

Efficient, Effective Outreach

Four best practices for optimizing outbound customer care using today's multi-channel interactive technology and personalization principles

Designing efficient, effective outbound care

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“Tellme is a great example of making technology serve the needs of real people, not the other way around.”

Walt Mossberg
Wall Street Journal

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Executive Summary

While there are many well-established best practices for the design, development, and deployment of customer self-service solutions for the contact center, companies have less guidance for proactive, or outbound customer care applications. Many businesses have tried to develop outbound care strategies based on inbound design principles, but they quickly discovered that these campaigns fall short in customer satisfaction and ROI. Tellme's research and experience with customers reveals several distinct considerations that customer care executives, designers, and marketers need to take into account when defining a company's outbound customer care.

This white paper discusses four key best practices for the design and deployment of successful outbound customer care applications, focusing on customer experiences that are relevant, timely, action-oriented, and efficient.

Organizations that focus on these principles and integrate them into their outbound care activities, in any industry, will find their task automation and customer engagement rates quickly rise. The ultimate benefit reflects in the bottom line by avoiding costly agent interactions and eliminating unnecessary inbound traffic to their contact centers.

“Proper application of these design principles yield highly satisfying experiences for customers, even to the point of driving viral recommendations and customer satisfaction ratings for your company.”



Calls of a fundamentally different nature

There is a fundamental difference between placing an outbound service call and receiving an inbound call from a customer. When a customer contacts your company, they are prepared for the conversation they're initiating and are already operating in the context of the task they're trying to complete.

With outbound, the applications often reach customers in situations where they might be unable to pay full attention or engage with the application, and they rarely have planned to receive the call. This is true even if the customer has consciously opted into receiving these kinds of notifications.

Such a lack of context significantly impacts the attitude of the person receiving the call and their willingness to participate in a conversation. Customers interacting with an outbound call are less tolerant of inefficiencies and more prone to abandon a call that doesn't directly benefit them, as compared to customers who initiate a call to the company's toll-free customer service line.

This difference in caller context is the basis for the best practices explored in this white paper. In order to reduce customer frustration, increase engagement, and drive better task completion rates with outbound campaigns, applications need to be:

- 1) **Timely.** Because each outbound call can be seen as an interruption, businesses should strive to reach out to customers when it's most necessary, and when they're most likely to capture the customer's attention.
- 2) **Relevant.** Outbound calls need to be perceived as relevant and valuable by the recipients to be successful. Relevance takes many forms, but context-awareness and personalization should be used wherever possible to minimize frustration.
- 3) **Action-oriented.** Outbound notifications should be closely tied to a specific action – whether encouraging a behavior that benefits the customer or preemptively preventing a potential negative outcome. Any action also needs to be focused on a single primary task.
- 4) **Efficient.** Customers interacting with an automated outbound call are less tolerant of inefficiencies than ones who have called an inbound IVR. People dealing with an outbound call won't wait through the "inefficiencies" present on many inbound IVRs.

The following sections discuss each of these principles in detail.



Four best practices for efficient, effective campaigns

Ultimately, the goal of any outbound campaign is to maximize the reach, engagement, and task completion with a target set of customers. Without optimizing for these goals or defining clear business objectives for each, companies waste a key opportunity for engaging with their customers in more meaningful ways. On the other hand, proper application of these design principles yield highly satisfying experiences for customers, even to the point of driving viral recommendations and customer satisfaction ratings for your company.

1 Be timely: reach out when it's best for the customer

Timely outbound interactions are defined by two factors:

1. Calling when information or action for the call is most beneficial to the customer
2. Calling when the customer is most likely to answer

First, the context for a call influences when the best week or day is to call. For example, a 401k or pension holder who is approaching the age of their Minimum Required Distribution (MRD) will appreciate a reminder of the upcoming event a few months in advance, along with a call to action to verify their mailing address and potentially provide their direct deposit information.

Second, identifying the best time of day to call requires firsthand knowledge of a customer's recent customer service history (across all channels, including the web and mobile). In addition to properly timing a call against the calendar, it is beneficial to know that:

- The customer previously placed calls about balance inquiries and fund options between the hours of 4 and 6 pm during the week.
- They are not currently employed.
- And, previous calls to the customer after 6 pm were either never connected or resulted in a quick hang-up.

An optimized campaign calling strategy takes these kinds of variables into account and ensures that when you reach a customer with an important call to action, they are most receptive to that call to action.

Note that in the example above, the context of the call is known from normal business processes. Thus, the macro timing of the call (week or day) can be defined by business rules such as a certain number of days or weeks before a customer-impacting event. However, the fine-tuning of timing for the call depends on information about the customer's historical behavior. The richest data can be drawn from a customer's inbound calling history, so leveraging interaction history from the inbound IVR platform can yield the highest rate of success at connecting with the customer on the first attempt. Further, integration

Use a combination of business processes and the customer's historical behavior across all contact channels to determine the best time to call.



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with a central customer database that retains customer interaction history across all channels allows your company to choose the best time *and* the best channel for outreach to the customer.

2 Maximize the relevance of each call

A customer quickly categorizes each received call as either a beneficial interaction that improves their life or an irritating nuisance that distracts. As a result, outbound calls need to be perceived as relevant and valuable by the recipients for them to be successful.

Unlike inbound contact, with outbound customers are no longer initiating the conversation – even if they explicitly opted in to receiving calls. A first signal of relevance to the customer’s immediate needs is self-identification of the calling party. Caller ID can be a useful tool in giving your customer the context of your message before they pick up the phone. People commonly answer or decline the call based on caller ID. Consider what caller ID to display to encourage the behavior you want. A blocked or private number is the worst way to introduce your company’s message to the customer. Instead, the caller ID could be used to convey the message itself (e.g., 'Payment reminder') or the business (e.g., 'Bank of Pennsylvania'), or something else.

“A blocked or private number is the worst way to introduce your company’s message.”

Once a customer answers a call, any upfront delays are perceived as an abuse of the customer’s consent. Audio must be presented within milliseconds, and that audio must contain useful information for the customer, not a placeholder message such as “please wait.” Once the information is presented, three outcomes may result:

Information	Customer Perception	Result
Confirmation of customer expectation	Message was helpful, company is managing the relationship well	Hang up and move on with day
Reminder of customer expectation, but customer needs have changed	Message was helpful, but customer now wants to communicate back to company	Triggers an inbound contact from customer, inbound contact center may have no context
Company wants customer to take action	Depends on customer ability to act at time of call	Company must make it quick and easy for customer to accomplish action, or else customer gets frustrated by having to remember one more task

The next section addresses how to deal with the second and third situations above, which require active customer participation in response to the outbound message.

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3 Focus on a specific action

Outbound notifications should be closely tied to action: either encouraging action that directly benefits the customer or preemptively preventing a frustrating situation. Another important concept for this best practice is *consequence*. In many cases, something of consequence has happened or will happen to the customer or their account, and the call you place is designed to alleviate or reinforce that consequence.

Many companies have outbound notifications systems, particularly in industries faced with unpredictable, time sensitive changes that affect customers or could influence customer behavior. Two well-known examples of this are found in the airline industry and the brokerage industry. In both cases, events occur that could drastically affect the lives of customers, whether it be negative (a flight cancellation), or positive (stock price hitting a desirable limit).

The opportunity here is to use outbound communication to drive customer engagement and action. With a flight cancellation, an airline could offer a traveler the opportunity to hear upcoming alternative flights, book an available seat, and direct them to the new gate. In more challenging scheduling situations, that outbound application could also connect the caller to an available contact center agent to assist with the rebooking. Because the traveler didn't have to rush to the closest gate attendant and fight for a spot, the airline has turned a negative situation into a positive service event.

For driving these richer, interactive outbound applications, speech-enabled IVR permits a faster, more streamlined interaction than DTMF-only, or touchtone, prompts. By allowing customers to easily provide input to the application (e.g., "I'd like the flight at 5:40pm," or "Sell 50 shares at a limit of \$25.00"), customers will complete more tasks in an automated fashion, and in less time, minimizing the impact of the interruption on the customer and on your agent workload.

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With **interactive**
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4 Optimize for efficiency

Finally, Tellme's analysis of historical platform traffic shows that customers dealing with an outbound call don't tolerate the inefficiencies inherent to inbound self-service applications. These inefficiencies can include delays in routing to an agent, playback of informational and marketing messaging, hold times, and long menus to navigate. The most common reaction to perceived delays is "Hey, you called me – please don't waste my time."

Some familiar examples of this are messages like: "Your call is very important to us," or "This call may be recorded." These kinds of messages simply lengthen the conversation and increase the likelihood of a customer abandoning the call, as expectations are naturally different when a business contacts an individual versus the other way around.

To minimize the perception that a call is an interruption and to maximize your task completion rates, we recommend that applications employ the following strategies:



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- Consider allowing customers to request being contacted at a later time or date, perhaps by offering the option to schedule a reminder or callback.
- Don't assume a customer has information on hand that is necessary for an outbound call (e.g., account number, recent transactions, prescription IDs). Therefore, provide alternative authentication techniques and leverage customer data as much as possible.
- Deliver only essential information during a call, focusing on high-impact data or situations where there is a high probability of not delivering the info through other channels. Time-sensitive information may also be considered, depending on the context.
- Use speech-enabled interactions to streamline call flows and let customers respond naturally wherever they are, on whichever phone you reached them on.
- Create prompts and dynamic data that sound as smooth and natural as possible to ensure callers retain critical information and don't have to request repeats.

Conclusion

When creating new outbound campaigns or redesigning existing outbound self-service applications, it is important to recognize the fundamental differences between inbound and outbound self-service applications. Whereas with an inbound IVR, customers have already put themselves in the context of the call and their relationship with the company they are calling, in an outbound scenario customers are less likely to be prepared for the conversation and are less tolerant of irrelevant, inefficient messages.

As detailed in this white paper, Tellme recommends four best practices for designing and deploying great, highly effective outbound customer care:

- 1) **Timely.** Because each outbound call can be seen as an interruption, businesses should strive to reach out to customers when it's most necessary, and when they're most likely to capture a customer's attention.
- 2) **Relevant.** Outbound calls need to be perceived as relevant and valuable by the recipients in order to be successful. Relevance takes many forms, but context-awareness and personalization in particular should be used wherever possible to minimize frustration.
- 3) **Action-oriented.** Outbound notifications should be closely tied to a specific action – whether encouraging behavior that benefits the



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customer or preemptively preventing a potential negative outcome. Any action also needs to be focused on a single primary task.

- 4) **Efficient.** Customers interacting with an automated outbound call are less tolerant of inefficiencies than customers who call an inbound IVR. People dealing with an outbound call don't appreciate the inefficiencies present on many inbound IVRs (routing, informational messaging, marketing, hold times etc.).

About Tellme

Tellme is the world's largest VoiceXML platform, improving automation and customer service performance for businesses across 2 billion+ calls every year. To deliver this world-class service, Tellme builds and maintains an award-winning platform that encompasses the following features:

Application Lifecycle Resources: Customers, partners and developers who build applications on the Tellme platform use Application Lifecycle Resources to develop and optimize their applications throughout the lifecycle of the application. Tellme offers a variety of tools to ease voice application management and drive insights that can increase task completion rates. Tellme helps you accomplish tasks such as: building and testing voice applications, changing your voice application in real-time, recording calls for tuning purposes, analyzing user segmentation and calling patterns, and much more.

Core Platform Services: Tellme experts manage, maintain and optimize the Core Platform Services to deliver the best performance on core platform functionality. Tellme's expertise in speech, audio and integrated customer experience enhance the quality of your inbound and outbound voice applications to enrich the caller experience, increase task completion rates and create opportunities for further business growth.

Network Services: Tellme's industry leading carrier-grade network is optimized for scalability, security and reliability due to its attention to Network Services. Tellme customers enjoy both peace of mind and flexibility with a carrier-grade platform that supports the latest in technology. Tellme's powerful network-based platform encompasses carrier-grade TDM and VoIP telephony infrastructure to support your inbound and outbound voice traffic, as well as a highly reliable web infrastructure to support data transactions. With capacity on-demand, Tellme can easily handle seasonal or event-driven spikes in call volume, ensuring you are always available to your customers, and there's no bottleneck for important outbound communications.

For more information, visit <http://www.tellme.com/business>.

