Call Centre

Outbound Campaigns

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What is an Outbound Campaign

An outbound campaign is a component of the Call Centre application that enables a team of Users to call a list in an efficient and managed manner. The list is typically leads that were generated but can also be for customers or follow-ups. Outbound campaigns are created by adding campaign items, Users and Outcomes. You can be added to one of four possible campaign types:

- **Preview dialling**
  This option displays a lead to a User. The campaign items are not set to dial automatically. The User decides whether to dial the number on a campaign item. This option if used if pre-work may be required on the document.
- **Click-to-dial**
  This option displays a campaign item to a User. The primary number on the item is automatically called when the User clicks the **Next** button.
- **Power dialer**
  This option automatically dials the primary number a pre-defined number of seconds after a campaign item is presented to a User. When the User completes the call and selects an outcome, the next campaign item is presented to the User.
- **Progressive dialer**
  This option pre-screens outbound calls and only presents non-voicemail calls to Users. Users do not need to click the **Next** button.

Accessing the Campaign

To access an outbound campaign, do the following:

1. Log on to 1Stream CRM. You are immediately available on the campaign you are assigned to, so ensure you are ready to receive calls when you log in.

Using the Call Controller

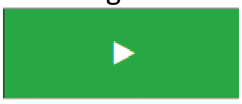
The call controller enables you to manage your current call and move to the next call, once you have set the outcome for the current call. The call controller has different settings, dependant on the type of campaign you are assigned to. Clicking the down arrow on the call controller displays two options:

- Auto dial record
- Auto click next

This is particularly relevant to Preview dialling as in this mode you can manage your efficiency by selecting **Auto click next**. You are initially required to start the dialling process by clicking the **Next** button. After the first click of the **Next** button, the campaign items that follow are auto-clicked.

Figure 1 - Call Controller

For Preview dialing, click-to-dial and power dialer you need to click the **Next** button to start receiving calls and to move to subsequent calls:



You are able to automate the process to receive the next contact and auto-dial the contact. To set this up, do the following:

1. Click the down arrow next to the **Next** button. See the button with the red frame highlight in **Figure 1 - Call Controller**. The **Campaign Settings** dialog box is displayed.
2. Select the **Auto dial record** checkbox to have the next item automatically dialled.
3. Select the **Auto click next** checkbox to have the next item presented automatically.

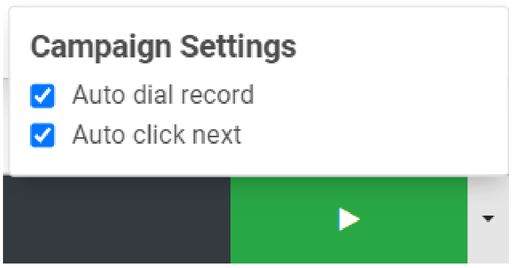


Figure 2 - Campaign Settings

Important:
Please check with your supervisor before selecting either of these options to ensure it is within your company's policy.

For Progessive dialer campaigns, these two options are not available to select as Progressive dialer automatically dials and pushes calls that are answered by a person, to the next available User.

Manage Busy Statuses

Busy statuses enable unavailable states on your call controller, for incoming campaign items. To select a busy status, do the following:

1. Click the green dot in the call controller at the bottom left-hand side of your screen. The busy statuses are displayed. See **Figure 2 - Busy Statuses**.
2. Click the required busy state to select it. The green dot turns yellow and you will not receive any campaign items.

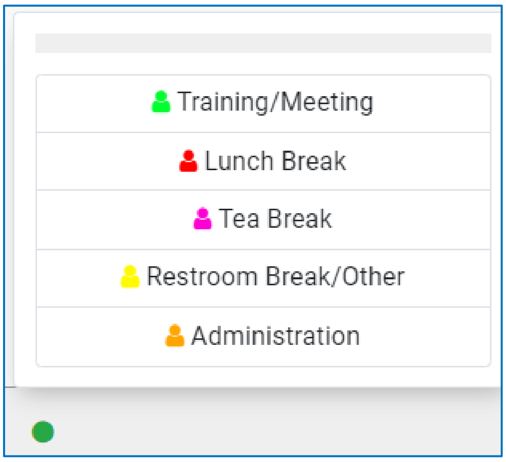


Figure 2 - Busy Statuses

Note:
This is an example of busy statuses. These statuses are configurable and may be different for you company. Check with your supervisor for clarity on your company's busy statuses.

To return to an available state, do the following:

1. Click the **Go Online** button at the bottom left of your screen:

Important:
The system remembers your busy state if you log off. Ensure you return to available state when you log back in to receive calls.

Join and Leave Campaigns

You are able to join or leave available campaigns. To join or leave a campaign, do the following:

1. Click the **Campaigns** button in the call controller, at the bottom right-hand of your screen.
2. Place your mouse pointer over the campaign name and click the **Join** button to join the campaign, or click the **Leave** button to leave the campaign. See **Figure 3 - Campaign Controller**.

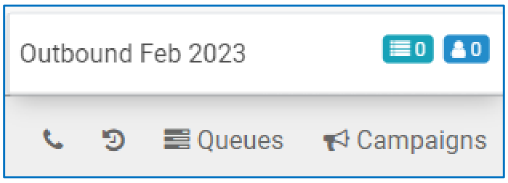


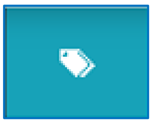
Figure 3 - Campaign Controller

Important:
Please check with your supervisor before joining or leaving campaigns to ensure it is within your company's policy.

Adding Outcomes to Interactions

After each interaction with a customer, you need to add an outcome. An outcome is wrap up information and sets requirements for what happens next with the interaction. To add an outcome, do the following once the interaction is complete:

1. Click the **Outcome** button. The **Select Outcome** window is displayed.



2. Click the drop-down arrow next to the **Outcome** field and select an appropriate outcome for the interaction.
3. Click the **Save Outcome** button.

After Call Survey

Some companies may request customer feedback to rate the customer experience with the company. If the customer opts to give feedback, you will need to transfer the call for them to provide the feedback. To transfer a call to a survey, do the following:

1. Click the down-arrow next to the call controller.
2. Click the **Transfer** icon. The **Transfer Call** dialog box is displayed.

   See **Figure 4 - Transfer Call Window**.
3. Select the **External Number** radio button.
4. Click the drop-down arrow next to the **Contact** field and select the required survey contact. Typically the option is After Call Survey.
5. Click the **Blind** button for a cold transfer.
6. Click the **Complete Transfer** icon to complete the transfer.

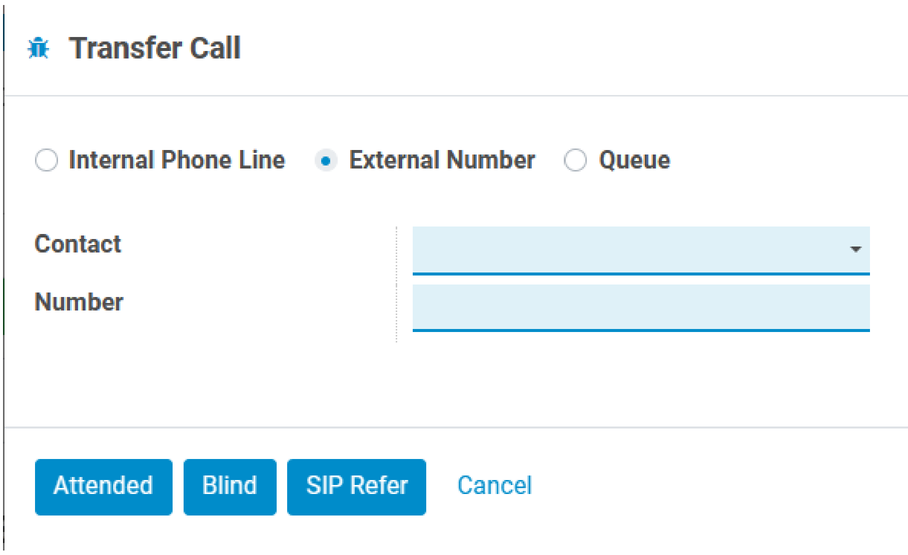


Figure 4 - Transfer Call Window