

CASE STUDY

Baseplan ensures compliant comms on Microsoft Teams with Dubber





OVERVIEW

Baseplan Ltd is a wealth management and advisory firm based in Dublin, Ireland. They have a number of agents who provide financial and retirement planning advice to clients.

Gordon Mellon, Baseplan's Managing Director, said, **"we needed a compliant and simple solution to record our client-facing interactions on Microsoft Teams."**

Compliance with the Central Bank of Ireland's recording regulations, including MiFID, was central to Baseplan's decision to deploy Dubber to their senior management and staff.

Dubber's flexible recording and retention options, as well as its full certification as a Microsoft Teams recording solution, provided the firm's owners with peace of mind that their staff are communicating compliantly with clients.

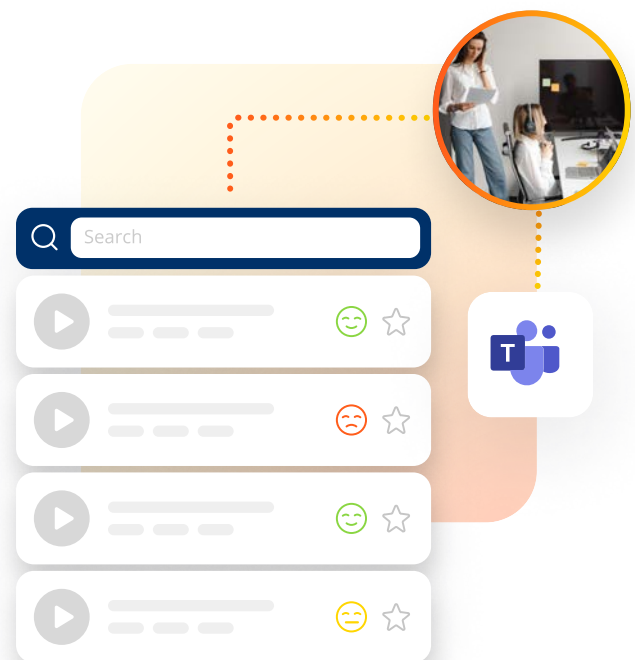
Gordon Mellon went on to say, **"Dubber ticked all the boxes that we needed - compliance, simplicity and efficiency. It's been a great investment."**

Furthermore, Dubber's cloud-native recording has enabled Baseplan to avoid outlaying significant capex costs toward an on-premise recorder, storage and ongoing maintenance. Deployment was rapid, enabling the firm to avoid any downtime as well.

By placing a forward from the client's mobile number to their Teams DDI, inbound calls are also recorded and across mobile devices.

Dubber's ability to provide an automatic transcription of every phone call was another deciding factor for Baseplan.

Previously, the transcription and storage of every client conversation had been a manual process that took anywhere between 10-15 hours per week. The removal of this was a quick assurance of Dubber's ROI upon deployment.





THE CHALLENGE

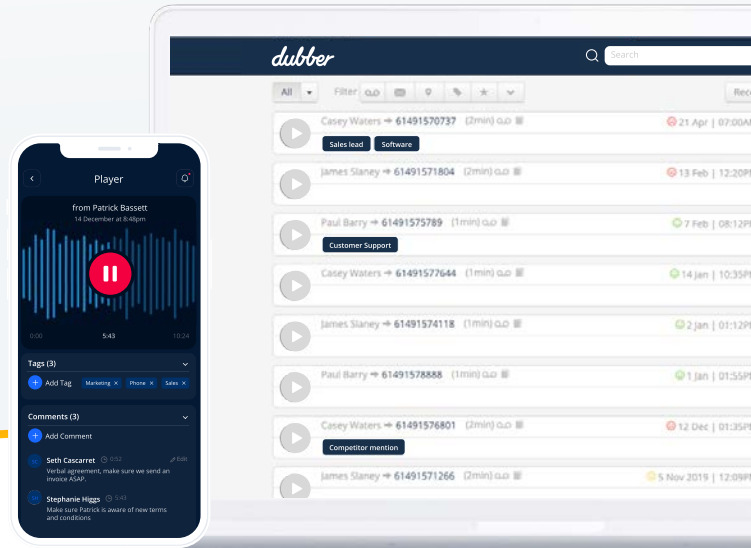
- Baseplan’s existing recording solution was difficult and costly to use and maintain
- Senior management weren’t confident that client conversations were compliantly captured
- Transcription process was manual and lengthy, effecting staff efficiency

THE SOLUTION

- Dubber call recording and voice AI on Microsoft Teams
- Compliance with all mandated recording regulations and flexible retention options
- Automatic transcription and storage of every call

THE TECHNOLOGY

- ✓ Dubber call recording and voice AI on Microsoft Teams
- ✓ Microsoft Teams Graph API



THE RESULTS



Time savings of up to 780 hours/per year

By eliminating the requirement for manual transcription and storage of calls



Compliance mandates met

Secure capture and storage of every client conversation for compliance with the regulator



Cost savings & flexibility

No capex costs for hardware and equipment with flexible user-by-user retention policy settings and unlimited scalability

“We needed peace of mind that our client-facing staff were communicating compliantly. Dubber has given us the confidence and visibility of that”.

Gordon Mellon
Managing Director, Baseplan





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