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Outbound (CX Contact) CX Contact Help

Dialing Modes and IVR Modes

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Learn about the available dialing modes and IVR modes.

Related documentation:

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Dialing Modes

When you configure a campaign, you'll need to choose a dialing mode or an IVR mode that best suits your campaign. Your choice will depend on the type of campaign you're running, the number of agents, if any, assigned to the campaign, and compliance regulations.

The tables below provide a summary of each dialing mode and lists the available pacing options and optimization parameters for each. If a field is blank, it means those options do not apply for that dialing mode.

Dialing Modes for the Voice Channel

There are two types of dialing modes for the voice channel: automatic and manual.

For automatic dialing modes, a dialer automatically dials phone numbers and then bridges the answered calls to agents. The system refers to an advanced algorithm and pacing calculations to determine such things as the number of calls it should make and the rate at which those calls should be made.

In manual dialing, agents dial customers or contacts manually.

Dialing Mode	Description	Pacing Options	Optimization Parameters
Predictive (Automatic)	<ul style="list-style-type: none">• The fastest dialing mode.• The dialer uses an algorithm to predict agent availability and call results so that it can safely dial multiple phone numbers for each available agent.• The constant rate of dialing results in reduced agent idle time.• To minimize the risk of call abandonment, use	<ul style="list-style-type: none">• Small Group mode• Ignore very long calls• Average inbound/outbound call duration• Inbound rate calls per hour	<ul style="list-style-type: none">• Agent Busy Factor• Abandoned Call Rate• Average Agent Wait Time

Dialing Mode	Description	Pacing Options	Optimization Parameters
	Predictive only in high-volume campaigns with at least 15 agents.		
Predictive with Seizing (Automatic)	<ul style="list-style-type: none"> The system reserves agents before making calls. The agents are 'predicted' to be ready to take the call when the call is connected. Use in high-volume campaigns with at least 15 agents in a group. 	<ul style="list-style-type: none"> Small Group mode Ignore very long calls Average inbound/outbound call duration Inbound rate calls per hour 	<ul style="list-style-type: none"> Agent Busy Factor Abandoned Call Rate Average Agent Wait Time
Progressive (Automatic)	<ul style="list-style-type: none"> The dialer places only one call for every one available agent. This guarantees that there's an available agent for every contact who answers a call, so there's no risk of exceeding the abandoned call rate. Use in low-volume, high-value campaigns with fewer than 15 agents in the group. 	<ul style="list-style-type: none"> Lines per agent Reserve agents for inbound calls 	
Progressive with Seizing (Automatic)	<ul style="list-style-type: none"> The system reserves agents in advance of making calls. Unlike the Predictive with Seizing dialing mode, which <i>expects</i> agents to be on the line when a call is answered, in Progressive with Seizing, agents are already reserved and waiting to take the call. Use in low-volume, high-value campaigns with fewer than 15 agents in the group. 	<ul style="list-style-type: none"> Lines per agent Reserve agents for inbound calls 	

Dialing Mode	Description	Pacing Options	Optimization Parameters
Pull Preview (Manual)	<ul style="list-style-type: none"> An agent requests (pulls) records from the system, previews the record, and then decides whether to dial the call. Use in high-value campaigns, where individual ownership of accounts is the highest priority. 		
Push Preview (Manual)	<ul style="list-style-type: none"> The system pushes records to an agent. The agent previews the record and then decides whether to dial the call. Use in high-value campaigns, where individual ownership of accounts is the highest priority. 		

Dialing Modes for the SMS and Email Channels

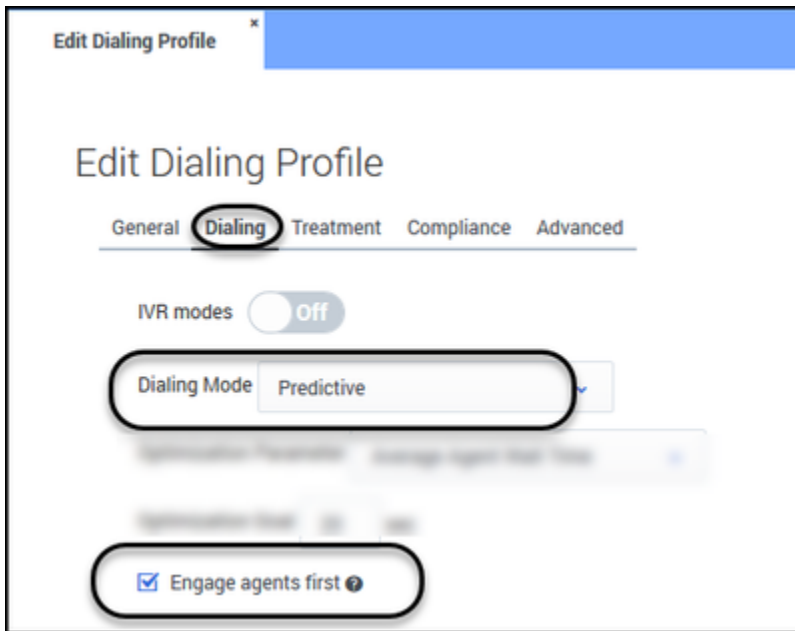
The table below lists the dialing modes available for SMS and Email channels.

Dialing Mode	Description	Pacing Options
Rate per Minute (default)	With this dialing mode, you can use the SMS per Minute or Email per Minute pacing option to define a precise number of text or email messages sent per minute.	SMS per Minute/ Email per Minute
Auto Pacing	With Auto Pacing, the pace at which text or email messages are sent is automatically set and adjusted in order to spread delivery out as evenly as possible throughout the delivery window.	
Broadcast	Use this dialing mode when you want to broadcast as quickly as possible to all contacts in the contact list.	

Enabling Dialing Modes

Any dialing mode can be enabled at the Dialing Profile, Campaign Template, or Campaign Group level:

1. Click the **Dialing** tab.
2. From the **Dialing Mode** menu, select the dialing mode you want to enable.
3. If applicable, select the pacing options or optimization parameters that will dictate the pacing for this campaign.
4. If you are using either Predictive with Seizing or Progressive with Seizing, check the **Engage agents first** option.



Dialing Modes and Target Abandon Rate

If you have a campaign using Predictive dialing and the **Abandoned Call Rate** optimization parameter, the system can switch to Progressive dialing in the event the target abandon rate reaches your optimization goal (for example 3.1%) to eliminate the risk of further abandonment. The system can then switch back to Predictive once the call abandon rate returns to an acceptable level (for example 2.9%).

To enable this functionality, go to the **Compliance** tab for the campaign object and set the conditions in which the system should switch to Progressive, and then set the conditions in which it should return to Predictive.

Edit Dialing Profile

General Dialing Treatment Compliance Advanced

☒ When Abandon Rate reaches

3.1

% switch to

Progressive

▼

dialing mode

☒ When Abandon Rate reaches

2.9

% switch to

Predictive

▼

dialing mode

Important

If the campaign group is currently running, the following restrictions are in place:

- You cannot switch from Predictive to Pull Preview or Push Preview.
- You cannot switch from Progressive to Pull Preview or Push Preview.
- You cannot change the Engage agents first option for either the Progressive (with Seizing) or the Predictive (with Seizing) dialing mode.

To change any of these settings, you need to stop the campaign group, edit the settings, and then resume the campaign group.

LIFO Mode

When creating/editing a Voice Profile, you can optionally enable LIFO (Last In First Out behavior) on the current dialing mode to support record insertion directly into the dialing buffer, as opposed to the calling list. Record insertion is only supported through the API. You may want to enable LIFO when you have time-sensitive contacts to dial. For example, a request for a contact (a sales lead) is initiated via a website visit. LIFO behavior works by prioritizing the most recent request for a contact (a record) by putting this request at the very top of the dialing buffer so that it is the next record accessed. This also includes being prioritized over other LIFO records that have not yet been attempted and are still in the dialing buffer.

Enabling LIFO

To enable LIFO behavior, turn on the LIFO mode switch in the **Voice Profile > Dialing** tab. You can enable LIFO behavior in any Voice Dialing mode.

Important

When LIFO behavior is enabled, standard treatment escalation is disabled. LIFO behavior only supports a single record dialed per contact.

Edit Voice Dialing Profile "37C41779B3"

General **Dialing** Treatment Compliance Advanced

All fields marked with an asterisk (*) are required

LIFO mode ☒ OnIVR modes ☐ Off

Dialing Mode Predictive

Optimization Parameter Agent Busy Factor

Optimization Goal 80 %

Number of ports 10

☐ Engage agents first☐ Use Small group mode when agents <☐ Lines per agent☒ Constrain Pass Times:

Days to Wait:

Choose Days

OR

Start Date

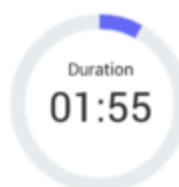
dd/mm/yyyy

Allow Attempts on These Days:

☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Timezone Source:

Device



IVR Modes

Use an IVR mode when you want to send personalized and/or interactive messages to your contacts.

Use Cases

- A retailer wants to solicit feedback from customers via an interactive survey. The customer answers a series of questions via a touchtone keypad (for example, *Press 1 for Yes or Press 2 for No*). The call ends when the contact completes the survey.
- A bank sends out a late payment reminder to its customers. Customers can press 0 to make payment arrangements with a customer service representative.

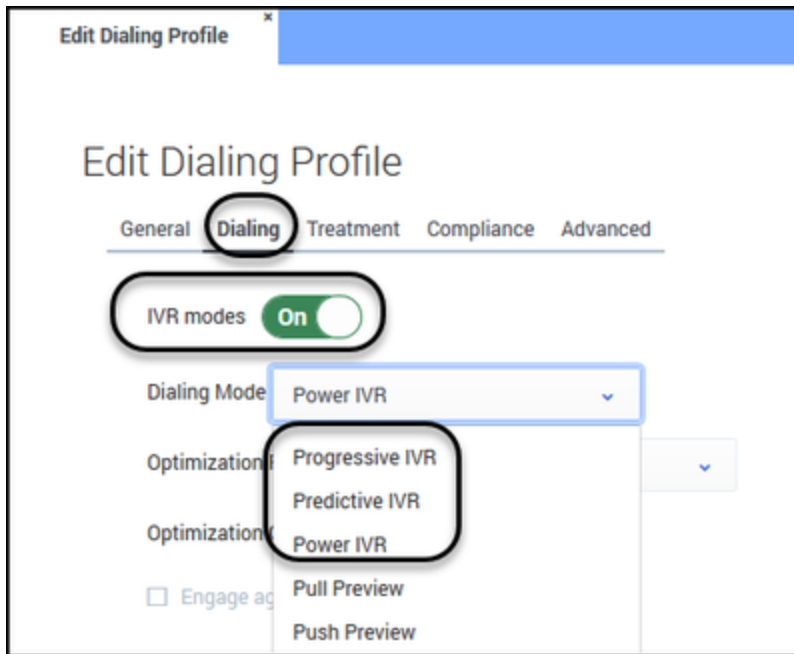
The table below provides a summary of each IVR mode and lists the available pacing options and optimization parameters for each. If a field is blank, it means those options do not apply for that IVR mode.

IVR Mode	Description	Pacing Options	Optimization Parameters
Predictive IVR	Calls can be connected to an agent. For example, <i>Press 0 to speak to a customer service representative</i> . The system bases pacing calculations on defined optimization parameters and pacing settings, just as it does when a campaign is running in the Predictive dialing mode.		<ul style="list-style-type: none"> • Agent Busy Factor • Abandoned Call Rate • Average Agent Wait Time • Average Distribution Time
Progressive IVR	Calls can be connected to an agent. For example, <i>Press 0 to speak to a customer service representative</i> . The system bases pacing calculations on the number of allocated IVR ports defined for that campaign group.	<ul style="list-style-type: none"> • IVR ports 	
Power IVR	Agents are not involved in these campaigns, so contacts are never given the option to speak to one. When the message ends, the call ends. The system bases pacing calculations on the defined number of calls per minute value.	<ul style="list-style-type: none"> • Calls per minute 	

Enabling IVR Modes

You first enable an IVR mode on the **Dialing Profile** page, as follows:

1. Click the **Dialing** tab.
2. Set the **IVR modes** option to **On**. All three IVR modes will now replace the automatic dialing modes in the **Dialing Mode** menu.
3. From the **Dialing Mode** menu, select the IVR mode you want to enable.
4. Select the pacing options or optimization parameters that will dictate the pacing for this campaign.
5. Optional: Specify the number of IVR ports you want to allocate to that campaign group.



Important

If the campaign group is currently running, you cannot change the **IVR modes** option, meaning that if this option is set to **On** while the campaign group is running, it must remain **On**.

Important

You can select a different **IVR mode** or switch to a manual dialing mode (Push Preview or Pull Preview) on the **Campaign Template** and **Campaign Group** page, but you cannot switch to an automatic dialing mode. You must either return to the **Dialing Profile** page and switch to an automatic dialing mode (set the **IVR modes** option to **Off**) or use a different dialing profile for that campaign template.

Related Topics

- Create and Manage a Dialing Profile
- Create and Manage a Campaign Template
- Create and Manage a Campaign Group