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LiveOps Outbound User Guide

LiveOps Outbound is an automated dialing solution that supplements your contact center business operations by providing tools to contact your customers.

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0. Introduction

Overview of LiveOps Outbound

LiveOps Outbound is an automated dialing solution that supplements your Contact Center business operations by providing tools to contact your customers. Use cases depend on the nature of your Contact Center's business operations. For example, LiveOps Outbound can be used to provide up-selling opportunities to existing customers, inform customers of their upcoming doctor's appointment, etc.

Functionality

LiveOps Outbound provides the following functionality:

- Three automated outbound dialers: Progressive, Preview, and IVR
- Campaign Management supporting redialing strategies, screen pop, dialer scheduling and lead import
- Do Not Call Controls
- Capability to support blended inbound/outbound agent states
- Agent Dispositions
- Integrated Reporting

What's New?

This is the first release of the *LiveOps Outbound User Guide*. All information in this guide is new and original.

About This Guide

Limited Release Draft

This document is a limited release draft. LiveOps Outbound is under active development and certain features are subject to change. Please keep this in mind as you read this document.

Intended Audience

This LiveOps Outbound User Guide is intended to be used by Contact Center administrators, supervisors and agent management users.

What You Should Know Before You Begin

To get the most out of this LiveOps Outbound User Guide, readers should have some basic knowledge and familiarity with the LiveOps Cloud Contact Center platform. For all users, this means:

- Knowing how to sign into the platform with your user name and password
- Having a solid grasp of Contact Center objects and terminology: e.g.,, Programs, Campaigns, Agents, Routing Attributes, Pools, etc.

Typographical Conventions

Throughout this guide, we use font color to denote the following:

- **Commands, button or menu names**
- **Terms and concepts** as they are introduced for the first time
- *Method or variable names*
- `User input`
- *Table or Figure caption*

In addition, we use a few icons to call out helpful information:

`Tip` Tip—advice or suggestions that will make your experience with the product more effective or enjoyable.

`!` Note—A possible catch or "gotcha" to watch out for or keep in mind.

See Also—a reference to further reading material or resources.

Denotes the end of a long series of steps in a procedure. This ensure you don't miss any steps if the list is longer than will fit on a single screen. This is often omitted for short procedures.

If a term appears as a green link, you can follow that to see the Contact Center Glossary entry for that term.

Finally, you can easily navigate throughout the *LiveOps Outbound User Guide* using the breadcrumb links at the top of each page, or you can jump to the next or previous chapters using links at the top and bottom of each chapter.

Further Reading

If you are new to the LiveOps Cloud Contact Center platform, you can find additional background reading in the Admin Quick Start Guide. You'll find this and other useful documentation under the Contact Center Help Menu, in the User Guides section.

Contact Info

If you have comments or suggestions on this document, please email them to techpubs@lists.liveops.com.

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1. Using LiveOps Outbound

1.1 Enabling LiveOps Outbound

To enable LiveOps Outbound in your Contact Center, contact your LiveOps Professional Services Manager.

1.2 What is an Outbound Campaign?

An Outbound Campaign consists of a list of customers (contacts) that will be contacted through an automated dialer. The use cases vary depending on your needs, but some examples include sending appointment reminders, conducting marketing efforts or making debt collection calls. Automated dialers provide many benefits over traditional manual dialing techniques, resulting in increased agent utilization and contact penetration. Automated dialers also give Agents more time to concentrate on the business goal.

In general, there are four types of automated dialers:

- **Progressive**
  This dialer automatically dials a new lead whenever an agent becomes available. At LiveOps, this dialer also discerns human vs non-human contacts (filtering out busy lines, no-answers, answering machines, fax lines), also known as Answering Machine Detection. This method of dialing provides improvement in agent productivity by an order of magnitude when compared to the manual dialing. Agents must be constantly "pinned-up" in order to receive contacts from a Progressive Dialer. Progressive Dialing is also known as Power Dialing.

- **Push Preview**
  Unlike Progressive/Predictive Dialers, this dialer does not require an agent to be pinned-up. The Preview Dialer first provides information regarding the lead to the agent before initiating a call. The agent reviews the information to formulate a calling strategy and when ready, presses a button to begin the call. This method strikes a balance between agent productivity improvements via automation and the customer experience. The agent productivity increase is significant when compared to manual dialing but is modest when compared to Progressive Dialing.

- **IVR Out**
  This dialer requires no agents to be available on the call. Instead, an IVR (Interactive Voice Response) is used to play an audio message to the caller. At LiveOps, this dialer also utilizes Answering Machine Detection.

LiveOps Outbound supports all three of the automated dialers listed above. The fourth type, known as a Predictive Dialer, typically dials multiple leads simultaneously with the expectation that an agent will be available whenever a call is answered by a live person. It uses historical data to predict when an agent might become available and places multiple outbound calls to ensure that a live person is on the line whenever the agent becomes available. This method of dialing generally provides the highest agent utility rates at the risk of increased customer abandonment rates and lower customer satisfaction. LiveOps Outbound does not support predictive dial at this time.

1.3 Outbound Campaign Creation & Configuration

Creating a New Campaign

To create a new Outbound Campaign, the user must have administrator rights in the Contact Center.

1. Sign into Contact Center using your credentials.
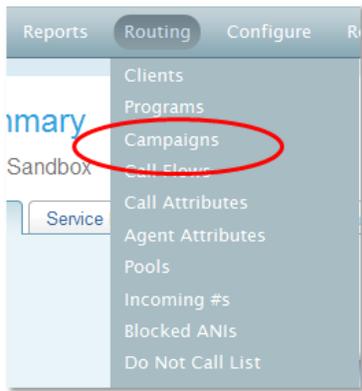2. Select the **Routing > Campaigns** menu.

Figure 1-1: Routing > Campaigns Menu
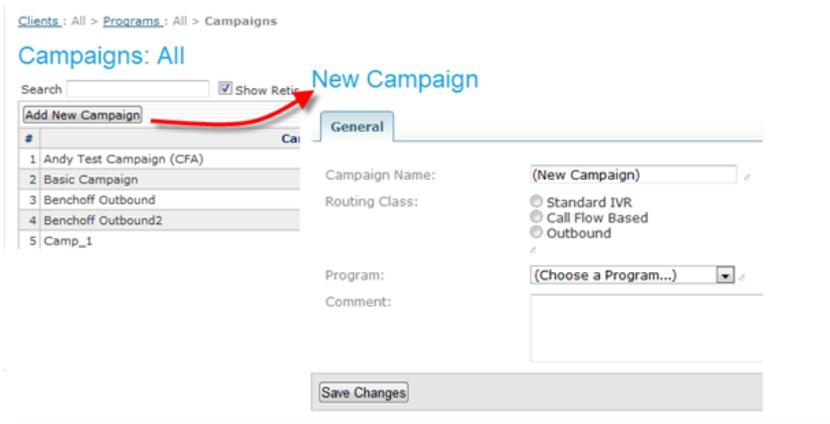
Figure 1-2: New Campaign Page

> **Tip** You can search for an existing Campaign from this view.

3. Click the **Add New Campaign** button.
4. Enter a meaningful name in the **Campaign Name** field. This name will appear throughout Contact Center.
5. Set the **Routing Class** field to Outbound.
6. Select the **Program** to which this Campaign belongs.
7. Supply a description or note in the **Comment** field.
8. Click **Save Changes**.

After creating the Outbound Campaign, you must perform the following steps:

1. Configure a dialer.
2. Set the dialer start/stop times.
3. Define Agent Pools.
4. Upload leads.

To configure these options, edit the Outbound Campaign you created in the steps above, then configure the fields in each of the tabs as described below.

General Tab Fields

The General Tab fields let you configure general settings for your outbound dialing Campaign.

Table 1-1: Outbound Campaign General Tab Fields

Name	Descriptions
Campaign Name	This is the name of your Campaign. It is useful for reporting purposes.
Status	Campaigns can never be deleted. When no longer in use, select "Retired" from the drop down menu.

ANI	This is the phone number that will be displayed on the customer's caller ID. Depending on call center settings, this field can be mandatory or optional. If the call center settings allow this field to be optional, and the field is left blank, then the agent's ANI will be displayed to customer's caller ids.
Weight	The weight can be used to prioritize the order in which multiple Campaigns are dialed when there is a significant queue of leads.
Default Expiration	The duration, in days, the lead will remain active.
Retry Interval	The number of hours between call retry attempts.
Retry Limit Type	This determines the way the outbound dialer will limit retry attempts. The following options are available: **Single**: This setting instructs the dialer to try to connect to the lead up to Maximum Retries, regardless of time of day. *Figure 1-3: Retry Limit Type: Single* **AM/PM**: Grants administrator more granular control over when to re-dial. The AM/PM Split determines two buckets where re-dials can occur. In the following example, we are defining 3 re-dials to occur before 2:00PM and 2 re-dials to occur after 2:00PM *Figure 1-4: Retry Limit Type: AM/PM Split*
Maximum Retries	The maximum number of re-dials per unique ANI before the system automatically expires the lead. ⚠ *To change the Maximum Retries for the AM/PM setting, first select Single, set the Maximum Retries and save the Campaign. You can then change the **Retry Limit Type** back to AM/PM Split with the new Maximum Retries value.*
Dialer Type	Select from Progressive, Push Preview, or IVR Out, as described in the section, <u>What is an Outbound Campaign?</u> above.
Message To Agent	Enabling this allows you to specify an informational message to be displayed to the agent during the call.
Agent Message Text	The message that appears to the agent when the call is connected. Call-related fields may be displayed in this message. An example: Hello, this is ${rep.firstname}, may I speak with ${namefirst} ${namelast}?
Screen Pop URL	The URL to "pop" when the call is connected. This URL provides an integration point between LiveOps Outbound and external systems. The following options are available: **No Screen Pop**: No screen pop will be triggered by the call. This is the default setting. **Use Lead Preview Screen Pop**: Presents a screen pop for each call containing standard information about the lead being called. This setting is required when using the Push Preview dialer. See the Screen Pop URL Parameter section below for more information.

Screen Pop URL Parameters

The screen pop URL contains standard call related data. For example, if you pop a screen for the following lead:

Phone Number	First Name	Last Name
18005551212	Fred	Bloggs

Then the URL will be populated with the following example parameters:

Table 1-2: Script Pop URL Parameters

Parameter	Sample Value	Definition
MastID	cc_123456789	This is the LiveOps session ID

Ext	jsmith	The username or numeric phone extension of the Agent.
VSRName	Joe	This is your agent's first name.
ProductPhone	8001234567	This is the phone number configured in the General Tab => ANI. This is the number that will be displayed on your customer's caller id.
ANI	8005551212	This is the phone number that was dialed.
quickPop		This is the Agent text that will be displayed in the Phone Panel. This field is configured in the General Tab => Agent Message Text
campaign_id	1234	This is the numeric identifier for this Outbound Campaign
worktype	OUTBOUND	This will always be OUTBOUND for outbound calls.
_past_tries	0	This is the number of times this customer has been called before this current call.
_max_tries	4	This is the maximum number of calls that will be placed to this customer, according to value set in "Maximum Retries".
namefirst	Fred	All the attributes defined the leads csv will appear here.
namelast	Bloggs	All the attributes defined the leads csv will appear here.
timezone	8	This is a numeric representation of the customer's time zone. 5 = Eastern, 6 = Central, 7 = Mountain, 8 = Pacific.
_cmsession	f8bb72d3-f5e0-4789-848a-b78f0338a92d	LiveOps internal use for Progressive and Preview Dialers
_cmkey	1325799006754	LiveOps internal use for Preview Dialer
_cmmaddr	353939612	LiveOps internal use for Preview Dialer

Telephony Tab Fields

The Telephony tab fields let you configure two aspects of behavior of the Agent's Phone Panel when they are "off-call:" Audio Messages and After-Call Work.

Table 1-3:Telephony Tab Fields

Name	Description
Select audio	Select an audio prompt to play to the customer when no Agent is connected to the call. This is typically used in conjunction with the IVR Only Dialer. Prompts can be uploaded or recorded by phone through the Audio Asset Manager.
Allow agent to do after call wrap up	Allows the Agent time to wrap up the previous call before the next lead is contacted.
Target (desired) wrap up time	The target time by which the agent should finish wrap up. For example, if set at 30 seconds, after the call ends, a progress bar within the phone panel will turn red as a warning after the 30 second mark approaches. At the mark for 30 seconds, a "TimeOut" message is visible on the phone panel.
Maximum wrap up time	Maximum time the agent has to do wrap up, before the next contact. After this time is reached, the progress bar clocking wrap up disappears and the agent is ready for the next call.
Enable auto wrap up	When auto wrap up is enabled, wrap up automatically begins when the customer's call leg ends. Otherwise, the Agent must initiate wrap up by clicking the Wrap Up button in their Phone Panel.
Minimum call length for auto wrap up	A call must last longer than this time for wrap up to be triggered. This allows for very short calls with no wrap up.

⚠ *You must enable Agent Wrap-Up in order for Agents to be able to disposition their calls.*

Dialer Start / Stop Tab Fields

The Dialer Start / Stop tab fields let you configure when the dialer will make calls. You can determine a default calling schedule for the dialer as well as specify blackout periods when you do not want the dialer to call.

⚠ *"Days NOT to call" and "Dialer Blackout Periods" settings supersede other settings.*

Dialer Time Zone

If the uploaded leads file provides a local timezone for the lead, then the dialer settings will assume that timezone. For example, if a lead's timezone is 8 (Pacific Standard Time) and the dialer is set between 6:00PM and 8:00PM, then the lead will be dialed between 6PM and 8PM PST. If no timezone is provided, then the dialer assumes EST.

Table 1-4: Dialer Start / Stop Tab Fields

Name	Descriptions
Earliest Time to Call	This specifies the earliest time that this Campaign can start making calls.
Latest Time to Call	This specifies the latest time that this Campaign can call.
Days to call	Use the check boxes to allow the Campaign to dial on those days.
Dialer Blackout Periods	Specify blocks of time during which the dialer will not make calls. For example, you can prevent calling during the lunch hour.
Days not to Call	Specify DNC (Do Not Call) days, for example, national or local holidays, state specific DNC days, etc.

Pools Tab Fields

The Pools tab fields let you select the group of Agents that will handle your outbound calls. Pool selection for Outbound Campaigns works identically to other Campaign types.

> We recommend configuring only one pool of agents per Campaign. However, you can have as many agents as you need defined within the pool.
>
> For more information on call routing in general and Agent selection specifically, please refer to the LiveOps Call Routing Guide.
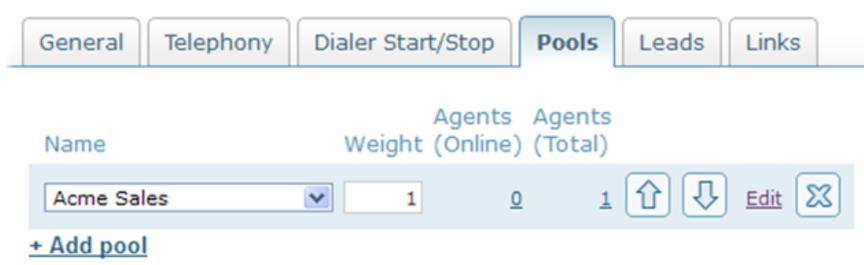
Figure 1-5: Pools Tab

Leads Tab Fields

A lead is a customer that you want to contact using a dialer. Leads can be uploaded in bulk from csv (comma separated values) text files. Once uploaded, leads remain *open* until they are resolved. A lead can be resolved if:

- the lead is connected with an agent and the agent dispositions the call
- the lead is expired according to the settings in the **General Tab**
- the lead is deleted from the **Leads Tab**

From the **Leads Tab**, you can add, delete and preview the list of leads that you want to call using this Outbound Campaign.
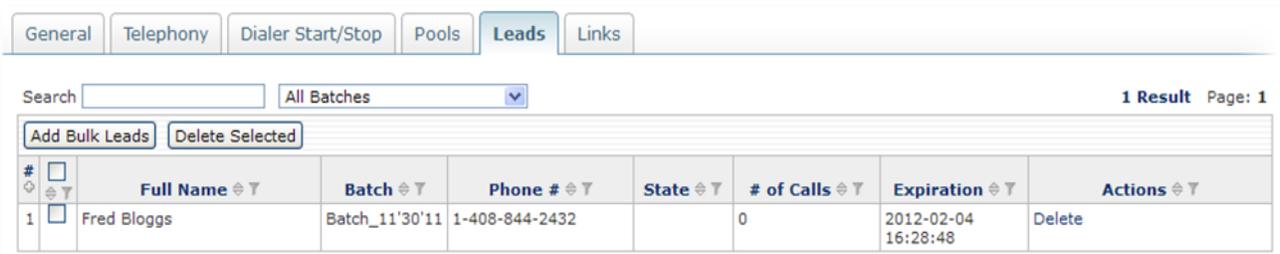
Figure 1-6: Leads Preview Tab

To bulk upload leads

1. Click the **Add Bulk Leads** button
2. Provide a **Batch Name**. You can filter your list of leads by this name.
3. Click inside the **Upload CSV File" field or click the** Browse **button to select the file that contains your leads.**
4. Click **Upload Leads.**

After uploading, you can preview the status of your lead batch by returning to the **Leads Tab**. This preview will be updated periodically as the dialer progresses

through its lead list.

> ❗ *CSV format requirements and a sample file are available in the **Need Help** call out.*
>
> ❗ *Duplicate leads, based on phone number, will be filtered out of your leads list for this Campaign.*
>
> ❗ *The Full Name and State fields may require 1 to 2 minutes before appearing in the lead list.*

1.4 Agent Phone Panel

The Phone Panel is the application that allows LiveOps Cloud Contact Center Platform Agents to receive and control telephone calls. To use the Phone Panel in outbound mode, the agent must have their **Worktype Outbound Allowed** agent_attributes:one set to **Yes**. This will allow the agent to see the worktypes **All Calls** and **Outbound Only** in their Phone Panel. **Outbound Only** is used for the Progressive Dialer, which will also allow the agent to pin themselves up by clicking "Initiate Open Line." Once pinned up, the agent will hear an introductory message and will hear another short message between calls. The agent leaves this line open throughout the Outbound Campaign session. To terminate the pinned up line, simply hang up the phone.

The **All Calls** worktype allows the agent to accept both inbound calls and outbound dial calls. Although agent pin-up is not supported within this worktype, an agent can receive Preview dials when not receiving inbound calls. In this case, when an outbound push-preview lead is assigned to an agent, that agent will receive a screen pop containing the lead information while also receiving a phone call to open the session. When the agent has reviewed the lead information and is ready to talk to the lead, the agent can click the "Dial Lead" button initiate the call.

At the end of the call, if the Outbound Campaign has **After Call Work** enabled, the agent will be able to disposition the call.

> 📑 For more information on using the Phone Panel, please refer to the [LiveOps Phone Panel Guide](#).

1.5 Call Dispositions

The final state of a dialed lead is its disposition. There are two types of disposition: system supplied dispositions, and agent dispositions. System dispositions are administered automatically from the dialer and include:

- BUSY - dialer detected a busy line and will re-dial per Campaign settings.
- NO ANSWER - dialer detected that no one answered the phone and will re-dial per Campaign settings.
- FAX MACHINE - dialer detected a fax machine and will not re-dial.
- HANGUP - dialer detected an immediate hang up and will not re-dial.
- Answering Machine/Voicemail - dialer detected an answering machine and will re-dial per Campaign settings.

Agent dispositions are managed by the Contact Center administrator. Agents select the appropriate call disposition at the end of each call using the phone panel.

To Manage Dispositions

1. Select the **Configure > Call Assets > Dispositions** menu.
2. Use the controls on this page to add or edit dispositions.

Dispositioning a Call

When a call to an Outbound Campaign having After Call Work enabled ends, the Agent handling that call can select a disposition from the list shown in their Phone Panel. They will then be made Available for the next call. If the agent fails to select a disposition within the After Call Wrap up period, the agent will be made Unavailable with a reason "Disposition Timeout". The agent must then select a disposition to become Available to take the next call.

> 🔵 Tip Dispositions appear in a variety of reports, showing the final status of the call.
>
> 🔵 Tip You should configure a wrap up time long enough to allow the agent sufficient time to select a disposition.
>
> 🔵 Tip Dispositions may be made "not visible", meaning that they will not appear to the agent.
>
> ❗ *You cannot create a disposition that has the same name as a shared, or common disposition.*

1.6 Do Not Call List

LiveOps Outbound supports a "Do Not Call" (DNC) list. Leads on this list will not be called by the dialer. Both Contact Center administrators as well as agents can add leads to this list.

Adding Leads to the DNC List: Administrators

- Select the **Routing > Do Not Call List** menu

Use the controls on this page to add leads singly or in bulk, or to delete leads from the DNC list.

Do Not Call Numbers: All

Search [_____]   Search for a phone number.   **2 Results** Page: 1

[Add New Number] [Delete Selected] [Bulk Upload]

#		Phone Number ◇ ▼	Start Time ◇ ▼	Actions ◇ ▼
1	☐	17149327970	2012-01-06 13:54:38	Edit - Delete
2	☐	17149327971	2012-01-06 13:57:36	Edit - Delete

Figure 1-7: Do Not Call List

Adding Leads to the DNC List: Agents

While on an outbound call with dispositions enabled, Agents can select the "Do Not Call" disposition to add the current lead to the DNC list.

1.7 Reporting

LiveOps Outbound provides three historical reports: Outbound Queue, Outbound Calls and Outbound Leads. Each report has two types - a grouped view, which allows you to track metrics from a high level, and a detailed view, which allows you to drill down into the details of each outbound call or lead.

Outbound Queue

Report: Outbound Queue

Tiny: https://losandbox.hostedcc.com/html/source.mpl?gzbgj

Time: Today | Yesterday | Last Week | Last Month

View: Table | Bar Chart | Line Chart | Scatter Chart | Scatter Detailed | Print Friendly

Refinements: Outbound Queue: Campaign Name is Vince_Outbound; grouped by Client, Program Name, Campaign Name, Phone Number, **Today** (midnight through now)

Generated on: 2012-01-06 13:09:57 (EST5EDT) **(from cache)** [2.55s]

#	Client	Program Name	Campaign Name	Phone Number
1	LiveOps	LiveOps	Vince_Outbound	1-714-932-7971

Figure 1-8: Outbound Queue Report

The Outbound Queue report allows you to see the leads that are currently open within your Outbound Campaigns. As the dialer progresses through its list and leads are completed (or expired), the items from this report will be removed. This report is generally current to within 15 minutes.

Outbound Calls

Report: Outbound Calls

Tiny: https://losandbox.hostedcc.com/html/source.mpl?r2iw6

Time: Today | Yesterday | **Last Week** | Last Month

View: Table | Bar Chart | Line Chart | Scatter Chart | Scatter Detailed | Print Friendly

Refinements: Outbound Calls: Campaign Name is Vince_Outbound; Session ID is in (729707103, 729197776); Disposition Type is custsvc;

Generated on: 2012-01-09 12:50:36 (EST5EDT) [2.82s]

Note: Removed date constraint: in the last **week** (2012-01-02 through last midnight), because a filter value was used for Session ID. Click here to run this report with the date constraint applied, or check the 'Always enforce date constraint' box before running the report.

#	Session ID	Date	Agent Answer Time	Program Name	Campaign Name	Lead First Name	Lead Last Name	Caller City	Disposition Type	Disposition
1	729707103	2012-01-05 16:09:46	2012-01-05 16:09:55	LiveOps	Vince_Outbound	Fred	Bloggs	SAN JOSE	custsvc	Angry Customer
2	729197776	2012-01-05 15:28:07	2012-01-05 15:28:17	LiveOps	Vince_Outbound	Fred	Bloggs	ANAHEIM	custsvc	Angry Customer

Figure 1-9: Outbound Calls Report

The Outbound Calls report details outbound Campaign activity during the specified time period. Information displayed includes number of calls made, resulting dispositions and basic lead information, such as caller ANI.

Outbound Leads

Report: Outbound Leads

Tiny: https://losandbox.hostedcc.com/html/source.mpl?qzbr3

Time: Today | Yesterday | Last Week | Last Month

View: Table | Bar Chart | Line Chart | Scatter Chart | Scatter Detailed | Print Friendly

Refinements: Outbound Leads: Campaign Name is Vince_Outbound; **Today** (midnight through now)

Generated on: 2012-01-06 13:10:30 (EST5EDT) [2.62s]

#	Campaign Name	Session ID	Total Calls (Rep)	Attempted	First Attempt Date (Rep)	First Attempt Date	Attempts	Finished Time	Outbound Batch	Phone Number	Outbound Reason	Outbound Disposition	Age Less Than
1	Vince_Outbound	729731460	1	Yes	2012-01-06 12:39:25	2012-01-06 12:39:25	1	2012-01-06 12:44:30	Batch_12'13'11	1-408-844-2432	junk	IVR Msg Delivered (Contact) V	15 minutes
2	Vince_Outbound	730039730	1	Yes	2012-01-06 12:34:19	2012-01-06 12:34:19	1	2012-01-06 12:37:43	Batch_12'13'11	1-408-844-2432	custsvc	Angry Customer	15 minutes
3	Vince_Outbound	729730387	1	Yes	2012-01-06 12:13:40	2012-01-06 12:13:40	1	2012-01-06 12:15:31	Batch_12'13'11	1-408-844-2432	custsvc	Angry Customer	15 minutes
4	Vince_Outbound	730038320	1	Yes	2012-01-06 12:08:29	2012-01-06 12:08:29	1	0000-00-00 00:00:00	Batch_12'13'11	1-714-932-7971	open	IVR Message Delivered Redial (V)	15 minutes
5	Vince_Outbound	729707741	1	Yes	2012-01-05 16:30:06	2012-01-05 16:30:06	1	2012-01-06 12:08:28	Batch_11'30'11	1-408-844-2432	cancelled	cancelled	15 minutes
Totals:			5										

Figure 1-10: Leads Report

The Outbound Leads report provides detailed information regarding leads, including:

- number of re-dial attempts
- date/time of first attempt
- date/time of last attempt
- outbound batch name
- other leads table parameters

2. Appendix

Outbound Best Practices

Following are some tips for using LiveOps Outbound:

> **Tip** Agents need to be pinned-up when they are taking calls on progressive dialer campaigns.
>
> **Tip** Configure only one pool per campaign. However, you can assign multiple agents to one pool.
>
> **Tip** Keep the number of active Outbound Campaigns to 15 or less.
>
> **Tip** Assign agents to only one Outbound Campaign at a time.
>
> **Tip** When using the Preview dialer, Agents must click the "Dial Now" button within one minute.

In this chapter...
- Outbound Best Practices