

# Call Recording Policy

Owner: Compliance Director

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## Contents

2. Document Details.....	2
Revision Control.....	2
Document Approval.....	2
Policy / Document Overview .....	2
Distribution .....	3
Scope.....	3
Policy / Document Review .....	3
Compliance .....	3
3. Reason for use of Call Recording .....	4
4. Access.....	4
5. Enable’s Obligations.....	4
5.2 Third Party Access.....	5
6. Where do we advertise that we record Call Recordings. ....	5
7. How long do we store the Calls. ....	5

## 2. Document Details

### Revision Control

<i>Version</i>	<i>Date</i>	<i>Name</i>	<i>Revision History</i>
1.0	30/03/2017	Hannah Martin	Issued.

### Document Approval

This document has been approved by David Bushnell/Jon Cutting as per the date of the latest revision.

### Policy / Document Overview

The purpose of this policy is to establish acceptable and unacceptable use of electronic devices and network resources at EnableIT in conjunction with its established culture of ethical and lawful behaviour, openness, trust, and integrity.

EnableIT provides computer devices, networks, and other electronic information systems to meet missions, goals, and initiatives and must manage them responsibly to maintain the

confidentiality, integrity, and availability of its information assets. This policy requires each user who accesses and uses an information asset must comply with the company policies and protect the company against damaging legal issues.

## **Distribution**

Controlled copies of this document are stored within Sugar Documents module. Any other copies are uncontrolled.

Customer can be supplied with uncontrolled copies for information and reference purposes. Controlled copies will only be supplied for contractual purposes and will only be updated during the course of the contract for which they have been supplied unless otherwise agreed in writing by EnableIT Technologies Ltd.

The pages of this manual are not to be removed, defaced, modified or altered in any way.

Any suggestions regarding errors, omissions, or additions should be notified to the Management representative. The Management Representative will carry out all changes to documents in a controlled manner.

This manual is available to all as a reference guide via EnableIT Technologies Ltd documents module and is a controlled document.

## **Scope**

This policy covers all of EnableIT's business and no part is currently excluded from scope, including all persons while conducting work or otherwise using company resources including facilities, property, data and equipment owned or leased by EnableIT.

## **Policy / Document Review**

This policy/procedure will be reviewed annually to determine;

- a) If it addresses risk exposure and is in compliance with the applicable security regulations and direction.
- b) If it is still required and up to date.

In the event that significant changes or regulatory changes occur, this document will be reviewed and updated as required as per the Document/Policy management process.

## **Compliance**

This policy is particularly relevant to employees who wish to use PODs for work purposes. However everyone in EnableIT needs to comply with this policy.

Failure to comply with these policies and standards and/or any related information security and or information technology policy standard or procedure may result in disciplinary action.

### 3. Reason for use of Call Recording

**Enable use Call recording for a number of different reasons.**

- Business prospective, call recording can help a business comply with strict regulations, pass legal controls, resolve potential disputes with customers as well as support with employee training and customer quality assurance.
- Provide evidence of a business transaction
- Record verbal agreements made between EnableIT and the Customer, Example,
  - Consultancy Calls to discuss development so we are able to refer back to and review the customers needs and wants.
  - For designated employees to review Management Meetings with Customers
  - Reveals and Change Requests to Project; Customer will be informed that all REVEALS and PHONE CALLS will be recorded. This is so we can confirm and review the information they give to us.
- Ensure that a business complies with industry standards and regulatory procedures,
- See that quality standards or targets are being met,
- Training purposes
- Quality Monitoring
- Fact verification

### 4. Access.

All calls are stored in a secure storage access within Sugar. Directors are the only people who have access to the system.

Request for a recording of a call can be made to a Director. If the justification meets the requirements in Point 3, then the request will be authorised.

Call will be downloaded and once reviewed the recorded call will be deleted.

### 5. Enable's Obligations

#### **5. 1 Do I have to let people know that I intend to record their telephone conversations with me?**

No - provided you are not intending to make the contents of the communication available to a third party. If you are you will need the consent of the person you are recording.

No Recorded Calls are used for Marketing, they are only used for Business Requirements and to record verbal agreements in relation to the customer's bespoke CRM / Mautic.

## 5.2 Third Party Access

All calls recorded by EnableIT will only be used internally, (Refer to *Reason for use of Call Recording*). **No calls** will be given to any Third Party.

On the customer request a record of the recorded calls can be given the customer via a Secure FTP Area.

1. A formal request via email has to be made by the customer.
2. Call Request Form is to be completed. – Held within EnableIT SugarCrm.
3. Change Management to be completed.
4. Copy tasks from “Call Request Form” into the Change Management and assign the tasks to the appropriate personal.
5. Complete all Tasks in the “Call Request Form”
6. Data will only be stored for 5 working days. If there is a weekend between the 5 day period the FTP area access will be removed from the customer at the end of the working day. Access will be given again at the start of the working day on Monday.
7. At the end of the 5 day period of access, the data in the FTP area should be remove and deleted. (Remember before requesting the data to be deleted you should review the files to see if there are any calls which are required for Business Requirements for EnableIT before deleting.

## 6. Where do we advertise that we record Call Recordings.

- Website under our Terms and Conditions
- Appended to our EnableIT Technologies Signature, which is automatically sent by EnableIT’s Mail Server.
- Statement of Works

## 7. How long do we store the Calls.

Calls will be kept for a maximum of 6 months unless justification is made by the Account Manager or Project Lead.

This has to be done in writing to the Technical Director. (Jimmie Ireton)

A record of the deletion should be evidenced – This can be in the form of screen shot from Sugar evidencing calls have been deleted.

**--- END OF DOCUMENT ---**