



# THE US CONTACT CENTER DECISION-MAKERS' GUIDE 2015

THE OUTBOUND & CALL BLENDING CHAPTER

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“The 2015 US Contact Center Decision-Makers’ Guide (8<sup>th</sup> edition)” – extract

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The *"US Contact Center Decision-Makers' Guide (2015 - 8<sup>th</sup> edition)"* is the major annual report studying the performance, operations, technology and HR aspects of US contact center operations.

Taking a random sample of the industry, a detailed structured questionnaire was answered by 212 contact center managers and directors between April and May 2015. Analysis of the results was carried out in June 2015. The result is the 8<sup>th</sup> edition of the largest and most comprehensive study of all aspects of the US contact center industry.

This White Paper is taken from "Outbound & Call Blending" chapter of the report, sponsored by Enghouse Interactive.

**The entire 350-page report can be downloaded free of charge from  
[www.contactbabel.com/reports.cfm](http://www.contactbabel.com/reports.cfm)**



Enghouse Interactive is a global leader in providing solutions that deliver differentiated customer experience and maximize the value of every customer interaction.

Enghouse Interactive's comprehensive portfolio of interaction management solutions span omni-channel contact centers, Computer Telephony Integration (CTI), self-service Interactive Voice Response (IVR), knowledge management, operator consoles, call recording and quality monitoring, media voice services, and outbound dialers.

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**Contact:**

e: [info.ei@enghouse.com](mailto:info.ei@enghouse.com)

a: Enghouse Interactive North America Headquarters, 2095 W. Pinnacle Peak Rd.,  
Phoenix, Arizona 85027 USA

t: +1 602-789-2800

w: [www.enghouseinteractive.com](http://www.enghouseinteractive.com)

## OUTBOUND & CALL BLENDING

The traditional outbound call was simply about selling more products to new and existing customers. However, legislation and customer pressure impacted on cold calling, and the past years have seen an increasing proportion of outbound calling being made to existing customers, either to deliver customer care or to inform them proactively about events and circumstances which affect them.

Outbound calling is fundamentally different from inbound, and - facing significant and growing cultural and legislative issues - must be managed sensitively:

- the nature of outbound is intrusive and usually driven by the needs of the business rather than the customer (except in cases of call-back requests and for proactive outbound service)
- this means that customers are more likely to be defensive and wary of the purpose of the call. Trust needs to be built very quickly in order to overcome this negative start point: having the right information about the customer to hand will improve the experience for both agent and customer
- outbound work can be very hard on agents: few people actively welcome most outbound calls, and persistent refusal, lack of interest and rudeness can be very wearing for agents, especially if productivity-enhancing technology such as dialers are being used. Management should consider ways of alleviating agent stress, through sensible scheduling and call blending, judicious use of technology, focused training and improving working environments, amongst other ways
- especially where the technology exists to do so, it can be tempting to treat outbound calling campaigns as an exercise in maximizing call volumes and (theoretically) revenues. However, this can result in brand damage and high staff attrition rates through over-pressured and exhausted agents delivering poorer quality interactions
- there has been a tendency to use offshore contact centers for low-value outbound sales campaigns which would otherwise be unprofitable to run. However, the same high standards of training and support are needed by offshore agents to do their job properly: too many businesses simply put the agents on a dialer with an inflexible script in front of them and then wonder why their customers and prospects become negative towards their brand
- tough legislation has emerged which is reducing the amount of cold calling which businesses can do. Cold calling is illegal in Germany, and the Do-Not-Call register in the US and the Telephone Preference Scheme in the UK allow customers to opt out of receiving any sales calls at all in theory.



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# Create a Customer Experience Everyone will Love

Enghouse Interactive makes it easy.

## **Customer Timeline**

Deliver a superior customer experience each step of the way by giving agents a Customer Timeline view outlining every contact's past, present, and future interactions in one place

## **Clear Omni-Channel Interface**

Empower agents with access to all interaction types in one universal queue for ultimate efficiency and smooth-flowing communication

## **Self-Service**

Relieve your contact center of the routine, easy-to-answer incoming queries, so agents can focus their attention on bigger issues

## **Proactive Notifications**

Instigate desired traffic and drive wanted inbound calls that will impact your bottom line, while strengthening customer loyalty

**Call blending** is an element of outbound calling which has had to fight against the conventional wisdom of the traditional contact center industry, which implies that the more one can segregate the contact center into a series of production lines, the better-run the operation will be.

Call blending gives the ability to deliver both inbound and outbound calls seamlessly to the agent, regulating outbound call volume based on inbound traffic. When inbound traffic is low, outbound calls are automatically generated for a specified campaign. When inbound traffic picks up, the dialer dynamically slows the number of outgoing calls to meet the inbound service level. Results can include increased agent productivity, streamlined staffing, and improved customer service. However, this process needs to be understood and managed carefully, as not all agents are adept at dealing with both inbound and outbound calls.

Sales to both new and existing customers are obviously still key reasons why companies carry out outbound calls, and the hybrid method - customer service leading to a cross-sell/up-sell opportunity - is seen a good way of circumventing the increasing numbers of people registering for the Do Not Call Register. However, businesses must be careful not to pester customers or abuse the relationship they have built up with frequent calls about products and services that are not tailored to the customer. Increasingly, turning an inbound service call into a cross-sell or upselling opportunity has become a widely-use tactic.



One way to tailor these proactive, outbound interactions and stay on the customers' "good side" is to use their preferred channel. A couple examples could be the preference of text messages for appointment reminders or email for order processing updates. Both of these situations still leave an opening for upselling, such as automated rescheduling and providing coupons while suggesting other products to purchase within order notifications.

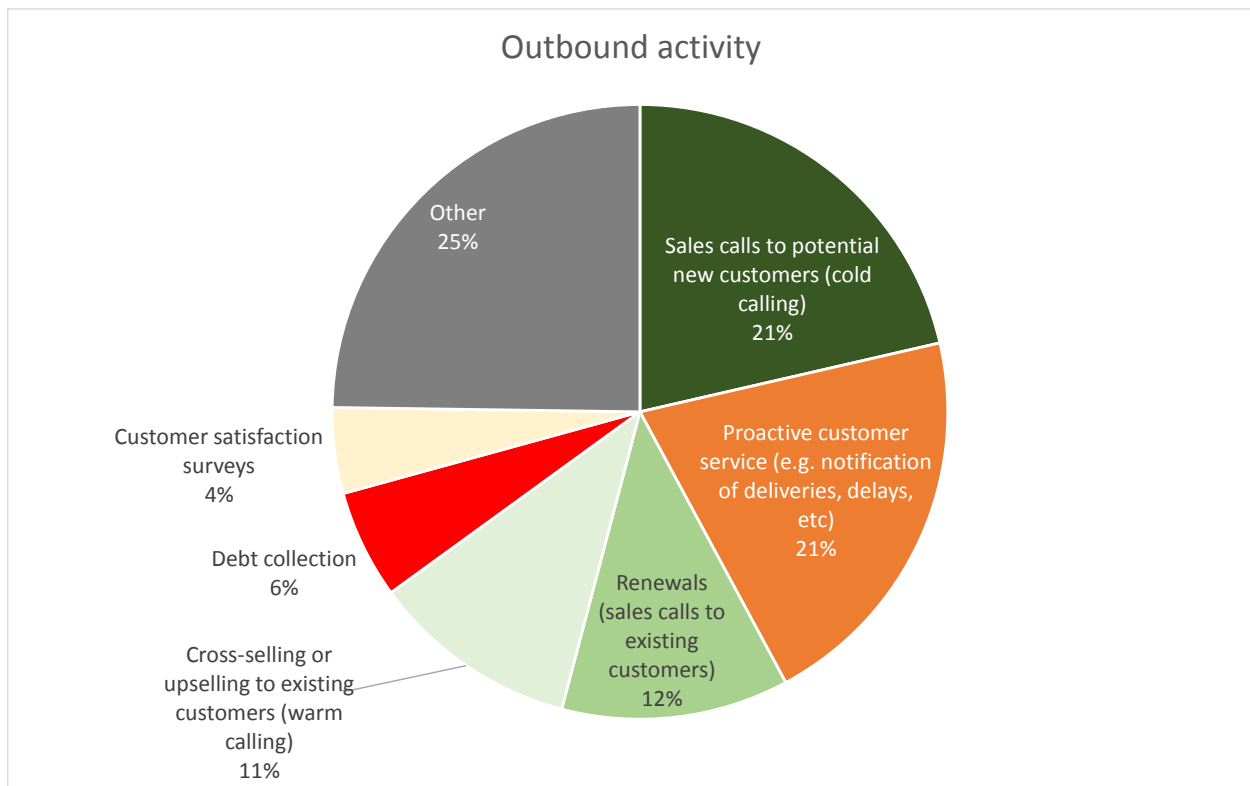


## OUTBOUND ACTIVITY

The traditional outbound activity of trying to sell to prospective customers (rather than those who have already done business with you), is still in #1 position, at 21%, alongside proactive customer service, which is a strong brand builder as well as an effective call avoidance tactic.

In total, the three sales-related activities - to potential customers, cross-selling and upselling to existing customers, and renewals to existing customers - account for 44% of outbound activity, compared to less than 40% in most of the previous years.

Figure 1: Outbound activity



Of those vertical markets that provided enough responses to this question from which to draw some conclusions, the B2C sectors (the services and TMT B2c sub-sectors, as well as retail & distribution) were more involved in sales calls to new prospects, as were outsourcers.

B2B sectors (manufacturing, TMT and Services B2B sub-sectors) were more involved in proactive customer care, as was insurance, the latter of which has to keep customers informed of claim progress and collect required information.

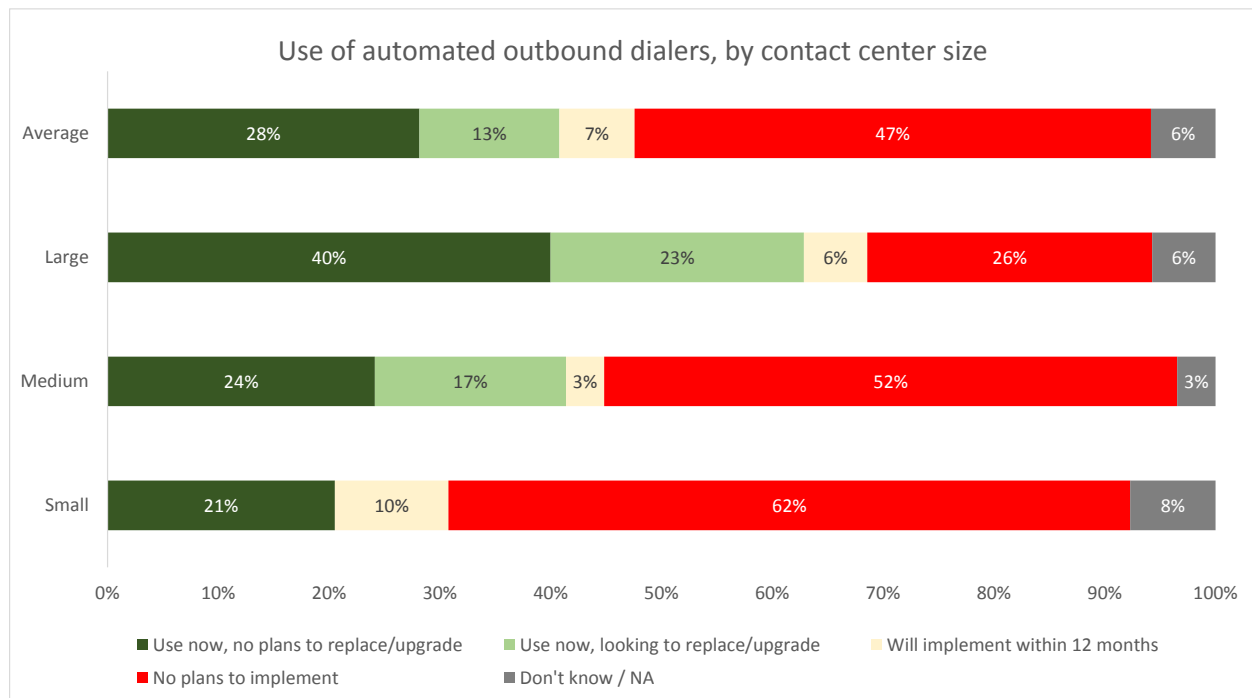


## THE USE OF OUTBOUND DIALERS

Automated outbound dialers are almost ubiquitous in large operations which carry out reasonable amounts of outbound work, as the efficiencies over manual dialing are so considerable that it will often make commercial sense. Outbound automation in the cloud is very popular, and this means the barriers to usage are even less.

While smaller operations may not see the same scale of cost savings, over one-fifth of these respondents have implemented outbound automated dialing technology.

Figure 2: Use of automated outbound dialers, by contact center size



Answer Machine Detection (AMD) is a type of technology that allows dialers in predictive mode to recognize calls that are picked up by an answer machine, and stop the outbound agent taking that call, keeping them free to speak with actual customers.

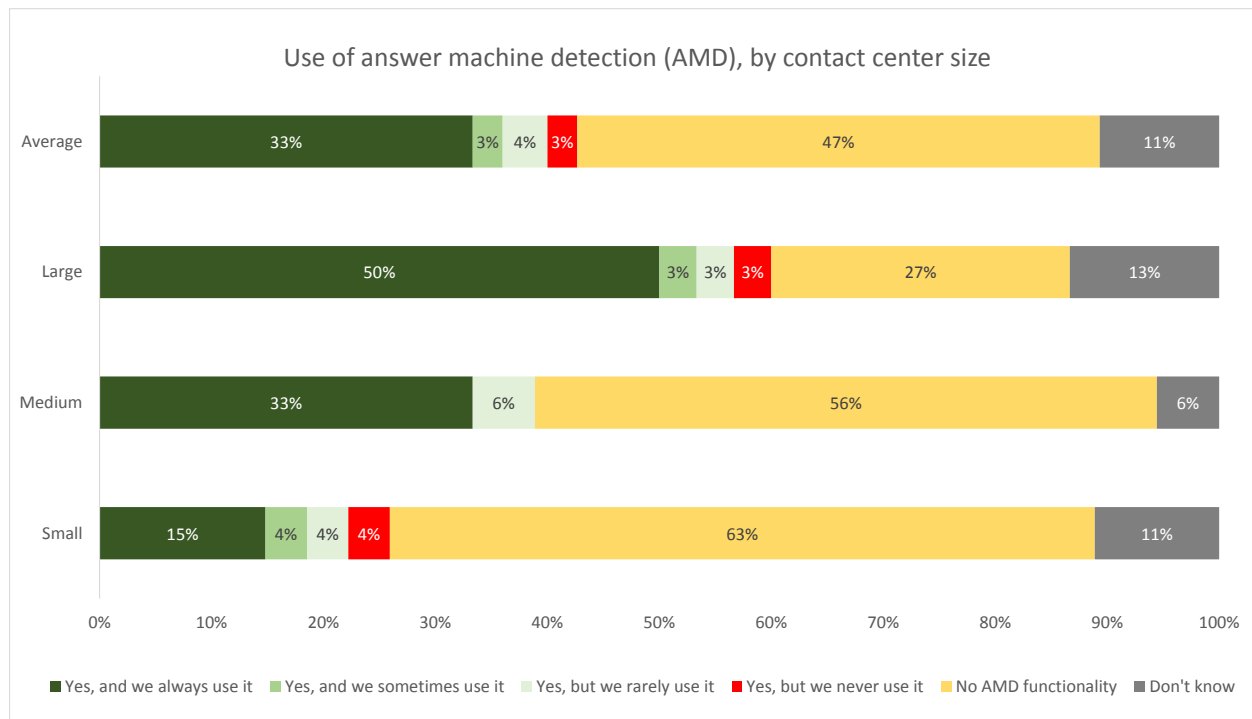
Most AMD solutions usually work by:

- Detecting a long string of words in one burst such as “Hello, we’re not available, please leave a message after the tone ...”
- Identifying a live caller who may answer by saying “Hello?” and then waiting for a reply.

However, AMD may cause problems and is not 100% accurate:

- There will be a pause or delay while the system tries to connect an agent, which may lead to the called party hanging up
- the AMD solution may incorrectly flag a live person as being an answering machine, hanging up the call. The effect of this ‘false positive’ is that the customer will effectively get a silent call which can be frustrating and worrying for the majority of the public who are unaware of how outbound technology works.

Figure 3: Use of answer machine detection (AMD)



Of those respondents that use AMD, one-third employ it all of the time, particular the case in large operations. Only a small minority pick and choose the times they use it (some contact centers only employ it in peak calling times, where customers or prospects are most likely to be available, so as to maximize live contacts). A very substantial proportion of outbound users do not have AMD functionality in their solution, especially those in small and medium operations.

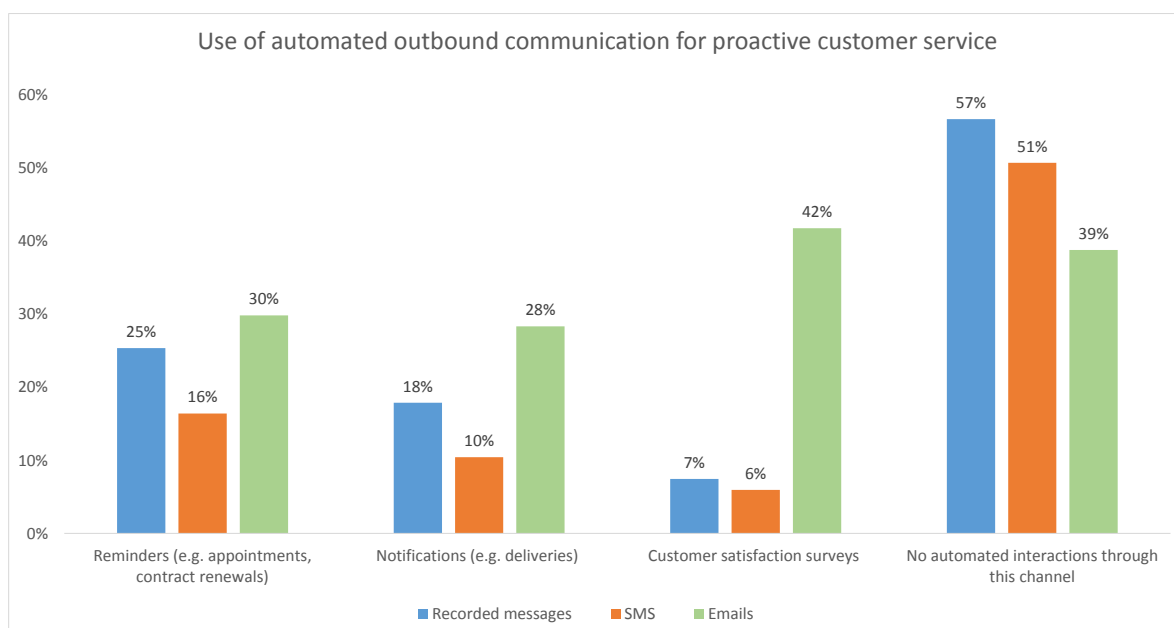
Around 90% of outbound calling is done by agents, with 10% via automation. The opportunity exists for automated outbound service to expand - such as sending reminders and notifications to customers through an automated process - thus significantly reducing the cost to the business while improving the overall customer experience. Many customers will choose to seek clarification or a status update at some point in the buying process through making an inbound interaction. By sending a pre-emptive outbound message, the business is proactively assisting the customer to manage their interaction.

57% of respondents do not use recorded messages for any purpose, whereas SMS messages are used by around half of respondents, mainly for notifications and reminders. Only 39% of respondents do not send automated emails at all. Email is used particularly for outbound customer satisfaction surveys, with recorded messages being used most often for reminders, as are SMS messages.



When using multiple communication channels, it is important to provide agents with a view and access to all past, current and future interactions, including the inbound. This is especially important when you consider different agents could be handling each customer conversation. Providing continuity to discussions across the lifetime of the customer creates an elevated customer experience.

**Figure 4: Use of automated outbound communication for proactive customer service**

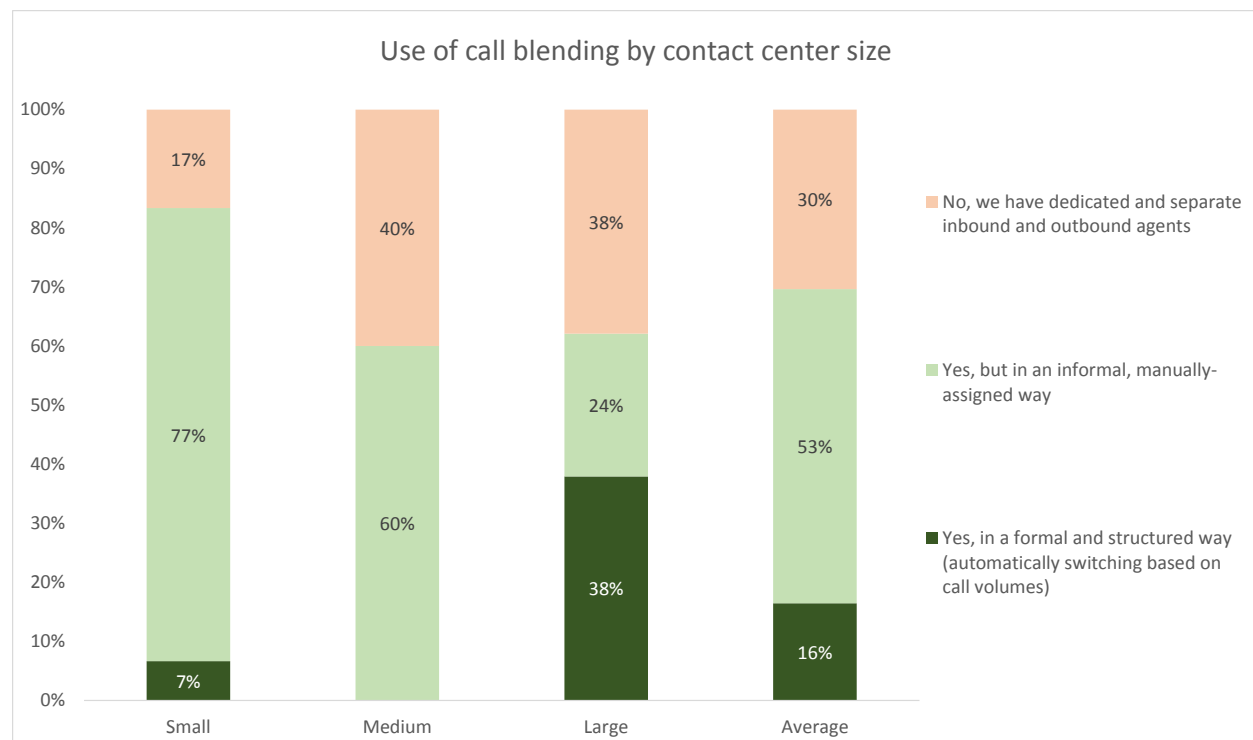


## CALL BLENDING

A contact center handling different processes involving customer service, sales orders, and outbound telemarketing will have different groups of agents with specific skills for these areas. Some agents are more capable and adaptable than others, and can be used as blended agents. For example, these agents may have a primary responsibility to handle inbound calls, but when the inbound call volume drops, the dialer will send a message to these agents indicating that they have been switched to outbound mode and start offering outbound calls to them. Where relevant, a CTI-type link will prompt a script for the outbound calls to run on the agent desktop and depending on the call volume in the inbound queue, the agents will be switched automatically, improving productivity. However, if there is a constant switching from inbound to outbound and back again, the agent may lose concentration and the productivity may go down.

A structured blended environment, where agents are moved seamlessly and dynamically between inbound and outbound, is used in only 16% of this year's respondents' operations. As usual, large contact centers are far more likely than smaller operations to use this type of approach. Small operations are more likely to operate blending on a manual, ad-hoc basis. A substantial proportion of both medium and large operations use dedicated teams to handle only either outbound or inbound.

Figure 5: Use of call blending by contact center size



It is interesting to put the use and type of call blending against key contact center performance and operational metrics, such as average speed to answer, which is - as usual - somewhat less in formal, blended environments than in dedicated and more ad-hoc environments, as agents are moved between tasks quickly and seamlessly.

Figure 6: Average speed to answer, by call blending environment type

Call blending environment	Average speed to answer (seconds)
Blending used in a formal and structured way	24
Blending used in an informal, ad-hoc way	30
Dedicated and separate inbound and outbound agents	32
Not applicable - no outbound calls made	55



--- Thought Leadership ---

## Why “Good Customer Service” Is *Not* Good Enough

*Now that personalized assistance, responsiveness and courtesy are expected, being proactive is where service organizations must distinguish themselves.*

Today’s customer centric marketplace gives a competitive advantage to those who provide the best customer experience; there’s no debating that point. However, providing good service *after* a customer reaches out to you is expected; it’s no longer a distinguishing trait. Research now suggests that service organizations that want to create a real advantage over their competitors need to contact their customers with valuable and timely information *before* their customers make inbound calls.

Research by [Enkata](#) affirms the value of an effective proactive customer service strategy, stating it can reduce inbound customer service call volumes by up to 30% over a 12-month period, and it can lower call center operating costs by as much as 25%. The study also found that proactive customer service had the potential to boost customer retention by as much as 5%, a huge benefit when considering the cost of lost customers.

### 2 Examples of Proactive Service

Much of the focus on proactive service is on the prospect or pre-purchase phase of a sale. For example, some car rental companies are using web self-service tools to provide instant responses to prospective customers before they commit to a rental agreement. This practice leads to significant reductions in inbound calls to their contact centers, which translates to big cost savings.

Although it may initially sound like an oxymoron (and tongue twister), proactive post-purchase customer service is a high-value way service organizations can differentiate themselves. A recent article in Forbes, for example, highlights how AT&T started implementing this kind of proactive service with new customers to reduce the confusion and frustration that accompanies the receipt of their bill. Now, in addition to their bill, customers receive a link to a personalized video that uses their actual data while explaining the different elements of the bill. It’s personalized AND proactive. According to the article, implementing this strategy helped AT&T realize a significant reduction in inbound calls, as well as an increase in the sales of value enhancing services like paperless billing.

### The Technology That Drives Proactive Service

While shifting one’s business strategy from reactive to proactive customer service begins with a mindset shift, it often requires a technology investment, too. For example, a dialer that intelligently and intuitively connects to a CRM solution and KMS (Knowledge Management System) enables account managers to make the right calls, at the right time, with the right information. In fact, studies show that using predictive dialing boosted agent productivity up to 300% compared with manual dialing systems.

As with inbound communications, outbound proactive interactions must also offer customers a choice of channels. So when sending that appointment reminder, or that notification of an outage in their area, or that update on their shipment, it’s critical to deliver the message in the customer’s channel of choice – SMS text message, email, or even prerecorded voice message.

Lastly, quality is key. Proactive communications must be measured, recorded and analyzed to ensure continuous improvement. When the right business mindset is combined with sound contact center solutions, proactive customer service can become a new and welcomed reality for a service organization. And when that happens, customer and agent feedback will validate that this differentiator is not just a nice-to-have, it’s a must-have.

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## THE ROLE OF MOBILE TELEPHONY IN OUTBOUND CALLING

Around 80% of US cellphone users have access to a smartphone, with this figure growing rapidly, meaning a large proportion of customers will want to contact businesses through these devices, whether via the telephony element of the device, or via the company's website or mobile app. Taking into account the use of tablet computers and handheld games consoles to access the Internet, the 'mobile channel' may actually be the first port-of-call for many customers, especially those in the younger demographics.

The dual, mutually-supporting drivers of high-speed mobile networks and the proliferation of smartphones means that provision of services via a mobile channel offers businesses and consumers the opportunity to make a step-change in the way that they communicate with each other. This new world of communication allows businesses to consider whether functionality such as multimedia streaming and videoconferencing could give them a competitive advantage in the customer service world.

Gathering, understanding and using the contextual data that can surround the mobile consumer will be key to pushing the uptake and functionality of this channel forward. The plethora of channels immediately available to the mobile consumer - including voice, web browsing, SMS, social media, and web chat - encourages the customer to act immediately for all their service or information requirements, rather than waiting until they are in front of a desktop computer.

In the US, the majority of current call plans make the recipient pay for an incoming call, which means that the caller has to be sure that the recipient actually **wants** to receive the call. Survey respondents make 28% of their outbound calls to cellphones and this figure will certainly rise further over time.

Respondents this year report paying a mean average per-minute rate of 2.16c to call a landline, against 2.37c per minute to a cellphone (medians are 1.9c and 1.98c respectively).

The same double pricing structure is also applied to SMS messages, meaning that the current low usage of business-to-customer SMS (and the lack of interest in growing this channel) is very understandable, with SMS being perhaps best suited to proactive customer service, where being sent information such as notification of travel delays or a danger of being overdrawn is actually worth a customer paying for. It is worth noting however, that respondents stated that their SMS volumes are expected to rise significantly.

See the '**New Media and the Customer of the Future**' section of this report for more about the role of SMS, as well as 'The Mobile Customer' chapter.

Further information about servicing the Mobile Customer can be found in "**The Inner Circle Guide to Multichannel Customer Contact**", and "**The Inner Circle Guide to Self-Service**"

Both reports are available free of charge from [www.contactbabel.com](http://www.contactbabel.com).





## APPENDIX: ABOUT CONTACTBABEL

ContactBabel is the contact center industry expert. If you have a question about how the industry works, or where it's heading, the chances are we have the answer.

The coverage provided by our massive and ongoing primary research projects is matched by our experience analyzing the contact center industry. We understand how technology, people and process best fit together, and how they will work collectively in the future.

We help the biggest and most successful vendors develop their contact center strategies and talk to the right prospects. We have shown the UK government how the global contact center industry will develop and change. We help contact centers compare themselves to their closest competitors so they can understand what they are doing well and what needs to improve.

If you have a question about your company's place in the contact center industry, perhaps we can help you.

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Telephone: +44 (0)191 271 5269

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