

# Predictive Outbound and Notifications: Create a Proactive Customer Experience



**Enghouse**  
Interactive



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*Up Next...*

## **What's New in Quality Management Suite 5.4**

Thursday, July 23, 2015 2:00 PM - 3:00 PM ET / 11:00 AM - 12:00 PM PT

## **Enterprise Knowledge Management Suite (EKMS): Reduce Costs by Enabling Customers and Agents to Quickly Find Answers**

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## **Self-Service: Create a Successful Agentless Experience**

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## John Cray

*VP of Product Management—Enghouse Interactive*

John has delivered contact center and communications solutions for 20+ years.

He is responsible for defining and marketing Enghouse Interactive's multi-channel contact center solutions, engineered to optimize customer/patient communications.



## Kai Kaufmann

*Sr. Director of Technology Strategy—Enghouse Interactive*

Kai has 25+ years' experience in software technologies—15 of those in the contact center space focused on enterprise products.

As head of technology, Kai is responsible for understanding industry trends and bringing relevant product solutions to market. His efforts ensure Enghouse Interactive's product portfolio maintains its leadership status in the marketplace.

# Agenda

- Using proactive service to boost customer satisfaction
- Opportunities to maximize success with outbound communications
- Putting outbound and mobile strategies into play
- Maintaining regulatory compliance
- Q&As

# Proactive Customer Service



# What is Proactive Customer Service?

Outbound communication to customers with timely, personalized information via their preferred channel – phone, text (SMS), email, or social media

“Waiting for your customers to contact you and only servicing them when they do is unproductive, unpredictable, and creates issues with managing resources through peaks and troughs of traffic. Instead, proactive outbound communications offer you the opportunity to keep customers productively informed.”

-Alex Black, CTO, Enghouse Interactive

# Why Use Proactive Communications?

- In the past, predictive dialers were used by telemarketers essentially interrupting your dinner
- Now notifications are welcomed by consumers when containing timely and relevant information
- Displace inbound call volume when correctly anticipating reasons customers will call
- Drive profitability by creating loyalty and reducing costs



# Outbound Opportunities

- **Calling on Accounts**
  - Revenue retention
  - Loyalty call
  - Welcome campaigns
- **Outbound Sales**
  - Telemarketing up-sell / cross-sell opportunities
  - Contract & warranty renewals
  - Fundraising
- **Right-Party Connect Campaigns**
  - Common in Healthcare, Insurance and early stage collections
  - Service Desk Follow-up
- **Message Delivery Campaigns**
  - Account status
  - Fraud detection
  - Payment alerts
  - Appointment reminders
  - Emergency / outage / closing notification
  - Prescription refill reminders
  - Sales & promotion alerts
  - Warranty expiration alerts
  - Outbound surveys

# Benefits of Proactive Communications

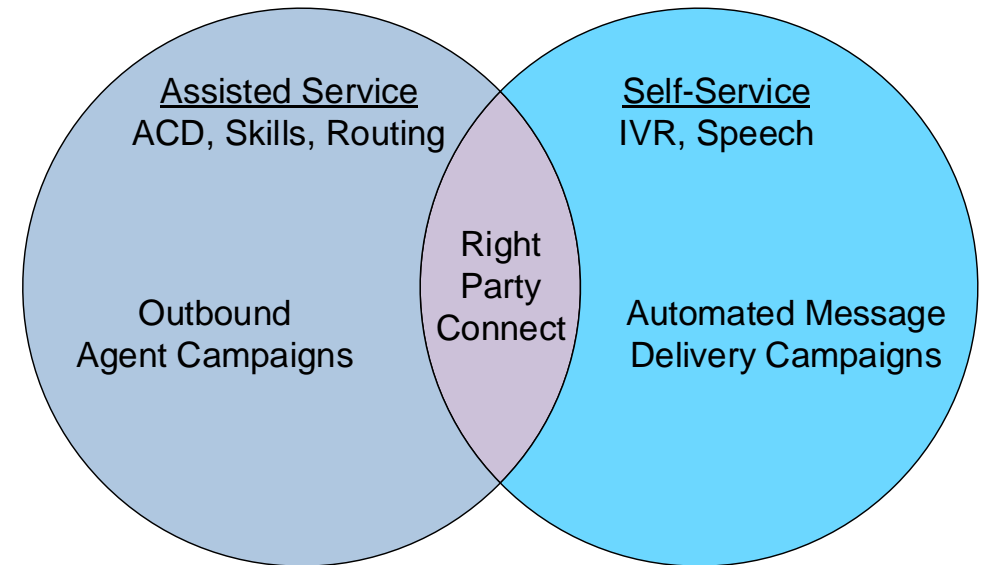
- Enhance agent productivity – take advantage of low inbound volume
- Deliver lower costs by streamlining campaign management
- Enable compliance
- Boost customer satisfaction by being proactive instead of reactive to customer needs
- Personalize customer interactions

# Blending Inbound, Outbound, and Self-Service

- Blended agent campaigns, inbound to outbound, to maximize success
- Outbound dialing modes: preview, progressive, power, and predictive dialing
- Multi-channel ACD, agent skills, workflow routing, queuing and distribution for campaign list management and automated outbound dialing

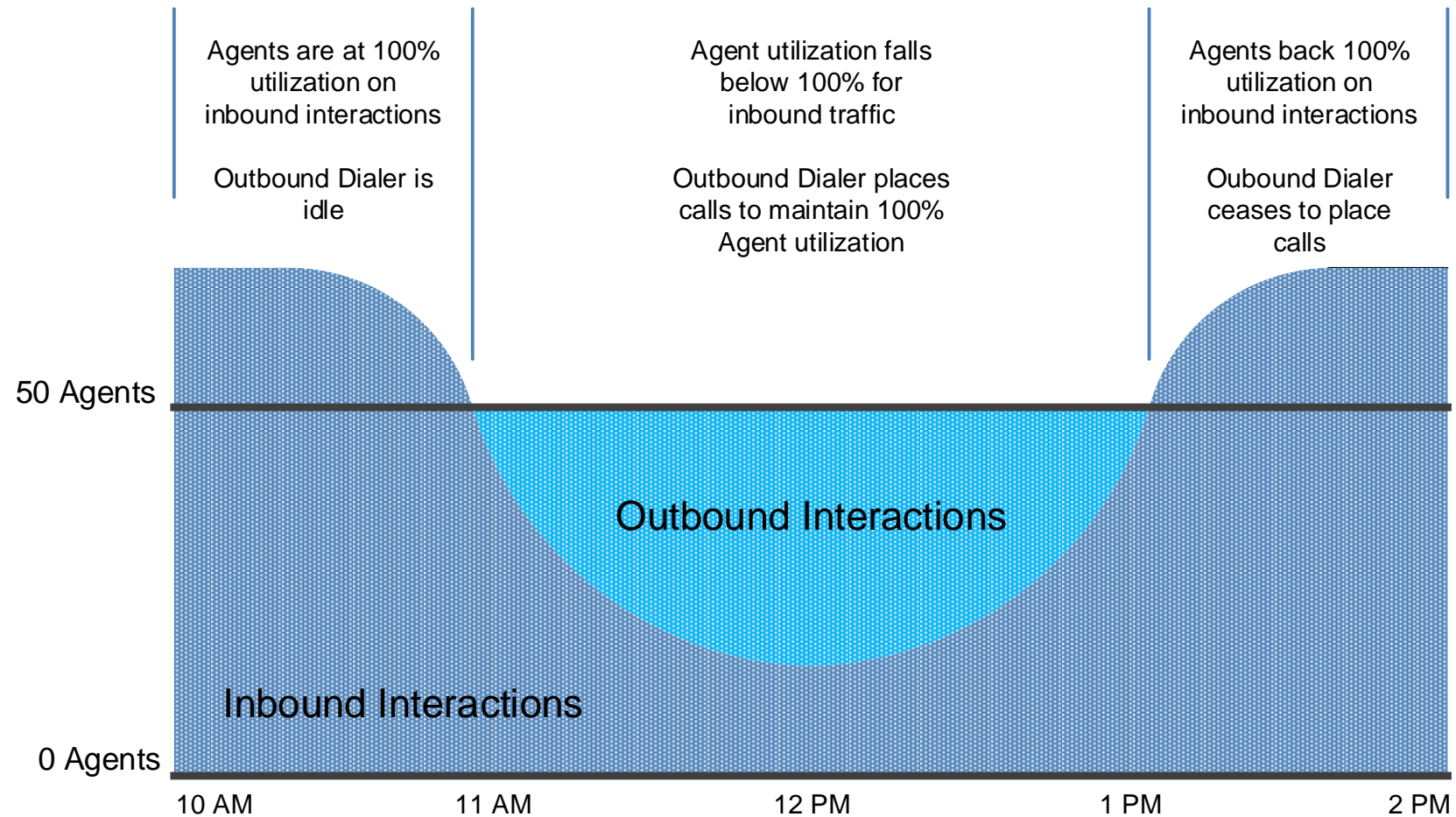
- **IVR / Voice Self-Service for Outbound Dialing:**

- Agentless automated outbound message campaigns
- In / Out Voice, SMS, and Email
- Option to connect with Agent



# Blended Agent Campaigns

## Primary Inbound / Secondary Outbound



# Outbound Dialing Modes

- **Preview** – enable agents to first view the available information (including interaction history) and then decide when to place the call
- **Progressive/Power** – place calls only when an agent is available to handle the call (based on priority and agent skill level)
- **Predictive** – state-of-the-art pacing to call a large number of customers in a short period of time, while reducing idle times and freeing agents from dialing calls
- **Agentless** – automate communications with your customers and leverage outbound IVR capabilities over voice, SMS, and email

# iAgent Experience

The screenshot displays the iAgent interface. At the top, a call log shows the agent's name (LORI NELSON), wait time (0:00:24), and queue (iatOutboundDialer). A toolbar on the right includes call control icons (play, pause, stop, end call) and a red box highlights the 'show' button. Below the call log, a 'Results' dialog box is open, titled 'Outbound Dialer Call - LORI NELSON'. The dialog has a 'Schedule a callback?' section with radio buttons for 'Yes' (selected) and 'No'. Below this is a list of reasons for scheduling a callback, such as 'Agent - Promise To Pay', 'Agent - No Promise', 'Agent - No Response', 'Agent - Refuse To Pay', 'Agent - Disputed Debt', 'Agent - Insurance', 'Agent - Legal', 'Agent - LMTC', 'Agent - Disconnected (SIT)', 'Agent - Wrong Number', 'Agent - Ans Machine', and 'Agent - Remote Party Hung Up'. To the right of the dialog is a 'Schedule a Callback' section with a table of phone numbers and a 'Call #' field. Below the table are checkboxes for 'Transfer this contact to me' and 'Keep all other calls scheduled for this contact'. The dialog has 'OK' and 'Cancel' buttons at the bottom. A red box highlights the 'Keep all other calls scheduled for this contact' checkbox. Three callouts point to the 'show' button, the 'Keep all other calls scheduled for this contact' checkbox, and the 'Agent - Remote Party Hung Up' option.

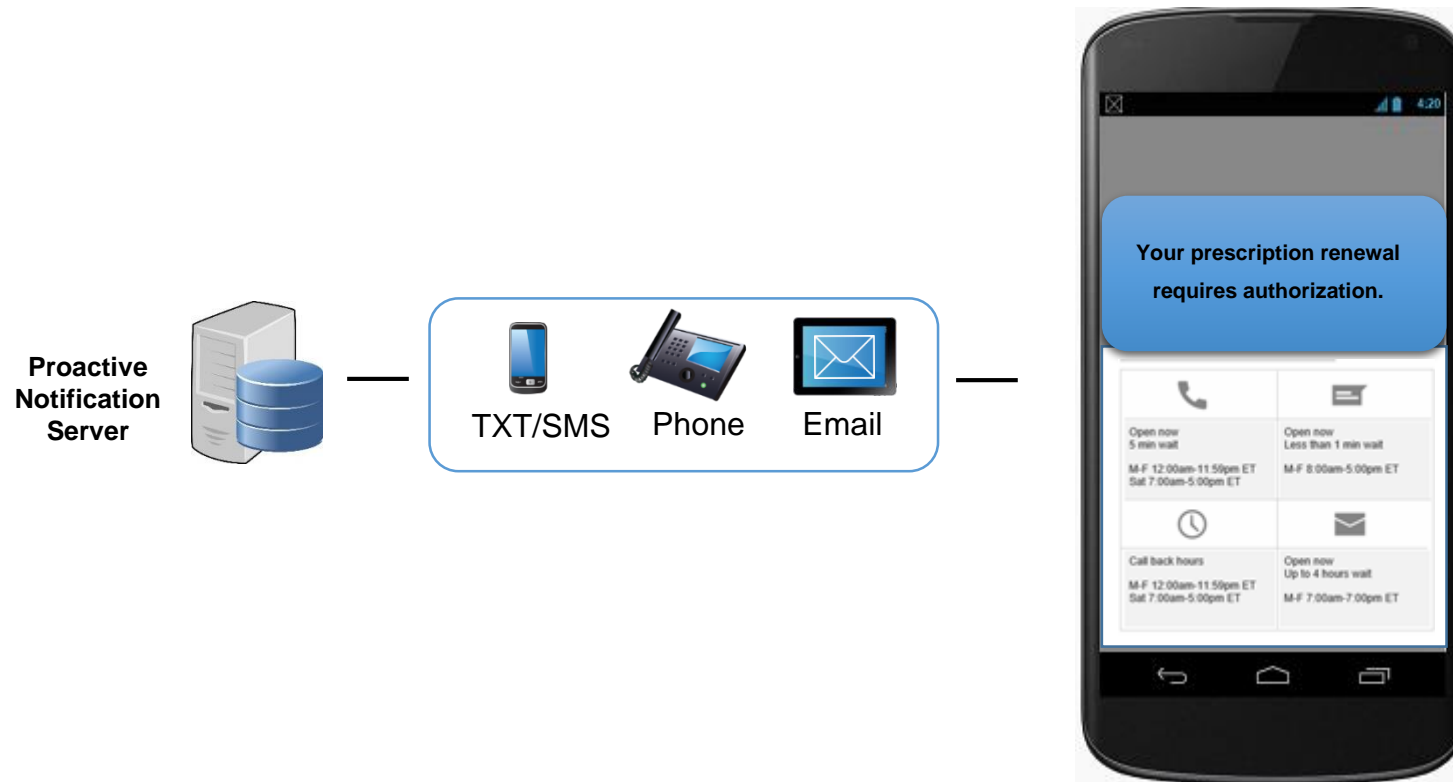
Leave a pre-recorded message for voicemails and move on to the next contact

Reschedule with a contact at a time that is convenient for them

Maintain account ownership for the agent

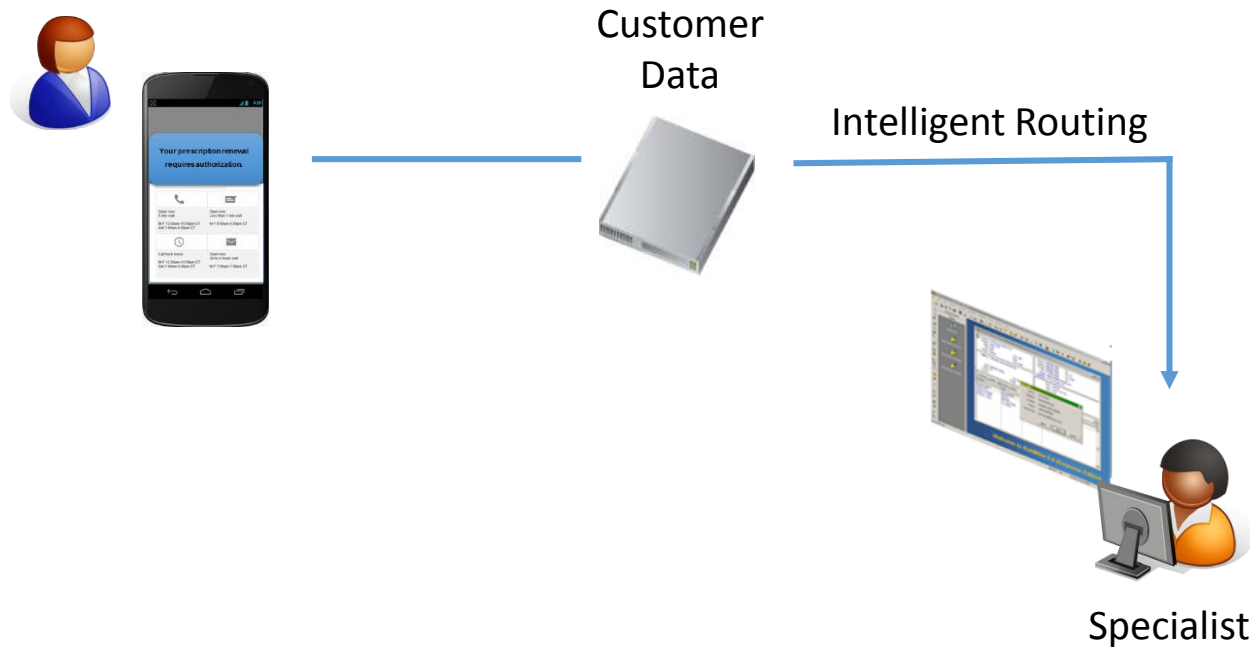
Outbound and Mobile

# Proactive Notifications + Mobile





# Sample Customer Interaction

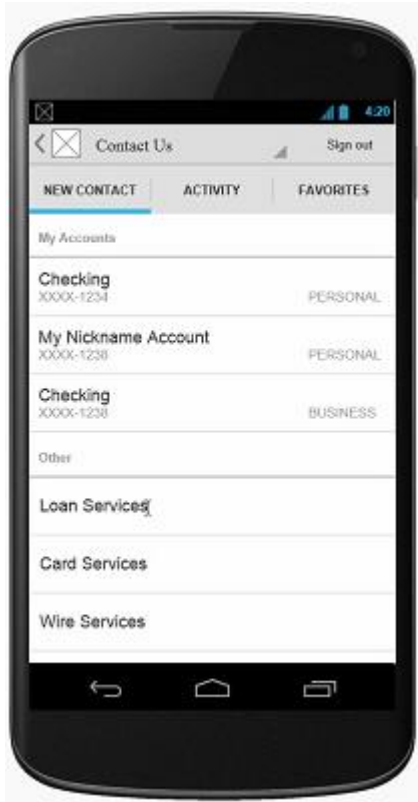


# Surveys

## Collect the Voice of the Customer

- Use surveys to collect data and improve the delivery of services and experience moving forward
- Build customer loyalty by showing that you appreciate their input and are dedicated to providing the best customer service possible
- Provide a proactive follow-up to the survey results - live touch

# Create an Effortless Customer Experience



- Use personalized, highly-relevant outbound messages
- Communicate through customers' preferred channels
- Guide customers through the next steps of the process
- Incorporate a mobile app for more intuitive service
- Provide a survey to collect the voice of the customer

# Maintaining Compliance



# Compliance Peace of Mind



- CCE 9's outbound dialer, formerly IAT SmartDial<sup>®</sup>, was built with regulations in mind
- Compliance-capable tools include:
  - Integration to national Do-Not-Call (DNC) lists
  - Internal DNC to track contact opt-out/opt-in
  - Configurable predictive algorithm and reporting to manage abandoned call rates
  - Caller-ID transmission
  - Call Disclosure
  - Locale/Time zone awareness
  - Call recording via Enghouse Interactive QMS

# Right-Party Contact

**Definition:** Validation that the correct contact has been reached

Can be leveraged in environments where a party needs to be identified before providing personal information

20-30 seconds of agent time is typically used for right-party validation

# Cell Phone Compliance

## Adhering to TCPA regulations for cell phone numbers

- Detect and remove cell phone numbers from predictive and power dialing lists
- Provide a manual-only dialing platform

## How to Adhere to TCPA regulations

- Check each phone number against the most current data available before it's dialed
- Exclude cell phone numbers and/or any other numbers you indicate
- Ability to “opt-in” individual numbers ok to dial once consent is given

# Manual-Only Dialing Platform

Agents receive a screen-pop of account information with options to manually type or copy the number into the dial field

Traditional management and reporting tools incorporated



Takeaways

# Proactive Outbound Success

- Proactive Communications – Queued and Automated
- Leverage Right-Party Contact to maximize agent optimization
- Use proactive notifications to anticipate customer needs
- Communicate through customers' preferred channels
- Incorporate an inbound, outbound, and self-service approach
- Add a survey to the mix for a proactive, personalized touch

# Ready to Ramp up your Outbound Efforts?

- Contact your sales rep to discuss your particular business needs
  - Email the Enghouse rep who invited you to attend this webinar series or reach out to John Gardner at [john.gardner@enghouse.com](mailto:john.gardner@enghouse.com) or 630-575-7789
- Request a one-on-one demo

# Upcoming CCE Webinars

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