

GUIDE

Every Conversation, Captured and Understood

From Contact Centers to Conferencing
and Calling



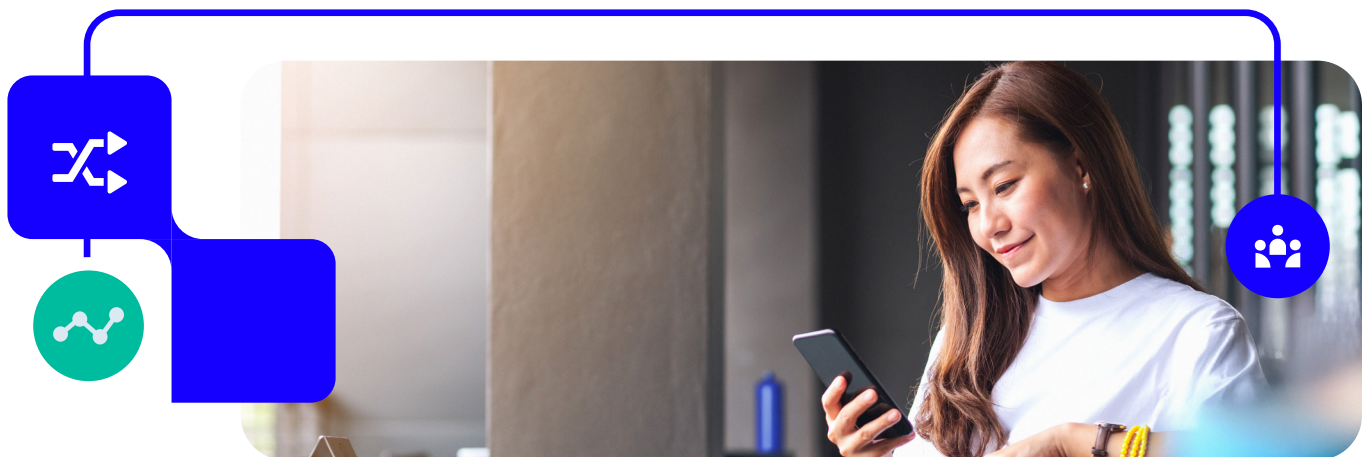
Conversations carry risk — and opportunity

Voice remains the channel of choice for service, sales, and high-value transactions. Customers rely on it for advice, approvals, and urgent issues — moments that matter most to your business. Yet conversations now span various platforms, including Microsoft Teams, Zoom, Cisco, Webex, Avaya, RingCentral, and mobile carriers. If even one interaction isn't securely recorded and retained, the consequences are real: regulatory fines, customer disputes, and missed insights add up quickly when voice isn't unified.

At the same time, the expectations for speed and intelligence have never been higher. Customers and regulators demand immediate access to complete records, IT leaders need scalable solutions, and data teams want actionable insights from every interaction. Voice is no longer just a record of what was said. It is a strategic asset that, when unified and enriched, fuels data privacy, regulatory compliance, efficiency, and growth.

Conversations transformed into lasting, actionable sources of intelligence.

Smarsh Call Recording and Analytics cuts through the complexity of scattered voice systems. Whether from calling, conferencing, or contact center, every conversation is securely captured, encrypted, and preserved in a single, trusted system of record. Compliance leaders gain confidence with defensible records, IT eliminates the cost of and risk of fragmented tools, data teams finally integrate voice into the enterprise data fabric, and quality leaders coach with complete visibility. What was once an ephemeral conversation becomes durable, trusted data that is structured, enriched, and ready for analysis, insight, and action.





Voice capture, built for AI and compliance

Trusted globally to preserve every word with full context for compliance and insight

When conversations are scattered across communications platforms and mobile networks, the risks multiply. Gaps emerge in data privacy and regulatory compliance. IT faces mounting complexity from fragmented tools, and leaders lose the ability to turn everyday conversations into actionable intelligence. The results are real: escalating fines, inefficiency, missed opportunities, and customer frustration.



Compliance risk

Regulators are watching. Since 2021, firms have paid more than \$3.5B in fines for missing or incomplete records, including voice. Every uncaptured call on Microsoft Teams, Zoom, or a mobile device is a potential violation. The cost of noncompliance is measured not only in penalties but also brand reputation.

Data privacy exposure

Conversations often include sensitive information — payment details, health records, and other personal identifiers. Without automated redaction and strict access controls, firms risk exposing customer data and violating privacy laws like GDPR, HIPAA, and PCI DSS. A single lapse can erode trust and invite regulatory penalties.

IT burden

Managing multiple recording solutions creates technical debt and complexity. Disconnected systems inflate costs, stretch IT resources, and open cyber risks. Legacy tools were not built for today's hybrid environments. The longer they remain in place, the harder they are to secure and scale.

Lost data value

Voice is one of the richest, most unstructured forms of communication. When it isn't captured and unified, it cannot be part of enterprise analytics. That leaves leaders blind to customer intent, employee sentiment, and operational signals that help drive revenue, efficiency, and growth.

Quality blind spots

QA teams can't coach effectively without full visibility. Random sampling of calls misses sentiment shifts, agent missteps, and early churn indicators. Customer trust erodes when issues go undetected, and training programs fall behind when they rely on incomplete data.

The Smarsh difference

Smarsh Call Recording and Analytics turns risk into resilience by capturing every conversation in full context — making it secure, searchable, and ready for AI.



Unify voice and communications data seamlessly

Compliance and security

Capture and protect every conversation to meet the world's toughest regulations.

- **Compliant call recording:** Capture every word across Microsoft Teams, Zoom, Webex, Avaya, and more.
- **Enterprise-grade encryption:** Protect sensitive data with rotating 256-bit AES encryption.
- **Legal hold:** Preserve calls beyond retention periods to support disputes or audits.
- **Compliant call sharing:** Share recordings safely through controlled links instead of risky downloads.

Flexibility and control

Scale seamlessly while maintaining control over retention and sovereignty.

- **Deployment choice:** Cloud, hybrid, or on-premises to match your IT strategy.
- **Unlimited storage:** Retain every record without limits, ensuring instant accessibility.
- **Custom retention policies:** Align with evolving global and local compliance rules.



Core oversight

Speed reviews, protect context, and support better investigations.

- **Advanced playback and tagging:** Quickly locate and organize calls for audits and coaching.
- **Screen and video capture:** Preserve full context of conversations for compliance and training.

Turn conversations into actionable intelligence

AI-powered insights

Simplify compliance while unlocking more value from voice data.

- **Transcription and summarization:** Automate review, save time, and surface insights.
- **Multilingual transcription:** Support global teams with accurate transcripts.
- **Data redaction (PII, PHI, PCI DSS):** Automatically protect sensitive data.

Quality and performance

Improve coaching, boost performance, and raise CX and EX.

- QA & agent evaluation tools – No-code scorecards and dashboards.
- Detailed voice analysis – Analyze tone, keywords, and conversation patterns.
- Sentiment analysis – Detect churn risks and customer dissatisfaction early.

Advanced Analytics

Empower every team with faster, self-service insights and proactive risk detection.

- **Generative AI queries and AI Agent:** Ask questions in natural language to uncover insights.
- **Drag-and-drop dashboards:** Tailor views to each department without IT.
- **Automated email summaries:** Deliver updates directly to stakeholders.



Every conversation, captured with confidence

When every interaction is captured, secured, and enriched, risk turns into resilience. Smarsh Call Recording and Analytics equips every leader with the tools they need – from compliance officers to IT architects, data strategists, and quality managers. The result is more than regulatory peace of mind: it is a foundation for efficiency, intelligence, and stronger customer and employee experiences.

1

Compliance leaders

Global regulations grow stricter each year, from GDPR and MiFID II to HIPAA, PCI DSS, and Dodd-Frank. Smarsh Call Recording and Analytics ensures every conversation is securely captured, encrypted, and archived. Compliance teams can quickly respond to audits, investigations, or disputes with complete, defensible records that stand up to regulatory scrutiny.

2

IT leaders

Managing multiple siloed recording systems is costly and inefficient. Smarsh consolidates them into one secure, cloud-native platform that scales globally while respecting local sovereignty rules. IT leaders simplify infrastructure, reduce overhead, and eliminate legacy systems – all while gaining the resilience and security modern enterprises demand.

3

Data leaders

Voice data is one of the most underutilized assets in the enterprise. Smarsh unifies voice alongside email, chat, and collaboration tools to create a 360° view of customers and employees. With voice as structured, searchable data, leaders can feed AI models, identify revenue opportunities, and uncover risk signals faster than ever before.

4

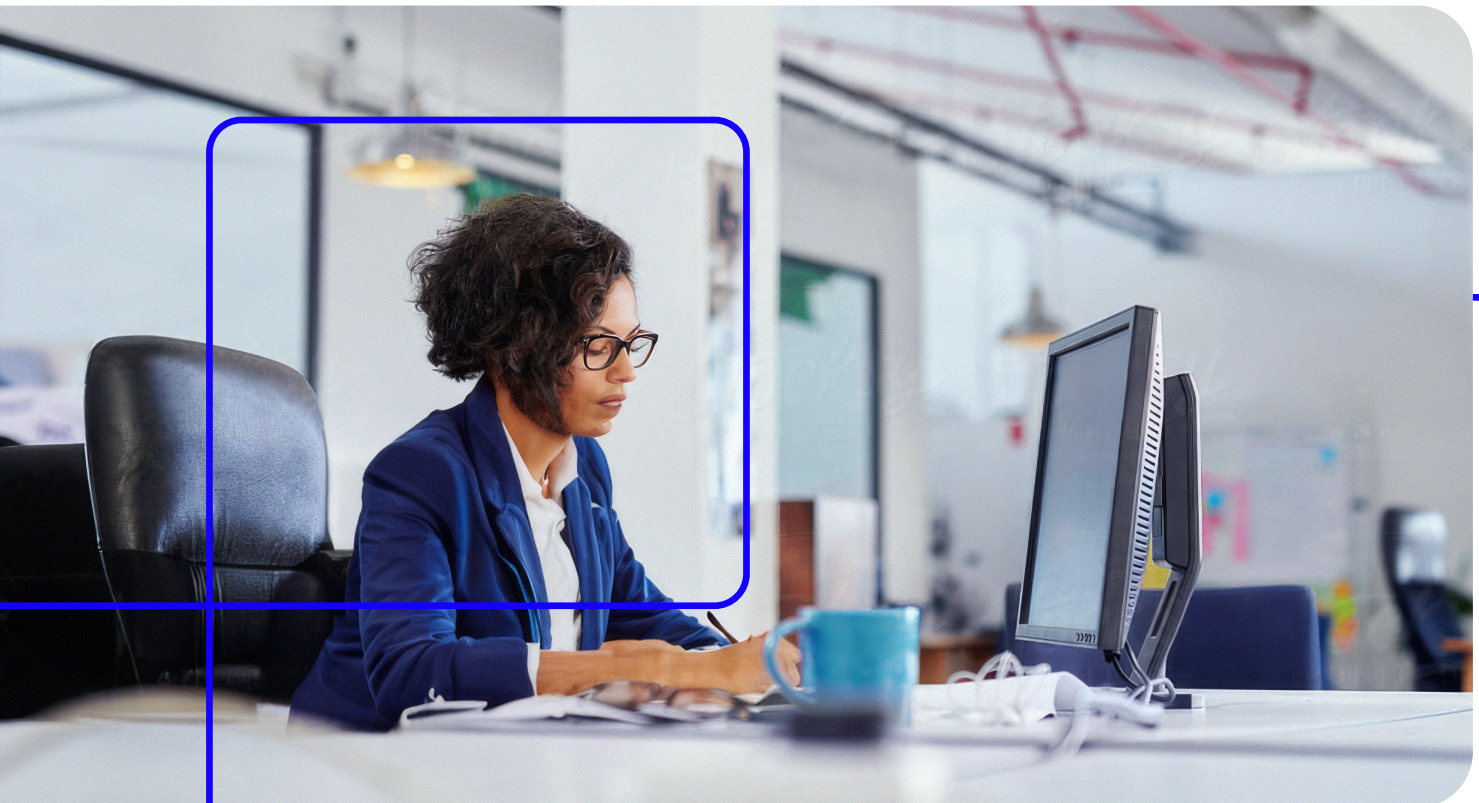
Quality leaders

Quality assurance depends on full visibility into customer interactions. Smarsh replaces random call sampling with continuous, automated QA powered by AI. Supervisors gain dashboards, sentiment analysis, and detailed agent performance metrics. Training and coaching improve in near real time, boosting customer satisfaction and reducing churn.

5

The perfect time to unify

Quality assurance depends on full visibility into customer interactions. Smarsh replaces random call sampling with continuous, automated QA powered by AI. Supervisors gain dashboards, sentiment analysis, and detailed agent performance metrics. Training and coaching improve in near real time, boosting customer satisfaction and reducing churn.



Smarsh Solutions Matrix

Solution Attributes	Core Recording License	Advanced Recording License	Conversation Analytics
Compliant Call Recording	✓	✓	✓
Cross Platform Integration	✓	✓	✓
Advanced Playback & Tagging	✓	✓	✓
Admin Licenses	✓	✓	✓
Unlimited Audio Storage	✓	✓	✓
Customizable Retention Policies	✓	✓	✓
Compliant Call Sharing	✓	✓	✓
Legal Hold	✓	✓	✓
Call Reporting Dashboard	✓	✓	✓
On-Demand Transcription and Summarization	✓	✓	✓
Enhanced Call Listing Page	✓	✓	✓
Enhanced Call Details Page	✓	✓	✓
Screen Capture and/or Video Recording		✓	✓
Manual PCI DSS, PII, PHI Redaction		✓	✓
QA & Team Member Evaluation Tools		✓	✓
QA Supervisor License		✓	✓
API Support		✓	✓
Automated PCI DSS, PII, PHI Redaction			✓
AI Agent			✓
Automated Transcription			✓
Sentiment Analysis			✓
Detailed Voice Analysis			✓
AI data analysis of multiple data sources (Email, Chat, and Social Media)			✓
Multilingual Transcription			✓
Call Suppression			✓
Full-Text Search			✓
Automated QA Scorecard Editor			✓
Custom Dashboards (Overview, Agents, Agents Performance, Interactions, Customer Experience, Business Risk, Customer Satisfaction, CX Self-Service Automation Identification, Phrase Hits Analysis)			✓
Summarization			✓



Looking to simplify compliance and get more value from your voice data? Let's talk. Explore how you can capture, govern, and act on every conversation.

Talk to An Expert



Smarsh® enables companies to transform oversight into foresight by surfacing business-critical signals from the most in-demand communications channels. Regulated organizations of all sizes rely upon the Smarsh portfolio of cloud-native digital communications capture, retention and oversight solutions to help them identify regulatory and reputational risks within their communications data before those risks become fines or headlines.

Smarsh serves a global client base spanning the top banks in North America, Europe and Asia, along with leading brokerage firms, insurers, and registered investment advisors and U.S. state and local government agencies. To discover more about the future of communications capture, archiving and oversight, visit www.smarsh.com.

Smarsh provides marketing materials for informational purposes only. Smarsh does not provide legal advice or opinions. You must consult your attorney regarding your compliance with applicable laws and regulations.

Guide - 10/25



1-866-762-7741



www.smarsh.com



@SmarshInc



SmarshInc



Company/smarsh