NATILIK

Staysure GROUP

CCaaS RFP Project

Solution Proposal

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Contents

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The contents of this document are confidential and must not be disclosed outside of Natilik and the organisation that it is prepared for unless otherwise agreed.

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1   Executive Summary

Natilik are excited to provide this CCaaS proposal to support Staysure on their transformational journey to becoming a Digital First Business, enhancing their communication & service delivery capabilities in providing tailored travel insurance. To continue raising the bar with award-winning service and recognised as the trusted & go-to experts.

There are several outcomes defined by Staysure which Natilik believe will positively impact a broad range of stakeholders across the business, IT & end user communities. These have been identified by Natilik here at the outset, & we intend to prove that our solution delivers against them as we engage throughout this RFP process.

Stakeholder	Desired Outcomes
Business	Leveraging Data efficiently to deliver: • Better insight into why customers have called & how they felt about the interaction & experience with Staysure. • Improve Quality Assurance processes & outcomes.
IT	Remove complexity & legacy infrastructure. Support business growth aspirations through greater agility Operate from an all-encompassing AI driven platform & a single interface
End User	Empowering your people, giving them better tools to learn Lower time to competence & raise performance

Table 1: Solution Outcomes

Natilik are confident that our proposed solution delivers against these desired outcomes & believe that Staysure will also benefit from **significant cost savings.**

As part of the initial design Natilik are proposing a solution based on the world leading NICE CXone platform. It is the only unified customer communications platform that combines leading CCaaS, WFO, Analytics, Advanced AI, Digital and Self-Service technologies, making NICE CXone the world leader for empowering organisations to transform their customer and employee experiences. Named 9x as the leader for CCaaS and AI Expertise in Gartner's Magic Quadrant, NICE invested $334m in R&D last year alone, with over 6,000 customers trusting NICE.

Natilik will look to leverage Staysure's investment in NICE IEX WFM as part of this cloud deployment, Natilik will seamlessly integrate Staysure's existing instance into the new CCaaS platform, enabling Staysure to ingest voice and digital channels to accurately forecast, schedule and see the true value in the unified solution.

In order to take seamless, secure and fast payments over a channel of Staysure's choosing, Natilik will be leveraging Sycurio, a powerful payment compliance solution. This removes all responsibility from the agents and ensures that Staysure are fully PCI compliant.

All of which will be underpinned by Natilik's Enhanced SIP to provide a flexible, secure & fully integrated telephony network. Natilik would like to offer a free billing assessment/workshop to present back the immediate savings that can be found on inbound/outbound calls. As an example, we recently helped a large national retailer save over £500,000 per annum, simply by switching their 0800 numbers to 0300. Additionally, by transferring to Natilik SIP, we can provide Staysure with a bundle of **free inclusive minutes per month**:

Natilik's recommendations on NICE CXone licence packages & any add-ons, with commentary as to the value they would bring to Staysure are highlighted in the Solution Overview section of this proposal.

As with any major Contact Centre migration project, a lot of time & effort will need to be spent designing the overall solution & migration plan. This is an area Natilik excels in, with extensive experience in migrating customers from on premise Calling & Contact Centre solutions to the cloud. **Capital One**, **the AA**, and **Homeserve** are examples of where we have done this successfully. Natilik focus heavily on all aspects of the solution from the high-level to low level design, functional & non-functional workshops, end user requirements, training & a proven methodical approach to migration.

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Finally, a word of thanks to Staysure & all involved in this process. Natilik look forward to further collaborative engagement in refining the solution & hopefully progressing to the next stage of the process. Natilik believe the combination of the proposed technology & our experience of delivering these types of projects will produce the perfect solution for Staysure & a long-term partnership that will breed mutual success.

2 Why Natilik

Specialising in Customer Engagement, Collaboration, & Connectivity Solutions, Natilik supports organisations like Staysure, in enhancing communication through the implementation of hybrid workspace, CCaaS & UCaaS solutions alongside seamless connectivity, management, security & observability tooling. Natilik are also an accredited **NICE** & **Microsoft** partner & have worked with a range of clients in delivering fully integrated collaboration & contact centre capabilities.

Additionally, Natilik provides networking solutions, focusing on optimising, & improving the connectivity & efficiency of IT infrastructures & this encompasses the design, implementation, & management of those network systems. With Security being a key area of focus for Natilik customers, cybersecurity solutions are provided by Natilik to safeguard digital assets. This involves the implementation of security measures to protect networks, data, & applications. Natilik partners with key vendors to meet the regulatory, compliance & eDiscovery needs of organisations across hybrid workspaces, CCaaS & UCaaS solutions. Natilik also extends its expertise to Cloud Services, assisting businesses in leveraging cloud technologies for storage, processing, & collaboration.

2.1.1 Natilik Managed Services

Furthermore,the Natilik Managed Services ensure the ongoing support & management of implemented technologies, covering monitoring, maintenance, & troubleshooting to ensure smooth operational continuity. Throughout these offerings, Natilik consistently prioritises the seamless integration & performance of technology solutions for some of the most well-known brands across the globe.

Natilik provide a truly global 24/7 "follow the sun" Network Operations Centre (NOC) with accredited engineers employed by Natilik and in region. Extensive experience designing, deploying, migrating, maintaining and supporting some of the most complex Contact Centre's.

Our goal is to be an extension of your team, delivering value & helping you to constantly drive value & innovate with the solutions we provide.

These are some of the reasons why our clients love working with Natilik.

Capability	Coverage	Consistency	Culture	Clients
Experts you can trust	**Supporting your global teams**	**Dedicated to best practice**	**Aligning our values together**	**Your partner for success**
Our highly accredited global team holds a depth of knowledge to define, design and deploy best in class NICE solutions with innovation at their core.	We support clients in over 100 countries worldwide. Operating out of our three centres of excellence in London, Sydney and New York.	Natilik utilises a unified set of systems, processes, governance, and methodology, driving consistent customer experiences globally.	Natilik prides itself in bringing together a group of passionate people united in a common purpose. Put simply, we believe that Natilik is big enough to matter, but small enough to care.	We hold strong partnerships with some of the world's most respected organisations. This is reflected in our consistently high NPS scores and client retention rates.

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65% of IT budgets are spent just to keep the lights on. Which creates a set of challenges…

Rise in BAU tasks
Your IT team are getting tied up in daily tasks instead of focussing on strategic and innovative projects.

Increasing complexity
An ever-growing number of systems, applications and the threat of shadow IT has resulted in complexity and risk.

Widening skills gap
A lack of consistency in team capability has increased outages and constrains business innovation.

Reduced resources
Your team are being tasked to achieve ever greater service levels with limited budgets and internal resources.

The Natilik Manage Service outcome

Empowering you to achieve your business goals with…

Increased innovation
Take the time back to focus on strategic projects and business outcome driven activities, rather than just keeping the lights on.

Reduced complexity
Consolidate your interactions down to just one expert partner, who seamlessly takes care of the day-to-day management of your solutions.

Highly skilled support
Ensure your solutions are not only expertly monitored, but technical knowledge & experiences are openly shared by Natilik's highly skilled experts.

Maximised budgets
Reduce your management overheads and deliver solutions and projects on time, with highly capable resource on-hand to ensure your business goals are met.

There's no 'one size fits all' approach to service excellence …

Outsource	Take care of everything for me
Partner	Manage it with me
Supply	Break-fix

Service Transition Management
Ensuring a smooth and efficient transition of new or modified services into your operational environment.

24x7x365 Tech Support
Providing you with the peace of mind that your technology estate is in safe hands, 365 days a year, 7 days a week.

Service Delivery Management
Bringing together a team of experts to ensure that your Managed Service delivers continuous service excellence.

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Partner

Manage it with me

- Service Transition
- 24/7 Tech Support
- Incident, Alert and Problem Management
- Asset Management
- Service Reporting
- Escalation Management
- Service Delivery and Improvement
- Backup Checks
- MACs
- Vulnerability Management

Features & benefits

- Pro-active expertise
- Regular reporting & insights
- Enhanced resolution timescales
- Minimise risk

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Outsource

Take care of everything for me

- Service Transition
- 24/7 Tech Support
- Incident, Alert and Problem Management
- Asset Management
- Service Reporting
- Escalation Management
- Service Delivery and Improvement
- Backup Checks
- Patch Implementation
- MACs
- Vulnerability Management
- Global Dedicated Resource

Features & benefits

- Fully managed service
- Extension of your team
- Free up your people
- Evergreen solution

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Global Reach

Operating from three centres of excellence, our clients benefit from in-region support across continents.
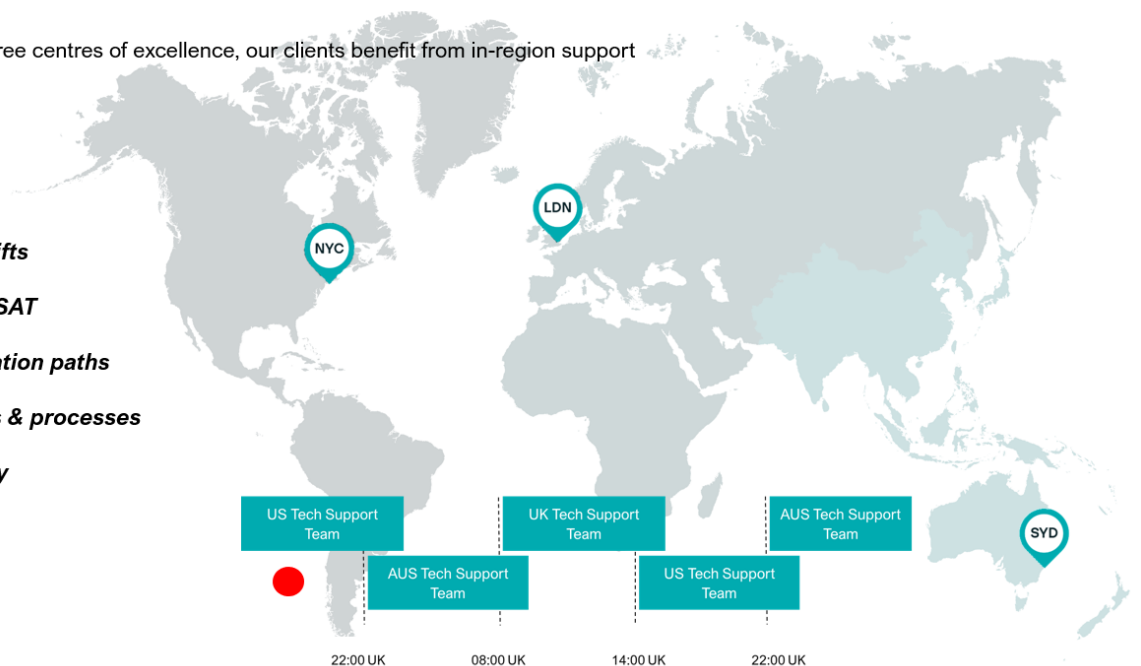
Overlapping shifts

Rewarded on CSAT

In-region escalation paths

Shared systems & processes

Aligned strategy

| US Tech Support Team | | UK Tech Support Team | | AUS Tech Support Team |
| AUS Tech Support Team | | US Tech Support Team | |

22:00 UK   08:00 UK   14:00 UK   22:00 UK

Four reasons to choose Natilik for Manage

95% Natilik fix

96% SLA performance

95% Client retention

98% Client satisfaction

"Amazing project, great work by the team. Went better than I could have expected."

"I think Natilik are great across the board. Pre-sales, post-sales, support, projects, etc. Probably the best supplier I've ever dealt with."

"We could work with suppliers direct, but the reason we come to, & stay with Natilik, is that you are the right experts to guide us through change & are always helping us to improve."

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Natilik Customer Engagement Clients

The client

A leading provider of roadside assistance services in the UK with a fast-growing insurance platform.

Known for its extensive patrols that attend an average of 8,000 breakdowns daily, this British brand has been providing roadside assistance for over 100 years. Further to its roadside assistance, the client also has a vehicle insurance services area that has close to 2 million insurance policies.

Key stats

| 1905	7,500	6	11.9m
Established	Employees	Offices	Customers

The challenge

The client's legacy contact centre platform, which had served the company and its customers well for many years, was reaching the end of its life. More importantly, it couldn't deliver the next wave of innovation that was desired. As a leading provider of roadside assistance, the contact centre delivers critical emergency breakdown services 24/7, 365 days a year, meaning that world class reliability and availability are critical to its success.

The solution

The Natilik Cloud Contact Centre as a Service (CCaaS) platform, powered by Cisco's HCS Enterprise Contact Centre, Teleopti WFM and Eleveo quality management delivers an AI enabled, omnichannel platform.

Developed by the in-house team, the Natilik CCaaS platform combines the best-in-class contact centre technology into one easy to use solution. Plus, CC Navigator, exclusive to Natilik, enables the client's supervisors to route and direct calls as well as reserving agents based on their client's current SLAs, impressively defining how many agents they want to reserve when the SLA goes below certain level.

The solution enables innovation and provides critical services for the client's customers stranded by the roadside, whilst offering support to 1,900 agents and 1,650 knowledge workers.
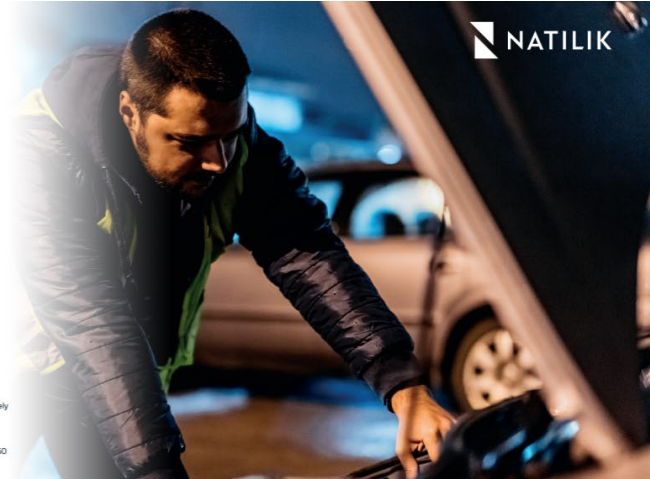
The outcome

Best-in-class technology
The team now have a world class, highly resilient contact centre platform that supports the critical services the client delivers to its customers.

Cost savings
The savings generated by the project will result in a neutral cost over the 5-year term, and alleviates the team from having to complete complex infrastructure management tasks, giving them time back to work on other business critical projects.

Capacity to innovate
The platform will enable the client to deliver the next generation of digital and IoT capabilities though the use of industry leading DevOps tools.

Happy customers
Overall, the project has resulted in an enhanced and improved customer experience.

When asked what Natilik do well?

"Integrated solutions and understanding of business needs mapping to the right outcomes."
Director of Operations

"Amazing project, great work by the team. Went better than I could have expected."
MD of Road Breakdown

A global business aviation company founded in 2004.

The client has been on a journey to revolutionise the business aviation industry by introducing a ground-breaking approach to flying: providing access to a worldwide fleet of private jets without the burden of aircraft ownership.

The client aims to deliver exceptional service to its customers, maintaining customer loyalty and happiness, and therefore appealing to new customers by recommendation. They also focus on empowering their customer-facing teams by using next generation solutions with the relevant AI, insights, and data analytics tools to best serve their customers.

Global fleet
of 350+ private business jets

96%	187
of the world	countries

Client Story: Transport

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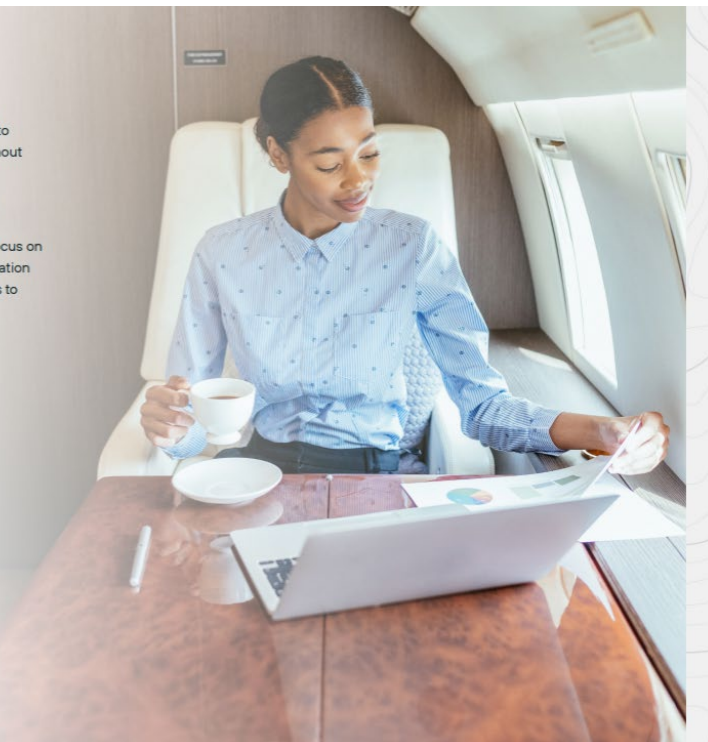
3   The Proposed Solution

3.1 NICE CXone Essentials Suite, WFM & EEM + Recommended ADD ON's

Essentials Suite	NICE CXone
✓	ACD Voice Agent
✓	Digital Agent
✓	Digital Channels
3*	Ports
✓	Integrated Softphone
5 GB	Active Storage
	CXone Audio Recording
✓	CXone Audio Recording Advanced
✓	CXone Screen Recording
✓	CXone Quality Management
	CXone Workforce Management
	CXone Performance Management
	CXone Interaction Analytics
	CXone Feedback Management

NICE WFM + EEM

ENLIGHTEN AUTO SUMMARY

INTERACTION ANALYTICS

ADVANCED QUALITY MANAGEMENT

5GB of Active Storage per month, per agent. Staysure are welcome to arrange for own storage if that is the preference.

Phase 1

Phase 1 - Nice Essentials Suite + (WFM & EEM + Auto Summary)	NICE CXone
✓	ACD Voice Agent
✓	Digital Agent
✓	Digital Channels
3	Ports
✓	Integrated Softphone
5 GB	Active Storage
	CXone Audio Recording
✓	CXone Audio Recording Advanced
✓	Cxone Screen Recording
✓	Cxone Quality Management
✓	Cxone Workforce Management & Employee Engagement Manager
*Natilik recommended Add on ✓	CXone Enlighten Auto Summary

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Phase 2

✓	Cxone Interaction Analytics
✓	Cxone Advanced Quality Management
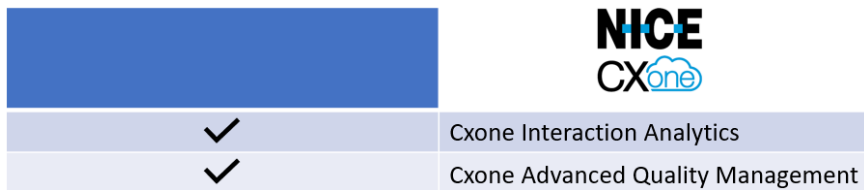
ENLIGHTEN AUTO SUMMARY

Agents either place customers on hold to complete the summary, causing customer frustration & increasing the AHT, or they devote time after the call when they could be focusing on more value-driven tasks. If the most important facts about an interaction are missed or omitted, your organisation is missing the opportunity to deliver a seamless experience.

Using an extensive array of purpose-built AI models delivered by out-of-the-box & generative AI technology, Enlighten AutoSummary reduces costs, improves productivity, & provides relevant information to the next agent.

☑ Liam Davis – Outcomes

Inbound Voice
253-895-8956
NOTES   ✓ Autosum Completed

The customer requested a new insurance card for their daughter, mentioning their employment with the company. The agent confirmed the policy number and offered assistance with ordering the cards. The agent provided a delivery timeframe of 10 business days. They also informed the customer about eligibility for a covered annual physical. The issue was resolved successfully. Customer sentiment was positive.

Save

Capture customer intent and integrate into your analytics program.

Deliver summarized actions based on structured AI and generative AI technology.

Identify key outcomes from AI-based models to monitor commitments. Agents can edit the notes if needed.

Measure customer satisfaction with AI-based sentiment scoring.

High Level Benefits

£ 157,089
Fully Adopted Annual Benefit

5 months
To Breakeven

£ 284,770
3 Year Net Benefit

80% After Contact Work Time Reduction

After Contact Work Time Reduction

Metric	Current State	Conservative	Aggressive
After Call Work - Seconds	103		
NICE Impact – ACW Reduction		80%	90%
ACW Reduction - Seconds		82.4	92.7
Agent Hourly Wage	£ 16.00		
Annual Wage	£ 33,280.00		
Burdened Rate (company paid benefits)	£ 0.25		
Agent Annual Comp Fully Burdened	£ 41,600.00		
Cost Per Call ACW	£ 0.57	£ 0.11	£ 0.06
Annual Call Volume	£ 343,156.00		
Annual Call ACW Cost	£ 196,361.49	£ 39,272.30	£ 19,636.15
Annual ACW Savings - Full Adoption		£ 157,089.19	£ 176,725.34

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INTERACTION ANALYTICS

CXone Interaction Analytics is an optional add-on part of the NICE suite of products which Natilik believes would add tremendous value to Staysure and feel strongly that part of phase 2 we should explore the benefits it can bring to the business.

Interaction Analytics is an AI powered omnichannel reporting & analytics tool that Identifies root cause & trends across 100% of customer interactions & delivers insights through the full customer journey to guide measurable improvements to increase customer satisfaction, detect risk & compliance issues & identify training opportunities to improve operational efficiency. Interaction Analytics identifies sentiment to find trouble areas & detects emotions as a predictor of NPS & performance measurement, all in a single, unified view, & without the help of a data scientist. It empowers agents & enables all business users to uncover insights that impact customer experience.

You might suspect that your customers' experiences vary greatly depending on the contact channel, agent, time of day, & other factors, but tracking this information fully & consistently can be difficult. With CXone Interaction Analytics, your organisation can analyse every interaction to understand what transpired, identify outcomes, & evaluate your customers' experiences across all channels.

- Analyse 100% of your customer interactions to get the full picture from a unified CXone view, plus third-party API applications.
- Categorise interactions based on discussion topics, frustration detection & expressed sentiment makes it easy to see where issues are occurring & what causes them.
- Detect & resolve issues driving down first contact resolution rates through simple analytic tracking strategies.
- Flexibility of usage allows business users across the organisation to login & create dashboards & category sets for different business purposes without having a data analyst background.

Interactive, visual work spaces let you see at a glance what people are talking about

Systematically Target Business KPI Business Improvements

Many contact centres are disappointed when their improvement efforts seem to fall short or take forever to get results. CXone Interaction Analytics helps your organisation pinpoint where the best opportunities for improvement exist across all channels & help you understand in detail what needs to change.

- Categorise interactions based on discussion topics & expressed sentiment to determine where issues are occurring most often & their causes.
- Analyses voice & text channels, including text interactions from external systems, to identify cross-channel dependencies or issues.

Manage Compliance Proactively

It's crucial to understand quickly when & where your organisation is out of compliance before damage is done. CXone Interaction Analytics examines all your recorded interactions to detect when non-compliance actions occur.

- Resolve & address issues before they escalate by automatically detecting potential risk & compliance problems.
- Identify when & where agents are out of compliance by detecting every occurrence through speech & text analytics.
- Make proactive corrections to mitigate compliance risk now & in the future.

Train More Effectively

Agents perform best when training is tailored to their needs, but it can be challenging to determine which topics are the best to focus on. With CXone Interaction Analytics, Staysure can identify specific training needs & topics based on agent interactions with customers.

- Identify the top trends in agent training needs to maximise training effectiveness.
- Review agent interactions based on agent-specific categories & sentiment to identify training or knowledge gaps.

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ADVANCED QUALITY MANAGEMENT

Organisations' customer satisfaction improvement programs often fail to advance their goals. Customer satisfaction surveys miss key insights because of low response rates. Programs that involve evaluators listening to a small random sample of calls & interpreting the results are inaccurate, which means that they also miss key insights.

Enlighten provides immediate value to organisations of all sizes with a single solution including AI enabled quality management & analytics combined to deliver the intelligence required by all stakeholders to make data driven decisions on improving customer experience. It automates the objective scoring of sentiment & behaviours that impact customer satisfaction metrics across 100% of interactions.

Sentiment scoring is a proven predictive indicator of customer satisfaction such as NPS, NPS & CSAT surveys. Enlighten also includes scored agent behaviours that directly impact the sentiment score, such as effectively question, acknowledge loyalty, build rapport & more. Gain immediate visibility into who has the best – or the lowest – sentiment scores & which agent behaviours are affecting it with pre-built models.

CXone Quality Management also allows your organisation to boost agent engagement, increase personal ownership & reduce agent attrition with the quality insights needed to self-improve within a collaborative environment. The agent experience is improved & streamlined with unified, real-time access to their quality performance & feedback from within the agent interface. Agent-centric features such as automated workflows to ask questions or dispute feedback, & the ability to conduct agent self-evaluations, empower your front-line. The solution also allows you to provide agents with access to best-practice examples with training & coaching material to improve the quality of their work.

> ➢ Category Manager for creating your own categories
> ➢ Quality Planner including advanced sampling using analytics categories
> ➢ Search Analytics Categories
> ➢ Coaching & Dashboards
> ➢ Player Tags

3.2 Future-proof Staysure with Enlighten AI

CXone Feedback Management provides customer satisfaction surveys that collect unbiased feedback & deliver immediate comprehensive voice of the customer insights across all channel interactions. Improve your customer experience & employee engagement with an intuitive interface & customizable views enabling agents & supervisors to identify opportunities to self-coach & improve.

Simple interactive dashboards allow quick & easy analysis of survey results. Users can go beyond viewing survey results — empower leaders to effortlessly see inside the minds of customers to better understand& their expectations, perceptions & needs. CXone Feedback Management provides a comprehensive understanding of the customer experience to clearly identify strengths & opportunities with omnichannel customer surveys:

- Capture valuable customer data & use it to improve customer experience, satisfaction & retention metrics
- Recognise & reward agents who receive positive customer feedback
- Increase response rates by providing surveys to customers in their preferred channel.

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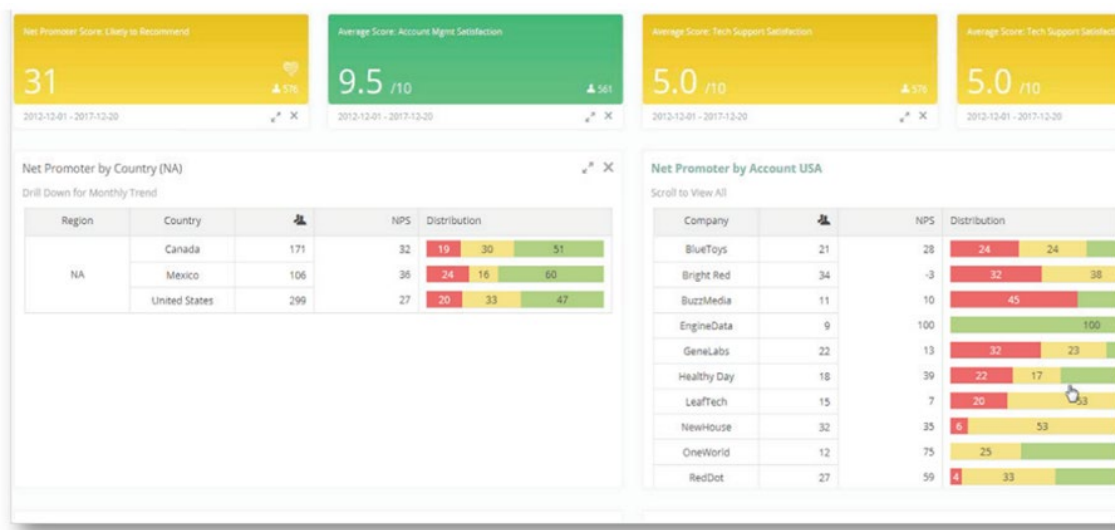
Unlock Detailed Customer Insights

Gain a comprehensive understanding of your customers' experiences, perceptions, & desires to clearly identify improvement opportunities:

- Deliver surveys to customers via voice, chat, SMS, or email to ensure the survey is presented on the channel your customers prefer
- Gather unbiased feedback from your customers, right after an interaction concludes, while the experience is top-of-mind
- Retain "whole picture" context with customer feedback by associating it with the corresponding agent & interaction

Quantify the Full Experience

Exp& beyond the call center to fit the full lifecycle of the customer journey. CXone Feedback Management:

- Fits the full lifecycle of customer journeys, including presales interactions to post-sales service
- Combines omnichannel data aggregation & analysis feedback from individual channels while retaining the ability to view each individual channel
- Provides CSAT-oriented post-interaction surveys & NPS-oriented relationship surveys for a holistic view
- Provides workflow-driven actions provide insights & alerts to create the optimal customer experience across your company

Amplify Agent Coaching Efforts

Easily craft detailed coaching plans based on completed survey data specific to an individual agent or a group of agents. CXone Feedback Management increases agent engagement & reduces turnover by providing unbiased feedback from customers directly to agents. This empowers agents to self-coach & identify opportunities for improvement, driving transparency & a sense of ownership for agents.

Agent Co-Pilot

Enlighten Copilot is purpose-built AI for employees that amplifies skilled labour at a reduced cost, promoting efficient work with fewer repetitive tasks & faster access to knowledge. A collaborative solution designed specifically for agents & supervisors with advanced tools that promote efficient work with conversational knowledge, on-demand & guidance, & task automation.

This by-their-side conversational AI experience acts as an empowerment multiplier to produce accurate, informed, & brand &-specific conversational responses leaving agents with fewer repetitive tasks & faster access to knowledge & answers. Supervisors can provide smarter guided interactions & AI-driven coaching to improve the overall agent & consumer experiences.
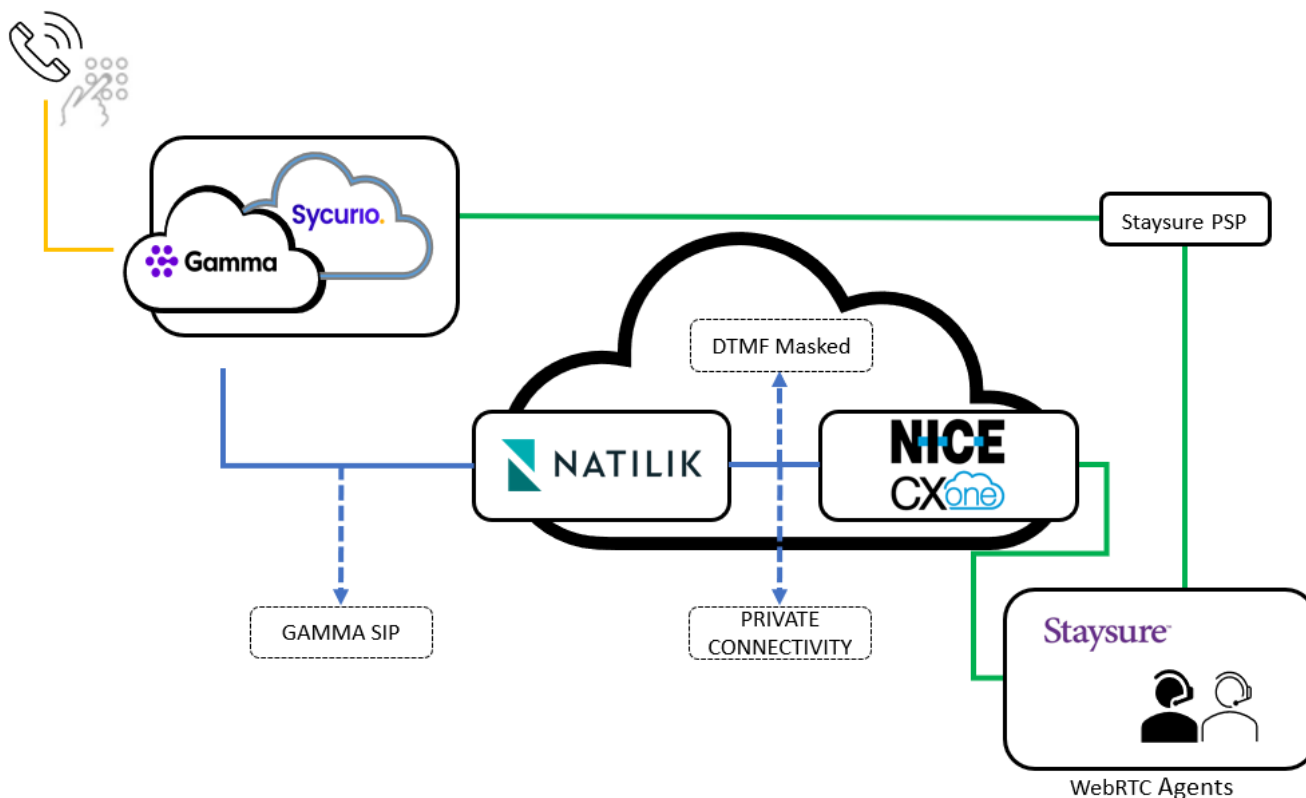
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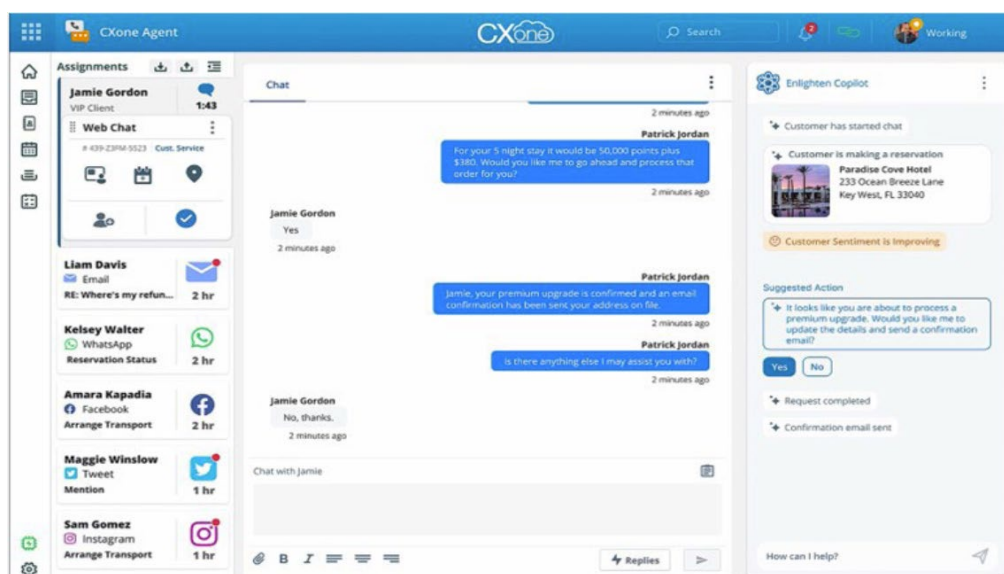
- **Vulnerable Customers**

  With the FCA focussed on ensuring vulnerable customers are effectively identified & prioritised it's important that organisations adopt technologies that can help them meet their regulatory obligations. Leveraging the AI capabilities of NICE CXone clients can ensure: they identify interactions based on the FCA specific drivers of vulnerability, they deliver targeted coaching where required to improve the handling of vulnerable customers, & they provide front-line workers with real-time guidance to help steer conversations in the right direction.

3.3 Solution Design

The proposed design encompasses a blend of cloud technology and private connectivity; delivering a seamless & secure contact centre solution accessed by agent and supervisors over secure internet connectivity from any location.

Our proposed solution leverages:

- NICE CXone as the core cloud-based contact centre solution. The solution out of the box offers a robust web-based agent desktop the leverages WebRTC to deliver calls to the agent irrespective of their location or backend corporate telephony device of choice.
  - We acknowledge that Staysure currently utilises NICE Cloud WFM, which is a crucial requirement to maintain with the proposed solution. Since Natilik is proposing NICE CXone & current NICE WFM is part of the comprehensive solution, we propose leveraging this existing investment to integrate the components seamlessly for a unified experience.
- PSTN connectivity is proposed using our partner Gamma who are on-net with Sycurio. Private connectivity would traverse the Natilik cloud using private links between Gamma, Natilik and NICE CXone. A diagram below is provided for how this solution will be connected.
  - At this moment Natilik has proposed 250 secure PCI enabled SIP channels which can be adjusted based on further workshops with Staysure.
- PCI compliance to allow agents to take payments. Natilik has proposed Sycurio which is integrated at network layer with Gamma & would segregate DTMF card data from the call thus descoping Staysure & the Contact Centre. This solution allows agent to remain connected to agent while taking the payment & allows the call to be recorded while remaining PCI compliant.
  - Sycurio also offer & simplify omnichannel payment methods should Staysure have a requirement to extend payment taking to other channels. Effectively you can take payments over the phone, via digital payment links in chat & messaging, through speech recognition in IVR systems, embedded payment requests into your AI voice- & chatbots & via SMS & emails - all with the minimal PCI DSS compliance requirements.

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3.3.1   NGN and IN Services

Our recommended solution to StepChange includes the transfer of existing NGN numbers to Natilik. Leveraging the core Gamma network,

Inclusion of NGN services within Natilik's solution provides several key benefits:

- By owning the vendor relationships directly, issues can be pinpointed and resolved quicker, reducing service downtime and impact.
- Greater insight can be provided on client experience, through end-to-end call reporting.
- Substantial cost benefits can be passed on to Staysure.
- Following OFCOM's regulatory changes in 2015 making 0800 free-to-call from any UK number, operators of 0800 numbers, i.e., Staysure, have seen the cost of operating those numbers rise significantly; telecoms networks passed the commercial burden for running those services to the organisations publishing them. In response, those businesses have moved to 0300 due to the significantly lower cost for receiving calls, and the lack-of-impact to customers who are typically able to call them for 'free' through their telephone tariff.

We note that Staysure advertise an 0800 number and believe that substantial savings can be created by making a full transition from 0800 to 0300 numbers.
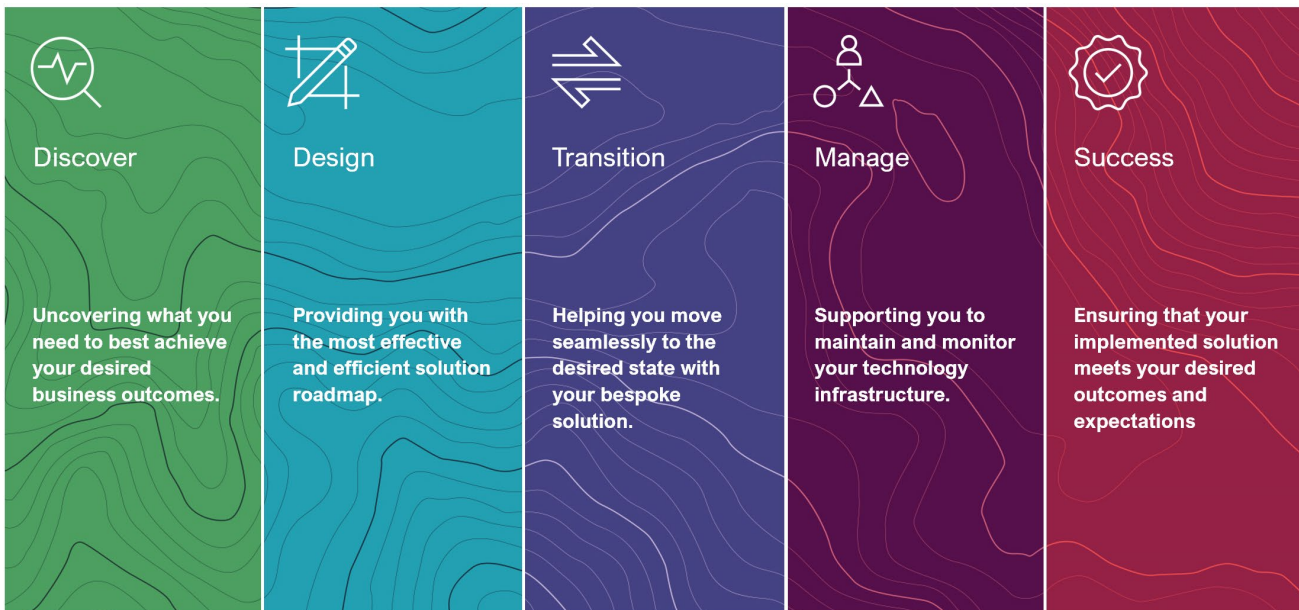
Both Natilik and Gamma have supported many organisations through a programme of change to 0300, and those experiences would be used to help Staysure build a considered plan to realise cost savings without impacting your clients.

Moving to Gamma SIP will entitle Staysure to the following **FREE** inclusive minutes:

1. 5000 minutes per channel, per month to UK Landline numbers per channel, so x650
2. 2000 minutes per channel, per month to Mobile numbers per channel, so x650

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4 Transition Approach

4.1 Natilik Services Methodology

Discover	Design	Transition	Manage	Success
Uncovering what you need to best achieve your desired business outcomes.	Providing you with the most effective and efficient solution roadmap.	Helping you move seamlessly to the desired state with your bespoke solution.	Supporting you to maintain and monitor your technology infrastructure.	Ensuring that your implemented solution meets your desired outcomes and expectations

Natilik have created our services methodology based on Industry best practices & our experience in providing our clients with the best solutions.

By defining these phases, we ensure that we take a logical approach to capturing your requirements, translating that into a solution design & seamlessly handing it in to our Transition teams to bring that solution to life.

This methodology has evolved over time & will continue to do so as we continue to capture & proactively address lessons learnt across all our client engagements.

4.2 Transition Approach

4.2.1 Initiate

The level of detail we follow in the design phase enables us to quickly & smoothly move into the transition & initiate phases. Natilik take the Solution Overview Document from the design phase & work with you to create a full & comprehensive statement of works.

Natilik takes the time to ensure that everything is considered. Natilik take the solution design & expand this to detail & document functional requirements & the specifics of how the solution will work.

4.2.2 Detail

During this stage Natilik are meticulous at defining the project to the finest level of detail; it is this that will ensure the success of your project. Natilik take the solution design along with the functional requirements & produce & validate a detailed design. Natilik identify all of the technical requirements & dependencies. We design system test scripts & focus on staff development, training & adoption plans where applicable.

The Natilik project manager will produce a detailed project plan & co-ordinate resources to meet the defined timescales.

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4.2.3 Build

In this phase Natilik take the detailed design & the engineering team builds the solution. Natilik provision your instance & ensure seamless access. Natilik configure, customise & integrate against your functional requirements & conduct thorough system acceptance testing.

With the solution now in place Natilik focus on transitioning this into an operational environment, conducting migration planning workshops with you & meticulously planning the deploy stage.

4.2.4 Deploy

The fundamental aim of this stage is to ensure a smooth & effective transition to our proposed solution. Natilik work will work with you through to support user acceptance testing & a thorough cut-over review. Natilik ensure that the necessary training is given on the new environment & assist in taking steps to maximise user adoption.

Natilik guide you through the cut-over process by providing comprehensive transition support before conducting a full operational handover & post implementation review. The final step of the process is to ensure a smooth transition into Natilik support & manage service, should this be included as part of this project.

4.3 Implementation Plan

The following implementation plan highlights the typical steps, timeframes & order associated with a project such as this. Timelines are a guide in this example.

Natilik tailor this implementation plan to meet the specific needs of each client. Variable factors such as configuration complexity, the number of required migration cut-overs & the seasonal periods of high activity all contribute to producing a plan that ensures a successful deployment & adoption of a new technology platform.

Natilik will provide a more detailed plan bespoke to the specific requirements of the client further into this process once more detail has been captured.
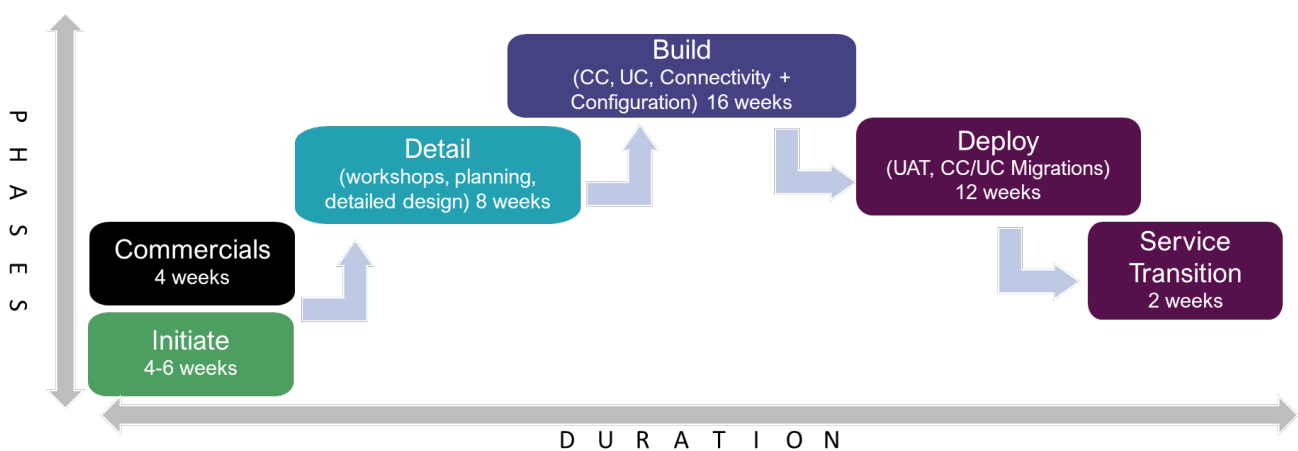
4.3.1.1 Plan assumptions & caveats:
The following assumptions & caveats are typical for a CCaaS project:

- Kick Off date of TBD following Contract Signature on TBD
  - Natilik do operate a 4 week mobilisation period but will look to start this process following a Preferred Bidder announcement on condition the Kick Off date can be met by Staysure.
- Bank holidays & Christmas period added as non-working days.
- Assumes TBD migration windows for NICE CXone
- Assumes 2 days Go Live support in hours, following each NICE CXone migration.
- Assumes for the design, build & testing phase there will be no more than 20 IVR's of a non-complex (limited integrations/functionality beyond simple IVR functionality) nature. This will be defined further following analysis of the call flows in the contractual phase & timelines may vary depending on findings.

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- Assumes a working velocity of 2/3 design workshops per week – this can be increased if needed.
- Duration specified is not a reflection of effort as we may use multiple resources to deliver.
- Ten days for design review/ sign off.
- We will only test a portion of call flows to prove functionality, client to validate use cases via UAT.
- Assumes UAT will run over 2 weeks.
- Assumes client has their IVRs/ Customer journeys documented.
- Assumes data capture will be provided in Natilik templates.
- Assumes design sign off will be completed within the time frame specified.
- Assumes data capture will be provided within the timeframe specified.
- Assumes the prerequisites defined in the Detail phase will be completed/ provided within the timeframe specified.
- Design documentation to be provided in Natilik templates, except where a Partner requires completion of their specific documentation.
- Assumes client can support dual running project activities where needed to speed up the delivery.
- Assumes non-complex number porting – NGNs on a reseller-to-reseller basis on the Gamma network & geographic numbers to be migrated in no more than 3x batches.
- Assumes remote services unless otherwise agreed.

There are opportunities to refine the implementation plan depending on the risk appetite, the key ones being:

- Design review/sign off times can be reduced with commitment from the client.
- SAT/UAT may be able to be run in a more iterative process – for example a subset of call flows can be tested in parallel to others being built. This will be assessed in the Initiate & Design phases.
- Migrations are currently scheduled over a 4-week period to allow bedding in time, but this can be reduced based on the clients risk appetite.
- Combine number porting into less than 6 windows where possible.

4.3.1.2 Implementation Plan Rationale

The focus with this plan is to ensure that there is absolute clarity & agreement of the solution being deployed, the timelines involved & the milestones that need to be achieved, alongside the impacts of these milestones not being achieved. As can be seen above, some phases are able to run sequentially to allow items not dependant on full design sign offs (standard platform build for example) to be stood up while designs are being reviewed. This enables us to further reduce delivery times. Within each phase, we will always look to run non-dependent tasks in a parallel fashion utilising multiple project resources where possible.

When deploying Natilik's NICE CXone based solution, one of the core benefits is the ability to carry out all the stages of our Transition Methodology & Implementation Plan with minimal disruption to the operation of your business. We achieve this by building the solution in parallel to the existing CC & then migrating agents & routing call traffic to the new platform during agreed OOH migration windows to ensure seamless operational continuity.

As a result of previous Contact Centre deployments & clients requirements for flexibility, Natilik can support migrations both virtually & on-site, depending on your specific needs. This would be discussed in more detail during the Initiate & Design phase & detailed out in the Migration Plan to ensure that a clearly detailed process is agreed to ensure a seamless migration.

This indicative timeline is based on our deployment experience for previous clients of a similar agent base size & requirements. During the project we will carry out regular feasibility reviews leveraging the Requirements Traceability Matrix & Deliverables to ensure that timelines are still feasible & should there be variation due to either an unknown complexity or extenuating circumstances, a Project Plan will be re-baselined in agreement with you.

4.3.1.3 Training & Adoption

Training & adoption are a critical path to ensuring the successful execution of any technology project. Natilik have a wealth of experience in ensuring that business readiness is achieved ahead of any migration event, ensuring all users are provided the needed training & resources to ensure a smooth transition.

Some of the areas where we provide support are:

Communications content – Customised & branded content that is developed with the end user in mind. The content will focus on the "What, Why, When, Where" elements of the project. The content may be delivered in various methods from print to video & include a human element to delivering pre-migration roadshows.

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e-Learning Content / Documentation – Natilik have developed a fully customisable series of interactive e-learning courses that can also be used for post course support or for new starters. The course content can be tailored to meet the needs of our clients so that it matches the infrastructure used & follows any specific setups. We can also include any company policy & usage messages. The content is then also available for ongoing inductions & onboarding.

Instructor Led Deliverables - Our trainers are well versed in the delivery of training courses across a wide range of business sectors, we understand the various user groups & their time constraints, so we can customise the training courses to suit the needs of the attendees easily. As organisations move to a more flexible & mobile way of working, our trainers also understand the need to pass over other information with regards to new ways of working, security, & accessibility.

Remote Support / Remote Floorwalking – Remote Support is a method used at go-live, where a qualified Trainer that has been involved with the project will be there to triage go-live issues will spend time virtually responding to individual queries, problems, tasks & work-related issues from members of your staff. As part of the floorwalker role, they will input into the issue log & then be there to go back & check with the person that has had the issue all has been resolved.

Floorwalkers can assist in the delivery of drop-in clinics, roadshows, at desk support as well as several other important training interventions.

A full RACI matrix will be established & provided as part of the project initiation. If this is required sooner, one can be provided.

4.4 Risk Management

Natilik believe that early identification of Risk is key to a successful engagement. We ensure clear focus & time is dedicated during all stages of transition to identify, review, & mitigate risk where appropriate. A formal review of all identified Risks takes part during the Initiate phase.

Following Initiate, regular risk reviews are carried out throughout the Detail, Build & Deploy phases, alongside lessons learned identification where applicable.

We track all project Risks in a shared Project Control Workbook (PCW) for clear visibility & ownership. All parties during the project are encouraged to flag risks as they are identified.

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