



PureEngage On-Premises Use Cases

Genesys Outbound Dialer (CE11) for PureEngage

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Improve customer communications and increase sales conversion using powerful dialer capabilities

What's the challenge?

Dialing for sales outreach is a hard job that requires specialized skills. Low agent utilization due to sub-par dialers, manual dialing, lack of appropriate blending of inbound/outbound result in fewer sales conversions.

What's the solution?

Deliver coordinated outreach and create optimal engagements based on agent availability while reducing costs. Improve the ROI of outbound sales campaigns by efficiently acquiring, up-selling, and winning back customers through automated and assisted calling campaigns by using a powerful dialer for voice calls and IVR for voice messaging.

Story and Business Context

A company needs to make outbound calls to initiate contact with its customers based on specific business rules for sales, marketing, care, or collections. This use case describes the ability to configure and execute outbound dialing campaigns – both automated and agent-assisted – based on customer-provided contact list(s).

Generating new business and upselling existing customers is a critical part of any business. Sales and marketing organizations are challenged with improving the efficiency of their team members; increasing reach, contact rates, response rates, and revenue; and complying with industry regulations.

Happier Agents

- Predictive dialing is used when appropriate to improve agent efficiency and satisfaction by removing low-value calls and wasted time.
- Productive and highly utilized agents have more opportunities to serve customers, close business, and meet their sales quotas.

Happier Legal Team

- Compliance and business rules are accurately maintained to ensure enterprise-wide contact strategy adherence.

Improved Effectiveness / Higher Return on Investment

- Improved Return on Investment of outbound sales and marketing campaigns (such as telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions) and outbound campaigns.

- Leads are routed to sales agents within seconds (not minutes, hours or days) since "speed to lead" follow up is crucial in many sales environments, driving lead contact rates and conversion rates while decreasing call abandonment rates.
- Sales departments use predictive, progressive, and/or preview dialing modes instead of making manual dials, and outbound call volume is efficiently paced, which results in more sales conversations and increased agent productivity.

Use Case Benefits

Use Case Benefits	Explanation
Improved Employee Occupancy	Improved agent/employee occupancy by leveraging them for outbound campaigns. Increasing the number of right parties connected through predictive dialing, optimizing the number of agent-handled calls.
Improved Net Promoter Score	Improved customer experience by proactively contacting customers and prospects with targeted or personalized offers and special promotions
Increased Revenue	Increased revenue by improving performance of outbound campaigns
Reduced IT Operational Costs	Reduced IT dependency and empowering Business User management of campaigns
Reduced Volume of Interactions	Reduced volume of interactions by proactively sending communications through outbound channels

Summary

The Genesys system supports both agent-assisted and automated outbound calling campaigns using dialer and outbound IVR channels. Dialer calls can be made in predictive, progressive, preview (Push/Pull), Outbound IVR modes (Power/Fixed, Predictive, Progressive), or manual mode. The company can use its marketing, CRM, or collections system to generate contact lists based on a one-time event, recurring events, or trigger-based events. The lists include the appropriate contact details, such as contact name, contact phone number, and contact reason. Delivery results are recorded in the system to feed into reports.

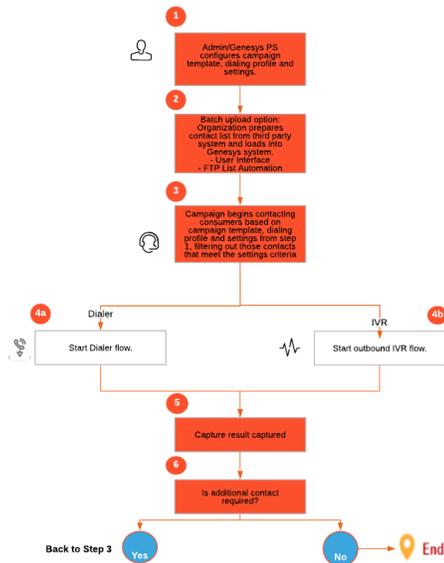
Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which is expensive and wastes time. Companies are managing communication in silos and don't have an integrated, outbound dialing campaign. All companies must follow industry regulations and manage for compliance risk.

Use Case Definition

Business Flow

Business Flow

The following diagram shows the main flow of the use case:



Business Flow Description 1. The administrator or Genesys PS configures a campaign template, dialing profile, session profile, and settings in the Genesys system.

2. The organization prepares a contact list from a third-party system (such as a CRM), then uploads the list using batch upload, the user interface, or FTP list automation capabilities.

3. The Campaign Group begins contacting consumers based on the campaign template, dialing profile, and session profile from step 1, filtering out those contacts that meet the settings criteria defined in the dialing profile.

4a. For Dialer, the dialing mode is configured as Progressive, Predictive (seizing is optional and recommended), or Preview.

- In Preview mode, the agent receives or retrieves a record and the call is initiated by the agent.
- In Progressive mode, the system automatically places the call based on an agent being available for the specific campaign. 1-to-1 is the default for progressive mode. CX Contact also supports a progressive multiplier, 1-to-many.
- In Predictive mode, the system automatically places the call based on the pacing algorithm and expected agent availability.

For each call attempt, there are multiple potential results. For example:

- Bad Number or No Answer:
 - In Preview mode, the agent hangs up, and the disposition and the result are written back to the system.
 - In Progressive and Predictive modes, the call disconnects and the result is written back to the system.
- Answering Machine:
 - In Preview mode, the agent has the option to leave a message then disposition the call. Based on the call result code the call may be retried later. The result is written back to the system.

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- In Progressive and Predictive modes, the call either disconnects, bridges to an agent, or plays a message (based on the Destination DN configured in step 1) and the result is written back to the system.
 - Live Party (Call Result = Answered) connect: the agent is connected to the consumer.
 - The consumer can opt out. The agent records this result in the agent desktop and it is written to a system DNC list. Access to this DNC list requires a Care ticket and intervention.
 - The consumer can ask for a callback. The agent records this result in the agent desktop and the callback is scheduled.
 - At the end of the call, the agent records a disposition code and the result is written back to the system.
 - Call result status and record type are written to the list.
 - Info Mart and the BI Extract are required for agent disposition results.

4b. For Outbound IVR, there are multiple potential results. For example:

- Bad Number or No Answer - the call disconnects and the result is written back to the Genesys system (Info Mart and Contact List).
- Answering Machine - the call either disconnects or plays a message (based on the configuration chosen in step 1) and the result is written back to the Genesys system.
- Live Party connect - the call plays the Outbound IVR message.
 - The consumer can opt out of future calls, typically done by including "Press 9 to opt out of future calls".
 - Optionally, the administrator may choose to offer the option to connect to a live agent, typically done by including "Press 2 to connect to a live agent".
 - If the agent is part of the Genesys environment then calls can predictively be paced to keep the agent busy. Progressive mode is also available in a

default 1-to-1 or progressive multiplier
1-to-many configuration.

- If the agent is external to the Genesys environment, connection can also be achieved by routing to a phone number provided by the company, external to Genesys. In this case pacing is managed with the number of outbound calls in predictive or progressive (recommended) modes. Pacing cannot determine the availability of agents that are not part of the Genesys environment
 - *Consideration: Outbound voice trunks have limits and sizing should be considered to enable the proper dialing rate*
 - The result is written back to the Genesys system.

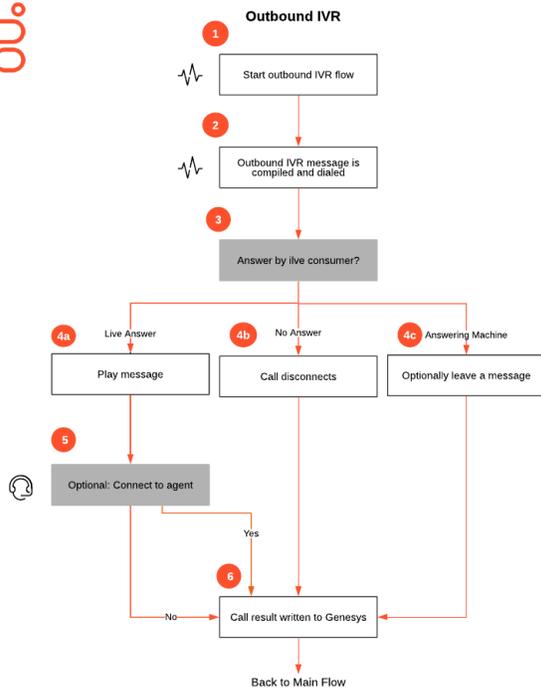
5. Call results are written back to the Genesys system and utilized to determine next actions.

6. Depending on the call result, additional contact attempts may be undertaken. If additional contact is required, the contact treatment configured in step 1 will continue at step 3. If no additional contact is required, the contact treatment ends.

Business Flow

Outbound IVR

The following diagram shows the Outbound IVR subflow:



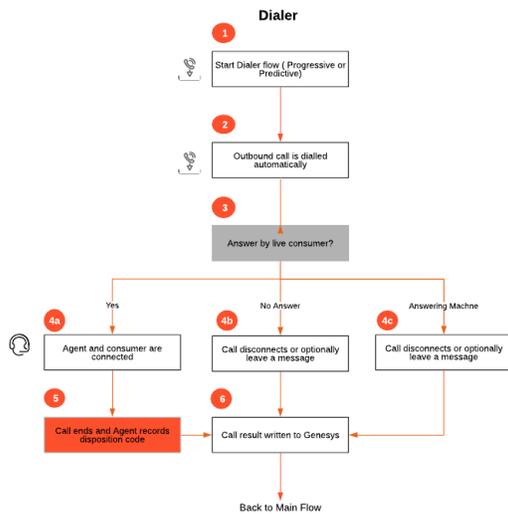
Business Flow Description For Outbound IVR, there are multiple resulting scenarios:

- Bad Number or No Answer - the call disconnects and the result is written back to the system.
- Answering Machine - the call either disconnects or plays a message (based on the chosen configuration in step 1) and the result is written back to the system.
- Live Party connect - the call plays the Outbound IVR message.
 - The consumer has the option to opt out of future calls. This is typically done by including "Press 9 to opt out of future calls".
 - Optionally, the Customer Admin may offer the option to connect to a live agent (based on the chosen configuration). This is typically done by including "Press 2 to connect to a live agent". This can be achieved by routing to a phone number provided by the company.
 - The result is written back to the system.

Business Flow

Dialer

The following diagram shows the Dialer subflow:



Business Flow Description

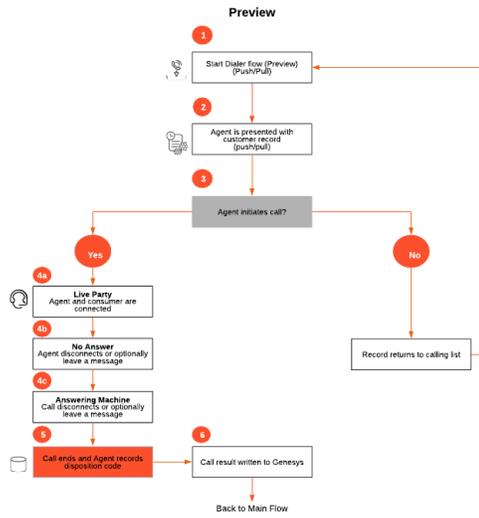
- For Dialer, the dialing mode is configured as Preview, Progressive, or Predictive.
 - In Preview mode, the agent receives or retrieves a record and initiates the call.
 - In Progressive mode, the system automatically places the call based on an agent being available for the specific campaign.
 - In Predictive mode, the system automatically places the call based on the pacing algorithm and expected agent availability
- For each call attempt, there are multiple resulting scenarios:
 - Bad Number or No Answer:
 - In Preview mode, the agent hangs up and the result is written back to the system.
 - In Progressive and Predictive modes, the call disconnects and the result is written back to the system.
 - Answering Machine:
 - In Preview mode, the agent has the option to leave a message. Based on the disposition code, the call may be re-tried later. The result is written back to the system.
 - In Progressive and Predictive modes, the call either disconnects or plays a message (based on the configuration chosen in step 1) and the result is written back to the system.
 - Live Party connect - the agent is connected to the consumer.
 - The consumer has the option to opt out. In cloud, the agent records this in the agent desktop and it is written to a suppression list or DNC list in the premise.
 - The consumer has the option to ask for a callback. The agent records this in the agent desktop and the callback is scheduled.

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- At the end of the call, the agent records a disposition code and the result is written back to the system.

Business Flow

Preview

The following diagram shows the subflow when preview mode is used:



Business Flow Description Based on the result of the call, additional contact attempts may be undertaken, either:

- in the same channel, or
- in another channel (Cloud only)

This is configured in the campaign settings in step 1.

For more details

For additional details, contact your Genesys Sales Representative by filing out the form or for immediate assistance call us: 1-888-Genesys.