



## Compliance Recording for Teams

A Crayon Service



# 40% of the workforce plan to leave their jobs\*

\*WHEN FORCED BACK INTO IN-PERSON WORK ENVIRONMENTS

*#thegreatresignation*



# Ready for a hybrid world: Crayon Modern Work

We believe in the power of the individual to achieve the greater good.

Crayon's Modern Work Practice empowers our customers to offer people-centric workplace experiences without compromises on cybersecurity or manageability, tailor made for today's business world.



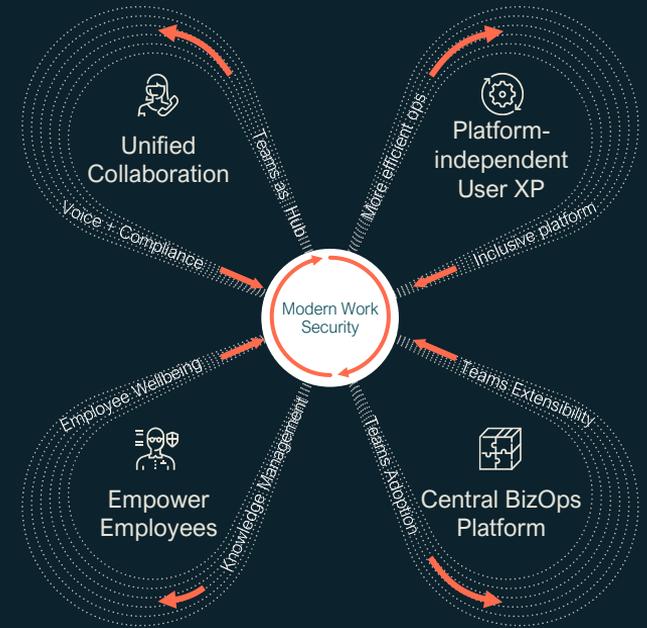
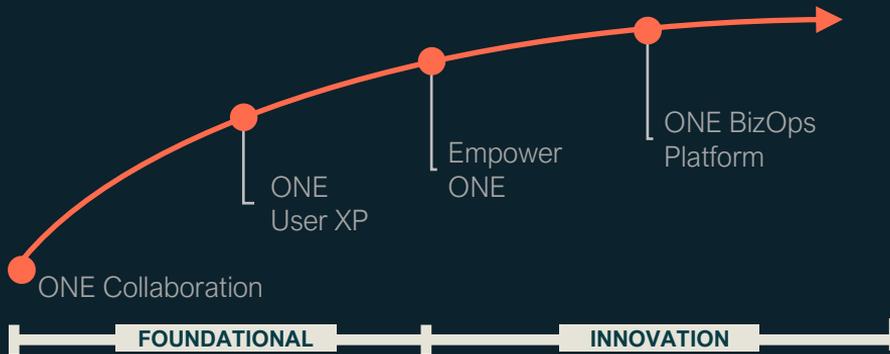
PREPARE THE BUSINESS FOR THE WORKFORCE OF TOMORROW

# Crayon ONE Work

## One Work Mission

- Empower our customers to attract and retain talent
- Master tech-intensity with a people-first IT setup
- Reduce complexity and promote innovation
- Increase efficiency and wellbeing of every individual

Modernizing IT and practices to shape the workplace of tomorrow



DEEP COMPETENCY IN STRATEGIC AREAS OF MODERN WORKPLACE

# Service Model Breakdown

## Global Modern Workplace Services Team

### Teach me how to do it

Delivers tailor-made direct and indirect technology enablement, utilizing industry best practices and Practice Area Training:

Collaboration & Communication

MWP Security

Core MWP Infrastructure

### Do it with me

Delivers end-to-end best practice configurations using Crayon Accredited Accelerator:

Collaboration & Communication

MWP Security

Remote Workplace

Core MWP Infrastructure

### Do it on my behalf

Delivers end-to-end Managed Services using Regional Delivery Hubs:

Remote Workplace

Cloud Backup

Compliance Voice Solutions

Knowledge Graphs

### Modern Workplace Community

Drives Workplace modernization and helps customers to offer secure and managed Modern Work environments

Platform-Independent User XP

Unified Collaboration

Empowering Employees

Central BizOps Hub



## Bridging the compliance gap in Microsoft Teams

Since the begin of the pandemic, Microsoft Teams became a fundamental pillar for thousands of businesses, providing a mission critical platform for collaboration, communication, and inclusion.

While many different industries use Microsoft Teams as their “central hub for collaboration”, regulated verticals have advanced needs for handling their communication from a compliance perspective.

Crayon’s Compliance Recording Service accommodates those customers and caters specifically to their needs.





## TEAMS - COMPLIANCE OFFICER POINT OF VIEW

The built-in recording functionality offers user convenience but does not correspond with advanced compliance needs.

Regulated industries require compliance functionality that allows them to enforce recording and retention, independent of user input and action. Some use-cases go to the extent, that a call can't happen if the recording fails.

Crayon's Compliance Recording Service enables customers within regulated industries to utilize Microsoft Teams as their fully fledged PBX solution, without jeopardizing their legal exposure.

This way, those customers can offer their users a coherent and complete collaboration and communication platform, without any media disruption.

## BUSINESS VALUE

Crayon's Compliance Recording Service enables you to operate Microsoft Teams as your central hub for collaboration and communication, while enforcing state-of-the-art and compliant capturing of voice, text, and video.

### Compliance Recording Use Cases:

- Finance Industry / Investment Banking
- Insurance
- Healthcare
- Providers of core infrastructure (energy / oil / gas)
- Retail
- Customer Service
- Tele Sales





## USE CASE

### Compliance Recording for regulated industries

Industries like Finance/Banking, Healthcare, or Insurance employ sub-groups of users that are held to higher standards when it comes to capturing their communication, compared to unregulated industries. In Investment Banking, calls from the Trading Floor must be recorded by law (CRD (EU) 2017/565).

Crayon's Compliance Recording helps to establish the required recording functionality without impacting the user's productivity or leaving room for human error.

Crayon's Service is certified and helps customers to follow local and EU legislation.



## USE CASE

### Compliance Recording for Customer Service

Verticals like retail, consumer goods, various service industries, and sales have advanced needs to constantly check and adjust the level of customer service they provide. High-paced environments like this often entail various challenges for its users, to maintain manual recording practices.

Crayon's Compliance Recording helps to establish a framework that allows businesses to capture, track, and analyse their customer interactions. This way, businesses are empowered to generate more value from their customer communication, identify trends and apply tailored training & enablement for its employees.

## Key Benefits



**Reduced Compliance Risk**  
Adhere to regulations by capturing records, surveilling regulated interactions and producing compliance evidence



**Internal Controls**  
Monitor employee conduct and adherence to policies from the back-office to the trading floor



**Faster Investigations**  
Speed up the reconstruction of the full context of interactions for investigations and auditing



**Significant ROI**  
Simplify deployment, free up resources and avoid compliance fines and penalties

## EMPOWER MICROSOFT TEAMS

### Crayon's Compliance Recording allows you to:

- Capture voice, video, screen sharing, and other types of interaction within Microsoft Teams callings and meetings – with an integrated, high-availability recording solution
- Facilitate compliance with record-keeping data governance, and monitoring policies under MiFID II, Dodd-Frank, MAR, GDPR, HIPAA, and more to avoid fines and penalties
- Record, manage, label, search, replay, analyze, and easily export interaction streams that should be retained due to internal policies or external regulations
- Simplify, modernize, and automate your recording infrastructure while deploying in the cloud, on premises, or as a hybrid solution



# How does it work?

Crayon's Compliance Recording empowers you to:

- Implement automated recording based on policies
- Integrate multiple compliance storage solutions
- Utilize advanced search, playback, data governance
- Integrate with various transcription engines
- Unify capturing for Microsoft Teams and other platforms
- Deploy on-prem, hybrid, or in public cloud
- Benefit from enhanced security with access control audit trails

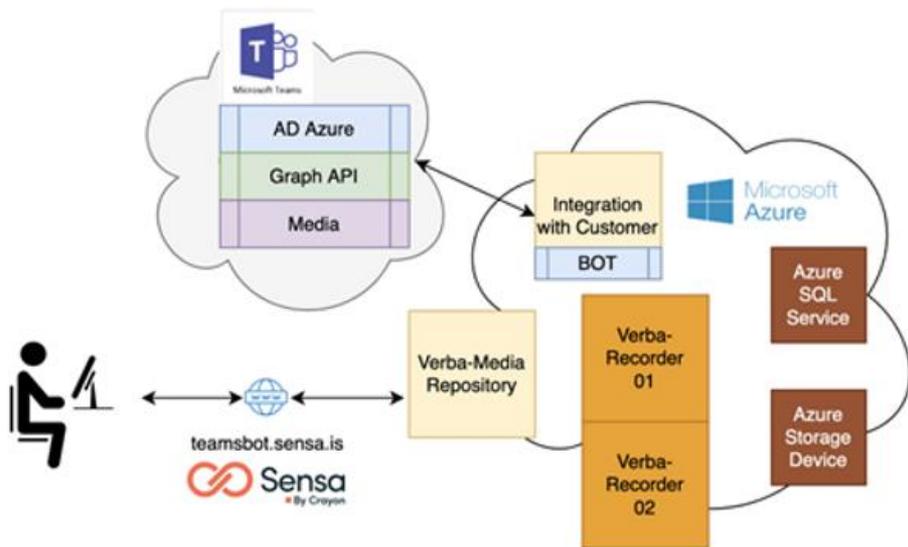


## COMPLIANCE SERVICE

# System Components & Architecture

Crayon's Compliance Recording Service runs PBX independent.

- The following components are utilized:
- Azure Subscription
- Azure Virtual Machines, running Verint compliance recording solution
- Azure SQL Service
- Azure Storage (or BYO)
- Teams Bot for integration into Teams environment



## Service Options

*The pricing for compliance recording depends on various options the service can offer.*

*For a detailed overview, please refer to your Crayon Account Manager.*

### General Setup

- Capture for Teams – Voice Only (1 – 3 years)
- Capture for Teams – Text Only (1 – 3 years)
- Capture for Teams – Voice & Text (1– 3 years)
- Capture for Teams – Voice & Text & Video\* (1 – 3 years)
- Capture for Teams – Advanced\*\*

### Retention

- 3 months retention period
- 5 years retention period

Applies only to Voice & Text in a managed service environment

### Storage

- Standard – Azure Storage managed by Crayon
- Advanced – Bring your own storage (managed by customer)



\* video capturing requires high amount of storage

\*\* video and screen content capturing requires high amount of storage

## MODERN WORKPLACE – COMPLIANCE RECORDING OPERATIONS

# Managed Service

*If Compliance Recording is operated as a managed service, Crayon takes on the configuration, deployment, monitoring, maintenance, and day to day operation.*



### General Setup

- Crayon's System Integrator SENSEA (out of Iceland) deploys and operates the service
- Crayon provides all levels of support (1<sup>st</sup> – 3<sup>rd</sup>)



### Shared Responsibility

- Crayon guarantees service operations up to 99.9% (for details refer to Service Description)
- The customer is responsible for checking the recordings manually, as Crayon is not allowed to listen into those recordings, neither has access to them



### Right fit, when

- you want to consume 'compliant calling' on as a service basis
- You want to outsource the responsibility and operations of your compliance recording platform
- You deal with resource or skill constraints but are mandated to implement a compliant solution for your regulated users



## MODERN WORKPLACE – COMPLIANCE RECORDING OPERATIONS

# Customer Managed Solution

*If Compliance Recording is operated as a customer managed solution, Crayon will offer the required consultancy and professional services to configure and deploy Compliance Recording into the customer environment*

### General Setup

- Crayon's System Integrator SENSEA (out of Iceland) configures and deploys Compliance Recording into the customer environment (Azure tenant, Vms, SQL Service, Storage) based on a statement of work (SOW)
- Crayon will handover the final solution to the customer

### Shared Responsibility

- Crayon is responsible for the initial configuration and deployment of the solution
- The customer is responsible for all aspects of operating the solution, such as: General public cloud setup, backup, redundancy, monitoring & security deployment
- The customer is responsible for managing the compliance service in their own environment

### Right fit, when

- you require consultancy and support for the initial setup of compliance recording
- You want to operate the solution in your own on-premise, hybrid, or public cloud environments



## REFERENCE CASE – COMPLIANCE RECORDING

# Financial Sector

*A leading bank out of Iceland required a solution that enabled compliance recording within their PBX solution. Skype for Business is currently in use and must be migrated to Microsoft Teams as well.*



### Business Problem

- Bank employs 450 highly regulated user (financial institutions + MIFID II)
- Skype for Business is outdated and had to be migrated to Microsoft Teams
- Microsoft Teams' current recording functionality does not meet compliance requirements



### Business Solution

- Implementation of a Teams certified compliance recording solution
- Implementation of necessary security and monitoring capabilities



### Outcome

- Microsoft Teams meets user expectation and acceptance
- Monitoring is provided by Crayon (Sensa in Iceland)
- All regulations requirements are met



## USE CASE – COMPLIANCE RECORDING

# Customer Service in Retail

*Understanding customer motivation within Customer Service Line and implement QoS within the Customer Service Team*



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