



Interactive Northwest, Inc.
Customer Experience Solutions

AVAYA PROACTIVE OUTREACH MANAGER USE CASES

WHITE PAPER



AVAYA POM USE CASES

INTRODUCTION

One of the best ways for an enterprise-size organization to increase the efficiency of its customer interactions and its customer experience scores is the use of proactive outreach, or outbound. Although there are regulatory requirements that need to be observed when an organization contacts its customers or prospective customers, proactive outreach technology provides compelling value. The Avaya Proactive Outreach Manager (POM) platform combines its full-featured outbound campaign management and outdialing engine with the powerful Avaya Aura® Experience Portal self-service platform. With the ability to use voice channels, SMS, and email, the POM platform affords an exceptional number of solutions providing value for almost every enterprise.

USE CASE GROUPS

The following categories divide proactive outreach solutions into some useful groups. While this certainly isn't an exhaustive list of the useful groups of solutions or use cases, this paper demonstrates several concrete examples to stimulate thinking about how each type of proactive outreach could be applied in an organizational context.

Use Case Groups Covered Include:

- Automated Notification
- Outbound Self Service
- Agent-based Outbound Campaigns
- Integrated Automated/Agent Campaigns

AUTOMATED NOTIFICATION

Automated notification is the prototypical use for proactive outreach – appointment reminders, alerts, broadcast messaging, etc.

Examples:

- *An airline gives a customer the option to receive alerts concerning his upcoming flight.*

This is a good case where the end user can be given a choice of receiving voice, SMS, or email notifications.

- *A cable company contacts a customer to remind her of an upcoming service appointment date, time, and location.*



The simple outbound notification may be augmented with the ability to have the customer indicate whether someone will be home (“confirm”) or the appointment needs to be cancelled (“cancel”). This can be taken a step further by offering an option to be transferred to an agent who can reschedule the appointment.

- *The cable company notification is integrated with its backend scheduling system so it calls the customer to alert her that the technician is on the way, and delivers the expected arrival time.*

If the customer does not answer or answers that the appointment cannot be kept, the field dispatch is re-routed to another service location to avoid the cost of an ineffective truck roll.

- *A medical practice calls its clients and uses a secure notification process to deliver sensitive information such as medical test results.*

Some notifications contain sensitive information that may be protected by law, such as medical information protected by HIPAA or financial information that would cause harm to the organization and/or client if it reached an unintended recipient. As POM uses self-service VoiceXML applications to interact with the called party, it is possible to securely verify a recipient by something as simple as validating the last four digits of the social security number, or as advanced as voice biometrics.

OUTBOUND SELF SERVICE

Although the common expectation is that voice self-service is only offered on inbound calls, there are numerous examples where outbound self-service makes even more sense. The application that interacts with the called party uses the same VoiceXML and backend data integration of inbound applications, making outbound self-service equally as capable.



Examples:

- *Rather than relying on callers to remain on the line for post-call customer experience surveys or to prevent agents from disconnecting dissatisfied callers, post-call surveys can be delivered by outbound campaigns.*

It is common to think of surveys only in the context of inbound contact center interactions, but the concept can be extended to customer satisfaction surveys for any form of service – car repair, major appliance purchase, utility company service call, etc.

- *An alumni association needs to verify and correct alumni data records so it uses a voice-enabled data collection form application that can both play back information for verification and collect missing information.*

This may be an extension of the “simple survey” that asks yes/no or simple multiple choice questions to the collection of more complex data. Numeric data can be easily collected with DTMF. With the use of automated speech recognition, alphanumeric data or sets of well-defined verbal categories (“directed dialog”) can be collected. Free form voice responses can also be recorded for later transcription.

- *A collections agency uses a pay-by-phone application to target low value, “soft” collections that would otherwise not be cost effective for agent time.*

A pay-by-phone module can be a very valuable component of inbound self-service because it can be easily secured for PCI compliance and it eliminates the exposure of sensitive card data to agents. In this outbound case, the called party is notified of a late payment and given the option to pay by previously stored card or by collecting a credit or debit card for payment, without speak with an agent.

Although this example applies the pay-by-phone capability to a collections scenario, it can also be useful in other notification scenarios where the collection of payment information is needed to complete the interaction with the called party.

AGENT-BASED OUTBOUND CAMPAIGNS

The Avaya POM platform supports outbound campaigns using preview, progressive, and predictive dialing methods. With preview dialing, the next call record is delivered to the agent before the platform dials the number. This gives the agent time to study the current record's information.

The platform allows the agent to have full control of when dialing starts, or the campaign can put limits on the agent's preparation time. Although preview dialing automates the dialing process, it does not make maximum use of agents. The agent in preview mode must still listen to call progress, encounter busy and ring-no-answer conditions, and may encounter answering devices. The platform can detect answering devices and deliver the campaign specific pre-recorded message, thereby relieving agents from leaving messages on numerous calls.



Progressive and predictive dialing involve the platform placing calls before an agent is assigned. The platform algorithms ensure, based on prior dialing history or on configuration parameters in the campaign, that an agent is highly likely to be available if a call is answered by a person. These dialing methods can make very efficient use of a team of agents to place a large number of calls. As the team size increases, predictive calling can be extremely efficient.

Examples:

- *After a large software company customer schedules a service call online, the company's technical support team connects with her using POM in preview dialing mode. Before the call is dialed, the technician reviews the customer-provided trouble information to expedite problem resolution and increase customer satisfaction.*
- *A debt collection agency uses the POM platform in predictive dialing mode to work through its collection lists. Calling uses a follow-the-sun model with the campaign starting in the Eastern Time zone and working progressively throughout the day to the Pacific Time zone.*

Many contact centers have both inbound and outbound functions where agents are assigned to teams dedicated to one function. By cross training some staff as both inbound and outbound agents, it is possible to use "blending" to more effectively manage the load of both inbound and outbound calls. This is especially efficient when inbound call volumes fall.

POM supports the standard Avaya approach to agent blending. Agents on the Avaya contact center platform (usually Avaya CM Elite) can be assigned both an inbound and an outbound skill. When POM starts a campaign, it acquires all of the agents with the outbound skill required by the particular campaign. POM uses a connector to the Avaya CMS to monitor occupancy of the inbound queue(s). When blending is enabled, if the occupancy of the inbound queue reaches a threshold, POM releases the dual skilled agents back to the CM inbound queue. This reduces the number of agents that POM has available for the outbound campaign, effectively throttling its out calling. Once the occupancy of the inbound queue falls below a lower threshold, the dual skilled agents are re-acquired to complete the POM campaign.

INTEGRATED AUTOMATED AND AGENT CAMPAIGNS

The simplest automated/agent integration is proactive notification that allows a called party to elect to speak with an agent. Integration can ensure the outbound campaign doesn't send so many called parties to the inbound queue that unacceptable queuing delays occur. A connector between the POM platform and the Avaya CMS accomplishes this. POM monitors the inbound transfer queue(s) and the rate of automated outbound calling, and throttles if the inbound queue fills beyond a configured level.

Another integration involves the use of both agent-based and automated either as separate campaigns or different parts of a single campaign. The following examples demonstrate some of the power of using both automated and agent campaigns in the same platform.



Examples:

- *A marketer of home beauty products uses POM with predictive dialing to connect its agents with prospective customers. Once an order is taken, automated notification campaigns inform the customer when her order has shipped, and the expected arrival date. Subsequent automated campaigns remind her when it's time to reorder. Customers who decline to accept are transferred to consultant agents who try to close the sale personally.*

This is an example of agent-based campaigns for an activity that requires skilled agents—telesales—augmented with automated campaigns for efficient customer handling, customer notifications, and customer retention.

- *A health consultancy has established programs for smoking cessation. A client is enrolled in the program and meets periodically with a trained counselor via telephone. Automated campaigns are used to contact the client in order to monitor compliance with the program and track progress. A client with immediate questions can be transferred to a member of the counseling team. A personal counselor regularly contacts the client for one-on-one follow-up using a POM preview dialing campaign. Frequency of the automated and agent-based contact changes as the program progresses.*

This is an example of using automated campaigns to collect information that inform subsequent agent-based campaigns. By mixing both automated and agent-based contact in the outbound campaigns, the health consultancy gains maximum efficient use of its counseling staff.

- *A medical device manufacturer collects client usage data via remote telemetry and provides clients with compliance counseling. A preview dialing campaign is used to facilitate the counselors' outreach. To increase efficiency and allow counselors to handle more clients, an automated campaign contacts clients who are in compliance, and provides them with the summary report, praise and encouragement.*

In this scenario, an inefficient task requiring a larger counseling staff benefits from POM's ability to automate the dialing. The backend system can identify clients who require personal calls from those who only need the automated call, only calling those who need the personal touch to instruct and motivate. Both forms of outreach can be combined in a single campaign using POM's ability to segregate the preview calls from the automated calls in the outbound strategy.

SUMMARY

The Avaya Proactive Outreach Manager (POM) platform leverages the power of the Avaya Aura® Experience Portal (AAEP) platform to create an innovative outbound engine. By harnessing the full power of the AAEP platform, automated voice campaigns can deliver sophisticated interactions with the called parties. Voice applications have access to speech technology (automatic speech recognition, text-to-speech translation, and even voice biometrics) as well as access to backend data sources that the application can query as well as update based on the interaction with the caller.

In addition to the power of a general purpose self-service platform for the voice channel, the AAEP supports bidirectional SMS and email channels. Although there may be less costly and/or easier-to-use single-purpose platforms for SMS or email notification delivery, the ability to support all three channels—including combinations of these channels—sets the Avaya POM platform apart. Adding the ability to support preview, progressive, and predictive agent-based campaigns to the automated campaigns makes the platform an incredibly rich tool to build almost any solution requiring proactive outreach.

Enterprises that recognize the opportunities they have to meet their customers' needs by judiciously combining inbound service (agents, telephone voice self-service, inbound SMS and email, inbound chat, and web) with proactive outreach will establish a level of service that differentiates them from their competitors. If these contact points are carefully orchestrated to provide a unified brand experience and data is integrated between these touch points, customer experience and customer promoter scores can be taken to new levels.

This whitepaper gives examples of how POM can be used to provide valuable real world solutions. We hope they will stimulate thinking around the ways similar solutions can be applied to other business contexts.

Avaya Proactive Outreach Manager (POM) Use Cases

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About Interactive Northwest, Inc. (INI)

Since 1992, INI has been a leader in developing IVR and telephony communication solutions, and was one of the first companies with combined expertise in host connectivity and telephony networks. INI's software products and services follow a complete implementation life cycle—from solution design and project management to interface development and test, deployment, documentation, training and ongoing support. Recognized for its expertise in voice response, speech recognition, CTI, and security, INI delivers effective solutions that balance the client's infrastructure requirements with the end-users' expectations, resulting in high satisfaction for clients, partners, and end-users alike. With its stellar reputation, proven ability to deliver results, and innovative yet highly-stable standards-based solutions, INI is ready for the next evolution in the ever-changing landscape of contact center communications.

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