SKYPE FOR BUSINESS
Ready for Compliance?

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For more information on today’s topic please visit: www.HolisticSurveillance.com
Is Skype for Business ready for Compliance?

1. Global Regulations for Voice Communications
2. Skype for Business for Back-office communications
3. Recording of Back-office communications
Existing regulations

- Dodd-Frank* stipulates the ability to quickly and accurately reconstruct trades

- The Market Abuse Regulation (MAR) stipulates keeping records of all telephone and electronic communications

- MiFID II requires to record and monitor all communications to detect market abuse

*) Dodd-Frank Wall Street Reform and Consumer Protection Act
New regulations are on the rise

- SEC Adopts Business Conduct Standards
- The Bank of International Settlements Creates a FX Global Code
- EBR European Benchmark Regulations
• Recording of telephone conversations and electronic communications
  - ESMA expects firms to record all internal telephone calls or electronic communications regarding the handling of orders and transactions.
  - The monitoring should aim at ensuring that the records accurately reconstruct the audit trail of a transaction.

• Record keeping
  - ESMA expects firms to deliver or make available copies of these records in an unencrypted and easily analysable format, or provide the means that such data can be unencrypted when requested by the client, competent authority or other competent third party.
Modern Workplace | Skype for Business

Identity | Productivity | Asynchronous & Synchronous Comms & Collab

AAD | Office | Exchange | SharePoint | Groups | Skype | Teams | Yammer

@akaleem | Aamer Kaleem | Microsoft Corp
50 Billion voice Skype minutes
Three Trillion video Skype minutes
500 Million Android downloads
100 Millions Meetings every month
Category Leader

**Chat-based Workspace**
- Teams

**Mail & Calendar**
- Outlook

**Voice, Video & Meetings**
- Skype

**Co-Creating Content**
- Office 365 ProPlus

**Sites & Content Management**
- SharePoint

**Enterprise Social**
- Yammer

**Introducing Microsoft Teams**
- 84% share of cloud email for Fortune 1000

**100M meetings each month**

**Co-authoring**
- across desktop, mobile, web

**190M end users**

**85% of Fortune 500**
Complete cloud communications with Skype

Chat, voice, HD video, & conferencing across devices

Unify your global phone systems with Cloud PBX

PSTN Conferencing that includes a dial-in number

Make and receive calls with PSTN Calling plans
100 million meetings conducted each month using Skype services

Voice
Complete cloud communication

- Provide one platform for meetings and voice
- Reduce voice and conferencing costs
- Connect to meetings and each other from virtually anywhere, on any device

Cost savings

“We estimate that we will save about [US]$100,000 a year by standardizing on Skype for Business Online. This savings results from reducing the use of third-party conferencing providers, long-distance and toll calling contracts, and PBX and phone systems.”

- Niv Dolgin, Director of Enterprise Infrastructure, Ixia
Cloud Communications

PSTN Conferencing

- Use a toll-free dial-in number to join meetings from any device
- Dial out to bring participants into the meeting

Cloud PBX

- Centrally manage users for communications, email, and content from Office 365
- Eliminate separate PBX systems and transition to the cloud

PSTN Calling*

- Subscribe to calling plans from Office 365
- Use existing phone numbers or get new ones

*PSTN Calling is an add-on to Office 365
Business Scenarios Enabled by Skype for Business

**Remote expert**
with Victor, a small business owner

**Benefits**
- Reduce staffing cost for branches
- Improve staff productivity (operating profit for most of employees)
- Improve customer satisfaction and retention by providing access to specialists

1. Uses device (Windows, iOS, Android) to video conference with specialist
2. Completes and signs form at the branch
3. Advisor facilitates interaction with specialist

**One-to-many video events**
with Mike, a mortgage specialist

**Benefits**
- Engage with community
- Reinforce relationships and attract new customers
- Promote small and medium business services
- Save costs associated with in-person seminars (e.g., event setup, catering, staffing, etc.)
- Customers can use any browser, on any device, with no plug-in required

1. Advertises an online educational webinar on bank website and via email
2. Conducts mortgage-focused educational seminar via Skype Meeting broadcast
3. Customers (current and potential) attend remotely by video

**VIP alerting**
with Stacy, a personal banker

**Benefits**
- Improve customer satisfaction and retention of high-value clients
- Improve branch revenue and financial productivity per customer
- Reduce staffing cost for branches

1. Receives automated alert on Skype for Business that VIP customer is in branch
2. Creates VIP customer and mentions referral
3. Initiates video conference between VIP and their specialist
4. Advisor facilitates interaction with specialist

**Telecommuting**
with Claudia, a financial advisor

**Benefits**
- Reduce office space costs with ability to implement flexible workplace policies
- Increase customer satisfaction by leveraging expertise from employees working anywhere
- Improve employee retention with flexibility to work from anywhere

1. Works from home at to hear telecommuting program
2. Uses Skype for Business from their home computer to answer work calls, attend meetings, etc.
Flexible options

On-Premises
End-user features & customer PSTN services integrated on-premises
- Control
- Integration
- Compliance
- Dedicated hardware

Hybrid
Users online or on-premises; integration with PSTN services on-premises
- Flexibility and scale
- Increased functionalities
- Cloud connected
- Extend reach

Online
Cloud PBX in Office 365; PSTN services provided by Microsoft
- Reduced capital costs
- Reduced overhead
- O365 reliability
- Instant scale
UniCredit, a €1 trillion bank with 9,000+ branches, plans on using Lync and Skype Federation to make it easy for customers to connect to a specialist. In the near future, a customer at a kiosk in a small bank branch could initiate contact with a specialist.

**Benefits**

- Improves customer communication to help improve customer service and retention
- Supports flexible workplace to help reduce cost
- Reduces travel by 10% (projected €100 million savings)

“We want to enable the bank to be visible and make it as easy as possible for our customers to connect with us.”

— Wolfgang Müller, Expert System Specialist UniCredit Business Integrated Solutions
Skype for Business

Latest Updates

PSTN conferencing in

90 countries 400+ cities

Continue to expand PSTN calling footprint
US, UK, France* & Spain*
*in preview

Regionally hosted meetings

Microsoft Teams for digital teams
Skype Developer Platform Overview

Experiences
- Devices
- Appliances

Authoring
- Android
- Apple
- Microsoft .NET
- HTML5

APIs/Services
- Calling
- Messaging
- Sharing
- Management
- Federation
- Meetings
- Presence
- People
- Network
- Interop

Cloud/Networks
- Skype for Business
- Skype
- Office 365
- Microsoft Azure
- PSTN

O365 Services – Microsoft Graph
## Category Solutions Require Spectrum of Custom PBX Apps

### Inbound Contact Center
- Custom mainline IVR
- Voice LOB automation (e.g. prescription refill)
- Enterprise information agent
- ACD: Custom queuing (e.g. park, priority, failover)
- ACD: advanced routing
- Skills-based routing
- Call-flow editor
- Outbound dialing for apps
- Ad-hoc conferencing
- E911 notifications
- Malicious call trace
- Ethical walls
- Call Recording
- Per-user disclaimers
- Policy-based announcements
- Estimated hold time
- Callback
- After-call survey
- Attendant Console
- Agent Desktop
- Customer click-to-call
- DECT / WiFi Phones
- IP speakers
- Analog devices

### Outbound Intelligent Dialer (predictive, progressive, preview)

### Attendant Console
- Attendant Console
- Agent Desktop
- Customer click-to-call
- DECT / WiFi Phones
- IP speakers
- Analog devices

### Emergency Notification and Paging
- DECT / WiFi Phones
- IP speakers
- Analog devices

### Compliance Recording

### Custom PBX Apps

### Interactive Response

### Call Distribution

### Call Control / Media Capture
- Outbound dialing for apps
- Ad-hoc conferencing
- E911 notifications
- Malicious call trace
- Ethical walls
- Call Recording

### Announcements / Hold Treatments
- Per-user disclaimers
- Policy-based announcements
- Estimated hold time
- Callback
- After-call survey

### Business / Devices Integration

### Platform

- Interactive Response
- Call Distribution
- Call Control / Media Capture
- Announcements / Hold Treatments
- Business / Devices Integration
Skype is ready now

World class user experience

Worldwide availability

Extensive partner network
Office 365 built for hyper-scale

- 300B user authentications handled
- 38% of Global international calling mins
- 265 petabytes of data stored
- 70M+ Monthly active users
Activate Office 365 E5
Compliance Requirements for Skype for Business

- Securely Record All calls
- Record Encrypted calls
- Rich Call Metadata
- Centralized Recording
- No Single Point of Failure (Redundancy)
- Recording not visible to Skype users
  - No negative user experience impact
  - No desktop client
Compliant Focused Total Recording Platform

**Strategic**
- Future proof
- New Business Applications
- Multi-channel
- Flexible Archiving

**Scalable**
- Front-Office
  - all Trading Systems
- Back-Office
  - all major IP PBX systems
- Mobile Phone recording
- Central Portal

**Secure**
- Secure Recordings
- Secure Access
- Secure Storage
- Secure Replay
NICE Trading Recording (NTR)

- Offers the Essential Communication Compliance Needs for Trading Floors

- Largest Back Office Monitoring 40,000 Users
- Largest Trade Floor 8000 Channels
- 500,000 IPT Back Office Channels Globally
- Billions of Interactions Securely Captured and Archived with NICE

Proven Success
NICE Compliance Framework

Business Solutions

Application Framework
Applications Portal, Workflows, Dashboards, Reporting, Unified Administration

Archive & Analytics
Data integration, Cross-channel analytics engines, Structured and unstructured data warehouse, Business entities and Operational data

All Communication Channels
Capture layer of Trader Voice, Cisco, Skype Voice, text, video and other communication channels

Additional Data
Transactional and other data
NTR Fusion for Central Portal

- Use one Central Portal for all NTR Recording Servers
- Centralized User Administration
- Centralized Search & Replay
- Roles Based Access Control
- Bulk Operations & Rules

Single Portal for ALL Compliant Voice Recording Operations
NTR Managed Content Lifecycle

• On Capture Servers
  • Local buffer
  • Encrypt/fingerprint
  • Push to Core

• On Data Management Servers
  • Local buffer
  • Add Retention on Content and Metadata
  • Push to Archive
  • Option to Add Litigation hold
Capturing Skype for Business Voice

1. The Front End Server sets the Recording Target (extension to be recorded)

2. The **NICE Proxy** is introduced between the Front End Server and the NICE Recording

3. The NICE Recording Satellite is selected for the recording

4. The IP address of the Recording Satellite send to the Front End Servers as the Recorder Audio Destination

5. The Audio is forked from the Proxy to the Satellite
Summary

- Easy to deploy
- Total recording
- Secure
- Fast

- ONE Recording solutions to record ALL calls
- Enables recording of all endpoints that are selected for recording
- Secure Audio is relayed to the NTR Recording Servers
- Recording is enriched with metadata for fast and accurate search and replay
The Holistic view on Compliance

Aggregate

Analyse

Control

Connect to all communication vaults

Index and analyze all interactions

Review alerts and start investigations

Supervision

Investigate

Explore

Observe

Review

Investigate

Dashboard

Reports

Ingestion Linguistics

Universal Index

Analytics

Risk Scoring

Thank You

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