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Outbound (CX Contact) CX Contact Help

Pacing and Optimization

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Learn about pacing and optimization to define the way in which contact attempts are made.

Related documentation:

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Pacing Options

> **Warning**
> Pacing Options are used to control the dialing algorithm, so it's important you understand the implications incurred when changing the pacing.

Pacing and optimization defines the way in which contact attempts are made - you select the parameters that best satisfy your business requirements and the dialing algorithm adjusts accordingly.

This article describes the following:

- Pacing options
- Optimization parameters
- Advanced dialing options

Pacing Options are enabled on either the **Dialing** tab or the **Advanced** tab for the dialing profile, campaign template, or campaign group.

The table below provides a summary of each pacing option, identifies their associated dialing mode and IVR mode, and references the tab used to enable each option.

Parameter	Applicable Dialing Modes	Description	Where to Enable
Lines per agent	• Progressive • Progressive with Seizing	Use the Lines Per Agent pacing option to adjust the number of outbound calls dialed for each available agent. Pacing is based on the number of outbound calls that are simultaneously in progress and the number of agents in ready status. The system calculates the number of new outbound calls to be dialed	Dialing tab

Parameter	Applicable Dialing Modes	Description	Where to Enable
		as the largest integer (rounded down) that does not exceed the number of available agents multiplied by the value of the progressive multiplier. **Example:** • The progressive multiplier is 0.7 • The number of ready agents is 4 • The number of queued calls is 0 • The number of dialed calls is 1 The system calculates the number of new calls: 1 = [0.7 * (4 – 0 – {1/0.7}] = [0.7 * (4 – 2)] = 1.4 (rounded down) = 1	
Small group mode	• Predictive • Predictive with Seizing	When small group mode is enabled, the dialer uses an advanced algorithm that takes into account all inbound calls that are at all stages of processing, not just those being queued. This allows the dialer to initiate outbound calls, even if one or more calls remain in the dialing stage. Because the dialer doesn't wait until all dialed calls are completed before dialing a new batch of records, agent idle time is reduced.	Dialing tab
Calls per minute	• Power IVR	Use the Calls per Minute pacing option to specify the number of concurrent calls the system can make per minute.	Dialing tab (First enable the IVR modes option and select Power IVR.)
Number of ports	• Progressive • Predictive • Progressive IVR (pacing and capacity control) • Predictive IVR (capacity control)	Important Number of ports is available as a pacing option for Progressive IVR mode only, but it can be used to control campaign group capacity for any of the three IVR modes. Use this option to allocate a set number of ports to the campaign group. This allows you to define the maximum capacity (number of concurrent calls) for that specific dialing event. The distinctions between each IVR mode are as follows:	Dialing tab

Parameter	Applicable Dialing Modes	Description	Where to Enable
	• Power IVR (capacity control)	• Predictive IVR - In Predictive IVR, where pacing is driven by the agent optimization parameter, the number of IVR ports assigned caps the maximum number of concurrent calls. • Progressive IVR - The allocated number of IVR ports acts as both the maximum capacity and the pacing mode, where the pacing algorithm looks to fully utilize the maximum number of ports (concurrent calls) at all times. • Power IVR - Pacing is set by the number of calls per minute; however, the calls-per-minute rate is capped by the number of IVR ports assigned.	
Average inbound call duration	• Predictive • Predictive with Seizing	Specify the average call duration for inbound calls and the system will refer to this value when calculating the average call duration.	Advanced tab
Average outbound call duration	• Predictive • Predictive with Seizing	Specify the average call duration for outbound calls and the system will refer to this value when calculating the average call duration.	Advanced tab
Inbound rate calls per hour	• Predictive • Predictive with Seizing	Specify the anticipated number of inbound calls per hour. These calls will not be factored into the dialing algorithm.	Advanced tab
Ignore very long calls	• Predictive • Predictive with Seizing	Outbound calls that last significantly longer than the average call duration (specified above) can increase the average call duration, which negatively affects dialing efficiency. Select this option to omit these calls from average call duration calculations.	Advanced tab

Parameter	Applicable Dialing Modes	Description	Where to Enable
Reserve agents for inbound	• Progressive • Progressive with Seizing	Select this option to reserve a specified number of agents in a campaign group using Progressive dialing for inbound traffic only. To the dialer, these agents will be in an unavailable status (for example Busy), so those agents will not be factored into the algorithm.	Advanced tab
SMS per minute/Email per minute (available for the SMS and Email channels only)	• Rate per Minute	Select this option to define a precise number of text or email messages sent per minute.	Dialing tab

Optimization Parameters

When you use an optimization parameter, the system adjusts call pacing to adhere to that parameter. For example, if you select the Abandoned Call Rate as the optimization parameter with a goal of 3%, the system adjusts the number of calls dialed to achieve the 3% goal. Call pacing may increase and decrease as the target rate fluctuates.

The table below describes each optimization parameter and lists the dialing mode and/or IVR mode to which it applies. Note: All optimization parameters are set on the Dialing tab for the dialing profile, campaign template, or campaign group.

Parameter	Applicable Dialing Modes	Description
Agent Busy Factor	• Predictive • Predictive with Seizing • Predictive IVR	The percentage of the agent's logged in time that they are occupied on calls.
Abandoned Call Rate	• Predictive • Predictive with Seizing • Predictive IVR	The percentage of dropped or abandoned calls - the result of the system dialing more calls than there are available agents. Important: Your optimization goal should not exceed the allowable abandoned call rate set out by legislative bodies such as FTC and OFCOM.
Average Agent Wait Time	• Predictive	The time, in seconds, that each agent waits between calls.

Parameter	Applicable Dialing Modes	Description
	• Predictive with Seizing • Predictive IVR	
Average Distribution Time	• Predictive IVR	The time, in seconds, that a call waits in the queue until there is an agent available to take the call. The number of calls, including abandoned, are calculated in the pacing algorithm.

Advanced Dialing Options

The following dialing options are set on the Advanced tab for the dialing profile, campaign template, or campaign group.

Option	Applicable Dialing Modes	Description
Answer type recognition	• All dialing modes	Defines the type of Call Progress Detection (CPD) analysis that is applied to outbound calls when dialing using SIP Server. For details refer to the call_answer_type_recognition OCS option description in the **OCS Option Descriptions** page.
Timeguard timeout	• Predictive IVR • Progressive IVR • Power IVR	Set a timeout, in milliseconds, for post-connect CPD. The call is transferred to a queue when the timeout expires, regardless of the call results or the completion of CPD.
Dialing Buffers	• All dialing modes	A dialing buffer acts as a multiplier for the number of agents that are available for a campaign. Together, the Minimum and Optimum values determine how many records the system keeps in memory. • **Minimal buffer size** - Enter the minimum number of contact list records per active agent that the system keeps on hand for dialing. The default is 4. • **Optimal buffer size** - Enter the optimal number of contact list records per active agent that the system keeps on hand for dialing. The default is 6.
Call Wait Connected Timeout	• All dialing modes	Specifies the timeout of the call. That is, the time at which the dialer should consider that the call is not answered by call party.
Calculate Duplicates	• All dialing modes	Select this check box to calculate duplicates during the pre-loading of campaign groups.

Related Topics

- Dialing Modes and IVR Modes
- Compliance Tools