

WHITEPAPER

Getting the most out of every conversation.

Dialpad Ai – a legal guide to data security, privacy, and regulatory compliance.



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3 **Dialpad + Artificial Intelligence: A powerful combination for your business**

4 **Compliance features for recording & transcription**

- 4 Customize your recording & transcription notifications
- 5 Specify exception rules by country and area codes
- 6 Automated notifications
- 6 Automatically detect agent notifications
- 7 Manually pause recording and transcription in-call
- 8 Automatically pause recording with context-awareness
- 9 Set analytics and keyword searching to identify training issues
- 10 Share calls confidently with Personally Identifiable Information (PII) detection
- 11 Control how recordings & transcripts are shared

13 **Compliance for specific jurisdictions and industries**

- 13 Data protection laws
- 13 Data Protection Agreement
- 13 Dialpad's role as processor
- 14 Transborder transfer authorization
- 14 Data Subject Access Requests
- 14 HIPAA
- 14 Government data demands

15 **Dialpad Ai data retention**

- 15 Retain data until you delete it or close your account
- 15 Customize data retention policies for each business unit

16 **Easy to set up and easy to manage**

- 16 Grant access to Dialpad Ai—for the employees who need it
- 16 Your employees have control of when they use Dialpad Ai

17 **Data security**

- 17 Secure sign-on and integrations
- 17 Encrypted calls
- 18 Demonstrated compliance

18 **Dialpad Ai uses transcript and audio data to improve the service**

- 19 You can use Dialpad Ai—without sharing data
- 19 Dialpad Ai data is stored securely in the US
- 19 We exclude specific data and industries from Dialpad Ai training
- 20 Dialpad Ai improvement is mainly automated
- 20 Access to audio and transcript data is limited to need-to-know groups
- 20 Data that is shared is de-identified

21 **Your information is your information**



Dialpad + Artificial Intelligence: A powerful combination for your business

Embedded in Dialpad's calling, conferencing, and contact center solutions, Dialpad Ai is a proprietary automatic speech recognition (ASR) and natural language processing (NLP) engine.

Built in-house from the ground up, Dialpad Ai transcribes and analyzes conversations to provide real-time insight. It's designed to help you and your employees make every conversation more efficient. (For example, by making voice data searchable and actionable.)

This legal guide explains how Dialpad has designed its artificial intelligence with privacy and compliance in mind so your company can take full advantage of Dialpad's powerful real-time business insights while ensuring compliance with applicable security and privacy laws.

Compliance features for recording & transcription

We recommend a simple rule of thumb: treat transcriptions the same as you would treat call recordings.

Call recording laws differ from state to state and country to country—most don't distinguish between recordings and transcriptions, as many were created decades ago. That's why we made sure to include customizable compliance controls for Dialpad Ai. With a robust set of admin and user settings, you can easily adhere to your business's recording and transcription requirements and regional regulations.

Customize your recording and transcription notifications

Dialpad Ai's transcription includes all of the same compliance features you'd expect for call recording, including the option to automatically notify the other party when transcription is stopped or started.

That means you can use Dialpad Ai with no change to your existing agent training if you're already using call recording.

To learn more about how call recording and transcription can work for your business and tips on handling notification and consent, see: [When and How to Notify Your Customers](#).

Specify exception rules by country and area codes

Like call recording, Dialpad Ai transcriptions adhere to pre-defined exception lists to refrain from transcribing or instead record the agent's side only. This is helpful whether you do business in a one-party-consent state, an all-party-consent state or both.

You can use an exception list to ensure recording and transcription happens on all calls except those from the specified area codes.

[Learn more about how to set up an exception list.](#)

Inbound Calls


Record all

Record all except those that match the exception list. This setting also applies to Ai transcriptions if you have Auto Start Ai turned on for this call center. This setting does not apply to manually initiated Ai transcriptions.

[Edit exception List](#)

Also record Agent's screen(s) ⓘ

Call recording greeting
 Callers hear this greeting before connecting with an agent.

Your call may be monitored or recorded ... ▾ 

[Record greeting](#) [Upload greeting \(.mp3\)](#)

Outbound Calls


Record all

Record all except those that match the exception list. This setting also applies to Ai transcriptions if you have Auto Start Ai turned on for this call center. This setting does not apply to manually initiated Ai transcriptions.

[Edit exception List](#)

Also record Agent's screen(s) ⓘ

Call recording greeting
 Callers hear this greeting before connecting with an agent.

Your call may be monitored or recorded ... ▾ 

[Record greeting](#) [Upload greeting \(.mp3\)](#)

* For a list of area codes in all-party consent states, formatted and ready to add to your exception list, [click here](#).

Automated notifications

You can set a default or custom greeting to play before calls through your [call recording settings](#), which can include a recording notification when required (as defined by your exception rules). You can also configure automated notifications for inbound and outbound calls separately.

Call recording greeting
 Callers hear this greeting before connecting with an agent.

Your call may be monitored or recorded ...
▼
▶

↓ Record greeting
↑ Upload greeting (.mp3)

Automatically detect agent notifications

Dialpad Ai's [Custom Moments](#) feature, you can set up moments to detect when agents give common notifications such as their name or badge number. Dialpad also comes with a built-in "[Call Recording Notification](#)" moment to detect verbal notifications from your agents. When automated notifications don't suit your use case, this moment can be used instead to ensure your agents are properly disclosing to your customers. Through the use of built-in and your own customized moments, you can easily track compliance and identify agents who may need additional coaching.

Real Time Assist Cards
 Create cards that automatically help your agents during customer calls.

[Create a card](#)

Custom Moments
 Build your own trackable moments based on custom trigger words and phrases to display post-call and in Analytics.

[Create a moment](#)

←

Manually pause recording and transcription in-call

There are certain categories of regulated data you may not want to record. Whether you're dealing with PCI, HIPAA, or other regulated data, Dialpad lets you stop and start both recording and Dialpad Ai while on an active call within the call by selecting the setting shown below:

Pause Recordings

Allow agents to stop/restart a recording during a call. When an agent stops and restarts a recording, the corresponding company level recording (if enabled) will also stop and restart for the call.

Check out [this article](#) for instructions on how to pause recording and Dialpad Ai while on an active call.

Coming soon: Automatically pause recording with context awareness

Using Dialpad APIs or a browser extension, you can configure Dialpad to programmatically pause recording and transcription when your agents take sensitive information.

Dialpad's [Recording and Artificial Intelligence APIs](#), tightly coupled with your own CRM's API, lets you automatically toggle recording and transcription when your agents open up a particular screen or field (and start again when it's closed).

*** Whether you're dealing with PCI, HIPAA, or other regulated data, this can help you make sure you aren't storing sensitive information. With Dialpad, the ability to automatically pause recording ensures that you're business is minimizing data collection and only collecting that data that is strictly necessary.**

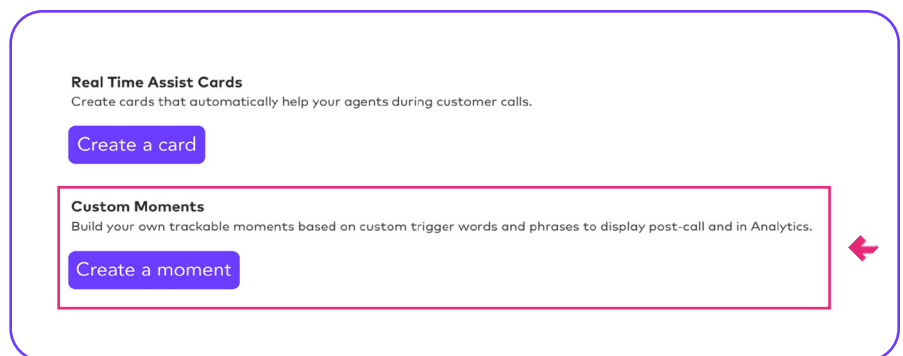
Through Dialpad's "Recording Compliance Extension," we make this even more accessible. This update to [Dialpad's extension for Chrome](#) allows admins to define web pages or fields where sensitive input is expected. Dialpad will then automatically pause recording and transcription until the agent has moved past that point in their workflow.

Contact your Customer Success Manager to gain access for your company.

Long story short: With Dialpad, you can take advantage of Dialpad Ai with confidence that no regulated data is improperly recorded.

Set analytics and keyword searching to identify training issues

Dialpad Ai transcription and analytics can help you identify sensitive data that you want to keep within the company. One way to do this is by setting a Custom Moment for terms associated with sensitive data, such as when a customer says, “My credit card number is...” This lets you spot trends and improve agent training more easily:

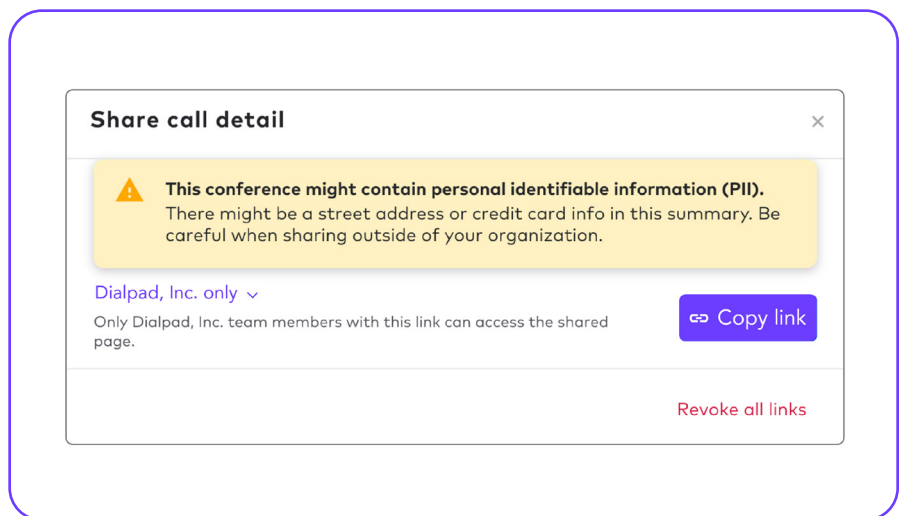


The screenshot shows a user interface with two main sections. The first section is titled "Real Time Assist Cards" and includes the text "Create cards that automatically help your agents during customer calls." Below this text is a blue button labeled "Create a card". The second section is titled "Custom Moments" and includes the text "Build your own trackable moments based on custom trigger words and phrases to display post-call and in Analytics." Below this text is a blue button labeled "Create a moment". A red arrow points to the right from the "Create a moment" button.

Essentially, Dialpad Ai improves your ability to protect your customers—and your business’s sensitive information.

Share calls confidently with Personally Identifiable Information (PII) detection

If Dialpad Ai is enabled, Dialpad will automatically review the transcript before sharing transcripts or call recordings and flag calls that may contain personal information. Dialpad Ai can detect street addresses, credit card numbers and other potentially sensitive number sequences such as SSNs.



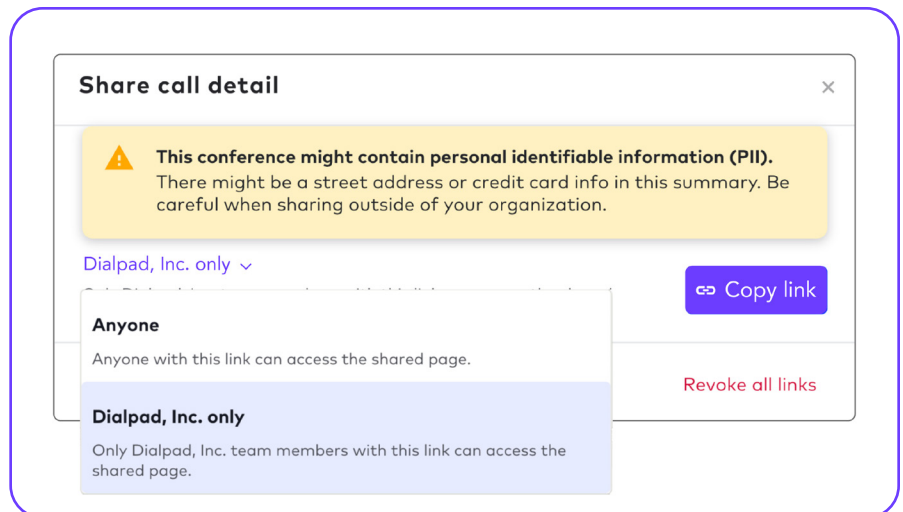
Humans can make mistakes—understandable! Dialpad Ai helps make sure those mistakes do not create compliance hazards.

Control how recordings and transcripts are shared

By default, you can easily share call recordings, transcripts, and Dialpad Ai summaries as links, both inside and outside your organization.

When you share these resources via links, Dialpad generates a unique, lengthy, and complex URL that provides direct access to the file and can be shared conveniently (such as by email or messaging)—but is not accessible without the direct link.

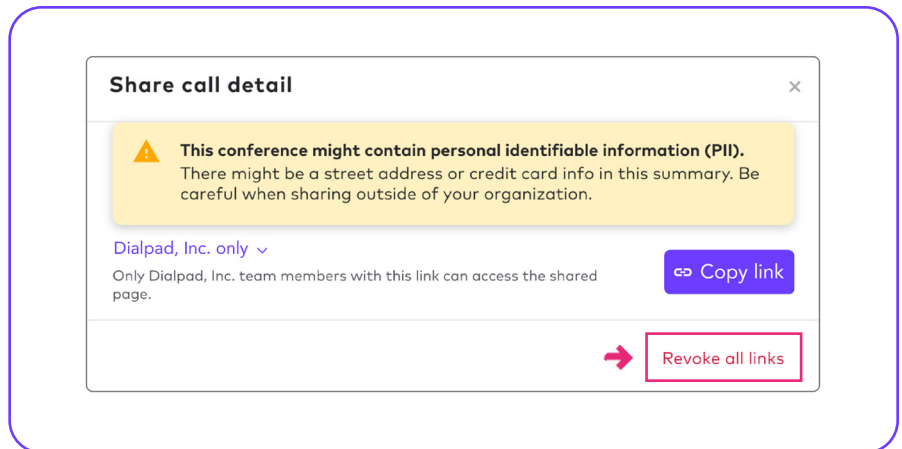
If you prefer, Dialpad also gives you the option to make links accessible only to people within your organization:



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Getting the most out of every conversation.

And for every shared resource, you can revoke access of any shared links, which makes each unique link unusable moving forward:



Dialpad Ai puts you in control of who has access to your information.

Compliance for specific jurisdictions and industries

Data protection laws

All Dialpad products and features, including its artificial intelligence, come with features and security controls needed to be fully compliant with recent GDPR-like data privacy regulations, from Europe (GDPR) and the UK to California (CCPA), Brazil (LGPD)—and counting!

Dialpad's privacy team constantly monitors the evolution of data privacy laws to ensure that Dialpad is compliant with each new and developing privacy obligation.

Data Protection Agreement

Dialpad offers a comprehensive Data Protection Agreement (DPA) that addresses the data protection requirements of Europe, the UK, US states, and other jurisdictions.

*** You can quickly review the [Dialpad DPA](#) and [sign a DPA with one click](#) via the admin interface.**

Dialpad's role as a processor

As explained in [Dialpad's DPA](#), under GDPR, Dialpad is a data processor, which means that we receive, hold, and process customer's personal data as directed by our company customers.

As part of its SaaS model, Dialpad regularly improves the performance of its products, including artificial intelligence features like automated speech recognition and natural language processing. These artificial intelligence-powered improvements are the reason that [Dialpad's transcription is more accurate than even our largest competitors](#) and help automatically identify customer data that may contain personal information. This automatic detection of personal information ensures that Dialpad only processes data in the manner directed by our customers and help our customers adhere to all data privacy obligations.

Transborder transfer authorization

In addition to holding certification for the EU-U.S. and Swiss-U.S. Privacy Shield Frameworks, Dialpad's DPA includes the European Commission's "Standard Contractual Clauses" (SCCs) to address the additional requirements applicable to exporting personal data from European jurisdictions to the United States.

Dialpad has also implemented several key supplemental measures on top of the SCCs, including encryption at rest and in transit and the absence of backdoor data access. A detailed description of Dialpad's supplementary measures are included in the SCCs.

Data Subject Access Requests

You can review, download, and export most of your data, including call recordings, directly from within the Dialpad app. Dialpad customers and end-users may also request to exercise their rights under applicable data protection laws (such as disclosure, export, and deletion) through Dialpad's [DSAR Portal](#).

Dialpad routinely monitors and follows guidance from the European Data Protection Board and national Data Protection Authorities and updates its DPA as needed. The privacy principles underlying the GDPR are of utmost importance for Dialpad, and we're working hard to make sure that you're able to use Dialpad Ai with peace of mind while staying true to those principles—and compliant under the GDPR and other data privacy laws.

HIPAA

Dialpad products and features are HIPAA-compliant, including its artificial intelligence-powered transcription and analytics. Dialpad makes it easy for US healthcare companies to use Dialpad services—you can sign a [Business Associate Agreement](#) with one click from the admin interface. With a signed BAA, HIPAA-covered entities and business associates can use Dialpad Ai just like any other company while remaining compliant with HIPAA regulations.

* For more information, check out our [HIPAA Data Sheet](#).

Government data demands

Dialpad protects all customer data, including call recordings and transcripts, to the fullest extent of the law. We scrutinize each demand, require a valid legal process for each element of data requested, and notify affected customers unless prohibited by law.

* For more information, see Dialpad's [Government Data Demands](#) policy.

Dialpad Ai data retention

Retain data until you delete it or close your account

When generating data within Dialpad apps, such as contact lists, call logs, text conversations, and voicemails, Dialpad will keep your data secure and available to you until you choose to delete it or until you close your Dialpad account.

Many everyday tasks like viewing or deleting account data and managing user accounts can be done immediately by your company's Dialpad Administrator through the [administrator settings](#).

If you have fewer than five users, you can close your account through your administrator settings. If you have more than five users, get in touch with our [Support Team](#) to close your account.

Customize data retention policies for each business unit

Data Retention Policy features are available to all Dialpad plans.

Retention policies can be set per business unit, such as an Office or Call Center, and separately configured for duration and type of data, such as deleting content (like call recordings and transcripts) or personal information (including phone numbers and contact names).

Retention policies can be used to preserve data before a given date and ensure deletion after that date. With a customizable retention policy, you're in control of your data.

* [Learn more](#) about Dialpad's retention policy settings.

Easy to set up, easy to manage

With extensive measures in place to ensure legal compliance, Dialpad makes it easy to use Dialpad Ai securely.

At account setup and for each new business unit, we'll ask if you want to enable Dialpad Ai for individual users and if they should be able to toggle Dialpad Ai settings during a call. You choose whether—and to what extent—your company wants to take advantage of Dialpad Ai:

Ai

Artificial Intelligence ●

Artificial Intelligence Ai helps you get the most out of your conversations with:

- 1 Real-time call transcriptions.
- 2 In-call coaching and Real-Time Assist.
- 3 Historical reporting tied to full call summaries, including action items and key moment detection.

1 LIVE TRANSCRIPT
REAL-TIME ASSIST

2 Price dispute

- Verify the agreed amount
- Come to an agreement

Auto start Ai (for this call center)
Ai will start working when your teams' calls and conferences start, ensuring Custom Moments and Real Time Assist to work.

Allow individual users to start and stop Ai during calls

Ai feature

Show real-time transcript at the start of a call or conference

You can customize your Dialpad Ai settings for the needs of every Department, Office, Call Center, or Coaching Team. [Learn how to manage these settings across your organization.](#)

Email us: sales@dialpad.com Call us: **1-855-DIALPAD**

dialpad.com

16

Grant access to Dialpad Ai—for the employees who need it

Just like call recording, real-time transcriptions and the insights you can derive from them are powerful features, but they may not be appropriate for all parts of the business.

That's why Dialpad gives you the option of setting access to Dialpad Ai features at the company and office level and as granularly as by individual employee phone numbers.

Your employees have control of when they use Dialpad Ai

When you give your employees access to turn on Dialpad Ai, they can choose to enable it or disable it either for all calls, before a call, or even during one. [Get more information](#) on individual Dialpad Ai settings.

Data security

Secure sign-on and integrations

Dialpad offers integrations for access management via SAML and SCIM from providers like Azure, Google Workspace, OneLogin, and Okta through our [App Marketplace](#), which lets you centralize user management, from single sign-on capabilities to automated user provisioning.

Encrypted calls

Encrypted with Transport Layer Security, data transfers within Dialpad use the modern standard for web communications and the same security that protects you while browsing the web.

Data at rest stays secure in the Google Cloud Platform with encryption of AES 256-bit or greater ciphers. When data is transferred during live phone calls and conferences, it's encrypted and authenticated using Secure Real-Time Transport Protocol (SRTP).

* See [our encryption page](#) for further information on our encryption practices.

Demonstrated compliance

Dialpad is SOC2 Type II compliant and undergoes annual third-party audit and penetration testing. Dialpad has implemented controls that meet the objectives of the AICPA Trust Services Principles, as verified by a third-party audit.

Dialpad is also a Cloud Security Alliance (CSA) Security, Trust, and Assurance Registry (STAR) member with published [CAIQ assessment results](#).

With Dialpad, you are able to harness the power of artificial intelligence to make your conversations more efficient and effective while remaining confident that no sensitive or regulated data is improperly recorded or processed and that all data that is processed is done so safely and securely.

Dialpad Ai uses transcript and audio data to improve the service

Dialpad's continuous improvement of the models that support our automated speech recognition and natural language processing is the reason that [Dialpad's transcription is more accurate than even our largest competitors](#).

Our transcription and analytics consistently increase in value for our customers because the models behind them are trained based on how our users actually use our products. (Mainly using portions of aggregated audio and transcripts from actual calls.)

By simply doing what you're already doing—using Dialpad Ai for transcription, note-taking, business insights, and agent training—you're helping make Dialpad's platform (and the insights you get from it!) more accurate and relevant.

You can use Dialpad Ai—without sharing data

It's as simple as that.

Yes, more data makes Dialpad Ai increasingly valuable. The real-world data from your users make Dialpad Ai transcriptions more accurate and insights more specific for how your company uses Dialpad.

However, we also offer access to all of Dialpad's powerful artificial intelligence capabilities without your company's data. You can stop or pause call recording and real-time transcriptions at any time or turn off Dialpad Ai entirely for a call, which also removes that call from artificial intelligence training eligibility.

Your company's Dialpad administrator can also exempt departments or individuals or set retention policies on the length of time to keep data.

Dialpad Ai data is stored securely in the US

As with all other permanent customer data, all Dialpad Ai data used to improve the service is stored using AES 256-bit within Google Cloud Platform in the United States.

We exclude specific data and industries from Dialpad Ai training

Dialpad proactively removes from eligibility the data of companies within sensitive industries such as healthcare and financial services.

In addition, customer data that's used for training is automatically reviewed for certain sensitive PI like identification numbers, credit card numbers, and addresses and, if detected, the entire conversation is excluded from use in training and testing.

Dialpad Ai improvement is mainly automated

Almost all use of Dialpad Ai data for product improvement happens via automated processes. Only about 0.05% of call audio or transcripts ever get seen by a human transcriber, generally when we need a human to help make sense of unusual words like industry terms.

Access to audio and transcript data is limited to need-to-know groups

Dialpad observes strict access management, and only the engineers and data scientists who work on Dialpad Ai improvement have access to training data. Internally, identifying metadata is stored separately, and data is pseudonymized.

Data that is shared is de-identified

On rare occasions that we may need human transcribers, Dialpad has implemented several measures to protect customer privacy. These measures include removing metadata, filtering out calls that might contain sensitive information, and breaking them into short snippets called “utterances” (about a sentence long), presented in random order.



Your information is your information

Dialpad Ai empowers businesses to make the most out of every conversation by automatically making voice data searchable and actionable.

When you combine Dialpad's artificial intelligence with robust privacy controls and security, **you can confidently unlock the full power of the conversations that your business has every day.**

Please get in touch with Dialpad's Privacy Team at legal@dialpad.com for more information or if you have any additional questions.