

## Outbound Dialing Enterprise Functionality



- Increase Agent Productivity and Utilization
- Reduce Training Time
- Increase Contact Rates
- Maximum Performance from Each List
- Easily Transfer Calls to Affiliates
- Customizable, On Demand Reporting
- Reduce Risk and Stay Compliant
- Achieve Higher Utilization with Universal Queueing

Increase dials per hour and Contact Rate (percentage of calls answered) while staying compliant, with ServicePattern's outbound dialing features.

We offer predictive, preview and IVR-only dialing modes.

### Increase Agent Productivity and Utilization

A combination of true predictive, preview and IVR-only dialing modes allows maximizing utilization of agents' productive time.

Our true predictive algorithm tracks agent availability and list success rates in real time and predictively dials the optimum number of calls based on real time performance. This allows agents to be fully utilized by filling in gaps in inbound call arrival with outbound predictive dials.

Campaigns can be run at specific times of day, days of week and more using periodic scheduled start/stop times with hours of operation.

Preview time can be limited for better pacing with our preview timeout auto-dial setting.

When one campaign's records start to taper off because of, for example, safe-calling hours or list exhaustion, another campaign can pick up the slack with our linked campaigns feature.

Our call progress analysis minimizes non-productive connections by effectively detecting human voice and separating answering machines at success rates over 85%. Messages could be left on answering machines by running an IVR scenario from dialing rules.

### Reduce Training Time with our Easy to Use Interface

Agent Desktop is a rich web application. It dynamically changes its interfaces based on task to offer most relevant controls at each moment. All call controls are through Agent Desktop and are available with either our softphone (included) or through an external phone.

Each campaign can have a fully customizable GUI form presented to the agent, with list data and input fields, along with such accelerators as:

- *Click-to-dial number field (e.g. for transfers)*
- *One-click disposition selection*
- *Hyperlink*
- *Customizable Voicemail Messages*

The form is customizable via our drag and drop web-based GUI editor.

For frequently used phrases and proposals, each agent can have a set of messages pre-recorded in their voicwe, or you can load professionally recorded messages. The playback of the message is not interrupted by the agent hanging up, which helps increase agent productivity. Agents don't have to remain on hold with an answering machine to leave a message.

A campaign can pop a Salesforce.com screen and fill activity record fields, including disposition, notes and custom fields. The activity record could be used to build reports in Salesforce.com.

### **Increase Contact Rates**

Multiple calling-destination-hours windows, with area code and postal code time zone adjustment can be set up per campaign.

Records can be suppressed by area code or postal code to exclude areas unlikely to answer.

Caller ID for each call can be selected in a number of ways, such as random, geographically closest, within same state, even from list record.

Hot leads delivered via API, (e.g. from website lead form) can be prioritized to be dialed first.

Right Party Contact scenarios have full IVR functionality, with record access, dispositioning capability, and include text-to-speech and vocabulary speakers (including vocabulary speaker for personal names). All scenarios are multi-lingual.

### **Get the Maximum Performance from Each List**

Lists can be imported via scheduled periodic import (FTP/FTPS), API or manually. The formats include CSV and fixed-column-width text file. Once defined, list formats can be re-used.

Multiple lists can be defined per campaign, in specific priority order. Dialing ratios can be specified for lists with same priority. The lists can be shared between campaigns.

A list can be loaded for multiple different campaigns by using filters. Filters use combinations of fields; or fields and other campaigns' dispositions, allowing records to flow from campaign to campaign.

Lists can be enabled or disabled for a campaign at any time.

Configure list settings to emphasize penetration or coverage, depending on campaign priorities.

Lists can be ordered for dialing in natural order, random order, and ascending/descending dialing order by selected fields.

Hot leads, updated via API can be set up to dial right away.

2Result export can also be scheduled periodic (FTP/FTPS) or manual. Exports can be filtered by disposition and date and can include recordings.

Salesforce.com campaigns can be set up to automatically synchronize with ServicePattern lists and have results saved as activity records.

It is possible to dial in parallel with a subcontractor; for example, by using our capability to eliminate specific records using an externally-loaded list of record IDs.

### **Transferring Calls to Affiliates Made Easy**

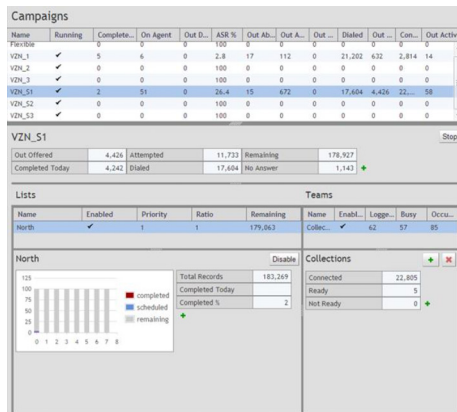
Agent can use one-click dial buttons placed on the campaign form.

The customer's caller ID information can be placed in Caller ID on transfer.

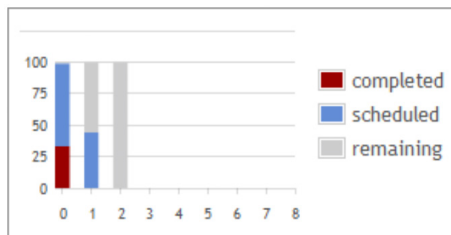
The call can be sent to a receiving call center directly from right party contact (RPC) scenario, wait in queue and read its information to a receiving agent before connecting the customer.

## Customizable, On Demand Reporting

We provide campaign status information in real-time via our campaign operator console:



The console shows, among other things, number of calls being dialed, number of agents available, team occupancy and count of dispositions. List status at-a-glance is provided by our unique list performance chart (percent of records completed, rescheduled, and remaining during each attempt):



Historically, we provide the following outbound-specific reports out-of-the-box:

- Disposition reports
- Campaign performance report
- Telemarketing compliance report

All in addition to the reports related to agent performance and quality, and other reports shared with inbound and blended multi-media.

## Reduce Risk and Stay Compliant with the TCPA

Safe hours calling windows have time zone data coming from both the area code and postal code of the record.

National and state calling hours are observed.

Both list field data and call recordings can be encrypted

Multiple Do-Not-Call lists can be assigned to multiple campaigns. Lists can be updated with a disposition on a call by agent or RPC/IVR scenario; the change is immediately reflected in all related campaigns.

Dialing mode can be restricted to preview-only (for tenant account at provider level).

We provide a TCPA (Telephone Consumer Protection Act)-tailored RPC scenario template out of the box.

We provide automatic consent expiration based on either list import date or per-record consent date.

(please see our compliance brochure for more details)

## **Achieve Higher Levels of Utilization with True Universal Queueing**

ServicePattern perfectly blends outbound campaigns with inbound and multi-media interactions:

- Outbound can augment inbound and reduce idle time.*
- Inbound calls can be recognized and processed as campaign callbacks with list match*

Full ServicePattern voice functionality is available with Outbound Dialer:

- Quality Management*
- Voice recordings*
- Screen recordings*
- Supervisor Console*
- Agent personal metrics*
- Reporting*
- Voice Signature*



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