

Outdial Queuing

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 UC for Business solution.

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Overview

CTI (Computer Telephony Integration) solutions have typically been used to address the needs of contact centers focused on inbound calls. Now, increasingly, contact centers wishing to gain a competitive business advantage are looking at new ways to contribute incremental revenue to their organization, while proactively managing customer relations – moving away from a cost center towards a profit center. Typical business drivers for adding outbound functionality to a contact center can include:

- Proactive management of customer contact and service issues
- Revenue opportunities to up-sell/cross-sell existing customers
- Migration of the contact center from a cost center to a profit center
- Maximization of agent productivity during off-peak periods
- Monitoring of customer satisfaction.

Some contact centers have struggled to seamlessly integrate outbound call functionality into their existing infrastructure. They have had to rely on manual processes or else have attempted to integrate 3rd party applications into their existing inbound contact center environment.

UC for Business's Outdial Queuing module has been specifically designed to address these issues. Outdial Queuing extends the CTI functionality of UCB's standard queuing application and covers the requirements of Outbound dialing in an integrated solution. This White Paper is designed to give the reader an insight into the functionality and benefits associated with version 4.0 Outdial Queuing.

What is Outdial Queuing?

Outdial Queuing dramatically improves the quality, success and productivity of every outbound customer communication by intelligently managing outbound call campaigns from within an existing UCB solution. Outdial Queuing enables contact centers to implement outbound campaigns simply and easily.

Agents can be set up to work in dedicated outbound queues or, by sharing agent resources between inbound and outbound call activity, contact center managers can optimize agent productivity in periods of low inbound traffic by automatically introducing outbound calls to the agents, a procedure known as "call blending".

CT Control is UCB's base server module which is used to connect all other modules and control PBX traffic. It processes all agent availability requests and is responsible for performing intelligent call delivery using skills-based routing to agents. When agents are logged in as "inbound/outbound" blended agents, CT Control intelligently routes calls to them so that all inbound calls take precedence over outbound calls. This ensures that the contact center's service level is not compromised as a result of outbound campaigns.

Outbound campaigns can be set up using either Power Dial or Preview Dial modes. The contact center manager, using the administration functions inherent in this module, can set the selected method of delivery on a campaign-by-campaign basis. When the call has been completed, a call resolution template is screenpopped to the agent's PC desktop via the Agent Desktop application. This must be completed with the appropriate resolution code before the next outbound call can be delivered to the agent.

Managing an outbound campaign is very simple. Using an intuitive administration application, managers can determine:

- The date and time when calls for the campaign will start and end
- Which queue the outbound call requests will be channeled to and consequently which agents will handle the calls
- Which customer phone numbers will receive the calls

Contact center managers can load this information directly into the campaign or import the required contact details and phone numbers from an external database.

With the assistance of NEC's Systems Integration team, contact centers with more complex outbound campaign requirements can further

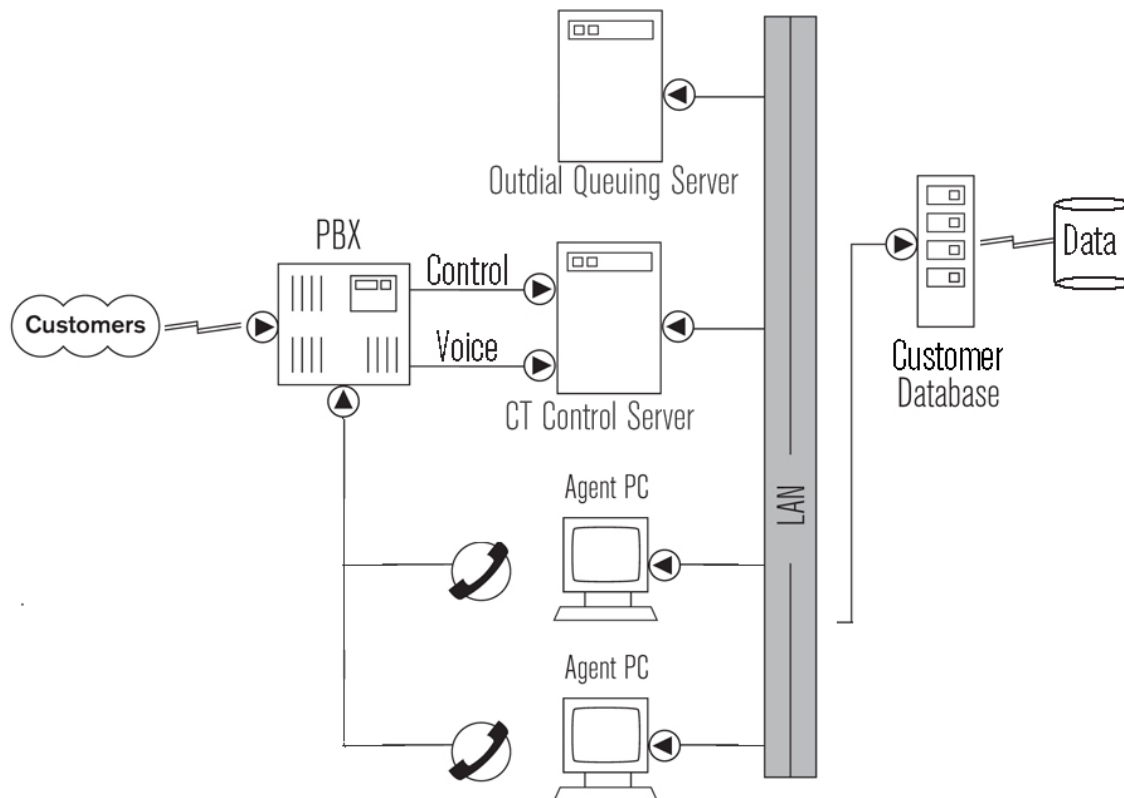
enhance standard Outdial Queuing functionality to include the following:

- Advanced data imports from a customer database
- Screenpop integration to a third party application
- Integration to an Interactive Voice Response (IVR)
- Advanced call flow scripting.

Outdial Queuing provides contact centers with a more flexible outbound calling campaign tool that balances the needs of your agents and customers within the context of your business objectives.

Physical Architecture

Figure 1. Physical Architecture Overview (WP-OD-001)



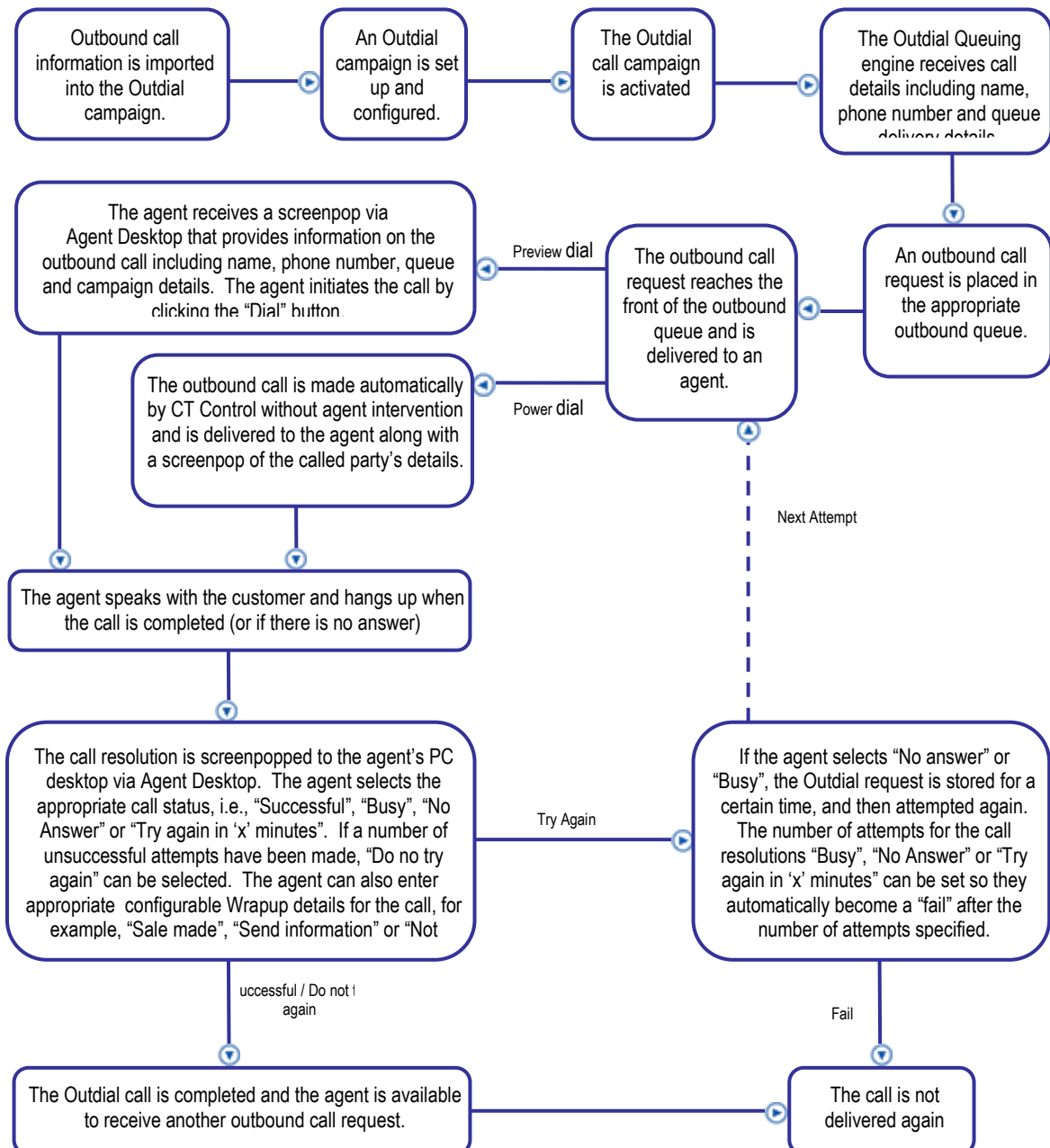
The CT Control server and Outdial Queuing server communicate over the LAN via TCP/IP

- If Outdial Queuing is required to access a 3rd party database, this is done via ODBC (Open Database Connectivity)
- Call information is delivered to the agents and screenpopped to their PC desktop via Agent Desktop; agents can then initiate the call. If Power dial is selected the call is initiated automatically as the screenpop occurs.

Call Delivery Process for Outdial Queuing

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

Figure 2. Call delivery process (WP-OD-002)



Key Features and Benefits of Outdial Queuing

Features

The key features of Outdial Queuing include the ability to select whether agents will be dedicated Outbound, Inbound, or “blended” (Inbound and Outbound). This gives managers the flexibility to best deliver on their campaign objectives and their overall contact center needs. Supervisors and managers can also select the call delivery mode that best meets their requirements (power dial, preview dial or autodial) - and this can be easily changed as operational requirements alter.

Agents in Dedicated versus Blended queues

Contact center managers have a number of options available to them when selecting which agents will receive outbound call requests:

- **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 class¹, or, if Call catchment is used (see page 10), based on the specified call limit.

Benefits

Organizations can gain a number of significant benefits from the introduction of UCB’s Outdial Queuing module, such as:

- Fully utilizing agent time – Call blending ensures that agents are proactively delivered outbound calls when inbound call traffic is low, leveling out peaks and valleys in your daily call flows. Alternatively agents can be set up to only make outbound calls.
- Maximizing your return on investment – A single integrated solution for both inbound and outbound call management means less risk and lower administrative overheads.
- Speed and flexibility – Create outbound campaigns quickly and efficiently while maintaining total control over all parameters.
- Information at your fingertips – Detailed reports equip managers with the information they need to improve contact center performance and the status of each campaign.
- Fast and easy – ODBC imports offer a quick and simple method of importing phone lists.

Call Delivery and Mode Types

Supervisors and managers can select the outbound call delivery mode that best meets both the requirements of the campaign and the agents’ skill sets. These delivery modes can be easily adjusted both before and after the campaign begins, for total flexibility. Two types of agent call delivery modes are available in Outdial Queuing; the supervisor can, on a campaign-by-campaign basis, select these modes:

- **Power dial** – In this mode the outbound call is made automatically by Outdial Queuing, via the CTI link to the PBX, 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 screenpop of outbound call details.
- **Preview dial** – When an Outdial Queuing campaign is set to run in this mode, the Agent Desktop screen pops an outbound call request template to the agent. This contains details on the party being called, and the purpose of the campaign. The agent may then initiate the call using the ‘Dial’ button on the template. The outbound calls are made via the CTI link to the PBX. This method of call delivery is recommended where agents are working in a blended call environment, as

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

it assists them in distinguishing inbound from outbound calls.

- Autodial – When Outdial is linked to an IVR2 system, the Autodial option allows outbound campaigns to run playing an announcement to the destination phone number. The IVR can be configured to offer immediate one-touch options, e.g., “Your account is now overdue. To pay your account via credit card now, please press 1; to speak with our accounts receivable, please press 2, or for further assistance, please press 3...”

Screenpops

Screenpopping called party, campaign detail information and any relevant notes ensures that the agents are better prepared to make the call, and that they have the necessary details about the campaign in front of them. The campaign will continue until all calls are finished for the campaign.

The current state of the call. The agent chooses Dial to establish the call.

- 1 Alternatively the number can be automatically dialed for the agent (using the Power Dial option within the Campaign setup).

When a campaign is activated, outbound called party information and campaign details are screenpopped in Agent Desktop to the agent before the call is initiated or connected (depending on the call delivery mode selected for that campaign).

- 2

Pending Call Resolutions. These are automatically screenpopped at the end of the call or the agent can enter the resolution during the call by either double clicking on the call resolution or by choosing the Resolve button.

- 3

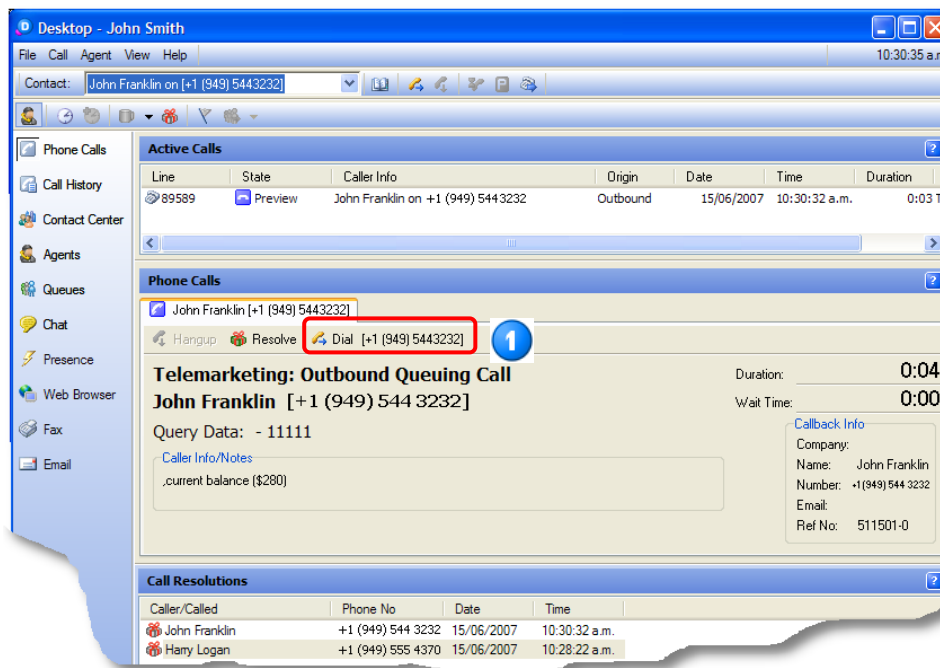


Figure 3. Agent Desktop Outbound screenpop for a campaign using Preview dial delivery mode

² The cost of the IVR license and any software customization is not included in Outdial Queuing

Call Resolution Codes

Resolution codes allow agents to record the outcome of the outbound call. This information can later be sourced from reports, providing a valuable tool for contact centers.

In addition, 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

Resolution codes allow the agent to:

- 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.
- Delete outbound calls. 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.

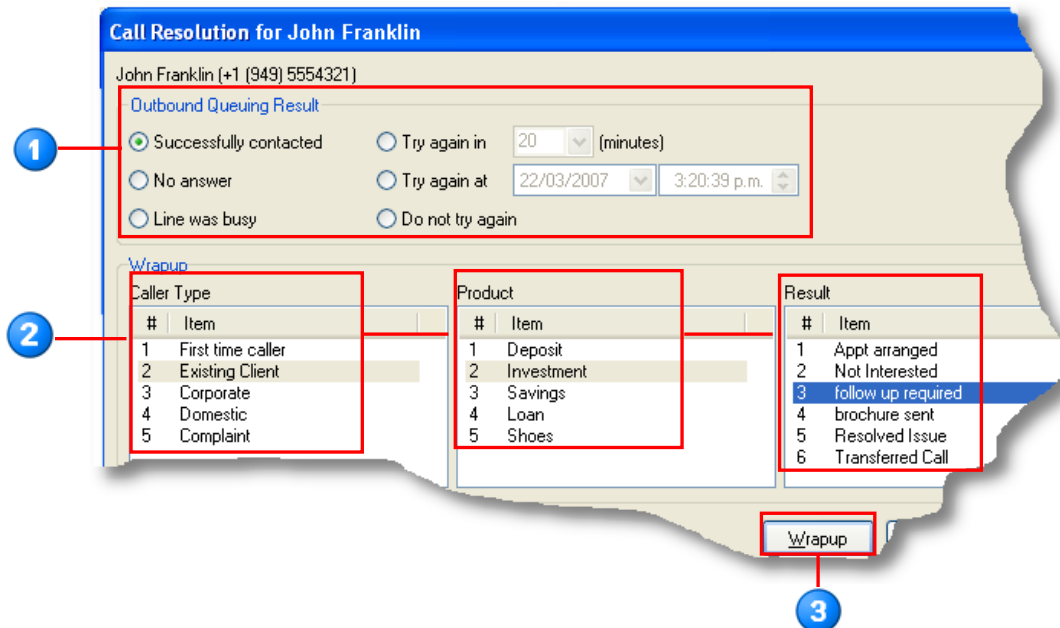
Wrapup Codes and Templates

Wrapup 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 Wrapups 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 Wrapup information appropriate to that call. The next call will not be delivered until after the Wrapup time has elapsed. Once the Wrapup screen has been screenpopped (as in the following example), the agent selects the appropriate item from each list.

- 1 Choose the appropriate result for the call. The agent can choose to call back at a particular time or if “busy” or “no answer” are selected the system will automatically reschedule the call according to the campaign setup parameters
- 2 Up to three Wrapup templates can be assigned to each campaign
- 3 The agent selects the appropriate resolution option, and then clicks Wrapup, and the outbound call is completed

Figure 4. Call resolution screen



Agent Desktop Features and Outdial Queuing

Outdial Queuing is a totally integrated solution with CT Control using a common interface to manage and deliver both inbound and outbound calls. Agents and supervisors can perform all required call delivery tasks in this environment, minimizing operational complexity and training, and maximizing labor efficiency. Supervisors and agents can also view the status of all queued calls as well as other agents. This “peer review” has proved to enhance agent performance as well as build a strong team culture. Key components include:

- Call status icons – The status of all calls can be viewed at a glance by supervisors and agents alike. Each different call type (e.g., Inbound, Outbound, or Outbound Campaign call) is displayed next to the agent’s name in its own unique color.
- Worktime – Every time an agent completes a queue call, they can be automatically placed into Worktime to enable them to complete after-call activities, i.e., paperwork, Wrapup codes, etc.
- Break – Agents request a Break when they need to leave their desks for a period, but plan on returning in the same day to take calls.
- Agent alerts – Agents can put themselves in Alert Status if they need assistance; a supervisor will see a red alert flag next to the agent’s name, and move to assist them.
- 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.
- 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)

Supervisory/Admin Features

In addition to the outbound functionality highlighted above, Outdial Queuing provides supervisors and managers with a powerful yet easy-to-use administration interface. These features include:

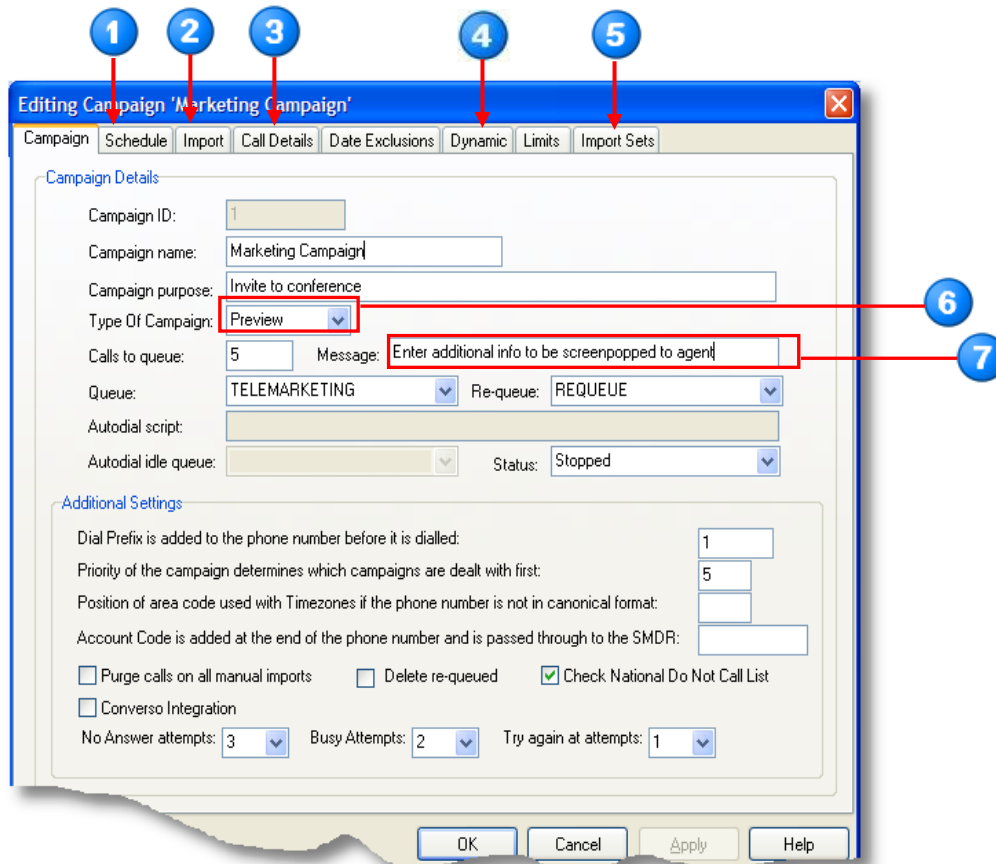
- Ability to support multiple campaigns – Simultaneously run multiple campaigns with varying parameters such as start/end times and dates.
- Administration Graphical User Interface (GUI) – A simple administration interface ensures quick setup of campaigns.
- Outbound call priority based on Call catchment – 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 outdialling must be paused to ensure lines and Agents are available to receive incoming calls.

Outdial Queuing Administrator Screen

This Administrative interface provides the contact center manager with the primary access point to establish and modify outbound campaigns.

- 1 Schedule the days of the week and times of each day this Campaign will run
- 2 Simple imports using ODBC or CSV files
- 3 Detailed list of all calls and associated totals
- 4 Unique Campaign ID and Name
- 5 Automate imports or record removal to/from your database
- 6 Set call delivery method to agents
- 7 Additional information to be screenpopped to the agent about this Campaign

Figure 5. Outdial Administrator



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. The list below is an example of just some of the outbound call parameters that can be reported.

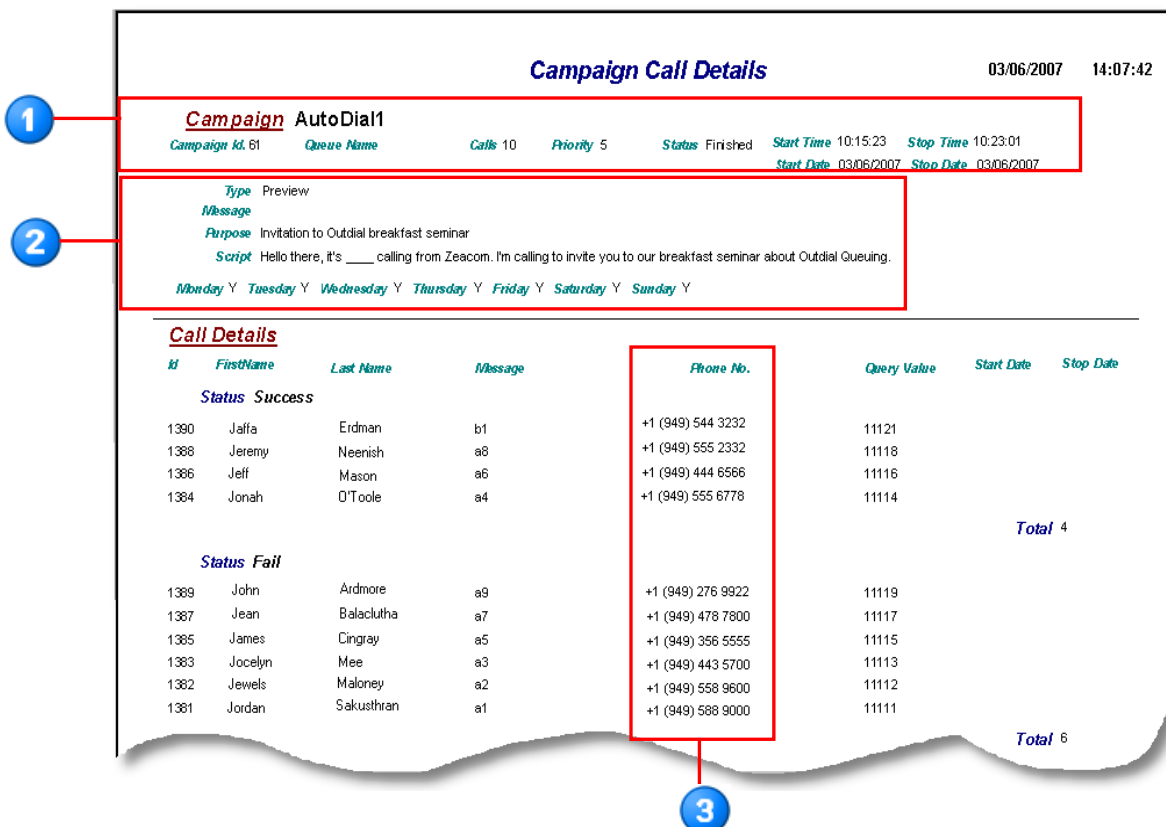
- Queue Performance
- Agent Performance
- Agent Availability
- Callback Analysis
- Wrapup Codes
- Call Details
- Queue Traffic Analysis
- Agent Activity
- Agent Summary
- Outbound Campaign calls by Agent and by Day
- Call Type Analysis

- Agent Wrapup
- List of Campaigns
- Outbound Calls per Campaign
- Campaign Call Results
- Campaign Call Totals
- Campaign Details

Report Example

- 1 Campaign information including the time the campaign was activated and what time it finished.
- 2 Campaign setup information is clearly shown.
- 3 Call information including the phone number dialed.

Figure 6. Campaign Call Details report



Outdial Hardware and Licensing Requirements

Server Level

The Outdial Queuing Server must be separate from the CTI Server. This will eliminate any potential slow-down when the ODBC / SQL queries are run, as CPU utilization can be very intensive during this activity. The two servers must be on the same network and be able to communicate on a TCP/IP level.

Refer to both the System Requirements and Specifications document and the Outdial MIB for specification requirements.

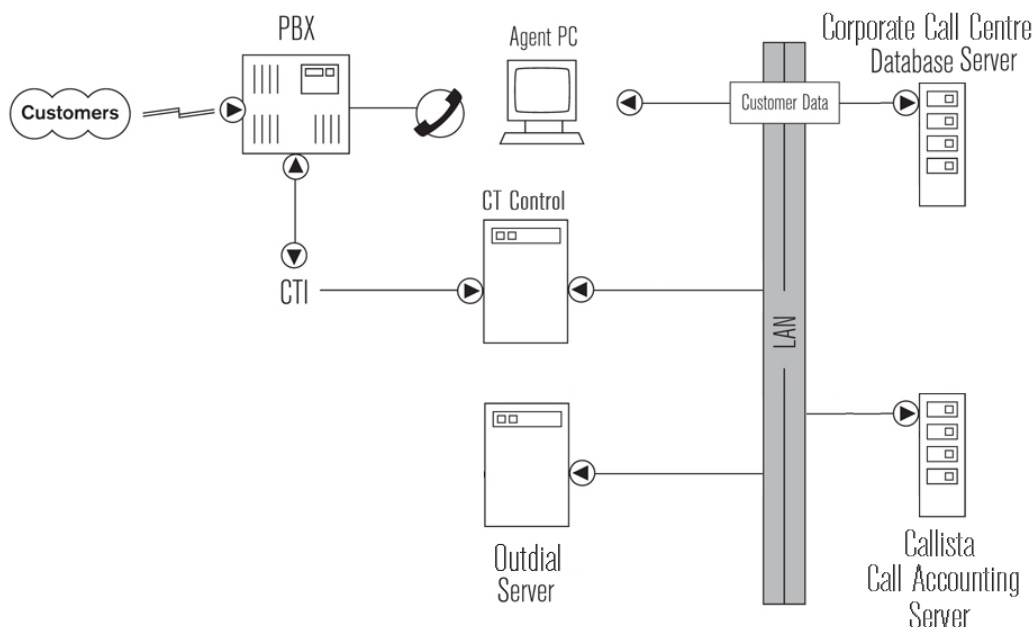
Licensing

The following licenses are required to operate Outdial Queuing:

- Outdial Queuing (one off-site license)
- CT Control (for each logged-on agent processing outbound calls)
- Agent Desktop (for each logged-on agent processing outbound calls)

System Architecture Example Diagram

Figure 7. Corporate Call Center Architecture



Outdial Queuing Case Study

Corporate Call Center Inc. provides seamless inbound, outbound, fulfillment and consultancy contact center services to clients on an outsourced basis. Due to the strong growth of their business, Corporate Call Centre investigated a number of technologies and vendors in conjunction with their move to new premises. They selected UCB from NEC as the contact center solution to support their growth and provide a migration path from call center to multimedia contact center.

System Description

Corporate Call Center operates a wide variety of inbound and outbound services for its clients. The company had previously used an automated inbound call management system. However - outbound calling was a manual process that required dedicated agents. The inefficiencies associated with this process made outbound campaigns both time consuming and expensive to run. Implementing Outdial Queuing addressed these issues.

In order to run a campaign for a client, Corporate Call Center uploads the client's customer records into its Paradox database. NEC integrated the Outdial Queuing and Paradox systems so that the client's customer data could be screenpopped to Agent Desktop. These screens are filled with the relevant customer details when a call arrives or an outbound call is made. Most of Corporate Call Center's outbound calling campaigns utilize Preview dialing call delivery to agents. This allows the agent to click on the 'Dial' button to initiate the call after reviewing the customer record, campaign details and call history on their screen.

At the end of the call, the agent is presented with a Call Resolution screen. This prompts them to enter a call resolution code indicating the status of the call. The information is then available to supervisors and managers via Outdial Queuing reports. The agent is given a Worktime allowance after every call in order to complete tasks associated with the call before they are automatically presented with another call to initiate.

Benefits

The customer benefits that resulted from installing CT Control and Outdial Queuing have been significant. "We operate in a very competitive market", says Ann Rowell, General Manager of Corporate Call Centre, "so managing staff retention, quality of delivery and costs is critical to our success."

Automation of the outbound calling process using Outdial Queuing, combined with the integration to their Paradox database, shaves valuable time off every call. Ann estimates that 5 seconds per call is saved due to presentation of the customer data and call history, in addition to the speed and accuracy associated with automating the dialing process. "This results in a cost reduction to the client or a savings in direct operating costs for the company on every call we make", says Ann. "But the biggest efficiency gain of all comes from call blending: the ability to use the same agents to handle both inbound and outbound calls. We have experienced a productivity increase of between 25% and 30% in terms of agents' time as a result of this functionality."

Cost Justifying an Outdial System

Cost Saving

Cost savings associated with the implementation of an automated Outdial solution such as Outdial Queuing fall into three broad areas:

- Improved call delivery – allowing more calls to be made, by the same number of agents.
- Improved agent utilization – resulting from agents working in a blended inbound and outbound call environment.
- Lower setup and administration costs – associated with implementing and managing outbound campaigns using Outdial Queuing.
- Higher sales conversion rate – and shorter talk times, as agents are better prepared and have all necessary customer information available to them.

For the purposes of this example we have reviewed the first two benefits as they can be clearly defined using readily available contact center parameters. Note that when undertaking a

cost justification for your project, the figures below should be adjusted to reflect your particular operating parameters.

Agent productivity statistics

Studies have shown that an agent working on outbound calls (without an automated outbound call management system) spends each hour on the following activities:

- 45% Talking with customer
- 15% Preparing for the call, finding information about the contact
- 15% Waiting for the phone to be answered
- 10% Post call work
- 5% Dialing
- 5% Leaving messages or rescheduling calls
- 5% Unaccounted/call reluctance

Using an outbound call management solution such as Outdial Queuing, contact center managers can begin to redress this imbalance, improve efficiencies and reduce non-talk time activities by:

How agent productivity is improved

- Automating the delivery and dialing of outbound calls – no need to look up contact lists and dial the number.
- Screenpopping call details to the agents PC – reduces both pre-call preparation time and agent talk time during the outbound call.
- Managing redial attempts – Outdial Queuing automatically reschedules any failed call attempt for future re-delivery to an agent.
- Delivering outbound and inbound call to agents in a blended queue.

These savings can be calculated using the following parameters, as shown in this example:

Table 1: Just 27 minutes an hour is spent speaking with customers.

Parameters	Example
Number of Agents making outbound calls	20
Hour worked per agent per month	140
Agent hourly rate (Incl. benefits)	\$16
Average outbound call volume per month	24,000
Percentage of outbound calls that result in a sale	20%
Average sales value	\$75
Estimated time saved per call due to Outdial Queuing screenpops	10 sec
Estimated agent productivity increase due to inbound/outbound call blending	15%
Total hours saved per month due to screenpops ³	67 Hrs
Number of Additional calls per	570 calls
Increase in monthly revenues due to outbound screenpops	\$9,120
Monthly labor savings due to a blended call environment	\$6,720
Tangible dollar benefit per month	\$15,840

This equates to positive bottom line impact of just over \$190,000 per year in this example.

³ This saving can be used either to reduce the number of agents required to make the same number of calls, or to increase the number of outbound calls generated by the current agents, as in this example.

Integration and Outdial Queuing

Core functionality of Outdial Queuing covers most outbound call scenarios “out of the box”. But for those contact centers looking for more advanced functionality, Outdial Queuing can be modified with the assistance of NEC’s Systems Integration specialists. More advanced Outdial solutions include:

- Screenpop integration to third party Customer Relationship Management (CRM) systems – If more extensive customer information is desired than Outdial Queuing provides, a company can enhance screenpop functionality by integrating Outdial Queuing with their CRM or Help Desk application. These applications are then popped to the agents with the customer’s details as the outbound call is made.
- Integration to third party campaign management tools – Outdial Queuing comes with a Campaign Administration application that supports the creation, modification and deletion of campaigns. It is also possible for another third party application to administer the Outdial Queuing campaigns by directly referencing and modifying the Outdial Queuing database tables.
- Autodial IVR call flow scripting – Outdial Queuing can be configured to hand calls over to an IVR system. This offers a fully automated method of contacting customers, e.g., for debt recovery, product advertising and other purposes. The Autodial option passes the call to the IVR and lets you create scripts for the recipient of the call to follow. Options can be offered such as allowing the called party to either pay the outstanding debt online by credit card or else to transfer to a Customer Service Representative. The IVR scripting is fully configurable.
- Integration to / development of advanced call scripting tools – The NEC Systems Integration team can develop specialized call scripting functionality where the industry standard CRM or Help Desk applications do not quite fit the customer’s requirements. Call scripting guides the agent through a detailed

question-and-answer format on their PC desktop and allows the agent to capture the relevant information from each call. NEC provides GUI design and prototyping to ensure that the system does exactly what is required.

Additional modules, such as UCB’s Integration Plug-ins or IVR, may be required to support these advanced features and functionality. NEC’s Systems Integration team will scope, develop and implement a solution that is customized to your requirements.

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