

Tech Line



Proactive Outbound Contact

By Lori Bocklund, Strategic Contact

There has never been a better time for small to medium centers to get the technology that they need.

In the age of service frustration and cynicism, it is still possible to “wow” customers. Many companies win them over with proactive outbound contact and, in the process, optimize their own internal operations and costs and benefits. While it might sound too good to be true, this technology draws from a number of proven capabilities and appears to be gaining traction in the market.

I love that my air carriers offer me the opportunity to tell them what updates interest me (e.g., upgrades, schedule changes) and how I want to hear about them. With little time to check on credit card charges and bank account balances, I rest assured knowing that my financial services companies will let me know when my accounts hit defined thresholds or when prescribed events occur. And it’s good to get those reminders of appointments, prescriptions or payments due to stay in good stead on various fronts. Recently, a notice of a delivery that was sitting on my front porch helped me quickly arrange the care of that important package.

Proactive outbound contact enables companies to connect with and inform customers, anticipating their needs, reaching out with useful

and timely communications, and triggering execution of the right transactions and outcomes at the right time. Few technology tools truly benefit both the customer and the company, but this one presents that rare opportunity.

Rooted in the Past, Differentiated in the Present

Proactive outbound communication leverages a number of elements of the traditional contact center, while fitting in nicely with today’s multichannel communications. It uses elements of a variety of tools and processes to make a compelling new approach.

Assisted service is the heart and soul of the contact center, yet it presents challenges for companies and their customers. Companies have to address the high cost of labor as well as the difficulty of making the right amount of staff available at just the right times, even during peaks. The event triggering customer contact is often a problem that needs fixing. The resulting interaction is often painful for both parties.

Similarly, interactive voice response (IVR) has a long-established role of handling → [page 2](#)

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the “easy” interactions and driving contacts to a lower cost channel. The customer is again initiating contact, and may not be happy to weave their way through this channel. When they fail to succeed, they transition to assisted service with diminished patience and goodwill.

These less than optimal interactions can instead be proactive, preemptive and positive. While taking a page from the outbound dialing book, proactive outbound isn't just a predictive dialer, calling to pester customers for payments or purchases. Companies can define campaigns to trigger one-to-many information delivery and updates to a slate of customers with com-

mon characteristics. Contacts can also be event-driven and personalized, one-to-one. In addition, customers may want to communicate via channels beyond the voice call, such as email, text or short message service (SMS), social media and push notifications in mobile applications. Proactive outbound operates across this variety of media channels to accommodate customer needs and expectations.

Proactive outbound communication can bring it all together, leveraging the best of multichannel, self service and assisted service. It is driven by customer choices and experiences, customizing and adapting communication to their needs.

Table 1: Many Vertical Markets Offer Proactive Outbound Opportunities

Vertical Market	Representative Application Opportunities
TRAVEL	<ul style="list-style-type: none"> ▶ Flight status ▶ Perk updates
TRANSPORTATION/SHIPPING	<ul style="list-style-type: none"> ▶ Package pickup/delivery ▶ Routing updates
BANKING/FINANCIAL SERVICES	<ul style="list-style-type: none"> ▶ Account status ▶ Account activity
UTILITIES	<ul style="list-style-type: none"> ▶ Outage information ▶ Payment reminders
HEALTHCARE	<ul style="list-style-type: none"> ▶ Appointment reminders ▶ Prescription refill reminders
RETAIL/eCOMMERCE	<ul style="list-style-type: none"> ▶ Sale notices ▶ Return notifications
TELECOM	<ul style="list-style-type: none"> ▶ Account status ▶ Payment information

Applications Abound

One of the exciting things about proactive outbound communications is the widespread applicability to a variety of markets. Table 1 provides a quick sampling of examples for a number of industries.

Proactive outbound solidifies a customer's connection to the company while reducing low-value contacts into the center. For example, customers gain confidence that financial com-

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The Business Case for Proactive Contact

The business case for proactive contact should be of interest to customer service, marketing, collections and other departments.



It offers these opportunities:

- **Cost savings.** Proactive outbound contact can be lower cost than a corresponding inbound contact. When assisted service is needed, the result is a more targeted, shorter interaction. Information is quickly available on the situation, and lower customer irritation leads to a more pleasant interaction for all involved. And those high-cost labor resources focus their time on more specialized, higher value-added interactions.
- **Revenue generation.** Great service drives loyalty. Personalization serves as a deterrent to change companies. Reminders drive revenue, for example, to buy things and to make payments. All of these contribute to revenue protection and growth.
- **Optimized service.** Using resources more efficiently benefits both the company and the customer, especially in unpredictable, event-driven peaks. Outbound contact defined by business rules provide a new level of agility that ensures customers are served and companies can respond with cost-optimized approaches.
- **Tangible “intangibles.”** Net promoter scores and other measures of the “voice of the customer” often seek to find out if the customer would recommend the company to others. In the “social” world, this metric becomes even more important. Customers are more likely to share positive experiences when companies reach out to them proactively with important information. . . or, at a minimum, they're less likely to have “horror stories” to share.

panies are watching out for them and protecting their assets, informing them quickly and via the channel(s) of their choice when anything might be amiss. Reminders ensure that customers remember important appointments, comply with prescribed regimens, and take quick action on investments or other time-sensitive transactions. And proactive outbound enhances collections, contacting customers in a positive way before their payments are too far past due. In the process, they sustain cordial relations while avoiding costly and painful collection efforts.

Companies can also use proactive outbound systems for internal alerts and notifications with employees. This technology can be an integral part of disaster recovery and business continuity plans, ensuring rapid notification of a

defined list of team members. Companies who get hit with unplanned peaks can quickly put out the “all hands on deck” notice to qualified backup staff. And reminder messages can go out on schedules or schedule changes with the option to confirm or request swaps.

Enriching Applications

This last example shows one of the ways centers can enrich applications using these proactive outbound systems. Outbound contacts can be converted to self-service or assisted-service interactions. With self service, the contacted party responds via an IVR-like interaction to provide confirmation or pursue a subsequent transaction. For example, when an airline calls to say a flight is cancelled, the application can present rescheduling options and provide confirmation on the choice the customer selects. In some cases, the interaction may need to move to assisted service, where an agent helps the customer resolve the issue that triggered the notification. In either case, the transition from one channel to another can and should leverage information already conveyed and available

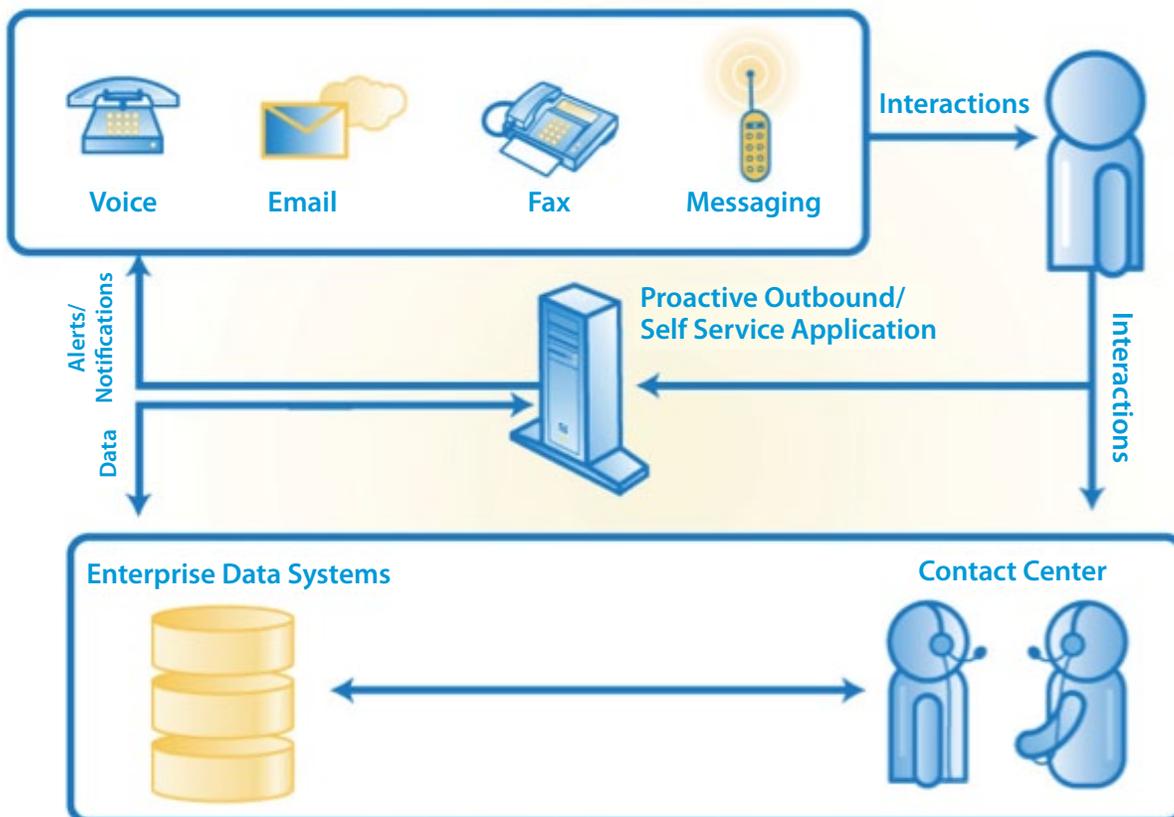
about the customer and the situation. Further playing out the cross-channel nature of such interactions, the transaction can offer a follow-up email or text with the critical information. Such flexibility and follow through can impress the customer in what otherwise would be a frustrating scenario.

Proactive outbound notification can also support parallel notification, informing multiple people and/or using multiple channels. Sometimes I want a text message, sometimes a call may be better. *Let’s do both!* Let me know and let my husband know, in case I am unavailable and we need to react quickly.

And with today’s channels, an interaction may be one-to-one and one-to-many. Invoking social media, a message could go out as a “tweet” to followers or a status update to “friends” who follow a company or are members of a defined group. The intelligence built into the business application and proper scripting ensure that the right information is shared with the right targets at the right time.

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Contact them before they contact you. Proactive outbound communications provide stellar service opportunities.



Proactive Contact Leverages Data and Applications across Multiple Channels
(Figure 1)

Keys to Success in Applications, Architecture and Delivery

These examples highlight a key consideration for pursuing proactive outbound applications: you can't just do it, you need to do it right. To achieve the potential business benefits (see the sidebar on page 2), companies need to take the time and tap the proper resources to ensure successful interactions.

Like other channels, there is no "one size fits all" approach. A company pursuing proactive outbound solutions must consider their contact types, automation opportunities, contact traffic characteristics (e.g., peaks, triggers for contacts), customer expectations and competition, among other things. And much like its partner technology, IVR, proactive outbound requires some expertise that has elements of both science and art in defining the scripts and interaction interfaces. Buyers must consider their vendors' resources (staff, expertise and experience) as much as the technology itself.

Proactive outbound can be delivered via a variety of sourcing and vendor options. Specialty vendors target these applications, often via hosted or cloud options. Vendors that offer solutions for IVR and CTI are also providers of proactive outbound applications, often as an optional application module or through partners that deliver applications on their platform. In all cases, the integration with the self service and assisted service is paramount. The knowledge that the vendor brings to the technical architecture, the processes and scripts

(including legal and regulatory considerations, as well as insights and resources for contact capture and tracking), and the reporting and analysis to optimize based on results can be a key differentiator.

Figure 1, below, provides a high-level architecture of the elements that make up a proactive outbound solution. Integration is a defining characteristic: integration of channels, data and interactions via self service or assisted service.

Five key elements surrounding data capture and use further define the path to positive outcomes:

1. Capture customer information. Contact information is the fundamental prerequisite to successful outbound contact. In the multichannel world, that means phone numbers (including mobile phones) and email addresses, at a minimum.

2. Capture what customers want. To move beyond generic (and potentially irritating) messages, you must capture when and how to contact customers. Define the triggers, channels and targets for communication. The best practice is to enable customers to define their preferences via the customer portal (logged in on the website), as well as through discussions with a CSR who might be promoting the service.

3. Define business rules. Whether customer-defined or internally driven, a contact must be triggered by a business rule. A customer selects the events that will trigger contact and the delivery channels to use. A company builds

rules to ensure notification when select events occur.

4. Capture what occurs. Like many systems in the contact center, a proactive outbound application generates a lot of data. Beyond capturing who is receiving communication, when, via what channels, the data should reveal outcomes and opportunities.

5. Analyze and optimize. An analyst should assess the data, review outcomes, and tune applications, scripts and offerings. Only then will the proactive contact truly meet both the company's and the customers' needs and deliver the benefits sought.

Pursue Proactively and Positively

Every company seeks ways to differentiate, and we all know that service can make or break a customer relationship. Proactive outbound communications offer a unique opportunity to improve the customer experience while delivering tangible benefits to the corporation. It's time to evaluate the fit of this multichannel interaction tool for your business and seek ways to "wow" your customers. Such good service might even become positively contagious! 

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Online Resource

This issue is available online at: [July 2011, Contact Center Pipeline](http://www.contactcenterpipeline.com/July2011/ContactCenterPipeline)

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