescheduling.
- Customer can reschedule the flight twice.
- Customer rescheduled the flight for next Thursday on the 11 o'clock flight.
- Customer prefers kosher meals but was informed only vegetarian meals are available.
- Customer is allergic to nuts.
- Customer was informed that red-eye flights contain nuts.
- Customer was upgraded to first class for a \$10 seat change fee.
- Customer expressed frustration with Spirit Airlines' policies.
- Customer decided not to fly with Spirit Airlines again.

Product: N/A

Product category: N/A

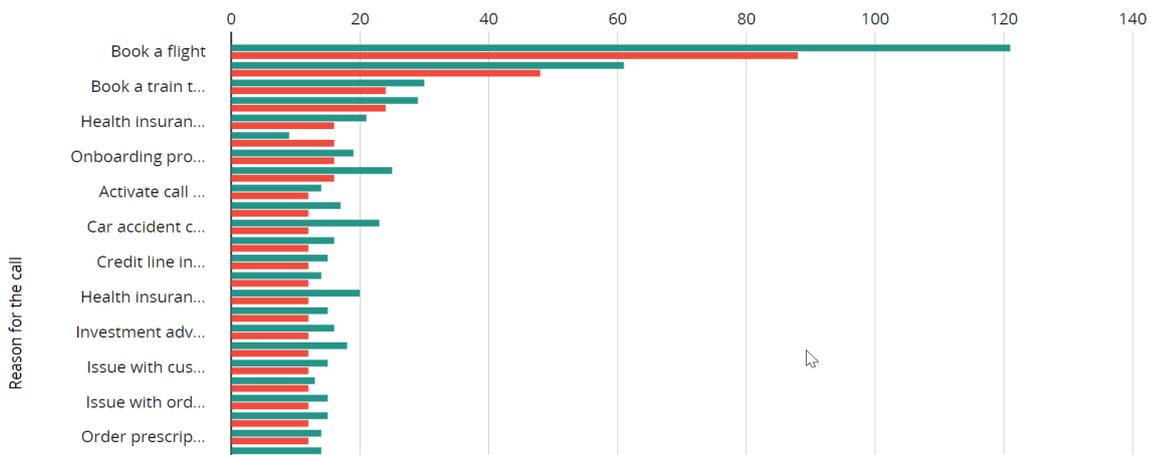
Reason of Call: Flight rescheduling and seat upgrade.

Calls by Reason for the call

Report Period: May 5, 2024 - Jun 4, 2024
Report Timezone: America/New_York
Run by: admin (Jun 3, 2024, 10:31 PM)
[More details](#)

Calls - Total	360
Minutes - Total	1,839
# of rows	94

Note: data on the chart is resampled down due to high volume
 Minutes - Total



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 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.

Evaluation report for «Samantha Moore»

View Call Edit Report Delete Report Export

00:00 / 05:04 Play 10s 10s x1 x1.2 x1.5 x1.7 x2 Save audio file

REPORT DETAILS CALL DETAILS TRANSCRIPT NOTES 1 AI INSIGHTS 4

EVALUATION REPORT

Agent: Samantha Moore
Group: Claims & Warranty Operations
Evaluation Form: Inbound call score card
Report Date: Jun 1, 2024, 9:19 PM
Evaluation Started: Jun 1, 2024, 9:19 PM
Evaluation Completed: Jun 1, 2024, 9:19 PM
Report Type: Auto score
Report Status: Completed

EVALUATION SCORE

52
SCORE

GREETING 100%

Did the agent greet the caller appropriately? yes (10 of 10)

AI Assistant:
Yes - The agent greeted the caller by saying "Hi, thank you for calling Spirit Airlines. This is Jackie. How can I help you today?"

Did the agent introduce themselves? yes (15 of 15)

AI Assistant:
Yes - The agent introduced themselves as "Jackie."

For the more detailed description of each of these features, check the corresponding sections in this document.

3. Transcription

Transcription Overview

Call Recording automatically transcribes voice into text, allowing users to quickly review the transcription and search for keywords or phrases.

View transcript in call details

To view a call transcript, open call details and navigate to **Transcript** tab.

The screenshot displays the call transcript interface. At the top, there is an audio waveform and a playback control bar with buttons for Play, 10s back, 10s forward, and volume levels (x1, x1.2, x1.5, x1.7, x2). A 'Save audio file' button is also present. Below the waveform is a navigation bar with tabs: CALL DETAILS, TRANSCRIPT (selected), AGENT EVALUATION (1), SHARED ACCESS, NOTES (1), and AI INSIGHTS (4). Underneath are expandable sections for CALL SUMMARY, SENTIMENT SCORE, and TOPICS / KEYWORDS. The main transcript area is titled 'TRANSCRIPT' and includes a 'Download transcript' button. The transcript content is as follows:

- Agent [0:02]: Hi, thank you for calling Spirit Airlines. This is Jackie. How can I help you today?
- Customer [0:08]: Hi, Jackie. I booked a flight for tonight on Virgin Airlines from Washington, D.C. to L.A., but I won't be able to make it, so I need to cancel my flight.
- Agent [0:25]: Well, this is Spirit Airlines.
- Customer [0:29]: I'm sorry, then I must have gotten it mixed up. I think I was supposed to come back on Spirit Airline.
- Agent [0:35]: Okay, not a problem. Go ahead and give me your ticket number. Let me look you up, see if you're in our system.
- Customer [0:41]: Okay, one second.
- Agent [0:44]: Sure, take your time.
- Customer [0:46]: Ticket number is A10357.
- Agent [0:52]: Okay, and the name on the ticket?

Full-text search

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

Call - Transcript Search query overnight shipping

+ Add filters Search Save Search

No auto-refresh Tags Download Export Share Delete More 0-7 of 7

DATE/TIME	DURATION	CALLER PARTY	CALLED PARTY	REASON OF CALL	PRODUCT	SENTIMENT SCORE
May 26, 2024, 5:43:07 PM	5:09	12225187068 (Aaron Marquez)	14081670668 (Carrie Ramirez)	Shipping time inquiry	N/A	90

assist you today? Hi, Don. I'm John and I have some questions about shipping times. I need to send a package internationally and another one domestically. Hi, John. I'd be happy to help ... John. Is there any way to expedite the shipping for either of this package if I need them to arrive faster? Certainly, John. We offer expedited shipping options for both international and domestic shipments ... express or overnight shipping services, which can significantly reduce the delivery time. With express shipping, your package can arrive within one to two business days, while overnight shipping ensures delivery on the next business

Inline comments

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

TRANSCRIPT Download transcript

Agent [0:03]: Good afternoon. Thanks for calling Ameritrade. How can I help?

Commenting at [0:04 - 0:05]

Make sure you introduce yourself at the beginnig of the call.

Save Cancel

Customer [0:08]: Hi, how are you doing today?

Agent [0:11]: I'm doing good. How are you?

Customer [0:13]: I'm fine. Actually, I'm more than fine. I just won the state lottery and I have a small fortune that I would like to invest.

Such inline comments are very useful for providing feedback an agent. After reviewing the comment, the agent can click Reply button and write an answer to the reviewer.

TRANSCRIPT Download transcript ▾

Agent [0:03]: Good afternoon. Thanks for calling Ameritrade. How can I help?

Comment at [0:04 - 0:05]

admin Jun 3, 2024, 11:08 PM Pin to top Delete

Make sure you introduce yourself at the beginnig of the call.

Reply

Customer [0:08]: Hi, how are you doing today?

Agent [0:11]: I'm doing good. How are you?

TRANSCRIPT Download transcript ▾

Agent [0:03]: Good afternoon. Thanks for calling Ameritrade. How can I help?

Comment at [0:04 - 0:05]

admin Jun 3, 2024, 11:08 PM Pin to top Delete

Make sure you introduce yourself at the beginnig of the call.

Sure. Thank you for your feedback.

Save **Cancel**

Customer [0:08]: Hi, how are you doing today?

Agent [0:11]: I'm doing good. How are you?

Download a transcript

To save a transcript as a text file onto your computer, click **Download transcript** button in the right top corner of the transcript. You can choose to save the transcript with or without timestamps.

TRANSCRIPT

Agent [0:00]: Hello, thank you for calling Capital One. My name is Jessica. How can I help you today?

Customer [0:04]: Hi, Jessica. How are you doing today?

Agent [0:09]: I'm great. How are you?

Customer [0:10]: I'm doing okay. I keep getting emails from you guys saying I'm pre-qualified for a car loan. And usually I ignore them, but now I'm actually in the market for a car. I'm wondering if you can tell me a bit about

Download transcript ▾
TXT file
TXT file (with timestamps)

Highlight spoken word during playback

When you playback a recording, you will see the spoken words highlighted in the transcript, allowing you to easily follow the heard audio and transcript.

00:43 05:43 || Pause ◀◀ 10s ▶▶ 10s x1 x1.2 x1.5 x1.7 x2 Save audio file

Customer [0:27]: these offers and what does pre-qualification actually mean and how much I'm actually pre-qualified for.

Agent [0:37]: Okay, can you give me your account number so I can see what we're dealing with?

Customer [0:42]: Yes, absolutely. The number would be 743-397-48.

Agent [0:51]: Okay, just give me one moment.
Are you there?

Customer [1:01]: Yes, I'm here. Sorry.

Agent [1:03]: Okay. So I just pulled up your account. And it looks like we have offered you pre-qualification for up to \$10,000.

Click in transcript to fast forward audio

You can click on any word in a transcript to fast forward an audio player to that moment. You will hear what was spoken at that time in the conversation.

Such a handy feature significantly speeds up the review process.

Agent [0:51]: Okay, just give me one moment.
Are you there?

Customer [1:01]: Yes, I'm here. Sorry.

Agent [1:03]: Okay. So I just pulled up your account. And it looks like we have offered you pre-qualification for up to \$10,000.

Customer [1:16]: Okay.

Review transcript during an agent evaluation

When doing an agent evaluation manually, you can open the Transcript tab to view the call transcript.

With such a transcript, you save significant amount of time during the review process. Most of the time, you don't even need listen to the call to answer simple questions like "Did the agent introduce themselves?".

Add Evaluation Report

00:00 / 04:49 Play ◀ 10s ▶ 10s x1 x1.2 x1.5 x1.7 x2 Save audio file

REPORT DETAILS CALL DETAILS **TRANSCRIPT** NOTES 1

TRANSCRIPT

Download transcript ▾

Agent [0:01]: Hello, thank you for calling Best Buy. My name is Jacob and I'm here to assist you today. How can I help you?

Customer [0:08]: Oh, great. Hi, Jacob. How are you today?

Agent [0:11]: I'm fine, thank you. How might you be?

Customer [0:14]: Okay, hi. I recently purchased a product from your store and I was wondering about the extended warranty options available.

Agent [0:26]: Of course, I'd be happy to help you with that. If you would please provide me with your order number or the date of purchase so I can look up your transaction.

Customer [0:36]: Sure, sure. My order number is 1234-5678A.

Agent [0:48]: Thank you for that. Please give me a moment to pull up your order.

GREETING

Did the agent greet the caller appropriately? yes no n/a

Did the agent introduce themselves? yes no n/a

Did the agent mention their company name? yes no n/a

Comments

VERIFICATION

Did the agent ask for the caller's name? yes no n/a

Conclusion

A call transcript is a key feature in the Call Recording product.

It is useful on its own, but more importantly, a transcript is used as a 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).

4. Call Summary

Call Summary Overview

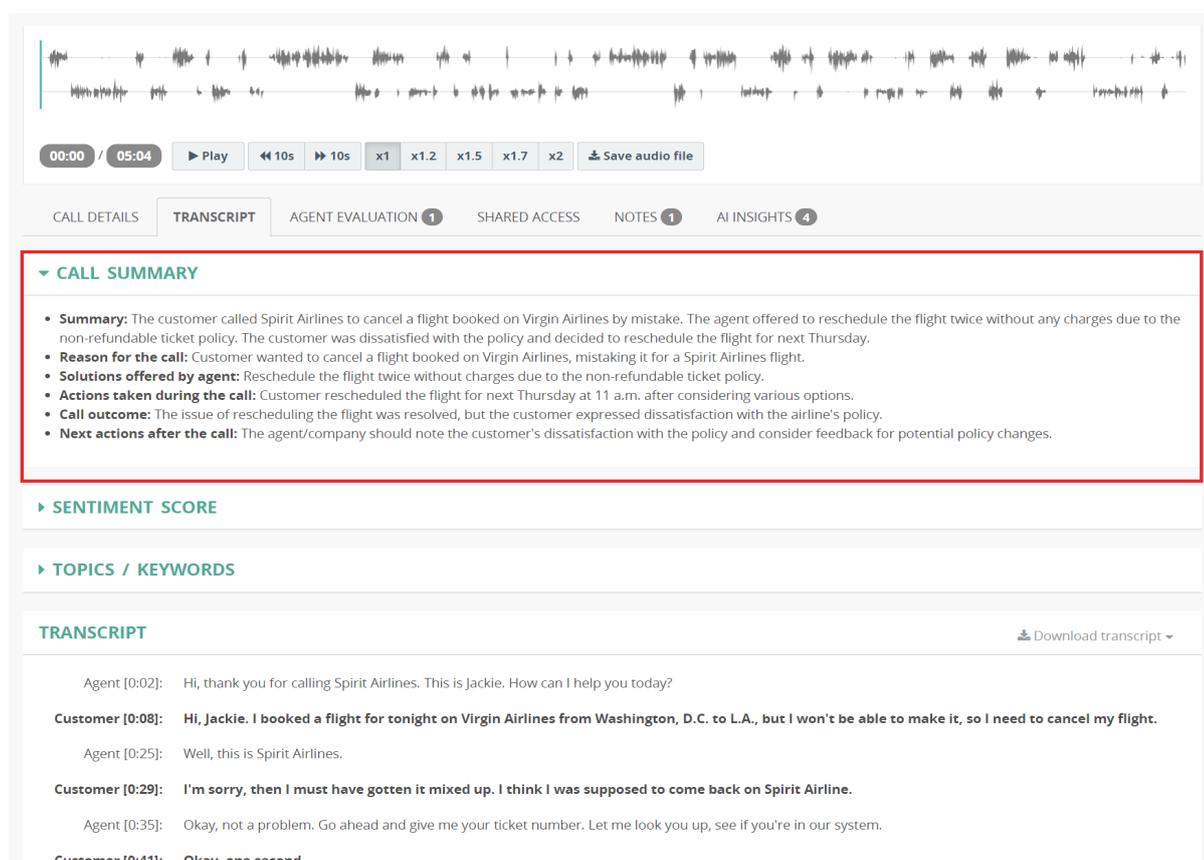
The Call Summary feature allows you to see a compressed version of the conversation in easy to read format.

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.

View a call summary

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

CALL SUMMARY

- **Summary:** The customer called Spirit Airlines to cancel a flight booked on Virgin Airlines by mistake. The agent offered to reschedule the flight twice without any charges due to the non-refundable ticket policy. The customer was dissatisfied with the policy and decided to reschedule the flight for next Thursday.

- **Reason for the call:** Customer wanted to cancel a flight booked on Virgin Airlines, mistaking it for a Spirit Airlines flight.

- **Solutions offered by agent:** Reschedule the flight twice without charges due to the non-refundable ticket policy.

- **Actions taken during the call:** Customer rescheduled the flight for next Thursday at 11 a.m. after considering various options.

- **Call outcome:** The issue of rescheduling the flight was resolved, but the customer expressed dissatisfaction with the airline's policy.

- **Next actions after the call:** The agent/company should note the customer's dissatisfaction with the policy and consider feedback for potential policy changes.

Additional notes

OK Cancel

Full-text search in call summary across all calls

You can use search under Recordings > Advanced Search tab to find all calls, where certain word or phrase appears in a call summary.

Select Call - Summary in the parameter list, enter the searched phrase and press Search button.

ALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG **ADVANCED SEARCH**

Call - Summary Search query sim card

+ Add filters Search Save Search

No auto-refresh Tags Download Export Share Delete More 0-5 of 5

	DATE/TIME	DURATION	CALLER PARTY	CALLED PARTY	REASON OF CALL	PRODUCT	SENTIMENT SCORE
<input type="checkbox"/>	May 29, 2024, 8:31:34 PM	6:10	12809927320 (Aaron Marquez)	14087850803 (Amy Haley)	SIM card verification is...	SIM card	90

Summary of the call: James Bond contacted AT&T for assistance with his SIM card verification issue. After resolving the SIM card problem, he decided to upgrade his internet plan for more data.

- Reason ... call: James Bond needed help with his SIM card verification and later wanted to upgrade his internet plan for more data.

- Solutions offered by agent:

- Sent a reactivation signal to the SIM card.

Custom format for a call summary

A call summary format is flexible. You can use the Prompt Designer to instruct 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.

AI Insight

Name *

Status Enable

Description

Save into Call note Custom field Sentiment score Call summary

Output template *
A template for the output text that will be created from the response

AI PROMPT

System message *

Prompt *

Max tokens *

Test Prompt for Call Summary

You can use the **AI Playground** to quickly test your Call Summary prompt and make sure it returns or produces a summary in the format you need.

Note

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 the **Test** button.

In the 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. One you located the desired call, click Select for an experiment button.

Test AI Prompt

Wide view

The screenshot shows a user interface for testing AI prompts. It is divided into two steps: 'Step 1. Select a call' and 'Step 2. Run an Experiment'. In Step 1, there are filter dropdowns for 'Call - Transcript' (set to 'Not empty') and a 'Search' button. Below the filters is a table of call records. The table has columns for DATE/TIME, DURATION, CALLER PARTY, CALLED PARTY, REASON OF CALL, PRODUCT, and SENTIMENT SCORE. The first row is highlighted, and its 'Select for an experiment' button is circled in red. The table also includes a pagination control showing '0-20 of 950'.

DATE/TIME	DURATION	CALLER PARTY	CALLED PARTY	REASON OF CALL	PRODUCT	SENTIMENT SCORE	
May 31, 2024, 7:11:27 PM	4:58	12433888719 (Aaron Marquez)	14086731075 (Rebecca Nunez)	Schedule a medical consu...	N/A	90	Select for an experiment
May 31, 2024, 6:37:29 PM	5:01	12451945314 (Aaron Marquez)	14088837195 (Keith Sanders)	International roaming ch...	Travel passes	90	Select for an experiment
May 31, 2024, 5:31:54 PM	4:49	12057949246 (Aaron Marquez)	14085943858 (Kelly Garcia)	Extended warranty inquir...	Knee brace	90	Select for an experiment
May 31, 2024, 4:57:26 PM	4:58	12536373964 (Andrew Nelson)	14084539700 (Heidi Burnett)	Investment options for l...	Fixed Deposit	80	Select for an experiment

In the Step 2. Run an Experiment, edit the AI Prompt as desired and click Test button. You will see a response from the AI in the AI Response panel.

You can run multiple experiments with different prompts to see what works the best for you.

Once you are satisfied with the results, you can save the prompt, so it will be applied to all the upcoming calls in your organization.

AI PROMPT

System message *

Based on the submitted call transcript, write a short summary of the call, which includes the following information:

- Summary of the call (no more than 100 words)
- Name of the customer
- Call outcome (Was the issue resolved?)
- Next actions after the call (what agent or company must do after the call ends).

Respond in a bullet-point format. Use Markdown formatting.

Test

AI RESPONSE

Response:

- **Summary:** The customer, Ms. Green, called AT&T to report unstable 4G data connectivity after upgrading to a higher package. The agent confirmed the upgrade and guided Ms. Green through resetting her network settings, resolving the issue.
- **Name of the customer:** Ms. Green
- **Call outcome:** The issue was resolved.
- **Next actions after the call:**
 - The agent should document the call details and the resolution in the customer's account.
 - Ms. Green should monitor her connectivity, and if the issue persists, she can call AT&T for further assistance.

API Usage: 1149 prompt tokens
122 completion tokens
1271 total tokens

TRANSCRIPT

[Download transcript](#)

Agent [0:01]: Good afternoon. Thank you for calling AT&T. How can I help you today?

Customer [0:08]: **Hi. I'm calling because my 4G data has been really unstable for the past two or three days. I just upgraded to a higher package, and since I upgraded, I feel like my connection is just as bad as ever.**

Agent [0:28]: I'm really sorry that you're facing troubles, but I would be happy to help you get things sorted. Can you start off by giving me your last name and phone number?

Customer [0:40]: **Yes, my last name is Green, G-R-E-E-N, and my phone number is 202-738-1421.**

Agent [0:51]: Okay, thank you so much, Ms. Green. Let me go ahead and pull that account up. Okay, and can you please confirm the address associated with your house?

Customer [1:02]: **Yes, that's 123 Big Circle Lane.**

Agent [1:08]: Okay, great. Everything checks out. Okay, you said you recently upgraded to a higher bandwidth, and now your network connection seems to be faulty. Does this

Customer [1:24]: **Yes,**

Agent [1:24]: happen

Customer [1:24]: **that's correct.**

Agent [1:25]: no matter where you are or only in certain parts of the home?

Customer [1:31]: **No, it happens in my house. It happens at work. I don't know what the issue is. They told me that if I upgraded, then I would have a faster internet connection but it's so unstable like I can see that there I have bars but it still doesn't connect to any internet no matter where I am.**

Agent [1:55]: Okay thank you so much for that information Ms. Green. Now may I ask did you upgrade over the phone or did you come into one of our service centers?

5. Sentiment Analysis

Sentiment Analysis attempts to detect the underlying emotion in customer calls and classify it as positive, negative, or neutral.

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 range from -100 (negative) to +100 (positive).

The sentiment is color coded (red for negative and green for positive) and is represented with 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.

The screenshot displays a call transcript interface. At the top, there is an audio waveform and playback controls (00:00 / 05:04, Play, 10s, x1, x1.2, x1.5, x1.7, x2, Save audio file). Below this is a navigation bar with tabs: CALL DETAILS, TRANSCRIPT (selected), AGENT EVALUATION (1), SHARED ACCESS, NOTES (1), and AI INSIGHTS (4). The main content area is divided into sections: CALL SUMMARY, SENTIMENT SCORE (highlighted with a red border), TOPICS / KEYWORDS, and TRANSCRIPT. The SENTIMENT SCORE section shows three scores: TOTAL SCORE (-40 😞), AGENT SCORE (-30 😞), and CUSTOMER SCORE (-50 😞). Below these scores is an explanatory text: "The customer was frustrated with the airline's no refund policy, lack of flexibility with meal options, and inability to provide a window seat without an upgrade. The agent tried to assist within policy constraints but was unable to fully satisfy the customer's needs." The TRANSCRIPT section shows a conversation between an agent and a customer.

Score	Emoji
-40	😞
-30	😞
-50	😞

EXPLANATION: The customer was frustrated with the airline's no refund policy, lack of flexibility with meal options, and inability to provide a window seat without an upgrade. The agent tried to assist within policy constraints but was unable to fully satisfy the customer's needs.

TRANSCRIPT:

Agent [0:02]: Hi, thank you for calling Spirit Airlines. This is Jackie. How can I help you today?

Customer [0:08]: Hi, Jackie. I booked a flight for tonight on Virgin Airlines from Washington, D.C. to L.A., but I won't be able to make it, so I need to cancel my flight.

Agent [0:25]: Well, this is Spirit Airlines.

Customer [0:29]: I'm sorry, then I must have gotten it mixed up. I think I was supposed to come back on Spirit Airline.

Review phrases with negative sentiment

When a call is classified as negative, the phrases that most represent the negative emotions are highlighted with red color in the transcript.

Such a highlighting allows you to quickly spot problem moments in the conversation.

Customer [1:01]: Okay, Ms. Allum. Yeah, I do see your ticket here, and it is a non-refundable ticket.
Would you like to change it to another time? I mean, you can cancel it, but you wouldn't be refunded. But if you change it to another time slot, you would still be able to use the ticket.

Agent [1:24]: Are you sure you can't give me points or miles or something?

Customer [1:28]: I'm sorry, Spirit Airlines has a 100% no refund policy. That's how we are able to keep our ticket prices so low.

Agent [1:38]: **That's ridiculous. People can have emergencies.** I've never heard of this. I've been traveling for so long. Um...

Customer [1:46]: It's only a \$65 ticket. I'm sure you can afford it.

Agent [1:49]: Are you the manager?

Customer [1:52]: I'm the supervisor, yes, for this region.

Show Sentiment Score column

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

The screenshot shows the Recordings page interface. At the top, there are filters for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'UNASSIGNED CALLS', 'BY TAG', and 'ADVANCED SEARCH'. Below these are search filters for date (2024/05/06 - 2024/06/04), user/group, and text. Action buttons include 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share', 'Delete', and 'More'. The main table has columns: USER, DATE/TIME, CALL DIRECTION, CALLER PARTY, CALLED PARTY, DURATION, REASON OF CALL, and SENTIMENT SCORE. The 'SENTIMENT SCORE' column is highlighted with a red border. The table contains 7 rows of call data with sentiment scores ranging from 90 to -40.

	USER	DATE/TIME	CALL DIRECTION	CALLER PARTY	CALLED PARTY	DURATION	REASON OF CALL	SENTIMENT SCORE	
<input type="checkbox"/>	Rebecca Nunez	May 31, 2024, 7:11:27 PM	Inbound	12433888719 (Aaron Marquez)	14086731075 (Rebecca Nunez)	4:58	Schedule a medical consu...	90	⊕
<input type="checkbox"/>	Keith Sanders	May 31, 2024, 6:37:29 PM	Inbound	12451945314 (Aaron Marquez)	14088837195 (Keith Sanders)	5:01	International roaming ch...	90	⊕
<input type="checkbox"/>	Kelly Garcia	May 31, 2024, 5:31:54 PM	Inbound	12057949246 (Aaron Marquez)	14085943858 (Kelly Garcia)	4:49	Extended warranty inquir...	90	⊕
<input type="checkbox"/>	Heidi Burnett	May 31, 2024, 4:57:26 PM	Inbound	12536373964 (Andrew Nelson)	14084539700 (Heidi Burnett)	4:58	Investment options for I...	80	⊕
<input type="checkbox"/>	Monica Burke	May 31, 2024, 4:44:48 PM	Inbound	12858256397 (Aaron Marquez)	14081156233 (Monica Burke)	5:07	Place an over-the-phone ...	90	⊕
<input type="checkbox"/>	Samantha Moore	May 31, 2024, 3:55:52 PM	Inbound	12721401489 (Andrew Nelson)	14089848560 (Samantha Moore)	5:04	Flight rescheduling and ...	-40	⊕
<input type="checkbox"/>	Shelly Russell	May 31, 2024, 3:17:10 PM	Outbound	14082959037 (Shelly Russell)	12261989791 (Andrew Nelson)	5:19	Schedule appointment	80	⊕

To display the Sentiment Score column in the Recordings page, navigate to Administration > Customization > Field Visibility in the admin portal.

Click Edit next to the corresponding layout (we recommend editing at least Recordings - All Calls and Recordings - Advanced Search layouts).

Fields visibility

LAYOUT	VISIBLE COLUMNS	
Recordings - All Calls	User Date/Time Call Direction Caller Party Called Party Duration Reason of Call	Edit
	Sentiment Score	
Recordings - My Calls	Date Time Duration Caller Party Called Party Tags	Edit
Recordings - Active Calls	User Date Time Duration Caller Party Called Party Timeline	Edit
Recordings - By User	Date Time Duration Caller Party Called Party Tags	Edit
Recordings - By Client	Client Date Time Duration Caller Party Called Party	Edit
Recordings - By Tag	User Date Time Duration Caller Party Called Party Tags	Edit
Recordings - Unassigned Calls	Date Time Duration Caller Party Called Party	Edit
Recordings - Advanced Search	Date/Time Duration Caller Party Called Party Reason of Call Sentiment Score	Edit
Recordings - Interaction	Time Duration Caller -> Called	Edit
Recordings - By Topic	User Date Time Duration Caller Party Called Party Topics	Edit

In the Edit Layout page, add the Sentiment score column to the Visible columns list.

Administration > Customization > Fields Visibility

Edit Layout «Recordings - All Calls» for System

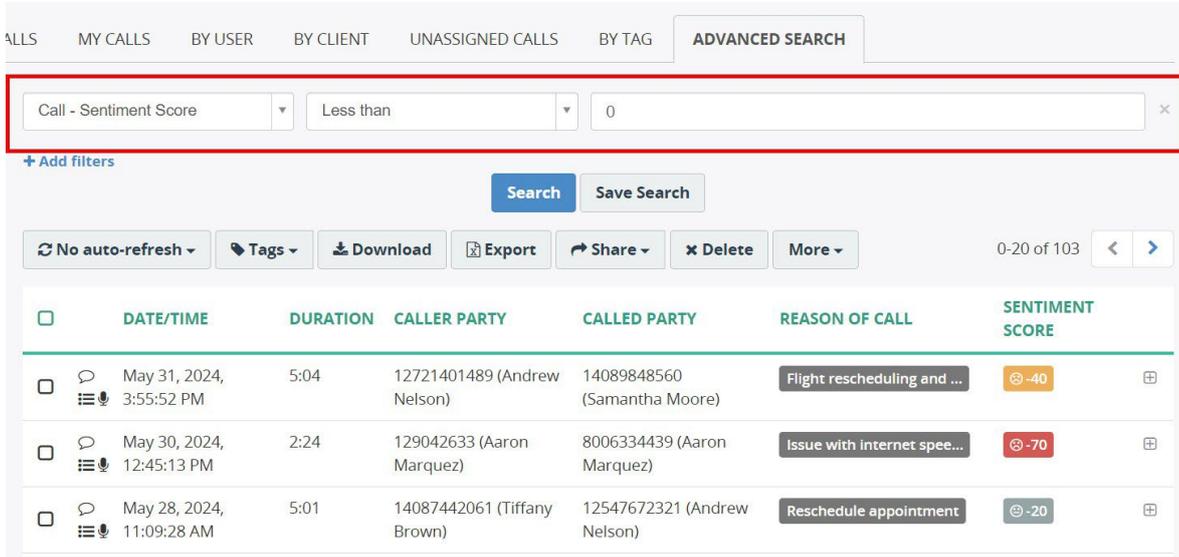
VISIBLE COLUMNS	HIDDEN COLUMNS
≡ USER hide	≡ CALL ID show
≡ DATE/TIME hide	≡ TENANT show
≡ CALL DIRECTION hide	≡ PARENT CALL ID show
≡ CALLER PARTY hide	≡ SECONDARY PARENT CALL ID show
≡ CALLED PARTY hide	≡ PBX CALL ID show
≡ DURATION hide	≡ PBX TRACKING ID show
≡ REASON OF CALL hide	≡ PBX CALL DIRECTION show
≡ SENTIMENT SCORE hide	≡ CLIENT show
	≡ DATE show
	≡ TIME show
	≡ ANSWER TIME show
	≡ DISCONNECT TIME show
	≡ CALLER -> CALLED show
	≡ TIMELINE show

With such settings, the Sentiment Score column will be display in the Recordings page.

Search calls by sentiment score

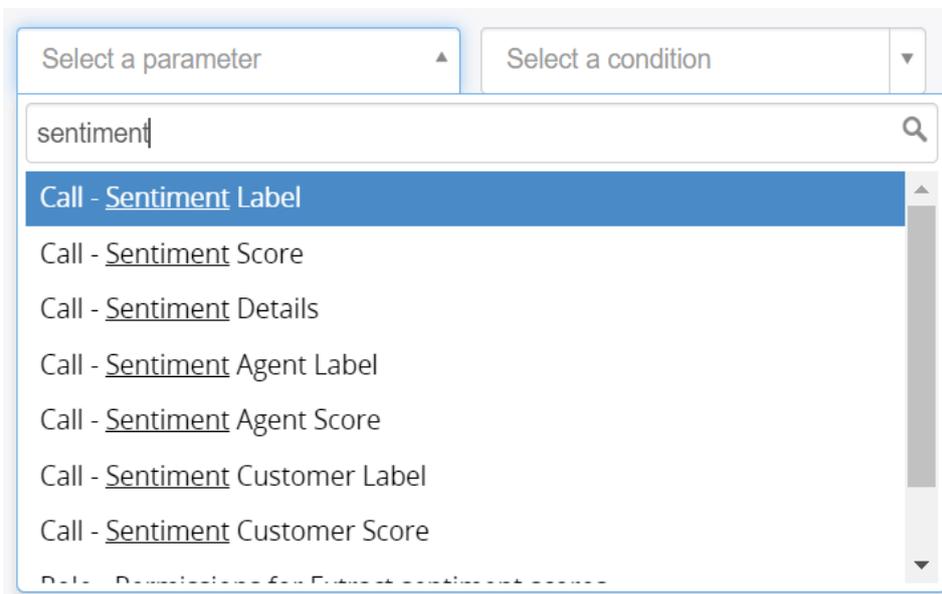
You can use the Sentiment Score in search criteria. For example, to locate all calls that have a sentiment score lower than 0,

navigate to Recordings > Advanced Search, select the Call - Sentiment Score as a parameter, Lower than as an operator and 0 as a value. Press 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 score in reports

You can include the sentiment score column in various Call Summary and Call Detail reports.

The following screenshot demonstrate the Call Summary report with total calls in each sentiment category.

Calls by Reason for the call				Calls - Total		Minutes - Total		# of rows	
Report Period:	May 6, 2024 - Jun 5, 2024			359		1,834		94	
Report Timezone:	America/New_York								
Run by:	admin (Jun 4, 2024, 1:29 AM)								
	More details								

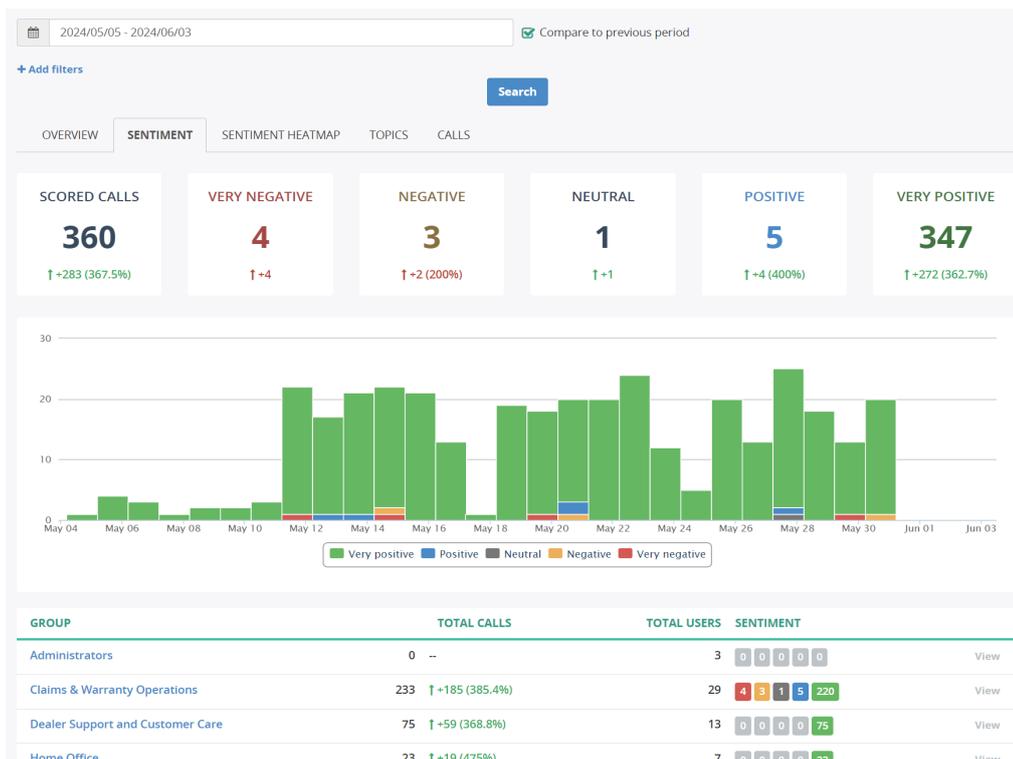
Reason of Call	Calls - Total	Minutes - Total	Calls - Avg Duration	Calls - By Sentiment					View calls
				Very Positive	Positive	Neutral	Negative	Negative	
Book a flight	22	121	5:30	22	0	0	0	0	View calls
Mortgage / Loan Inquiry	13	67	5:12	13	0	0	0	0	View calls
Issue with placing order	12	61	5:06	12	0	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

You can 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 checked, then a difference is shown in each metric between the current period and the previous one.

The dashboard support 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.



You can use the search panel in at the top of the dashboard 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".

Group «Claims & Warranty Operations» Manage group

2024/05/05 - 2024/06/03 Compare to previous period

Call - Duration: Greater than 5:00

Call - Direction: Is Inbound

Call - Topic: Is Loss of Business

+ Add filters Search

Sentiment heatmap

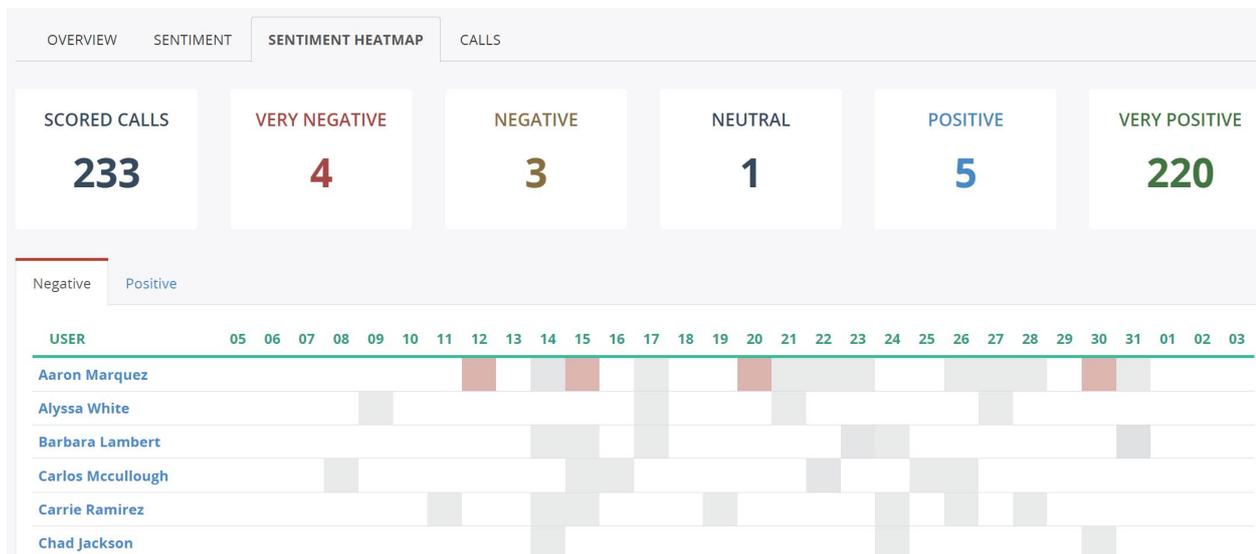
Navigate to Dashboard > Sentiment Heatmap to see a heatmap of sentiment score on a timeline per group or user level. Such a heatmap dashboard allows you to identify spikes in sentiment scores or call volumes.

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).

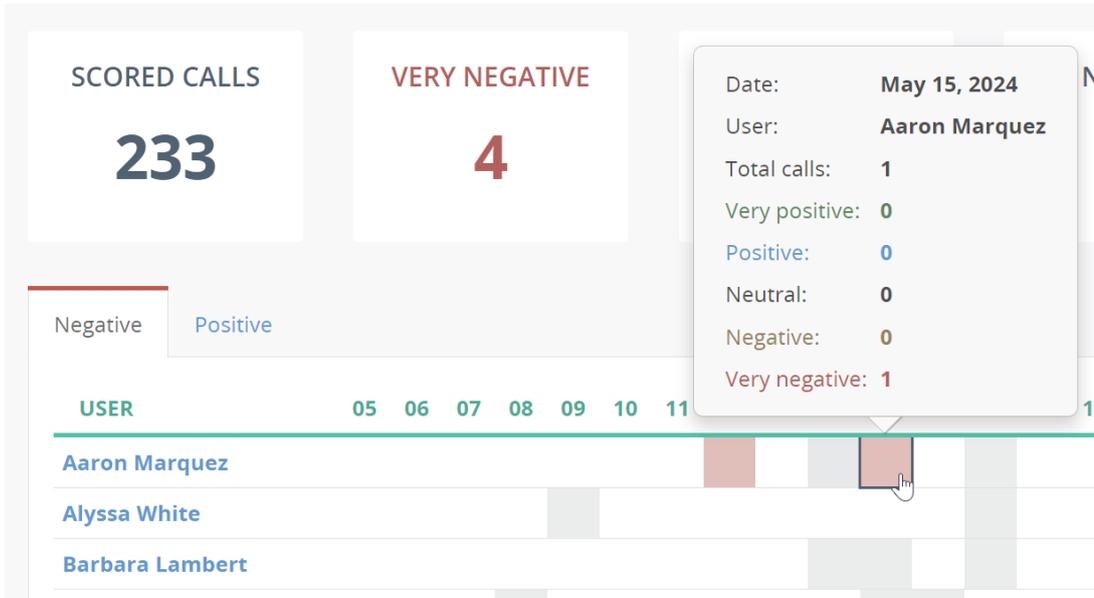
Note

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 prompt

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, you are able to customize the prompt that is sent to AI during sentiment scoring.

Particularly, you can change the definitions of "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 customer remained 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, you can improve sentiment scoring in your specific scenarios.

To edit the Prompt for Sentiment score, navigate to Administration > Speech Analytics > Generative AI > AI Insights. Click Edit next to the Sentiment score insight.

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

AI Insight

Name *

Status Enable

Description

Save into Call note Custom field Sentiment score Call summary

Output template *
A template for the output text that will be created from the response

AI PROMPT

System message *

Prompt *

Max tokens *

You can test your new prompt in AI Playground on your own calls to make sure it works as expected. To test the prompt, click Test button on the Sentiment Score AI Insight page.

6. 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.

How it Works

Topic analysis is based on keyword spotting. Keyword spotting, 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.

KEYWORDS

absolutely (2) Angry Frustrated Upset "I appreciate" "Blow up" talked on talked multiple times stupid is ONEAR nightmare

TRANSCRIPT

Agent [0:02]: Hello, this is [redacted].

Customer [0:03]: Hi [redacted], this is yet again[redacted] [redacted] [redacted] we have been talking for about a month now actually more than a month. It was October 20th was odd first call and then we **talked on** the 22nd and then we've **talked three or four times** since then and we're going through my notes here. What do you need from me? First came to this is about a one product. I bought online for my brother and I got free charges and two of them got taken care of but the one remaining charge is wrong and it **is just**

Agent [0:40]: It

Customer [0:41]: **been a nightmare** and it's still is not right.

Agent [0:44]: It's still not right? Oh my goodness. I'm so sorry. Okay.

Customer [0:48]: I am ready to come to [redacted] [redacted] [redacted] and **blow up** the building. I know I can't say that because it has to be taken literally but that is how I'm feeling. I am so **frustrated** this baby is being born today. And this is all I'm dealing with I am so **angry**.

Agent [1:06]: Okay. Give me just a second.

Customer [1:09]: That's a **stupid** \$15 item.

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.

The screenshot displays the 'Call Details' interface with the 'TRANSCRIPT' tab selected. At the top, there is an audio player with a waveform and controls for play, 10s navigation, and speed (x1 to x2), along with a 'Save audio file' button. Below the player are navigation tabs: 'CALL DETAILS', 'TRANSCRIPT', 'AGENT EVALUATION 1', 'SHARED ACCESS', 'NOTES 1', and 'AI INSIGHTS 4'. The main content area is divided into sections: 'CALL SUMMARY', 'SENTIMENT SCORE', and 'TOPICS / KEYWORDS'. The 'TOPICS / KEYWORDS' section is highlighted with a red border and contains a list of topics with checkboxes: 'Redirection Requests (1)', 'Resolution Indicators (customer) (1)', 'Customer Aggravation-Repetition (1)', and 'Upset customer - Emotional words (1)'. Below this list are four topic tags: 'supervisor | manager', '"thank you" OR thanks OR thankful', '"how many times"', and 'Ridiculous'. At the bottom, the 'TRANSCRIPT' section is visible, showing a conversation between an agent and a customer. A 'Download transcript' button is located in the top right of the transcript area.

Configuring Topics

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

Administration

Wide view ^v

License expires in 23 days

TENANT	TOPIC	STATUS	SENSITIVE	COLOR	DESCRIPTION	SPEAKER	KEYWORDS
Acme	Account Identification	Enabled				Customer	4 keywords View Edit
Acme	Agent insecurities	Enabled		#f39c12		Agent	8 keywords View Edit
Acme	Broken Trust	Enabled		#e67e22		Customer	12 keywords View Edit
Acme	Compliance message	Enabled				Agent	2 keywords View Edit
Acme	Credit card	Enabled		#8e44ad		Both	3 keywords View Edit

In the Edit Topic page, you can configure:

- Name for topic
- Color, which helps to visually distinguish different topics
- Optional description
- 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

KEYWORDS

Expression	Title (optional)
"my account is"	
"my customer ID is"	
my ONEAR:3 "number is"	
"my user name is"	

[+ Add Keywords](#)

[Save](#)

Keyword expression can be as simple as an exact phrase "cancel account" or more complex expression like "(cancel OR canceling OR cancelled) NEAR account". Check MQL expression for details.

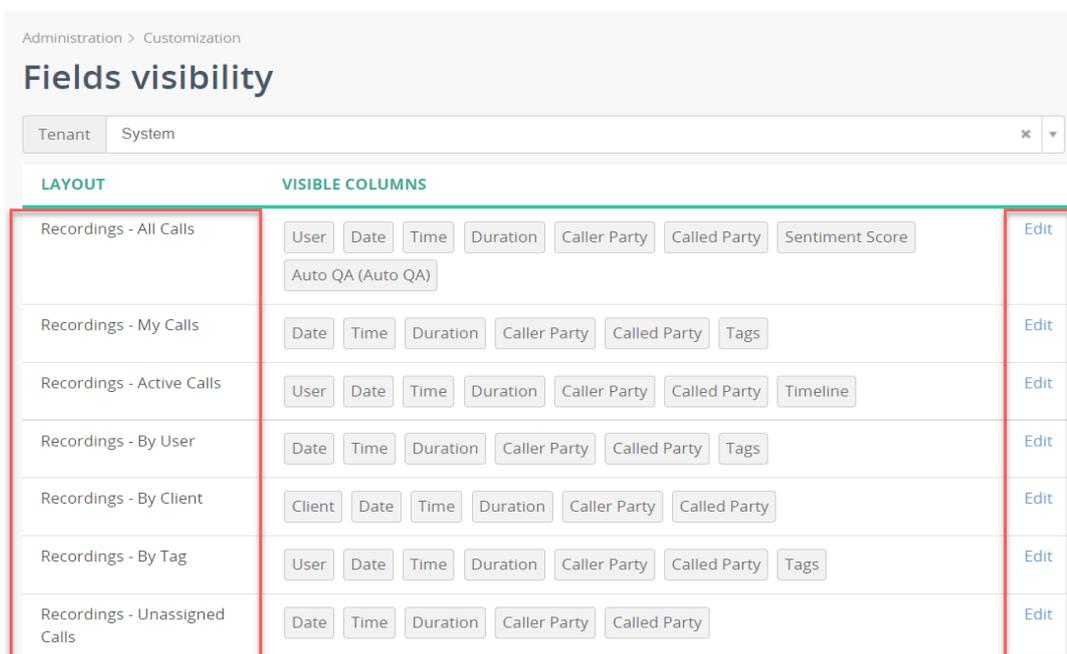
Title attribute is optional. It useful to specify a short and easy to read title for complex expression like "(close*|closing) NEAR account". A title will be shown in call details instead of the expression.

Configure Data Displays

Display Topic column in recordings list

To display topic information in call recordings list, navigate to Administration > Customization > Fields Visibility, click Edit

for the corresponding Recordings layouts (these layouts correspond to the tabs on Recordings page):



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

Administration > Customization > Fields Visibility

Edit Layout «Recordings - My Calls» for System

VISIBLE COLUMNS

☰ DATE	hide
☰ TIME	hide
☰ DURATION	hide
☰ CALLER PARTY	hide
☰ CALLED PARTY	hide
☰ TAGS	hide

HIDDEN COLUMNS

☰ CALL ID	show
☰ TENANT	show
☰ PARENT CALL ID	show
☰ SECONDARY PARENT CALL ID	show
☰ PBX CALL ID	show
☰ PBX TRACKING ID	show
☰ PBX CALL DIRECTION	show
☰ TOPICS	show
☰ USER	show

After you save the layout configuration, you will be able to see Topics column in recordings list.

DATE	TIME	DURATION	FROM	TO	TOPICS
Jul 7, 2021	7:35 PM	7:40	1521147438	915686591 (Yolanda Fletcher)	Positive Stateme... 4 Positive Stateme... 3 Shipping 3 Positive Stateme... 1 Resolution Indic... 1 Agent insecuriti... 1 Cursing 1
Jul 7, 2021	7:34 PM	0:13	567988805468	240941414 (John Mitchell)	Positive Stateme... 1
Jul 7, 2021	7:34 PM	0:34	827750989277	561731230 (Monica Johnson)	Positive Stateme... 2 Ending Statements 1 Resolution Indic... 1 Resolution Indic... 1 Payment language 1
Jul 7, 2021	7:34 PM	1:16	990671504996	575429417 (Desiree Jenkins)	Negative Stateme... 4 Ending Statements 1 Resolution Indic... 1 Positive Stateme... 1
Jul 7, 2021	7:34 PM	0:15	743226204746	792383680 (Dale Brooks)	Positive Stateme... 2 Agent insecuriti... 2

Searches

Searching by topic

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

The screenshot displays the 'ADVANCED SEARCH' interface. At the top, navigation tabs include 'ALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'UNASSIGNED CALLS', 'BY TAG', and 'ADVANCED SEARCH'. The search bar contains the filter 'Call - Topic' and 'One of' with selected topics: 'Lack of Knowledge' and 'Broken Trust'. Below the search bar are buttons for '+ Add filters', 'Search', and 'Save Search'. A toolbar contains 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share', 'Delete', and 'More'. The table below shows search results with columns for 'DATE/TIME', 'DURATION', 'CALLER PARTY', 'CALLED PARTY', 'REASON OF CALL', 'TOPICS', and 'SENTIMENT SCORE'. The table contains four rows of call records.

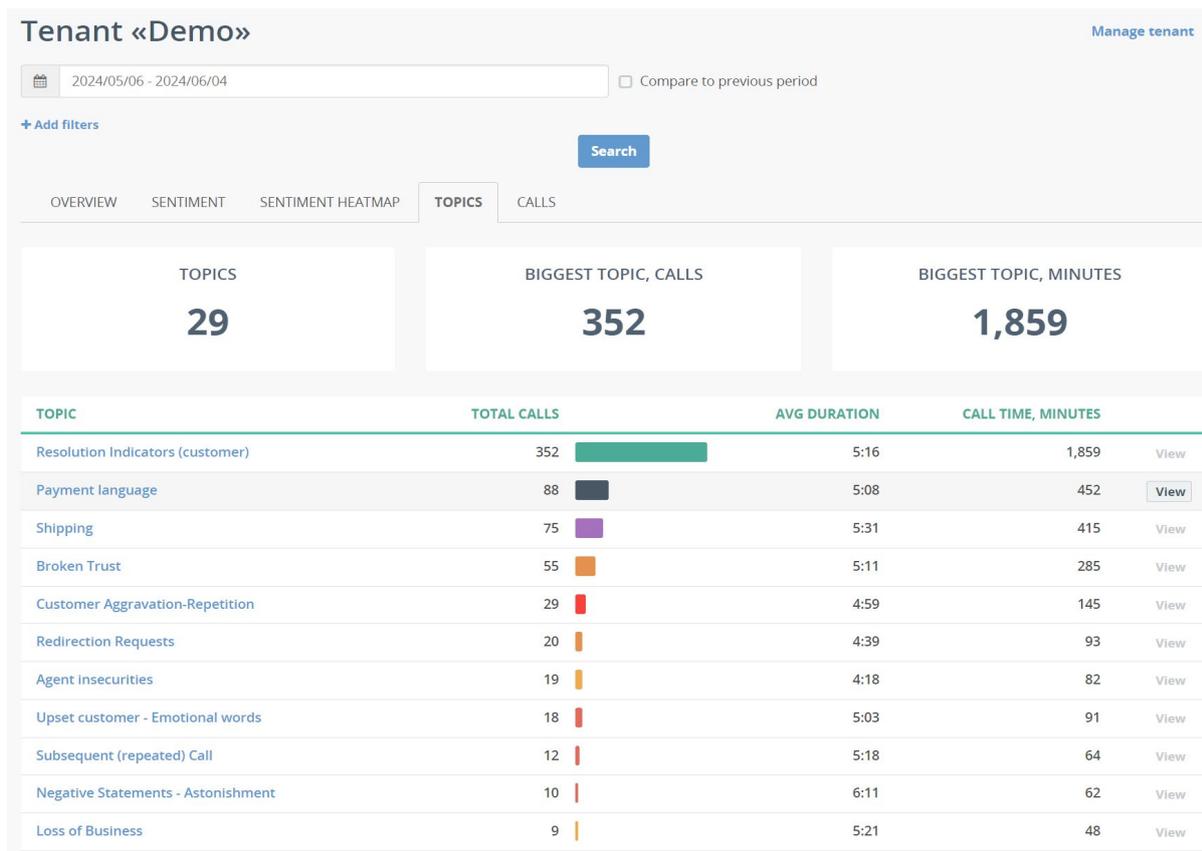
	DATE/TIME	DURATION	CALLER PARTY	CALLED PARTY	REASON OF CALL	TOPICS	SENTIMENT SCORE
<input type="checkbox"/>	May 31, 2024, 5:31:54 PM	4:49	12057949246 (Aaron Marquez)	14085943858 (Kelly Garcia)	Extended warranty inquir...	Resolution Indic... 7 Payment language 7 Broken Trust 1	90
<input type="checkbox"/>	May 31, 2024, 4:57:26 PM	4:58	12536373964 (Andrew Nelson)	14084539700 (Heidi Burnett)	Investment options for l...	Payment language 2 Lack of Knowledge 1 Resolution Indic... 1	80
<input type="checkbox"/>	May 31, 2024, 12:58:13 PM	3:09	127903936 (Aaron Marquez)	8006442126 (Aaron Marquez)	Issue with delivery delay	Broken Trust 1 Agent insecuriti... 1	80
<input type="checkbox"/>	May 31, 2024, 10:44:02 AM	5:16	12296306772 (Andrew Nelson)	14087185865 (Barbara Lambert)	Signing up for a new dat...	Resolution Indic... 5 Shipping 1 Broken Trust 1	90

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



You can narrow-down search to focus on particular calls, like shown in the following screenshot:

The screenshot shows the 'TREND ANALYSIS' section. At the top, there are filters for 'Tenant' (Acme), a date range (2021/06/15 - 2021/07/20), and 'Trend Period' (Week). Below these are three search criteria: 'Call - Duration' (Between 2:00 and 15:00), 'Call - Topic' (One of: Broken Trust, Subsequent (repeated) Call), and 'Call - Direction' (Is: Inbound). A '+ Add criteria' link and a 'Run Search' button are also present. Below the search panel is a table with columns 'TOPIC', 'TOTAL CALLS', and 'TRENDS'. The table lists two topics: 'Broken Trust' and 'Subsequent (repeated) Call', both with 7 total calls. Each row includes a bar chart and a 'View' link. At the bottom left, there is an 'Order by' dropdown menu set to 'Total Calls'.

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:

This screenshot is similar to the previous one but shows the 'Order by' dropdown menu open. The menu lists several options: 'Total Calls' (selected), 'Topic', and 'Topic' (repeated). A red arrow points to the dropdown menu.

Trend analysis for individual topic

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 a 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 keywords shows a numeric value, representing how many times it was spotted in calls for this period of time.

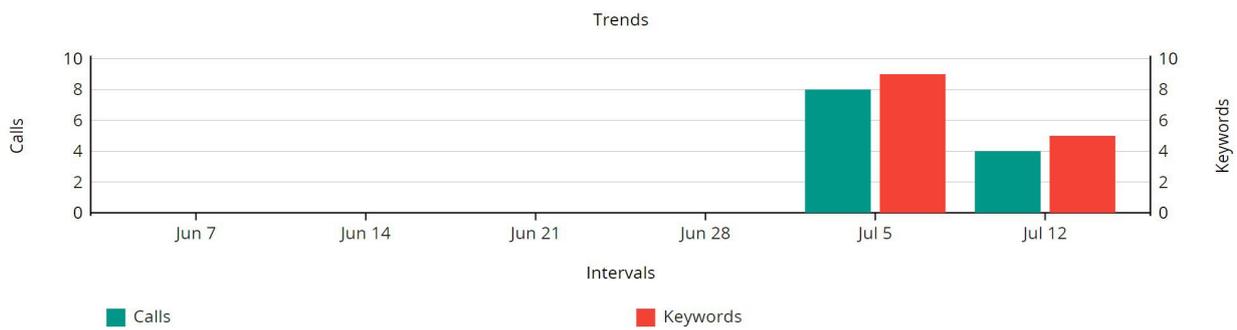
Topic «Subsequent (repeated) Call»

Name: **Subsequent (repeated) Call**
Tenant: **Acme**
Speaker: **Customer**

2021/06/08 - 2021/07/13 Trend Period: Week

+ Add criteria

Run Search



12 / 200
Total Calls (6%)

4
Minimum Calls / Week

8
Maximum Calls / Week

6
Average Calls / Week

14
Total Keywords

5
Minimum Keywords / Week

9
Maximum Keywords / Week

7
Average Keywords / Week

call* ONEAR:1 back 10 "last time" 2 talked on 1 talked multiple times 1 "called before" 0 "called last week" 0 called twice 0 "calling again" 0
"keep calling" 0 "never heard back" 0 "time I've called" 0

At the bottom of this page, you can see call recordings matching the search criteria:

CALLS										
Tags	Download	Export	Delete	More	0-12 of 12					
USER	DATE	TIME	DURATION	FROM	TO	TOPICS			TOPIC TOTAL SCORE	
<input type="checkbox"/>		Jul 12, 2021	5:26 PM	0:43	929465868502	837284959 (Valerie Woods)	Resolution Indic... 4	Positive Stateme... 1	Positive Stateme... 1	13
going on. Okay, we'll just have him give me a call back if you don't mind. [redacted] [redacted] [redacted] [redacted]. Okay. Thank you										
<input type="checkbox"/>		Jul 12, 2021	5:20 PM	7:40	853172865418	575429417 (Desiree Jenkins)	Positive Stateme... 2	Positive Stateme... 2		-4
know what that is. It's right underneath the back. It's called back snap navtr which almost sounds like the artist and for										
<input type="checkbox"/>		Jul 12, 2021	5:19 PM	2:50	428972788924	494425002 (Scott Martin)	Ending Statements 2	Positive Stateme... 2		0
I see. Okay. That makes sense. Okay, I guess I'll call back if I have any more questions. I thank you. Bye										
<input type="checkbox"/>		Jul 12, 2021	5:14 PM	2:49	348827038019	584723879 (Dennis Young)	Upset customer -... 3	Positive Stateme... 2		-156
was October 20th was odd first call and then we talked on the 22nd and then we've talked three or four times since then and we're going through my notes here. What										
<input type="checkbox"/>		Jul 7, 2021	7:47 PM	4:05	184319825788	557437735 (Christopher Hicks)	Positive Stateme... 4	Positive Stateme... 2	Agent insecuriti... 2	-13
1/2										

You can narrow down search by selecting criteria in the search panel and clicking Search button. For example, you can choose Group, Call duration, Call direction and other attributes to filter data.

Topic «Subsequent (repeated) Call»

Name: **Subsequent (repeated) Call**
 Tenant: **Acme**
 Speaker: **Customer**

2021/06/15 - 2021/07/20 Trend Period: Week

Call - Duration: **Between** 2:00 - 15:00

Call - Direction: **is** Inbound

Group: **is** Group Savage-Hale

[+ Add criteria](#) **Run Search**

Trends

Interval	Calls	Keywords
Jul 5	4	4
Jul 12	3	4

7. AI Insights

About AI Insights

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

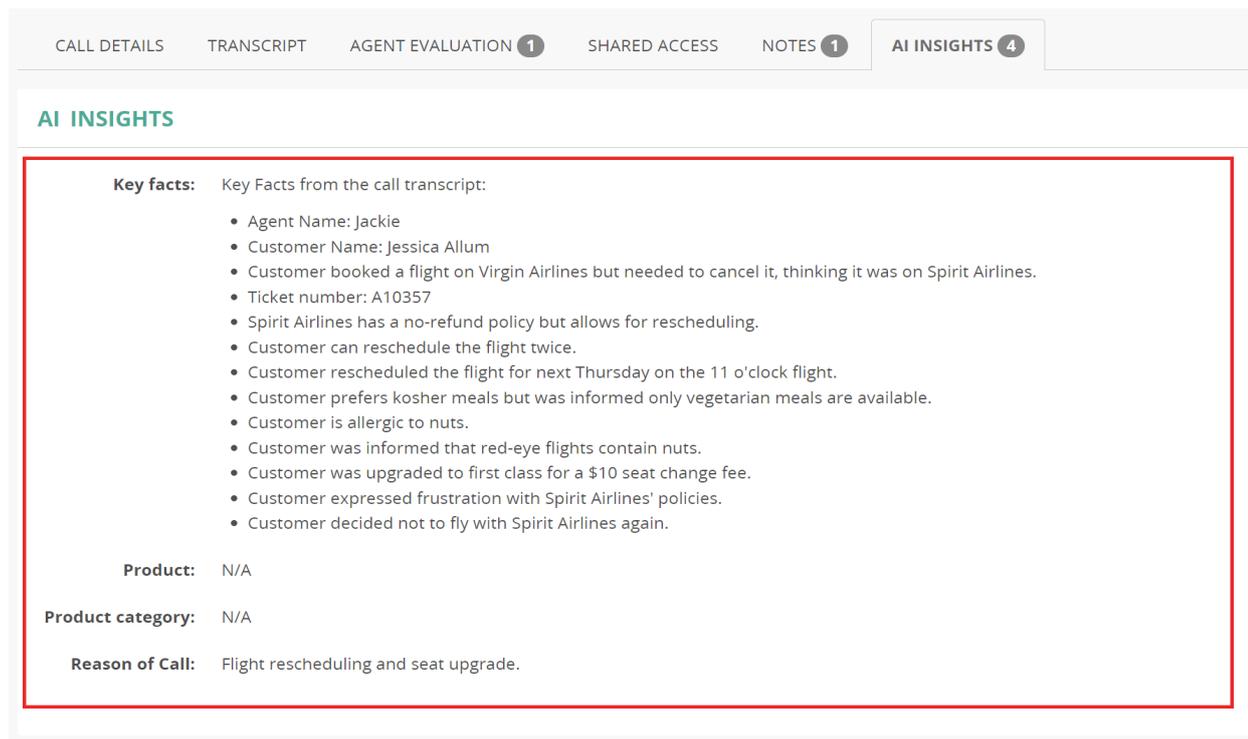
Reason for the call. AI Assistant can choose from one of the pre-defined options, or it can optionally create new options if the call doesn't fall into one of existing categories.

- 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 a subset of AI Insights.

AI Insights allow you to mine the data that is hidden in the conversation. If something was discussed during conversation, it can be extracted from it with AI 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

You can use the extracted AI Insights in the reports, for example, build a report to show a total of received calls with each reason for the call.

Calls by Reason for the call

Report Period: May 5, 2024 - Jun 4, 2024
Report Timezone: America/New_York
Run by: admin (Jun 3, 2024, 10:31 PM)
[More details](#)

Calls - Total	360
Minutes - Total	1,839
# of rows	94

Note: data on the chart is resampled down due to high volume
Minutes - Total

