Communications Center: Outdial Queuing
MODULE PAPER

Capture new Contact Center revenues and provide proactive customer support by implementing outbound calling campaigns quickly and easily. Change your Contact Center from a cost center into a profit center and dramatically improve the quality, success and productivity of every outbound customer communication by intelligently managing outbound call campaigns from within your Enghouse Interactive Communications Center solution.

Implementing Enghouse Interactive's fully integrated outbound campaign solution, *Outdial Queuing*, into your contact center lets you:

- Add campaigns for new sales or upselling existing customers – OR introduce proactive customer management into your total customer experience strategy

- Maximize your return on investment for both staff and tools, fully utilizing agent time – especially during times of reduced inbound call volume – while offering task variety

- Maintain contact center standards for all channels

- Increase speed and flexibility for outbound dialing

- Obtain fully integrated business intelligence of outbound activity across the entire contact center.

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How does *Outdial Queuing* Work?

Lists of target numbers for an outbound campaign are imported into the system for dialing. These numbers are presented to selected agents using the same distribution methodology and capabilities that are used for distributing inbound calls within the contact center, based primarily on agent availability and skills.

When setting up an outbound campaign, supervisors and managers can choose the queue delivery mode that best suits the requirements of the campaign, the type of calls and the agents' skill sets and experience/confidence. The queue type can easily be adjusted either before or after the campaign begins, offering total flexibility.

- **Power Queue** – By selecting this queue type, the outbound call is automatically dialed by *Outdial Queuing* on behalf of the agent's extension. This means that the call is presented to the agent's extension as soon as it is initiated, along with a screen-pop of outbound call details.

- **Preview Queue** – When a Preview Queue is selected, Communications Center's *TouchPoint* agent user interface presents an outbound call request popup to the agent. This contains details about the party being called, and the purpose of the campaign. The agent may then initiate the call using the 'Dial' button on the template. This method of call delivery is recommended where agents are working in a blended call environment, as it helps them in distinguishing inbound from outbound calls, while presenting both inbound and outbound calls in a streamlined manner.

- **Both** – A combination of Power and Preview queues might be selected for the same campaign when agents have different levels of experience. Calls are distributed evenly from both queues, but the agent's login class determines which queue they will take delivery from, allowing less experienced agents to take calls from the Preview queue.

Either the agent or the system initiates the outbound call which may be answered or not. During or after the call, the agent is presented with a resolution screen and (optionally) a wrap-up screen, where they are prompted to record the outcomes of (1) the call attempt and (2) the conversation. This means a call that rings no answer, or gets a busy tone, may go back into the system for re-queuing; a call that gives an invalid ring tone can be flagged for administration review; and a call that is answered is tagged with the results of the conversation (for example, sale/ no sale/follow up next month etc). If desirable/appropriate, campaign data can include multiple phone numbers (e.g., home, mobile, office etc) so that agents can try alternative numbers after an unsuccessful attempt. Supervisors or managers can get full visibility of all these attempts.

As soon as the agent has completed any associated work time or wrap-up, they are once more available to take delivery of new calls or be presented with more *Outdial* calls to make.

Below is a process flow showing an *Outdial* call example:

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Outdial Queuing Call Delivery Process

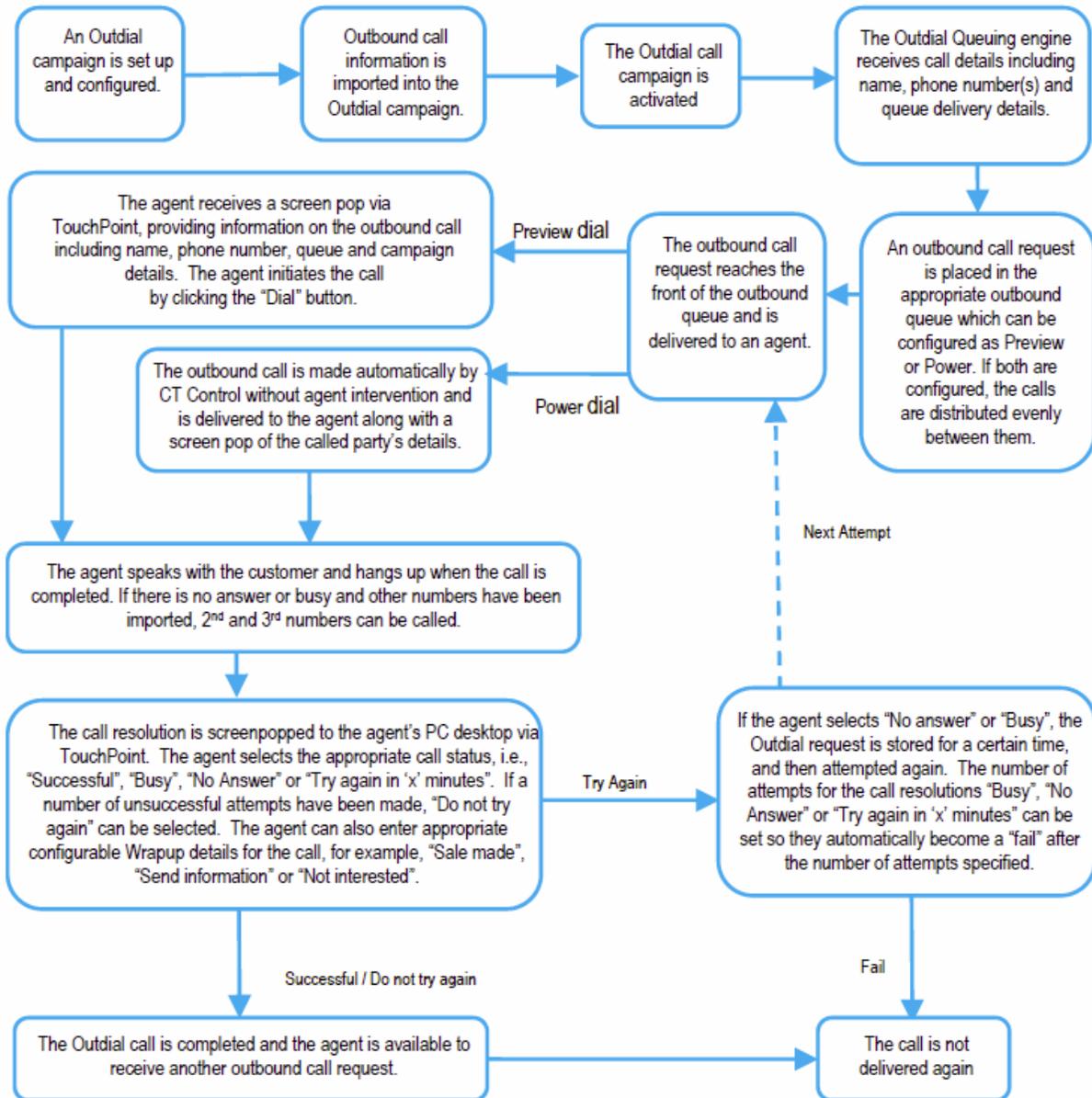The example below illustrates a typical *Outdial Queuing* call delivery scenario:

Figure 1. Outdial Queuing call flow

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New Sales, Upselling or Adding Proactive Customer Management to your Customer Experience Strategy

As well as using outbound campaigns to sell to new or existing customers, this is a good time to look at your existing customer engagement, the overall experience that your organization offers. Industry analysis continues to show that customers who are proactively "touched" by their providers in between using their services, have a higher degree of loyalty to these providers.

There is also no doubt that, where appropriate, phone calls have the most positive impact, compared to SMS (mobile texts) and email.

This engagement can include:

- **Presentation of customer offers** e.g., sale or discount details

- **Customer satisfaction assurance**

- **Keeping in touch** – providing valuable information/updates

- **Notification of renewals**/expiry, appointments and so on

- (With all of the above) **validation of customer data.**

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Maximize Return on Investment

By implementing outbound calling into your contact center, managers can be assured of making the most of all their resources, all of the time. Rather than experiencing downtime that not only makes managing resourcing difficult, but can also de-motivate some of your best agents, you can slot in outbound dialing.

You have the option of using specific staff for dedicated outbound calling, or else of blending inbound and outbound calling for selected (or all) agents.

Call blending ensures that agents can be proactively delivered outbound calls when there are no inbound calls waiting. Administrators set the agent class to take delivery of both inbound and outbound queues, with a lower priority on the outbound calls. If outbound dialing is given equal priority, it can be paused if the service level drops below a certain level.

On the administrative side, employing the same solution across the contact center means less risk, less training and lower administrative/resource overheads.

- **Quick setup** – Administrators create Outdial campaigns and adjust parameters using the intuitive administration interface. They can import phone lists quickly and easily from an ODBC-compliant database or a CSV file.

- **Efficiency** – Call information is delivered to the agents and screen-popped to their PC desktop via Enghouse Communications Center's agent user interface, *TouchPoint*. Agents can handle each interaction in a consistent way, in line with other interactions such as inbound voice, SMS (mobile text), fax, email or chat.

- **Preferred Agent** – Subsequent call attempts to the same phone number can be delivered to the same agent by setting the campaign to 'Preferred Agent on Retries'.

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Maintain Contact Center Standards for All Channels

Integrating outbound dialing into your daily contact center operations adds efficiency and structure:

- Managers get visibility and tools across all media channels, agents and queues, for the whole contact center

- Apply standards and metrics to outbound calls as for other channels

- Maintain consistent contact center principles and parameters across all channels

- Ensure efficiency by giving your staff the same tools for all their contact center tasks
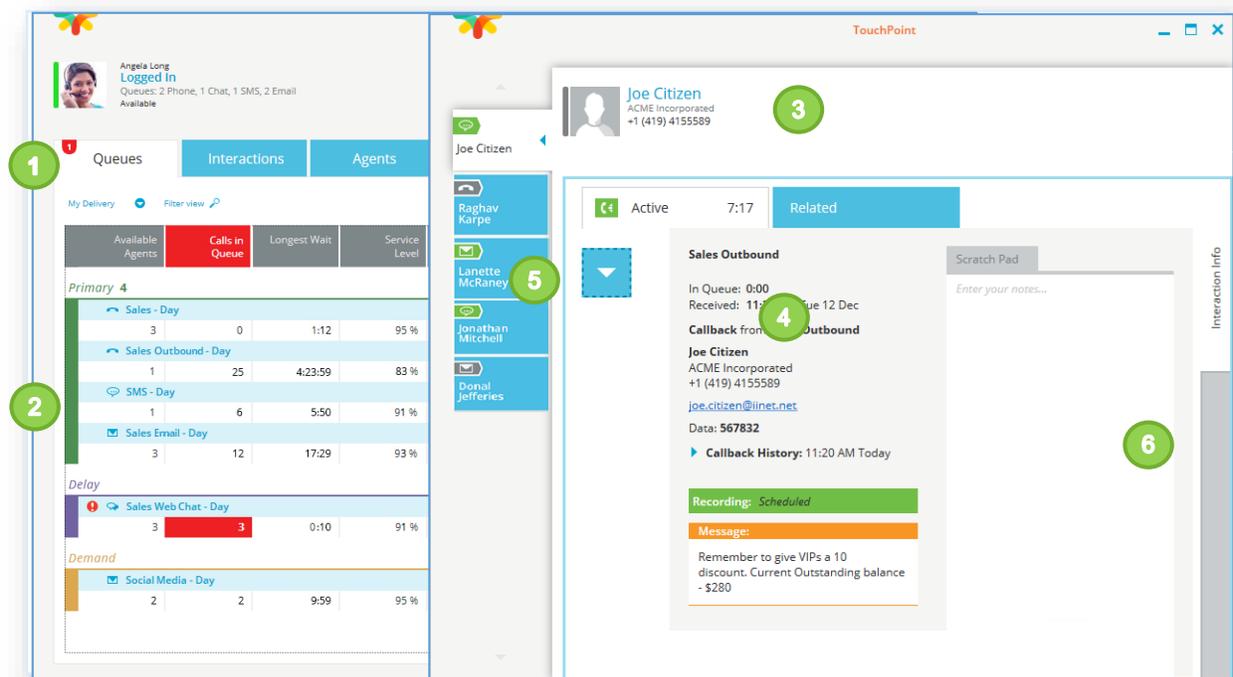
Figure 2.   TouchPoint Queues View and Interactions windows with active Outdial interaction

1	Primary TouchPoint window showing Queues View tab.
2	*Outdial* queue (also showing Phone Call, Email, SMS and Web Chat queues).
3	Interaction window for all media channels, including *Outdial*
4	Example of *Outdial* call
5	Communications interactions that the agent is currently handling
6	Scratch Pad for transferable notes (e.g., to other agents or a new queue)

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Increase Speed and Flexibility for Outbound Dialing

Automating the configuration, delivery and call processing for outbound campaigns provides significant benefits in resource optimization, operation efficiency and also accuracy. Managers can create outbound campaigns quickly and efficiently while maintaining total control over the configuration.

Outdial features that bring efficiencies for outbound calling include:

- **Fast, easy imports** – ODBC imports offer a quick and simple method of importing phone lists.

- **Multiple Numbers** – To increase the successful contact rate of a campaign, up to three phone number options can be imported for a single call record (contact). The *Outdial* system will try the first number and, if that call is resolved as 'No Answer' then the second number to be called is placed in the Preferred Queue so that it is delivered to the same agent. The same process is repeated for the third number and continues until the specified number of call attempts has been reached.

- **Define the order or specify times to attempt different types of number** – For example the business and mobile numbers can be scheduled to be attempted during the day while the home number is not attempted until after business hours.

- **Detailed reports and live campaign statistics** – Managers can proactively monitor the status of each campaign, empowering them with the information they need to improve both contact center performance and outbound calling results.
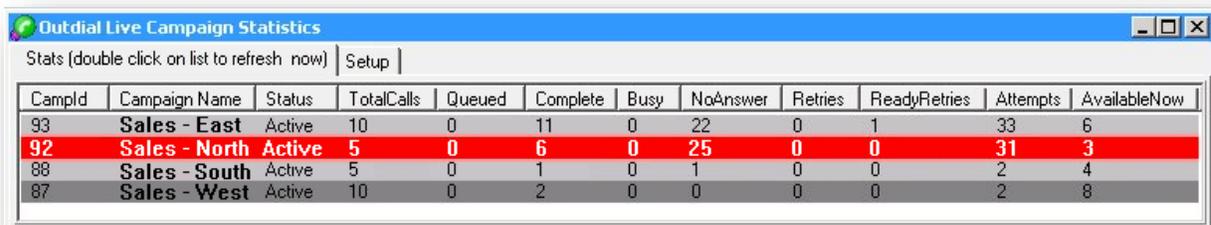
CampId	Campaign Name	Status	TotalCalls	Queued	Complete	Busy	NoAnswer	Retries	ReadyRetries	Attempts	AvailableNow
93	Sales - East	Active	10	0	11	0	22	0	1	33	6
92	Sales - North	Active	5	0	6	0	25	0	0	31	3
88	Sales - South	Active	5	0	1	0	1	0	0	2	4
87	Sales - West	Active	10	0	2	0	0	0	0	2	8

Figure 3. Contact center managers can monitor the progress of active and pending campaigns in real time from a live dashboard. The view is configurable, allowing columns to be included/excluded as required. Alerts for the number of calls left can also be configured.

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Figure 4. Example of Campaign Call Results Summary Report

Return on Investment

Use the table below to calculate the potential ROI for your organization:

Variables	Example	Your Center
A. Number of agents making outbound calls	16	
B. Number of hours per agent per day on outbound calls	8	
C. Number of outbound calls per agent per hour	8	
D. Expected sales closing ratio (percentage)	12%	
E. Average revenue per sale ($)	$30	
F. Working days per month	22	
G. Total contact center outbound calls per day	1,024	
H. Total contact center outbound calls per month	22,528	
I. Total revenue generated per day	$3,686	
J. Total revenue generated per month	$81,101	
K. Time saved per outbound call, with Outdial (seconds)	20	
L. **Investment** Value	$24,150	

Projected Results	Formula	Example	Your Results
M. **Total time** *(in hours)* **saved per month**	(H*K)/3600	125	
N. Additional outbound calls now possible per month	(M*C)	1,001	
O. Additional sales per month	(N*D)	120	
P. Additional results per month	(O*E)	$3,604	
Q. Additional results per year	(P*12)	$43,254	
Estimated payback time *(in months)*	(L/Q*12)	6.7	

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Obtain Fully Integrated Business Intelligence of Outbound Activity across the Entire Contact Center

Managers can monitor the real-time *Outdial* dashboard, and access specific *Outdial* administrative reports; they can also fully incorporate outbound interactions into their contact center analytics, see *Reports Module Paper*.

In addition to standard queue and agent performance reports that incorporate outbound interactions, intelligence can be gathered regarding the specific outcomes of (1) the outbound call attempt ("resolution" data) and (2) the conversation ("wrap-up" data):

- **Resolution Results** – Recording the outcome of an outbound call provides valuable agent control as well as subsequent contact center management information. Agents can enter a specific date and time that an outbound call should be re-presented to the queue if the customer specifies (permitted agents can also delete outbound calls if there have been multiple attempts to connect without success, indicating a possible problem with the contact information).
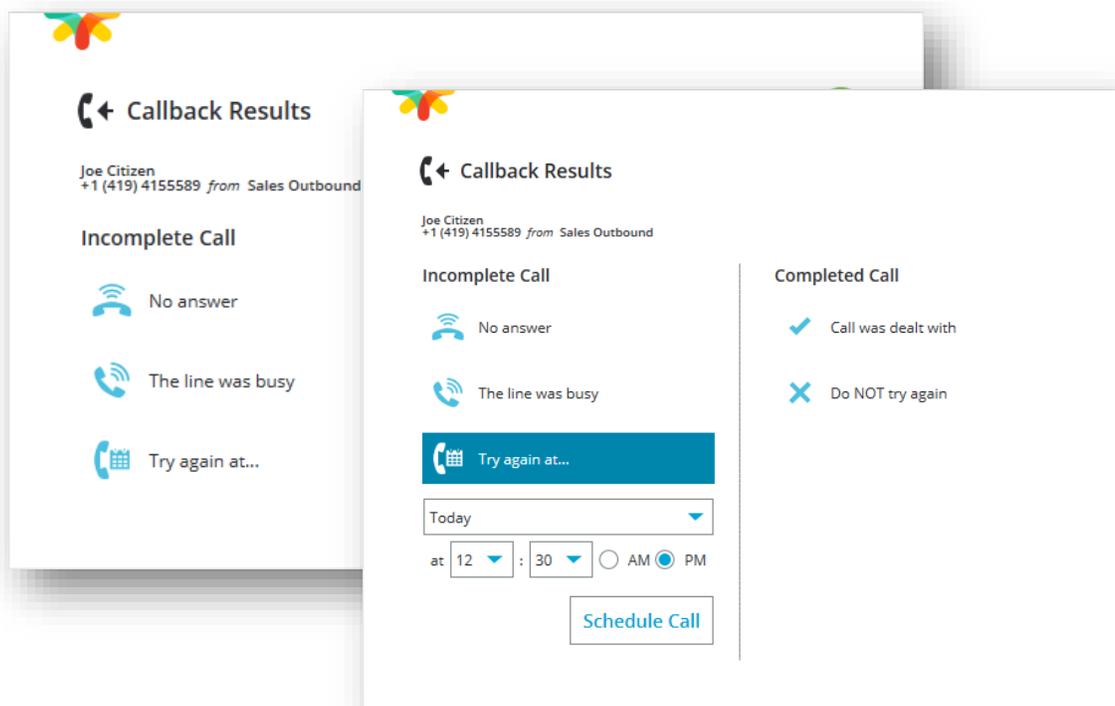
Figure 5.   Agents are prompted to record the result of the outbound call attempt:
- Was it successfully completed or not?
- If not, why not?
- Should a new attempt be scheduled rather than making a random attempt?

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- **Call Wrap-up Results** – Centrally created and maintained to ensure that call outcomes are recorded consistently across all channels and interactions, wrap-up templates can be customized so that specific information can be captured at the queue level. Agents can enter wrap-up information either during or after a call, to generate details about the outcome of the call for business or operational purposes. For example they could be prompted to record the commercial outcome of the call, and/or specifics relating to the content, such as product purchased etc.
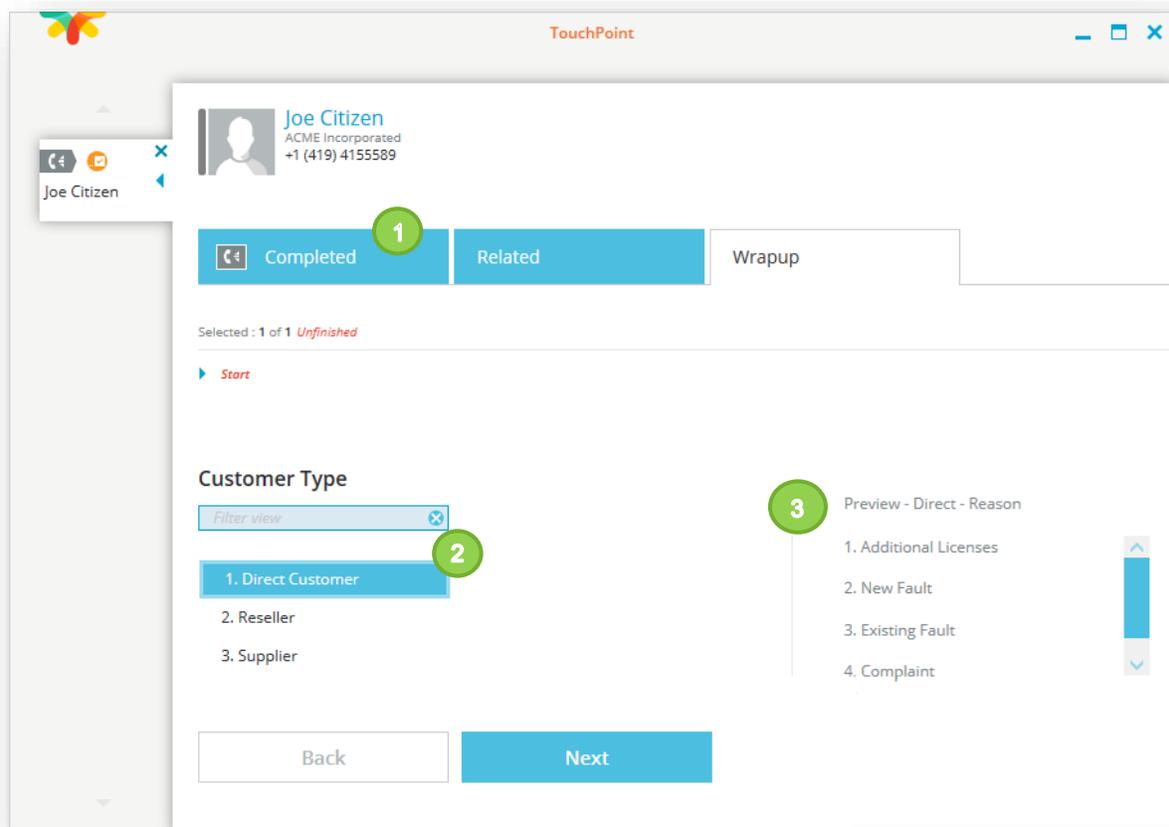
Figure 6.   The agent employs a template to wrap up an interaction

1	All completed calls that are still awaiting wrap-up. Administrations can configure the system to only deliver calls once wrap-up is done (i.e., the whole call operation must be completed), or else to resume delivery as soon as just the call itself is terminated.
2	The first menu in this wrap-up example is **Customer Type**. For long lists, the **Filter** allows agents to use key words in order to find the specific choice they want.
3	The next menu in this example is dependent on the option chosen in the first menu.

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Feature / Function Matrix

Features	Usage
Automatic processing of *Outdial* **outbound calls**	*Outdial* calls are automatically delivered to agents in the same way as normal queue calls.
Blended calling versus Dedicated Outbound calling	• **Dedicated Outbound agents** – Agents assigned to a dedicated outbound class will only be delivered outbound calls. When the agent logs in at the start of the shift, their login ID is automatically associated with outbound call delivery only. This means they only have access to calls delivered by the system into the outbound queue. • **Inbound / Outbound agents ('call blending')** – Agents assigned to an inbound / outbound Class can receive both types of calls during the day. Outdial Queuing communicates with CT Control and performs the call blending. Outdial Queuing only delivers outbound calls to agents when there are no calls waiting in any of the inbound queues for the agent's call delivery class[1], or, if Call catchment is used (see page 13), based on the specified call limit.
Campaign and Queue Types	The two methods of presenting outbound calls to agents are typically determined by the agent's experience and confidence or the type of call: • Agents receiving calls from a **Preview** Queue get a screen-pop with the call-target details, and then initiate the call themselves when ready. • For more experienced agents, and faster operation, calls can be delivered from a **Power** Queue, with the call automatically initiated at the same time as the screen-pop occurs. Agents can receive calls from Preview or Power Queues – or both.
Call Resolution Coding	Resolution codes allow agents to record the outcome of the outbound call. This information can be sourced from reports, providing valuable information to contact center management. The ability to force 'resolution screen-pops' at the completion of every outbound call enhances reports statistics as every call attempt is reported on and every action can be reviewed at a later date. Depending on the call, and their permissions, agents can: • Mark an outbound call as successful • Allocate reasons why the outbound call was not successful • Enter a specific date and time that an outbound call should be re-presented to the queue. This may occur because the caller specifies they would like to be called at a particular time

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[1] A call delivery pattern that gives the flexibility to change delivery based on time of day.

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	• Specify a number as "Do not call again", to prevent redelivery. This may be an appropriate action because the outbound call has been attempted "x" times and it has still not been successful, indicating a possible problem with the contact information See also resolution type settings, under "**Multiple Numbers**" below
Do Not Call List	Administrators can populate a "do not call" table that is checked before a call is queued, to prevent certain numbers being included in campaigns.
Live Campaign Statistics	The *Outdial* Live Campaign Statistics view allows contact center managers to monitor the progress of active and pending campaigns in real time. The view is configurable, allowing columns to be included and excluded as required.
Multiple Numbers	To increase the successful contact rate of a campaign, up to three phone number options can be imported for a single call record. • The *Outdial* system will try the first number, but if that call is resolved as 'No Answer' then the second number to be called is placed in the Preferred Queue so that it is delivered to the same agent. The same process is repeated for the third number and continues until the specified number of call attempts has been reached. • Each of the phone numbers can be scheduled to be attempted in a specified order or at specified times. For example, the business and mobile numbers can be scheduled to be attempted during the day but the home number is not attempted until after business hours. • The resolution types that generate a call to the next phone number in the list can be specified, i.e., "Busy", "No Answer", "Try Again at" and "Do not try again" can each be set as a resolution type that will then use the subsequent numbers for re-attempts.
Outdial **Administration Options**	*Outdial Queuing* administration options include: • Ability to support multiple campaigns – Simultaneously run multiple campaigns with varying parameters such as start/end times and dates. • Administration Graphical User Interface (GUI) – A simple administration interface ensures quick setup of campaigns. • Flexibility to meet changing needs – Create new campaigns or edit existing data before, during or after the campaign. • Real-time control – View and change campaign status in real-time. • Import call records from your databases – Query any ODBC compliant database, select the required parameters and import these call records into your outbound campaign. • Import multiple phone numbers for a single call record – Up to 3 phone numbers can be imported and scheduled to be tried in a specified order or only attempted at specified times

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	• Accommodate multiple time zones – Ensure that calls are only made to areas with different time zones during the appropriate hours specified. • Date exclusions – Specify dates when calls should not be made. • Call resolution management – Calls that are not resolved by the agent can be delivered or alerted to Administrators so they can confirm completion of all calls. • Account codes – Append a code to the phone number on an all or individual Campaign basis to record an account code against the call for call accounting or reporting. This functionality is PBX and Call Accounting dependent. • Prefix or Authorization codes – Prefix a code to the phone number on an all or individual Campaign basis to provide outside line access, toll access for an otherwise restricted number, or simply to allow a common prefix to be inserted on all numbers dialed (e.g., an area code when calls are dialed from a remote site) • Outbound call priority based on Call catchment – Calculate a catchment rate from CT Control to determine an acceptable threshold for prioritizing Outbound calls over Inbound. • Limit Outbound calls based on Inbound call threshold – Specify a threshold when outbound dialing must be paused to ensure lines and agents are available to receive incoming calls.
***Outdial* Reports**	*Outdial* reports allow contact center managers to view campaign information and details of specific campaigns in an easy-to-read format that assists managers in running outbound campaigns. Historical activity on *Outdial* tasks is comprehensively reported via CC's Reports application, including number of attempts, ultimate outcomes etc. The list below is an example of just some of the outbound call parameters that can be reported. • Queue Performance • Agent Performance • Agent Availability • Callback Analysis • Wrap-up Codes • Call Details • Queue Traffic Analysis • Agent Activity • Agent Summary • Outbound Campaign calls by Agent and by Day • Call Type Analysis

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	• Agent Wrap-up
	• List of Campaigns
	• Outbound Calls per Campaign
	• Campaign Call Results
	• Campaign Call Results by Call ID
	• Campaign Call Totals
	• Campaign Details
Preferred Agent	Even if multiple numbers are not imported, subsequent call attempts to the same phone number can be delivered to the same agent by setting the campaign to 'Preferred Agent on Retries'.
Screen-pops	Screen-popping called party information, campaign details and any relevant notes ensures that agents are prepared to make the call because they have all the key information in front of them. The campaign will continue until all calls are finished for that campaign.
Skills-based routing delivery	*Outdial* tasks go into the queue where they are distributed to available agents in the same manner as standard queue calls.
Wrap-up Codes and Templates	Wrap-up information can be entered after or during a call, and is used to generate details about the outcome of the outbound call for business purposes, e.g., reports specifically relating to the commercial result of the call. • The use of Wrap-ups can be optional or forced. • The supervisor specifies the templates to be used and the number of seconds that the agent has (after completion of the call) to enter Wrap-up information appropriate to that call. • Once the Wrap-up screen has been screen-popped the agent selects the appropriate item from each list. • The next call will not be delivered until after the Wrap-up time has elapsed.

Additional References and Resources

- Omni-channel Solution Paper:

http://www.enghouseinteractive.com/solutions/omni-channel-communications/

Ask your account representative for the complementary Communications Center Module Papers:

- Contact Center Connector

- CC Server TouchPoint Agent

- Reports