

## **Modernizing Appeal Hearing Conferencing for NMDWS with A Comprehensive and Industry-Leading Softphone Solution**

### **Overview**

Having efficient processes for serving the needs of the New Mexico’s residents is a key objective of the State of New Mexico Department of Workforce Solutions (“NMDWS”) to build trust between the State government and the general population, and to make sure the taxpayers’ dollars are invested in a highly efficient manner. NMDWS is considered a leader among state agencies throughout the United States in using technology to improve the management of Unemployment Insurance (UI) claims. A key part of this management process is holding Unemployment Insurance Administrative Law Judge (ALJ) hearings. These are held through conference calls as necessary when claim decisions are challenged by either the employer or claimant. These hearings are required to be recorded and maintained for up to 10 years. The hearing recordings are used if Unemployment Insurance claims are escalated to a higher level of appeal or a constituent requests a copy of the recording while the matter is under appeal. Making sure that conference call administrative hearings are managed in the most efficient and secure manner was a key element in the Agency’s roadmap for continued modernization of its IT infrastructure. Additionally, being able to link the recording directly to the Unemployment Insurance Tax & Claims systems case folder was considered ideal.

NMDWS required a new, highly secured conference calling, recordings storage and communication infrastructure to protect sensitive information. This led the Agency to search for a robust and comprehensive and cost-effective technology solution for handling its Unemployment Insurance hearing procedures.



The NMDWS in conjunction with its CRM partner, Deloitte Consulting, decided to replace the limited existing communications infrastructure with a more comprehensive and high quality softphone solution tightly coupled with the Agency’s Salesforce CRM. The replacement softphone communication system required a comprehensive conference call feature set and the capability for managing the recordings of the Unemployment Insurance administrative hearings, including the recording, storing and retrieving records of the conference calls within Salesforce with a direct connection into the Unemployment Insurance Tax & Claims systems. Software Next Door’s (SND) CloudCallee.io softphone solution was selected because it has comprehensive functionality, is highly secure as it is 100% native to Salesforce, and the SND team proved to have strong business knowledge, deep development skills in cloud-based solutions and communications networks.

## The Challenge

### The Business Challenge

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- **Conference Call Management:** Administrative Appeal Hearings via conference calls, needs to be easy but with better capabilities for running conference call hearings including higher quality of call recording, unlimited call participants, and automatic recording plus storing records of the call details.
- **Recordings & Appeals Case Management:** Implement a more effective and secure management and retrieval process for hearing recordings and case information. Best case scenario; all hearing recordings and case details stored in one place.
- **Efficiency:** Require Administrative hearing recordings to be linked to the Unemployment Insurance Tax & Claims Appeal case folder in our UI system cases.
- **Management & Reporting:** Develop robust management reporting and performance monitoring capabilities.

### The Conference Call Challenge

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- **Devices:** ALJs use a separate desk phone for managing conference calls which is cumbersome, prone to miss-dials, and time consuming
- **Participants:** The current system can only handle a maximum of 5 participants
- **Quality:** Actual call quality is low and call recordings are of the same low quality.
- **Call Management:** Participant call management features are rudimentary.
- **Case Management:** Conference call notes are stored separately from call recordings and neither are stored with other relevant case information.
- **Call Monitoring:** There is inadequate call monitoring capabilities.

### Technology Challenge

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- **Roadmap:** NMDWS has a roadmap for the modernization of its IT infrastructure.
- **Innovation:** Continue as a US market leader, using leading-edge technology to improve our management of Unemployment Insurance (UI) claims and the efficiency of our Administrative Law Judges (ALJs)
- **For the Record:** The Appeals team was still using windows based – For The Record (FTR) software. Which was for transcription services NOT conference calls!
- **Effective Resource Management:** Search for comprehensive though cost-effective technology solution for handling its hearing process.
- **Fit with IT Roadmap:** Making sure that appeal hearing recordings and case information are managed in the most efficient and secure manner was a key element in the Agency’s roadmap for continued modernization of its IT infrastructure.

### The Hearing Record & Case Information Challenge

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- **Call Hosting & Recording Management:** With respect to holding administrative appeal hearings conference calls, the NMDWS required a new, highly secured record keeping and communication infrastructure to record and protect sensitive information.
- **Scalable and Sustainable:** In the State of New Mexico, all appeal hearings are required to be recorded so there is a large volume of calls which need to be recorded and securely stored and maintained for up to 10 years.
- **Linked to Existing Case Folder:** Additionally, being able to link the recording directly to the Unemployment Insurance Tax & Claims systems case folder was considered ideal.

## The Requirements

### Softphone Conference Call Features

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- **Multi-Call Support:** Support multiple ALJs on multiple calls of unlimited participants.
- **Call Control:** Individually manage calls with mute, unmute, hold, and disconnect.
- **Call Quality:** Clear call and recording sound quality.
- **Call Annotation:** Easily add call notes to accompany each audio recordings.
- **Participants:** Hearing Participants must not be burdened with anything other than using their own phones to pre-call our check-in number and provide a standard phone number so the ALJ can contact them at the scheduled hearing day and time.

*KEY: No Participant requirements to use any type of software or have internet access for any conference calls, they can simply use a home, work, or mobile phone number to receive a call.*

### Technical & Functional Requirements

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- **100% Native Salesforce:** The solution needed to be 100% native to Salesforce in order to be secure and seamlessly integrated into the Agency's Salesforce CRM platform and the NMDWS's custom implementation.
- **Structured Data:** Each conference calls requires a unique identifier tied into the UI issue on appeal to allow information to be stored and retrieved in the Salesforce CRM.
- **Security:** Audio recordings should be kept in a highly secured environment with long-term storage and easy retrieval capabilities.
- **API:** The solution should have API capability to allow downloading the recording to an on-premise server.



### Manage Conference call Participants

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- **Flexibility & Control:** Flexible and user friendly softphone interface for each ALJ and authorized application Administrator control over mandatory call functions.
- **Call Monitoring:** Real-time call monitoring visually showing participant connections.
- **Call Sensitivity & Security:** Secure both live communications and post-call storage of recordings and call notes.

### The Hearing Record & Case Information Challenge

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## The Decision to Switch to “Cloud-Based” Solutions

Obsolete technology and growing demand of business processes were causing ever increasing costs in maintaining the NMDWS’s existing on-premise communication infrastructure. With that in mind switching to a cloud-based scalable enterprise softphone application with current communication technology was the logical way to go.



- **Customer Relationship Management (CRM) Solution:** Cloud-based Salesforce was selected as the CRM solution, due to its on-demand platform architecture which provides scalability, flexibility and development tools for customization.
- **Secure Platform:** The Salesforce platform provides the highly secure platform foundation for storage and retrieval of the relevant appeal hearing data.
- **Cloud-based:** Switching to a cloud-based, and 100% native to Salesforce, scalable enterprise softphone application with leading communication technology integrated within Salesforce was the logical way to go.

## The Solution

### Core Softphone Features

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- **Softphone & Communication Platform:** A comprehensive softphone application with robust conference calling features, on a leading communications platform offering the most up-to-date communications technology at competitive prices.
- **Low Capital Investment:** A softphone application and communication platform which did not require large capital expenditures, and which offered, on an on-going basis, a clearly defined path to upgrade to new technologies as and when that was appropriate without costly new investments.

### Development Team Expertise

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- **Expert Cloud & Telecom Engineers:** Experienced telecommunication developers with a deep understanding of cloud-based softphone solutions.
- **Expert Salesforce Engineers:** Experienced: Salesforce.com developers who could couple the softphone communication solution with the NMDWS's custom Salesforce CRM application, to access, store, and retrieve confidential information in a highly secure and efficient manner.
- **Expert Support Engineers:** Excellent tech support capabilities.
- **Fasts Development:** Short implementation timelines.
- **Responsive Team:** Supplier flexibility and capability in adding any needed new functionality to the combined CRM and softphone solution.

### SND Team, Cloudcaller.io & Twilio

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- **Highest Score for Compatibility:** After conducting several rounds of evaluations based on criteria including product features, initial and operational costs, and information security, **Software Next Door's (SND)** softphone solution – **CloudCaller.io** – scored highest on both functionality and compatibility among all products evaluated.
- **Industry-leading Communication Network:** The CloudCaller.io solution uses the **Twilio** communication platform to provide comprehensive, secure, high quality and low-cost communication services.

*“Our development and support teams are engaged from day 1, as part of our client’s team, ensuring deep knowledge of our client’s technology environment and needs, and resulting in fast and effective implementation and integration of agreed upon solutions,”*

*-Dan Federman, CEO  
Software Next Door*

- **Development Engineers:** Following product selection, NMDWS was also impressed by SND's development and support team, the deep knowledge shown for understanding the NMDWS's business requirements, the comprehensive low-cost plan to implement the desired solution, the short timeline for implementation and the willingness and flexibility to adjust to the NMDWS's budget restrictions.

## The Implementation Success

### Core Softphone Features

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- **Team Effort:** Collaboration between the NMDWS, Deloitte Consulting, and SND started during the evaluation process. The SND team understood the need to offer a flexible cost-effective solution tailored to the needs of the Agency.
- **Plug & Play Quick Implementation:** SND was able to quickly implement custom functionality for the interoperability between the softphone solution for holding the administrative hearing conference calls and the NMDWS's Salesforce CRM application.
- **Network Solution:** The NMDWS's IT team and SND engineers worked together to ensure any pre-existing network issues identified during implementation of the solution were resolved.
- **Success:** The final outcome led to a comprehensive, scalable, secure solution for the Agency's needs.
- **Low Capital Investment:** A softphone application and communication platform which did not require large capital expenditures, and which offered, on an on-going basis, a clearly defined path to upgrade to new technologies as and when that was appropriate without costly new investments

*"We are quite impressed by the CloudC~~aller~~.io application and SND's understanding of our environment, requirements and vision. They worked with us not only on their communication solution, but on our ties back to and use of Salesforce and even in optimizing our network connectivity in the State."*

- Sue Anne Athens, CIO

New Mexico Department of Workforce Solutions

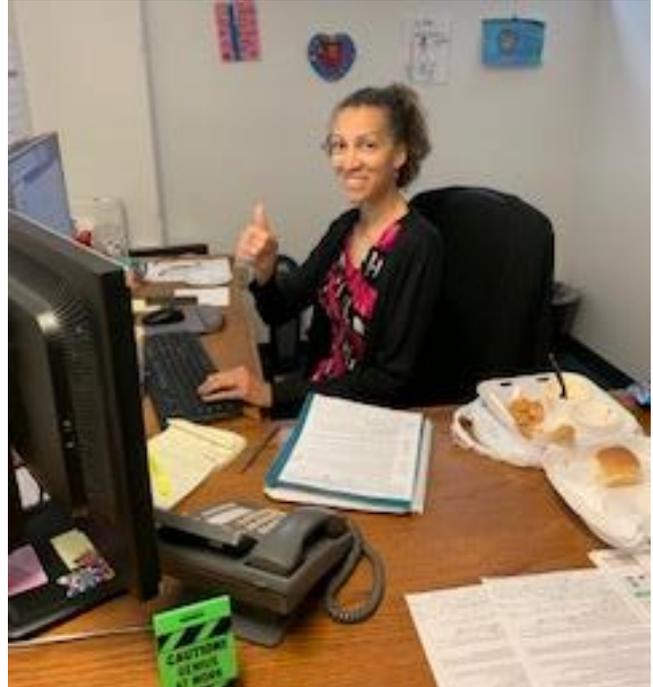
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## Benefits Realized

### Key Benefits

- **Sophisticated Conference Calling Feature Set:** A comprehensive softphone application with robust conference calling features, on a leading communications platform.
- **Ease of Use:** Intuitive interface for efficient administrative hearing recordings including unlimited participants and recordings management all in one place.
- **High Quality:** Significantly improved sound quality.
- **Case Management:** Storing and presenting all case information including administrative hearing recordings in one place.
- **Convenience:** Efficient and convenient way to locate recordings for the USDOL quarterly Performance Measure Review.
- **Management & Reporting:** Management reporting, performance monitoring capabilities and the ability to review scheduled hearing information by individual ALJ or the team as a whole.
- **Communication Network:** Teaming with Twilio, SND delivered a communication network offering high quality and secure communications at a low ongoing cost.



*“I have seen a lot of technical projects which took a long time. This implementation was ready to go in only a few months and it works just like we needed it to. We now have the reporting and monitoring capabilities we need to proactively manage our teams, with pending and closed hearing reports and the ability to spot check hearings recordings and case information.”*

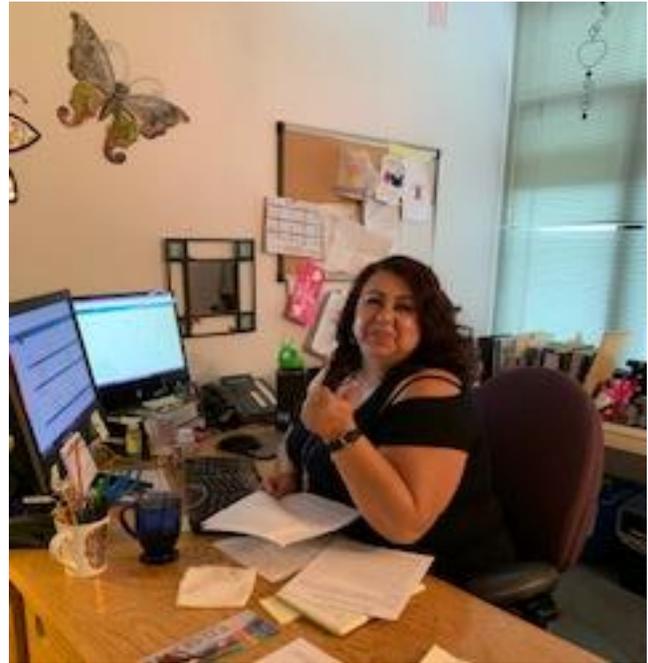
- Reba Blackwell, Chief of Appeal Tribunal  
New Mexico Department of Workforce Solutions

## Overall - High Satisfaction

### High Satisfaction

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- **Conference Calling Features:** Added features and functionality, like ability to add unlimited number of participants in a single conference call, and features that make facilitating and managing conference calls easier.
- **Easy:** Reduced clutter and easy access to the softphone. Staff liked accessing softphone online while working with other computer programs rather than having to manage a desk phone and a computer system
- **Efficient:** Easy access to Administrative Hearing recordings with storing all case information including administrative hearing recordings in one place!
- **Simplify:** ALJ's are not burdened with having to manually sort the daily docket by the time of the hearing as the soft phone application automatically sorts the ALJ's docket by time of the hearing.
- **Automated Check in Process:** Participants that have confirmed participation for the hearing by the deadline in the UI application are defined by their role in the hearing (i.e. claimant, employer witness) and automatically placed on the conference call roster in cloud caller.
- **Reduced Clutter:** Cases dismissed for failure to confirm participation do not appear on the conference call roster in CloudCallee.io



*“CloudCallee.io provides us with a highly secure and effective, easy to use conference capability, with secure access to, storing, and retrieval of the administrative conference call hearing information and at an attractive cost which fits into our budget. And, it is so refreshing to have a solution that works, people like it, and we are not constantly having to fix.”*

- Sue Anne Athens, CIO

New Mexico Department of Workforce Solutions

### Proven Solution

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This technology solution has proven to be a highly secure, efficient and cost-effective solution for Unemployment Claims Administration Hearings and is available for rollout in all 50 states. The cross-functional Deloitte Salesforce, SND and Twilio team has demonstrated the ability to implement the solution competitively priced with restrictive agency budgets in mind.