

# **Just What Is Voice Documentation?**

**A white paper by OAISYS**

## ***Introduction***

Voice documentation, literally speaking, is the process of documenting verbal telephone conversations. This sounds simple enough. Yet, to be truly valuable the full scope of business voice documentation involves much more than this simple definition. What is the purpose of documenting conversations? Who uses them? How are they used? The answers to these questions will provide a clear definition of voice documentation and, just as importantly, distinguish it from other communication processes.

Before jumping into such questions, it may be useful to reference an analogy. Business communications changed so dramatically in the 1990's that many of us do not really understand what it was like to do business prior to that period. One specific change was the widespread adoption of email. For the first time it was possible to type out a message and send it with the expectation of nearly instant receipt. It could be sent to multiple recipients at once. Better yet, a recipient could immediately pass that message along to a co-worker asking for input and it did not matter whether that co-worker resided in the same building, city or country.

Yes, faxing made physical documents instantly mobile. It did not solve the problem of clear, immediate transmission to multiple parties, or the challenge of team editing, and it only added to the existing process challenges of a manual paper filing system. What if that fax needed to be found and reviewed in three weeks as a project moved along? Whoever received it better have put it in the right folder in the right cabinet or it would take forever to find.

With email, this all changed. A message could be sent to one or any number of people. Those receiving it never had difficulty reading the text because it was not a scanned image, but the actual digital document. Recipients could edit the document directly and return it, even to the entire recipient list. And it was stored on the user's computer so it could always be found when needed.

Why did all of this matter? Well, business requires communication. Internal communication, external communication, group communication... Much of this communication is two-way with an action pending on a response. If you get an answer now, you can take instant action. Otherwise, you wait.

Just count how many messages you send each day. How many of these messages create responses on the same day, allowing you to take action? Could you have accomplished the same amount of work with letters and faxes? Would you have received responses today, or tomorrow, or next week? Imagine how much less work you would accomplish without email!

How does this relate to voice documentation? The telephone has existed for more than 100 years, giving people the ability to communicate in real-time. Until the advent of voice documentation those conversations happened and then disappeared. Any meaningful information from a conversation had to be separately documented into a physical or electronic note – or simply remembered by the parties involved. Would the notes of one party match up with the other?

Voice documentation renders that question moot. A voice document is an accurate historical record of the conversation. Voice documentation delivers the ability to store, organize, comment and share telephone conversations the same way one can with email (or any other form of documentation). Users can send a voice document to a project team, highlight the segment that needs review and ask the team for consensus. Previously, this same process would require transcribing the conversation into an email, which may lead others to ask questions because the full context of the conversation is not available. What was the tone of voice? Are you *sure* she said that, because it does not mesh with our previous conversations? What details might be left out of the summary that others will find meaningful?

In addition, a recipient can add comments that are immediately accessible to all other recipients and to the original sender. Voice documentation facilitates the immediate and accurate transfer of information so appropriate business decisions can be made and, action can be taken, more quickly.

Hopefully, this anecdote has whetted your appetite for a complete description of voice documentation. The following section will answer the questions posed earlier to provide a complete, clear description of this valuable business communication process and the resulting benefits.

### ***What is the purpose of documenting conversations?***

Most of us have been participating in telephone calls our entire adult life. Yet, none of those calls resulted in a voice document. Why should we start documenting our conversations now? Here are two great reasons: increased productivity and total accuracy. Voice documentation increases productivity by reducing the time it takes to communicate with others about a conversation. Accuracy is assured by creating a document of a conversation rather than relying on someone's memory. There are tangible business benefits directly linked to these two reasons.

A productivity increase is a business benefit in itself. This implies that it costs less per unit of work produced. Voice documentation increases productivity by reducing the time it takes to communicate to others about telephone conversations and by reducing errors that lead to duplicate work.

But in this case, it goes beyond reduced cost to include other competitive advantages. Consider work that is completed by a project team. The facilitation of faster, more accurate transfer of information related to a project reduces the time it takes for decisions to be made and action to be taken. Over the course of a project this can reduce the delivery time in a meaningful way. Imagine the competitive advantage a project-based company, such as an ad agency, engineering firm or technology consultant, will gain by offering customers a shorter delivery time for the same price! What kind of revenue gain can be had for a design or manufacturing firm by releasing products to market faster than the competition? By facilitating faster communication in collaborative efforts, voice documentation can be a difference-maker for business.

Let's refer back to our analogy. A business that implemented email could suddenly receive a request for proposal from a customer, share it with the project team for review and respond with a quote almost immediately. The same business receiving the request for proposal via fax would have to make photo copies and distribute these to the project team – or call a meeting. If anyone on the team works outside

of the office that could take some time. Only once all responses are back could a quote be sent. Which method gives the best chance of winning the sale?

Consider the same situation with a voice conversation. A salesperson receives a call requesting a proposal for a project with given requirements. The salesperson discusses the requirements at some length, states that the team will review these and present a preliminary quote. Without voice documentation the salesperson either has to type an email summarizing the conversation or has to call a meeting. Typing the email takes time. Likely the message will neglect some information from the conversation leading to a dialogue of questions and answers between the team and the salesperson. With voice documentation, the salesperson makes a note on the voice document requesting the team's input and shares the document with the team. All members can listen directly to the conversation, add their notes in context and the salesperson can generate the quote. The organization features of voice documentation allow all project team members to keep related documents in a single folder for each project. Future retrieval is fast and easy using these categorization tools.

Voice documentation also creates total accuracy. The conversation is directly captured, not summarized or paraphrased, so no element of communication is lost. The specific words, tone of voice, pauses, etc. are all included in the document. This creates the benefit of seamless information transfer. When a document is shared there is never a question about the other party's emotion, the details of the conversation or who said what to whom. Have you ever wondered if an email was angry or just to the point? With a voice document, you don't have to wonder because there is more communication captured than just words.

Another benefit of total accuracy is that of a professional image. Have you ever written down an email address incorrectly when it was being shared over the phone? The only way to get it right is to call the person back and ask them for it again; unless you have a voice document. In that case, review the voice document and correct the address without assistance. During the course of a single conversation multiple topics may be addressed: the current month's invoice, last week's service outage and a forthcoming new project. Rather than vaguely remembering the new project and asking an associate to call back and discuss the details all over again, just share the voice document after having highlighted the relevant portion. Now the client thinks the firm is listening to its every word – and it is!

Email made the same benefits available to the document world. Virtually all emails, sent and received, are stored and accessible when necessary. Why? Because it may be useful to instantly recall exactly what terms were agreed upon, the phone number for the conference call or the shipping address for the client. If a question arises, the message can be found quickly and shared with those to whom it pertains. Voice documents provide the same capabilities. Key details in question can be reviewed and shared with anyone to whom those details matter.

Lastly, total accuracy delivers the benefit of posterity. In business it never hurts to have accurate records of what was communicated between parties. Voice documentation adds to the already available methods of tracking communication for reference as necessary in the future. Emails are archived, contracts filed, health records digitized and stored, etc. Voice documentation brings one of the most

popular means of communication, telephone calls, into this tracking process. Now a business can always verify exactly what was said and by whom.

### ***Who uses voice documents?***

Voice documents are intended for use by every businessperson. Everyone can benefit from access to their own voice documents for the reasons listed above. The productivity and total accuracy benefits grow proportionally by the number of people using voice documents. Everyone has the need to share information from a telephone call with others, to verify a key detail from within a conversation and to comment on someone else's conversation. These are common communications processes that happen today in almost every business, but they happen inefficiently and inaccurately without the foundation of voice documents.

Some forms of documentation are strictly used by managers and administrators. Consider contracts; they are primarily negotiated and executed by managers then filed and archived by administrators.

Other forms of documentation are accessible to everyone because they streamline communications. Email fits this model. If it were constrained to managers and select workers, others would have tremendous difficulty communicating with coworkers and clients. The absence of a documented record of communications would make it nearly impossible to accurately share information with others or to verify what had transpired if there were a question. If the email documents were stored but only accessible to managers it would be little used. Not many workers would want to ask their manager for access to a message unless the need were imperative. And, when a document was retrieved given this scenario it was inefficient because a manager would be spending time looking up something that could be handled directly. Such a hierarchy of document access does not make sense. Most businesses give their employees access to send, receive and access email messages directly.

Of course, everyone has such permissions for their own communications. Others only have access to one's email if it is shared. Managers do not want workers perusing their messages. But it is desirable if everyone has access to their own email documents. Voice documents work the same way. Each person has access to review, organize, comment and share their own voice documents. This implied security is critical to the deployment and success of distributed documentation systems.

### ***How are voice documents used?***

Voice documents are used to review a conversation, highlight a portion, add a note and share them with others. Any document is simply a record of communication that can be verified and distributed to others. Usually it is shared with others for information only, for comment or to stimulate a specific action. Voice documents are no different.

Having received a call from a client asking for a rush shipment the order clerk may access the voice document, highlight the portion where the product is requested, further highlight the desired shipping address, add a note stating that an urgent shipment is needed and share it with the warehouse manager. Of course, this same step could have been taken by the order clerk taking the time to type out an email message that explains all of this and includes the parts requested and the shipping address.

That would certainly take more time than adding just the supplemental notes to the existing voice document. If the order clerk is rushed in typing out the email message there is a good chance a typo will occur. Will the right product be shipped to the right address? This is never a question when sharing the voice document directly.

A sales rep receives a call asking if the product in question can be customized to meet a specific requirement. The sales rep is not sure. She asks a few clarifying questions and promises to respond to the customer. Next, she accesses the voice document, highlights the details of the customization request, adds her question and shares it with the product managers. Within moments the product managers are able to review the specific question and reply with an answer to the sales rep. Having received the necessary answers she can respond confidently to the customer. Now, when the customized product is received, any question about the how well it meets the specification can be at least partially answered by reviewing the voice document to confirm the original requirements.

## ***Summary***

Voice documentation is a new communication process intended to make businesses more productive. This process brings telephone conversations into the same communications tracking process as already exists for email and other forms of documents. It gives every employee access to review, organize, comment and share documents created directly from their telephone conversations. The purpose of this process is to make information transfer seamless and fast, increase professionalism, reduce miscommunication and provide posterity for this medium of communication. Businesses can gain a competitive advantage by becoming more responsive, being faster to market and delivering a greater level of customer service because of fewer errors and communications inaccuracies.

## ***About OAISYS***

OAISYS® is a premier developer of call recording and customer interaction solutions for small to medium sized businesses and call centers. It has provided customers unique applications and professional service for over ten years. OAISYS successfully delivers its solutions exclusively through a nationwide network of expert resale partners who deliver complete communications solutions in their local markets to small to medium sized businesses.

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