10 Golden Rules of outbound campaigns
Introduction

This guide is aimed at anyone who is operating within an outbound or a blended contact center environment.

If you are considering an investment or have already invested in an automated dialing system for your outbound campaigns then this guide will serve you well. The right technology, of course, is essential but to get the most from this investment you also need to ensure your processes are hitting the mark.

We’ve put together these key tips to help ensure your outbound operations achieve success. These are exactly the areas that your West Unified Communications Services Success Manager would be helping you with at ‘go-live’ and on an ongoing basis thereafter.

Outbound Campaigns

Outbound campaigns are fundamentally different to inbound. We all know that making effective contact with your customers and prospects is critical to business success.

There’s a wide variety of different campaign types when it comes to outbound. Some of the most common include:

- Making new business sales calls to prospects
- Sales calls to existing customers for either renewals or for the purpose of cross-selling/up-selling
- Pro-active customer service (checking customers are happy or informing of delays or delivery details etc.)
- Debt collection
- Appointment setting
- Customer satisfaction surveys and market research

Technology plays a crucial part when it comes to creating successful outbound campaigns, allowing you to maximize the number of connections that you make.
Outbound dialing modes explained

Outbound dialing technology will typically offer three dialing modes.

- **Preview dialing** allows agents to review customer information before launching the call. It’s a useful tool for getting new starters trained. Preview dialing is also ideal for complex case management where an agent needs to understand and consider the history of the customer to determine how best it needs to be handled.

- **Progressive dialing** mode gives the agent a screen pop of the customer record while the system is making the call. The agent has time to review the record, but only for as long as it takes for the customer to answer. If the customer is busy or does not answer then the system will move on to the next record.

- **Predictive dialing** mode is when the system only delivers live answered calls to the agents along with a screen pop of the customer information. This allows you to fully utilize your agents, minimizing any ‘idle time’ and greatly increasing productivity.

- The typical talk time in terms of minutes per hour (agent efficiency) increases steadily with more advanced dialing modes; going from an average 12 minutes in the hour for manual dialing, up to 18 for preview, 32 for progressive and 45 minutes or more when using predictive dialing.

Why use predictive dialing?
Predictive dialing has a significant impact on agent efficiency and ultimately outbound productivity. Higher levels of talk time will result in more sales, collections, appointments, and responses.

Predictive dialing executed correctly and well managed can bring about huge productivity uplifts. The question really is: if you are operating in any kind of outbound environment why wouldn’t you utilize this technology?

More than just technology
There’s no question that a predictive dialing system will improve contact center efficiency and productivity.

However, people often assume that technology is the answer; yes, it is a critical part of the solution, but it’s also important to remember that technology is not a silver bullet, it can often uncover flaws and expose weaknesses in other processes. Let’s take a look at some of the golden rules that can sometimes be missed within the contact center. Overlooking these can result in inefficient campaigns and strategies that will not provide you with a strong return from your investment in a predictive dialing system.
RULE 1
Communicate and prepare staff for changes
People are inherently resistant to change – and agents are no different.

Remember by implementing new technology we are changing the processes that they have learned and are used to, and are typically making them work at a much quicker pace. Be aware that these changes, although embraced by the business, are not always welcomed by the agents—who frequently prefer an easier life.

Therefore communication is a critical factor, make sure that your agents know what is going to happen; explain to the team that this new technology is a tool that will in turn help them rather than purely serving the business. Ensure that they have adequate training; often different people will require different levels of training.

Importantly, consider changes to your payroll and commission structure; ensure this falls in line with any targets and KPIs where possible. It’s easy to sell a solution to staff when it will help them earn more money too!
RULE 2

Never forget the importance of data
Two key factors in a successful outbound campaign are agent performance and data.

Anyone that has ever used an automated dialing system will know that the more valid phone numbers you can feed in, the better the system can run (provided agents are available to take the calls). A dialer will work far more efficiently than a human, therefore it is very hungry for data. Starving the system of numbers (‘data’) can result in very high wait-times in between calls. These situations can really demoralize your agents as they feel that they are not accomplishing anything.

In addition to not having sufficient data, you need to assess the quality of the data that you have. A lot of bad numbers, along with a high level of retries, can once again result in a low connection rate and longer wait times for your agents.

Monitor the wait time and if it's high then review your dashboards to see if data ‘starvation’ is the problem. A good predictive dialing system will flag these issues up for you without the need to go wading through vast amounts of data to try and pinpoint where the problems are.

You might consider investigating other avenues for data sourcing but you can also look to do more with what you already have. For example, with incorrect numbers it's a quick win to send these records to a data cleansing company for verification.

With a good outbound system you won't need to wait for future campaigns before making the most of the refreshed data, you should be able to simply feed the clean data straight back in while the campaign is running.

Existing customer databases, business listings and online lead generation suppliers can be great sources of data too; but if purchasing new data be sure that you can return bad leads for a refund or replacement. If your calling lists contain higher volumes of mobile numbers then bear in mind that typically around one third of mobiles are either unavailable, off, or roaming, potentially leading to significant wasted time and calls.

Therefore consider using tools such as Mobile Number Screening which interrogates the network status of mobiles before calling them allowing you to effectively filter out any invalid numbers, as well as any mobiles that are turned off or abroad roaming. This makes for more efficient outbound campaigns as no time is wasted even trying to connect these calls; agents can purely focus on the good and available numbers typically driving up connect rates to mobiles by up to 40%.

Instill in your agents the importance of data quality too and encourage them to capture relevant and accurate information while on the call. Requesting and recording a second telephone number or an email address might give you a short term increase in average handling time (AHT) but your data quality is increased for future campaigns. It's important to encourage attention to detail and quality of work.
RULE 3
Maximize your connection rates
No one can guarantee your customers or prospects will be available and will answer your call but there are ways to greatly improve the chances.

By utilizing technology such as Mobile Number Presentation, dynamically presenting a mobile number to the recipient – you’ll find that connection rates to mobiles are typically driven up by 40%. Similarly, Local Number Presentation displays a number with a dialing code local to the customer, making customers 35% more likely to answer. Should they call back a missed call they will also be charged at local rather than national or premium rates which customers always prefer.

By using these different number presentation strategies you will see a significant uplift in the number of callbacks received—our customers typically experience a 100% uplift in number of callbacks. Furthermore for those customers who do call back, you are five times more likely to have a successful call outcome, as they are more receptive and are calling back at a time that is convenient to them.

As we saw in Rule 2, turning on Mobile Number Screening is another great way to maximize connection rates.

Where possible, make smart use of customer history and/or demographics to identify the best time to call. For example, you may want to avoid calling young mums during the school run. Be aware of the impact of environmental factors as well. For example, on a hot day when it’s likely that certain demographics are outside enjoying the sunshine, focus on dialing mobiles rather than landlines.

Also consider if there are changes that you can make to the campaign hours and agents’ shifts to enable the dialing to fall in line better with your peak connection hours. Don’t forget to ask your customers what matters to them— you might want to figure out what time of day your customers prefer to receive telephone updates and call-backs.

Use this data wisely to schedule your campaigns and shifts. In addition to connection rates check your conversion rates and look for patterns. To maximize success you need to call not only at a time when calls will be answered but also when your target audience are most likely to be in ‘buying mode’.
RULE 4
Ensure compliance with regulations
Failure to comply with regulations can lead to serious consequences so make sure you’re covered – outsource your compliance headache.

Different countries have different dialing regulations. For example in the UK there are regulatory bodies such as Ofcom, the Telephone Preference Service (TPS), The Office of Fair Trading (OFT) and the Information Commissioner. One of the main things that can arise if you don’t get your strategy right is silent calls to consumers – where the dialer system connects a call to a customer without having an agent ready to take that call.

Ofcom state that this ‘abandoned call rate’ should be no more than 3% of all ‘live calls’ calculated per campaign or per call center over any 24 hour period. Should an abandoned call occur there’s also a rule stipulating that within 2 seconds of the connection you must play a brief recorded message to the called party stating the identity of the company on whose behalf the call was made along with a local or free phone number should they wish to call back, plus the option to opt out of any further marketing calls. This recorded message must not contain any marketing content.

In addition to this, if an abandoned call has occurred, there must be no subsequent dialing attempts made to that consumer within the following 72 hours unless an agent/live operator can be guaranteed (i.e. if they are using preview dialing method). Full details of legislation can be found within the Ofcom statement available on their website. Make sure you’re aware of the rules and that you use a dialing system that will guarantee compliance to this and other legislation.

The Telephone Preference Service (TPS) is the central opt-out register where consumers can record a preference not to receive unsolicited sales and marketing telephone calls on home or mobile telephone numbers. It is a legal requirement that all organizations do not make calls to numbers registered on the TPS unless they have the consumer’s consent to do so.

For those calling in a business to business environment, the Corporate Telephone Preference Service (CTPS) offers a similar opt out service for corporate subscribers.

Be mindful that specific industries and outbound campaign types can be further regulated by industry bodies, such as the FCA for financial services. Keep compliance in mind not just to avoid hefty fines but to protect your brand and reputation and most importantly to keep your customers happy.

A good predictive dialing system will have safeguards in place and will automatically ensure you conform to these regulations.
RULE 5
It’s not just voice: use other channels and strategies too
Combine different channels and contact strategies for optimal impact. Consult with your Success Manager for guidance and best practice.

To help improve your campaign success rates, a flexible system will allow alternative approaches. Why not send an email or SMS to the customer prior to a call to ‘warm them up’? This can significantly improve the connection rates and the likelihood of a successful outcome.

In addition, use different approaches depending on when and where the contact has come from. For example, if a lead has come into a website in the small hours of the night, make sure that this customer is not called–and rudely awakened–when the contact center opens first thing in the morning. Test and refine these retry strategies to see what brings the best results for your business.

When it comes to outbound voice campaigns, a common challenge for many contact centers is keeping agents productive and maintaining performance levels where the contact rate is simply too low. Even where numbers are good the contact rate may be affected because the dialing data is aged and has simply been dialed to the point of exhaustion (as well as a host of other external factors).

Predictive dialing helps to compensate for low contact rates to a great extent. However if, even in predictive mode, contact rates are particularly low (usually meaning your sales or collections will also be low), then using live agent resources can result in a very high ‘Cost per Sale’ (after all the staffing element of the campaign is the biggest cost to most contact centers).

Statistically circa 80% of your successful results occur in the first 5 dial attempts. Beyond that the yield starts to diminish. Most would agree that it would be better to dial 10 numbers once, than 1 number 10 times, however unless you have an unlimited data pool, the reality is that you want to squeeze the maximum amount of successful contacts from the pool of data that you do have.

A useful tactic to employ in these scenarios may be to make use of automated campaigns. These campaigns operate much the same as normal ‘live’ dialer campaigns, only there is no need for live agents to be logged into the campaign before the dial can be attempted. When a call is answered, a customized recorded message is played and, if appropriate, the recipient can then opt to speak directly to a human agent. This strategy is not just a generic telemarketing strategy (PPI anyone?) but is often useful in collections type campaigns e.g. allowing organizations to continue to pursue aged debt where all previous contact attempts have failed, without the need to first staff the outbound campaign with live agents.

It’s important to frequently run an analysis on the volume of sales-successful outcomes that you gain per dial count. Ofcom is there to protect consumers; so keep your customers in mind when it comes to your dialing strategies. Having a rule that says, for example, after 30 no answers the record is closed, is not customer friendly. Do some analysis on dial counts versus closed records. Analyze the data where you’ve achieved a successful call outcome in just one or two calling attempts and look for patterns; time of day, gender, title, postcode etc.

If contact has been established then you need to ensure this customer does not get repeat marketing calls—a ‘kill call’ facility will ensure they are removed from the outbound list.

A good predictive dialing solution incorporates reporting to save you time analyzing data. West UC takes this one step further with the provision of Success Management included in the package. The Success Manager – a former contact center manager—is there to help customers make the most of the technology in their environment with detailed insight into both the software and the contact center environment. They help to benchmark performance and highlight areas where both short and long term gains can be made.
RULE 6

Use scripting to **increase** customer satisfaction
Scripting can greatly enhance the effectiveness of your outbound campaigns. A dynamic call script can help to deliver consistent, confident and compliant communications with your customers. Small ‘on-the-fly’ adjustments can have a big impact on results.

Avoid static, inflexible scripts that are more likely to hinder than help. Ensure your scripting is logical and not likely to cause any frustrations for the customer (for example, if they are being asked to repeat any information).

A good system will have the ability to quickly make changes based on customer behavior. With a flexible scripting system you can make instant adjustments if you’re not getting the desired results or if circumstances change, for example a new offer is launched or you need to react to external events. You can also run ‘A/B testing' to evaluate the effectiveness of different scripts.

Rather than have agents flicking through different screens and business systems (and getting distracted), ensure all of the necessary and relevant information is together in one place making life easier for agents and allowing them to concentrate on the job at hand.

With common sense and continuous assessment, call scripting can improve the experience of your customers. It also reduces your reliance on agent training as it plays a front-line hand-holding role in guiding agents to successful call completion.

You’ll also find that significant efficiency improvements can be made, through the options to pre-populate screen data based on previous responses or by having automated email content written based on script responses and the integration with other business systems. So don’t underestimate scripting, just ensure your approach is sensible and you’re not restricted by dated technology.
RULE 7

Don’t forget about **inbound**
An important part of the outbound process that people tend to forget about are the call-backs.

If someone has missed one of your calls and returns the missed call, they are likely to be happier to talk to you (after all they are calling you at a time that's convenient for them) and are more pre-disposed to a successful call outcome. But how are you treating these call backs in order to maximize the chance of conversion? Depending on your industry, the skill set for your inbound team may not be the same as your outbound agents.

A great trick is to set individual CLIs (caller line IDs) for your agents so any call-backs can be routed straight through to that specific agent. Other options include the call going back into an IVR that can take messages or route the call to the correct team or department.

With skill based routing you can assign different skills and abilities to each agent with different priorities. Take this a step further with intelligent data directed routing to transparently route the call based on information you have about that customer.

Be sure your predictive dialing capability is fully integrated into the wider contact center operation. A system that can handle blended dialing, intelligent call routing, dynamic scripting and have different number presentation options will offer a greater overall solution than any standalone ‘dialer’.
RULE 8
Establish the right KPIs
The Key Performance Indicators (KPIs) you use within your business and how you assess performance against them is crucial.

Just because people look and feel busy, it does not make them productive or successful. Ultimately, the most important thing for everyone is the impact on your bottom line.

Before you undertake any form of outbound campaign be sure to clearly determine your KPIs. KPIs shouldn’t necessarily be about the number of dials, or even the number of connects; what matters are the figures you add to the top line, converting leads into sales, converting business, booking appointments, collecting debt, increasing your profits. So this means that when using outbound technology available talk time is key.

Also ensure that you review your processes. What areas of the process can be sped up even when there is a successful call? An optimized process will add valuable time to the agent’s availability to the system for further calls. This also means cutting your losses to be sure that your agents know when to close a call and move on. Too much time spent on a call that the agent cannot close is time that could have been used for other calls. But don’t sacrifice quality over quantity; get the right balance. Get your KPIs right and this will encourage your agents to spend the time talking to the people that they need to talk to.

Where are you making most revenue? Where is your highest success rate? Where are you having most success with the least number of contacts? It pays to minimize wasted effort and time. This is where the input from a Success Manager—who has seen it all before—can be truly invaluable.

Also ensure you have the right person to manage the contact center. Managing data is very different to managing people, yet contact centers typically have one person with this dual role. Not only do they need the correct skills to manage and motivate your agents, but they also need to know how to monitor your real-time statistics and react accordingly.

Systems today, particularly cloud based systems, are very easy to use. The beauty of this is that it frees up your managers to concentrate on managing people and developing the team, removing most of the data management burden that was traditionally associated with this role.
RULE 9

Minimize staff churn and improve agent satisfaction
We all know that staff turnover in the outbound industry can be high. In city center contact centers, you may see attrition rates in excess of 80%. In a typical contact center the recruitment, training and support costs can be over $5000 per agent replaced.

Clearly these costs are not insignificant; reducing staff turnover will always have a direct impact on the bottom line. Don’t forget too that while the system will improve the agents’ talk time, it cannot help them sell your product.

Listen to your staff. Set up forums where their input, ideas and feedback are all recorded and acted upon accordingly. This increase in staff engagement will not only improve retention rates (saving both time and money), but it’s also going to improve customer retention rates as they’re getting a better and more consistent service. You’ll also get some great insights into the kinds of conversations your agents are having that will help drive the success of future campaigns. Cloud call recording is also essential to grade these calls and get more insight. For example, if you’re in a sales environment, gain understanding on why people are not buying; have you got the right call outcome codes set up? Instead of logging everything as ‘not interested’, set up the right categories (without over complicating it) such as price, product or reputation, and you can then be much more effective with your future campaigns, for example by targeting special offers in the future to the price driven subset.

Staff training is also an essential component. When agents speak to the right party, it’s vital that they are able to make that conversion. Analyzing your statistics will show you if you have any agent training needs. Where people are falling short, make sure your software has monitoring and coaching tools built in to facilitate their development. Ensure that your agents have the correct skills and training necessary to do the best for your business when they are on the telephone. Coaching and encouragement can help make these agents a success while also helping to lower staff turnover.
RULE 10

Make sure you choose the technology solution that’s right for your business
We want the technology, we want the predictive dialing solution, but do we invest in the product in-house or do we look for a hosted solution? What is the difference between ‘hosted’ and ‘true cloud’?

Remember to review your options carefully; different businesses have different requirements.

Legacy on-premises systems
With premises-based equipment you take full responsibility for infrastructure and architecture along with security. There is physical equipment that will need to be installed, configured, provisioned and maintained. You'll need significant IT resources to handle this task and to keep on hand throughout the lifetime of the system. It gets more complicated when there are multiple sites and locations as the kit will need to be housed and configured at each. Larger organizations have historically gone down this route, but the move to the cloud has been building momentum over recent years and cloud is now becoming the delivery method of choice for organizations of all sizes.

Hosted systems
The terms 'hosted' and 'cloud' often get confused and it is in some vendors' interests to exacerbate this confusion. A hosted system can actually differ greatly from a cloud solution. As cloud has grown in popularity, many on-premises vendors have tried to latch onto this by offering a hosted version of their legacy on-premises system. This is not ‘true cloud' and you're likely to still incur a lot of hardware headaches, plus you're not going to leverage all of the real cloud benefits. In the rapidly changing contact center environment, a hosted version of a legacy system will simply be a snapshot in time of whatever functionality that an on-premises system has. This will not have automatic software updates and will still need ongoing maintenance, albeit not at your actual premises but wherever they have housed your server with your version of the software on it.

Cloud-based systems
True cloud systems will be multitenant and will have one version of the software that is accessible to everyone through a standard web browser. The power, agility and scalability of harnessing true cloud becomes apparent. Resources are efficiently shared and updates are rolled out to everyone. The hardware environment is completely taken out of the equation. Within the cloud environment you have no need for the extra concern or responsibility of the on-site infrastructure and architecture; it has built in resilience and it allows you to work from anywhere with internet connectivity.

There are many advantages to the true cloud way of working but what should you look for in a cloud or any other provider? Here is a good starting point:

- 24/7/365 support
- Predictable, pay as you go pricing
- Stability & resilience
- Security
- Compliance
- Scalability
- Easy, no cost upgrades
A phased approach
The first step is to identify and acquire the right technology that will satisfy all of your outbound requirements and generate maximum efficiencies in your contact center. Once you launch your initial campaigns, you will use the system generated results to analyze and refine your dialing strategy to optimize the campaign performance and maximize your ROI. A good dialer system will make it easy for you to identify where you are successful, and where you need to focus. In fact some dialers will even go further and report directly to you what you need to change in order to increase your contact rates and sales.

Step 1. Automation
Bring the software online, start to use it, see the benefit to your business straight away. You are also generating your metrics and statistics for later review and improvement.

Step 2. Review & optimization
Review the data you have collected while using the system and see what changes you can make at campaign and schedule level to improve talk time and agent availability. Look at features that you can invoke to minimize agent wrap time. If needed you can take it a stage further and look at automated campaigns, or text to speech IVR, to remove your skilled and trained agents from the more mundane and less efficient dialing hours.

Summary
As we can see from the various topics discussed, it is not all about technology. An outbound solution with predictive dialing will increase your talk time, that much is guaranteed, but it’s also about your business processes, logic and management. Make sure the system you choose is flexible and user friendly.

Be aware not to look at predictive dialing in isolation, consider inbound and call blending options as well as your outbound operations. Also think about your future business needs and capacity for growth and expansion of channels.

What should you look for in a predictive dialing system?

1. Legislation and compliance
2. Flexibility
3. Multiple dialing modes (preview and progressive dialing can be beneficial for some campaigns)
4. Additional contact center features and functionality
5. Ease of use
6. Statistics: real-time and historical
7. Integration points
8. Easy data manipulation
9. Scalability

If you have good processes in place combined with the right technology (and the right people) then you’re in a strong position. Consistency is also key when it comes to the service that your agents are providing; ensure they are able to deliver a good quality service and that they can also qualify sales early and are thereby not wasting time on the wrong calls. How can you focus on how well your agents are doing? You should notice how much more management time you have freed up. This time can now be spent developing your staff or exploring the world of call recording to help with quality monitoring and continuous improvement. How well the agents do on these calls and the quality of them are what affects your bottom line.

Invest in the right system and follow these 10 golden rules to ensure that you get the maximum return from your investment in outbound contact center technology.