



Dialers

uContact net2phone | Training.



What is an autodialer?

As their namesake gives away, an **autodialer** is a software that calls telephone numbers automatically on behalf of a live agent. This way, you can ensure proactive communications between your agents and customers at all times.

Also, having autodialers helps companies make their outbound campaigns more efficient.



Why use autodialers?

First of all, using uContact's autodialers will help you **streamline and automate your marking processes**. In addition, over time, you will also be able to know exactly how many times you need to call a certain contact list to connect with a person.

Also, autodialers offer:

- Maximum agent productivity.
- Efficient outbound campaigns.
- Improved Contact Center performance.
- Improved Customer Experience.



How do they work?

Although it is true that there are different types of autodialers -each of them with specific functionalities- they all require some basic configurations to work:



Redial threshold
(Time between calls)



Activated



In time



**List of numbers
to mark**



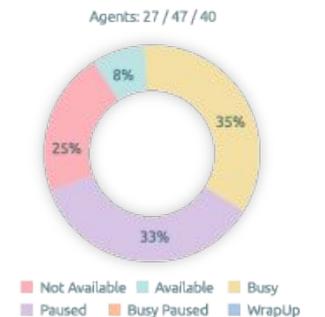
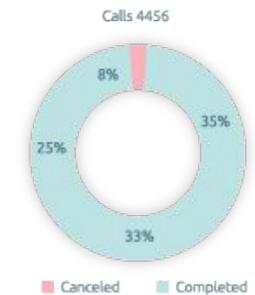
Available agents

How do they work?

When executed, the software tells the dialer which phone number to call from the database, and what to do in case it is forwarded to voicemail, there is a busy signal or if the call is picked up.

Likewise, it is possible to configure the time the dialer must wait before cutting off the call and classify it as unanswered, busy, on hold, and others.

And what's best is If the call appears as missed, unanswered, put on hold, sent to voicemail or out of service; **the dialer will take care of calling the contact back.**



How do they work? | Telephone parameters

The dialers can be configured to call different phone types (Home, Work, Mobile, Priority and/or Unknown), depending on the hour and particular specifications on the uploaded list. For example, if the list states that after regular office hours the dialer has to call the mobile number of the client.

Types of numbers:



Home



Work



Mobile



Priority



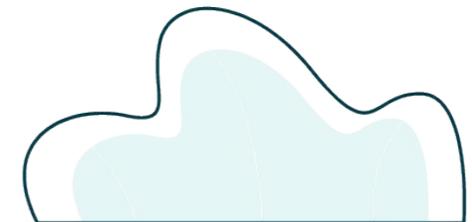
Unknown

Within the established time range, the dialer will call the list according to the assigned logic, no matter what the main number loaded in the list was. This means that, if the dialer is instructed to call the client's mobile phone (**M**) and it is outside office hours, the dialer will do this even if the main number associated with that client when loading the list has been the work number (**W**).

If there is a Priority number (**P**), the dialer will ignore any of the established rules and call it first. Meanwhile, the 'Unknown' (**U**) numbers - that is, it is unknown whether they are mobile or work telephones - indicate to the dialer that they should be left until the end of the call queue.

Also, phone number types can be excluded depending on the hour, in order to avoid calling certain numbers at a bad time.

Even if the dialer changes the number to call, it will always keep the number of retries that it will have to execute for each one. Why? Because, in this way, it does not exceed the maximum retries defined for each campaign.





You need to be careful with the dialing rules, since it can pause or stop the dialer's flow, according to the rules established, as well as affect the agents' waiting time between calls (which delays retries to the numbers which were not connected).





Maximum # of channels.

Dialers cannot make more calls than those configured by the dialer.



Overdial

The system will make more calls than agents have available. In this way, you will know how many times you have to call to connect with a person.



Time-Out

How long do you want the dialer to ring before proceeding to the next contact on the list.



Time between calls

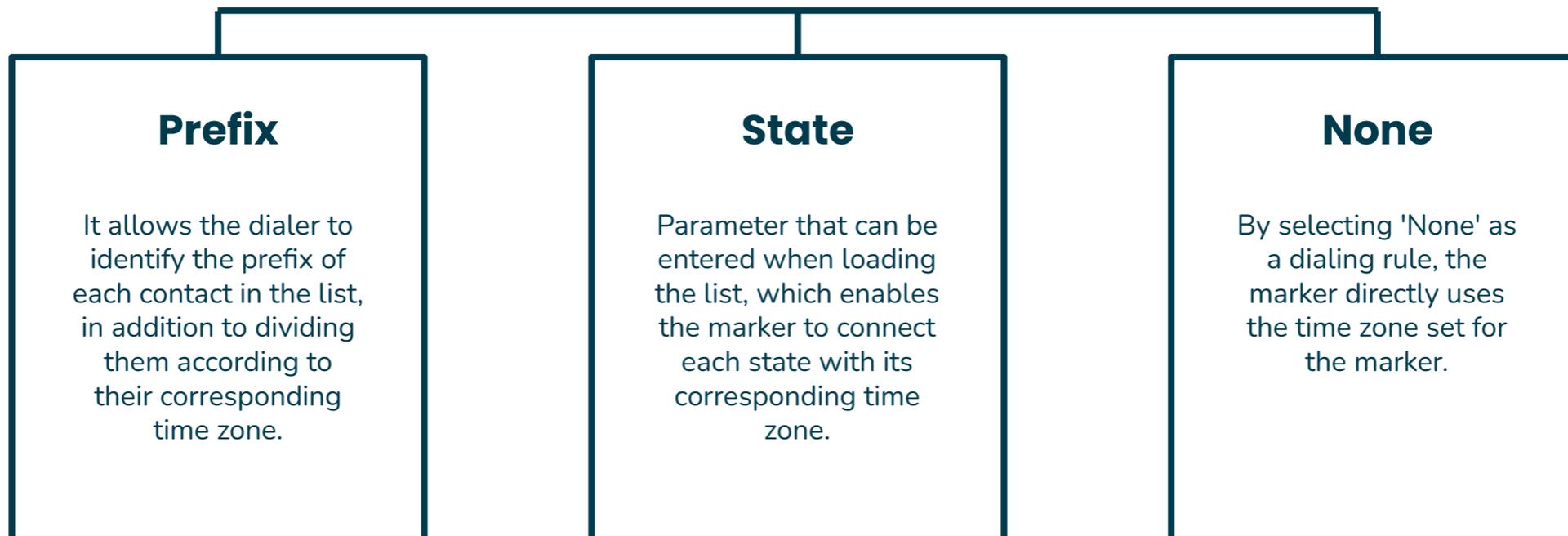
Minimum time the marker has to wait before executing the next attempt (to the same number or to another if the one that was dialing reached its maximum retries)



Retries

Maximum number of times the same number must be called before proceeding to the next number on the list.

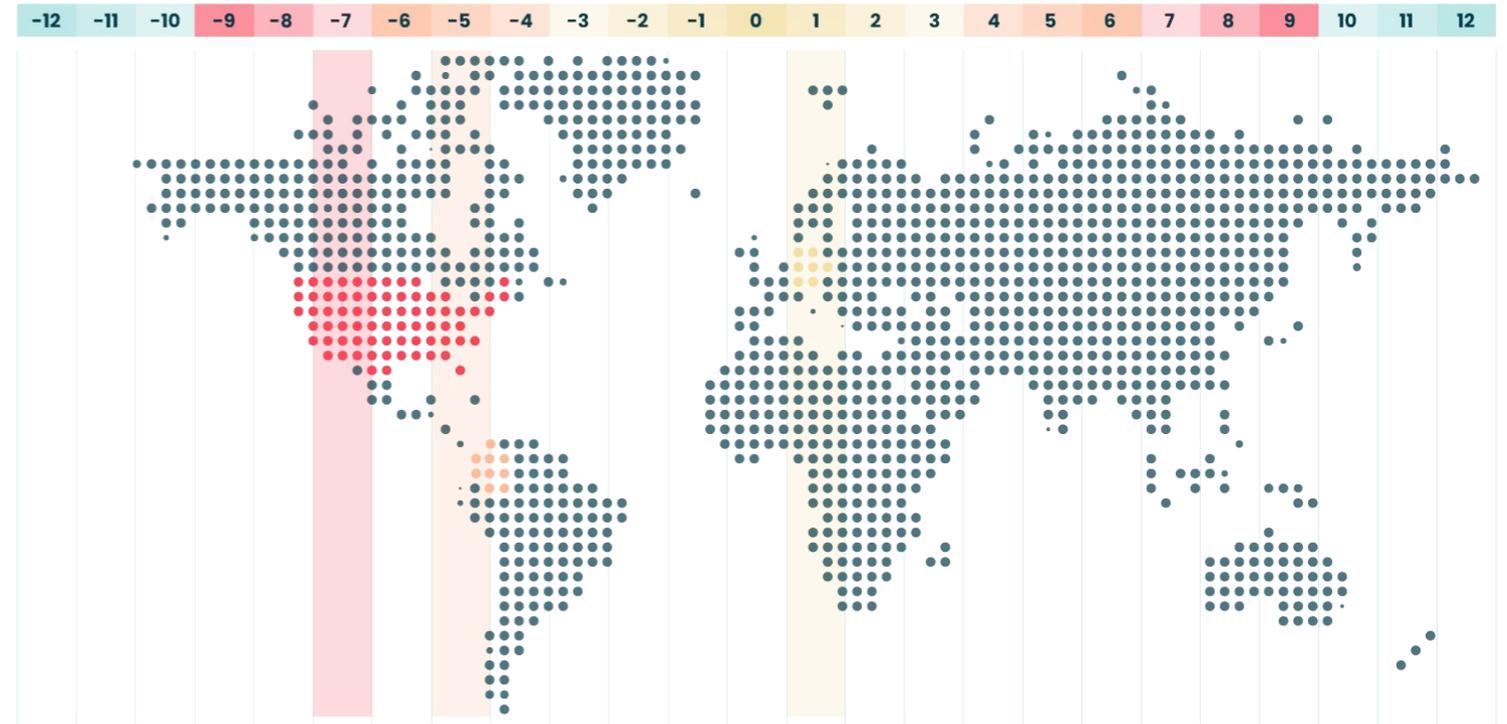
When creating a dialer, there is the option of establishing certain dialing rules, which will determine its behaviour when consuming the lists that are loaded. In this section, you can select the country and time zone in which it will work, and then identify **three methods to sorting lists**:



Each list can be loaded for a different time zone, which means that the dialer will make calls from those lists that are active according to the dialer's time zone. Also, the dialing time in the configuration will correspond to the local time zone.

Example:

If the dialer's schedule time is set for the local time zone of the server, which is from 09:00 a.m. to 04:40 p.m., the client1 will be called at server-time, and so on.



Calls can be classified in the following status, or **dispositions**:



Every disposition is associated to an action. Nevertheless, there is a 'No Action' configuration that is used for those dispositions where the client has already been effectively contacted, thus, there is no need to keep trying.

Respool



If a call is answered by a client, but they are occupied and asks to be called later, that contact can be inserted in the list again for the dialer to try again later.

Respool Alternative



Same as respool, but it calls the first alternative number, eliminating the actual one. It is useful when that number does not belong to the client anymore but you still have more numbers.

DNCR



You can create lists for certain contacts so that, although they belong to a list, the dialer does not call them.

Reschedule



When a call is rescheduled. For example, a client asks to be reached the next day at certain times. That contact will not be a part of any list, but when that date & time arrives it will be inserted to call.

There are countries where mobile phone providers set a voicemail audio to reproduce before the call is answered, charging the caller with the cost of the phone call. In order to avoid this, uContact has a system called 'Early Media', which **detects these voicemails before the call is answered and, therefore, cuts the call short before the provider charges us with it.**

Note: This is only applicable if your telephony provider allows it.



uContact answers every call that is made and puts them on hold by voice detection. Once detected, it is analyzed and classified based on if it is a mailbox or not. If it is a mailbox, the system cuts the call before it charges you; if it is not a voicemail, it transfers the call to an agent normally.

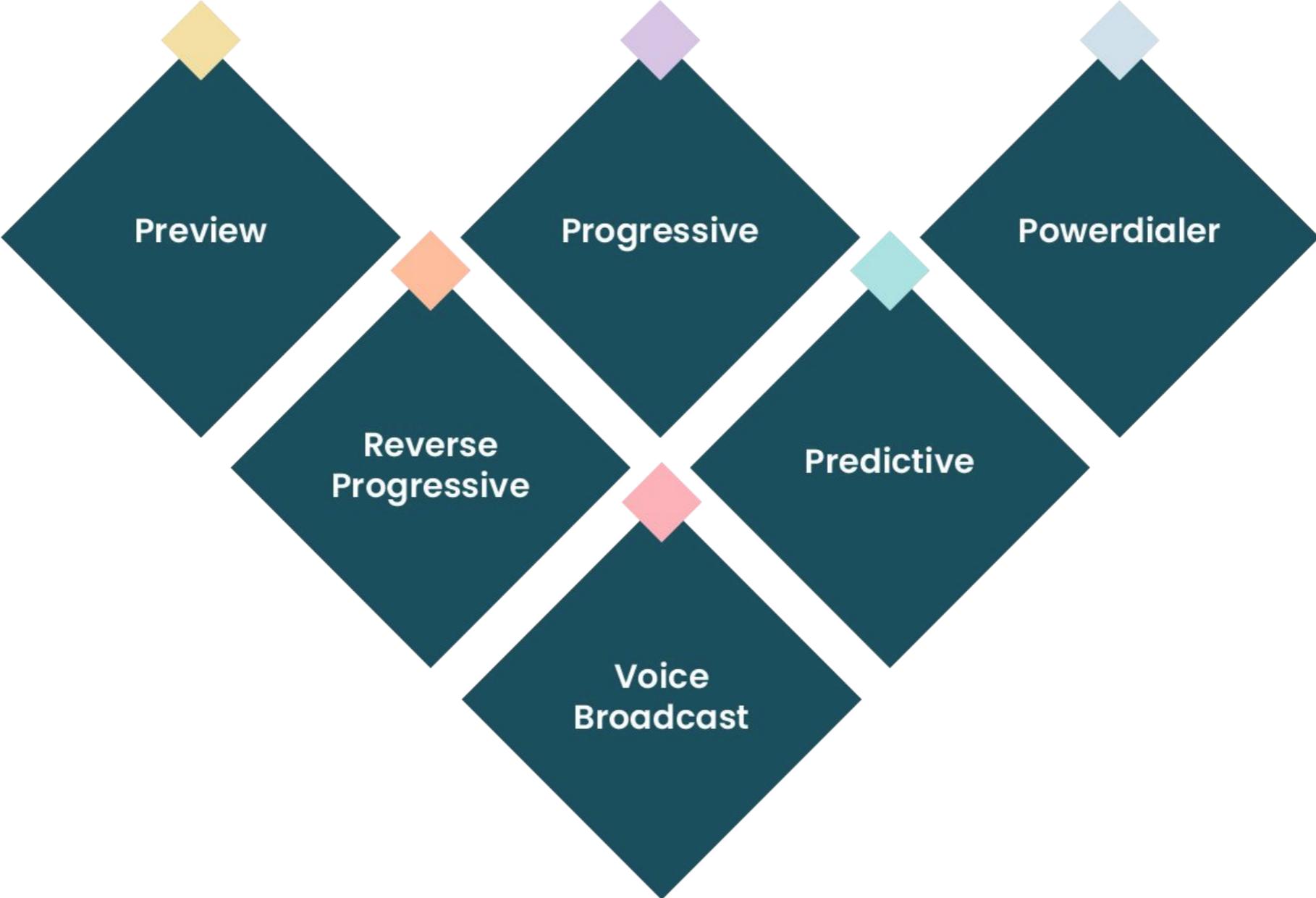
The Early Media function **only applies to Predictive and Power dialers**, since the others are set to make the call after the agent is connected.

Why use Early Media? Well, given that nowadays the percentage of mailboxes reached is very high, this functionality translates into a **significant reduction in costs for the client**.



Dialer types.

Dialer types

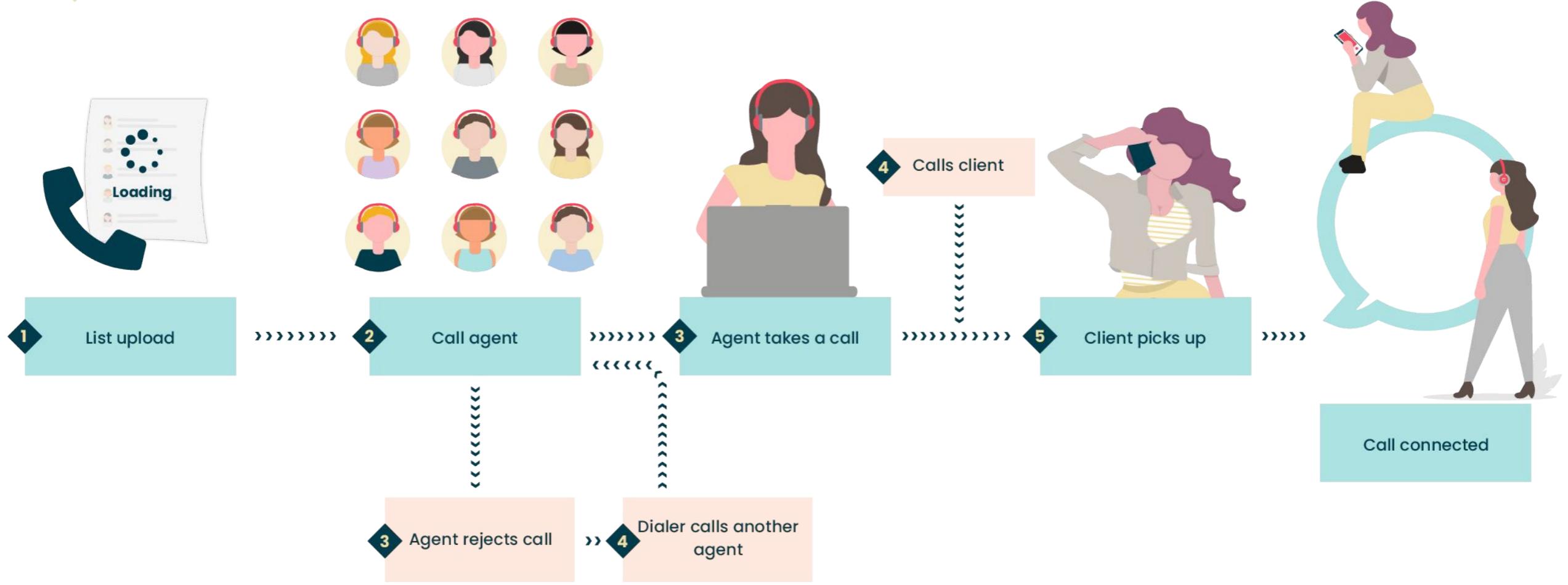


◆ Preview Dialer.

This type of auto dialer calls the agent first and gives him the option of taking the call or not; unless the dialer has the 'autoanswer' option activated. In this case, the agent cannot reject it because it has already been answered.

On the contrary, if he decides to take it, the dialer transfers the call back to the client and the agent will hear it ringing or cancel it -among other things-, just as if it were a manual call. Basically, then, the Preview dialer is **based on the agent's availability**.





Why Preview?

The information of the call is given to the agent before connecting with the client, which allows him to study the case and increase the chances of success.

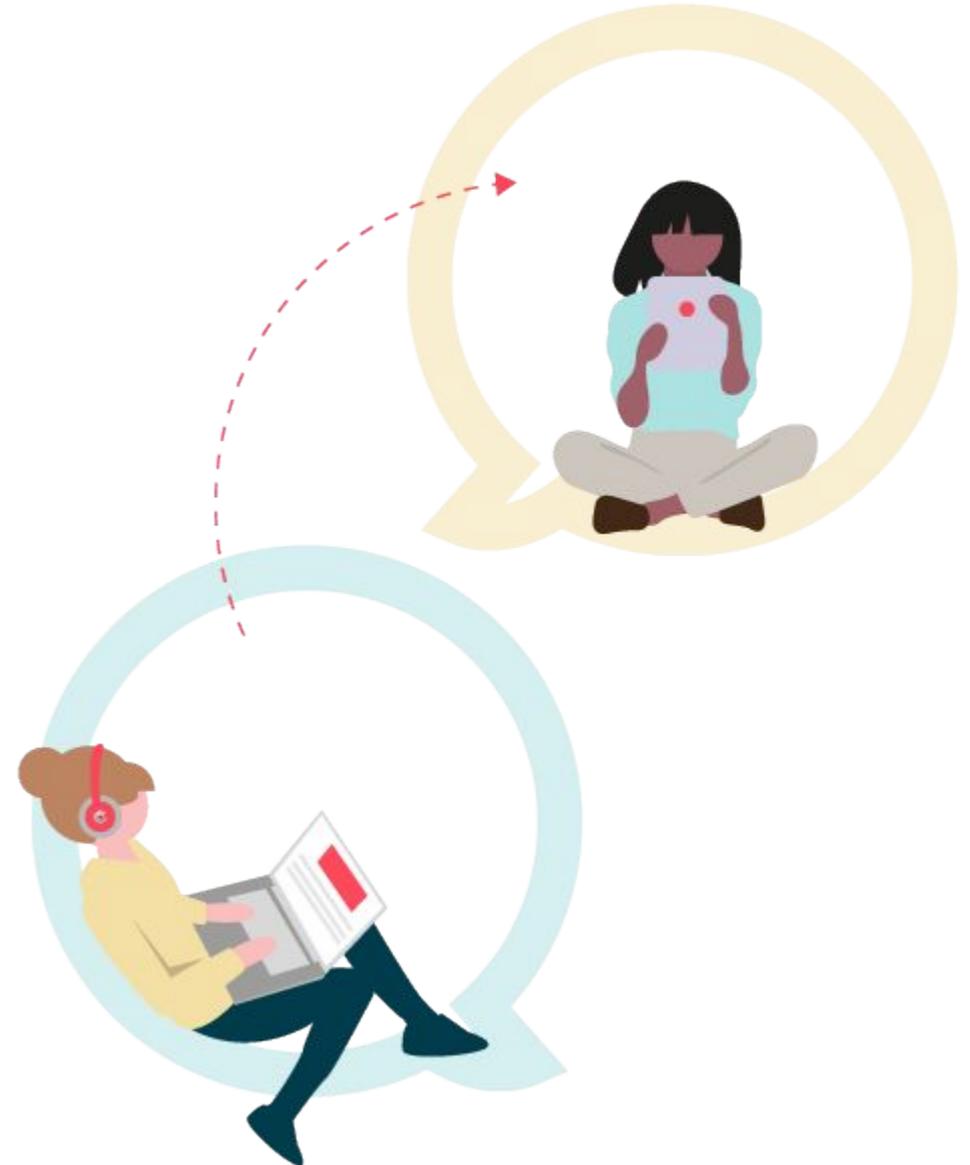
There is no abandonment rate, as there is always an agent available once the call has been placed.

They are perfect for:

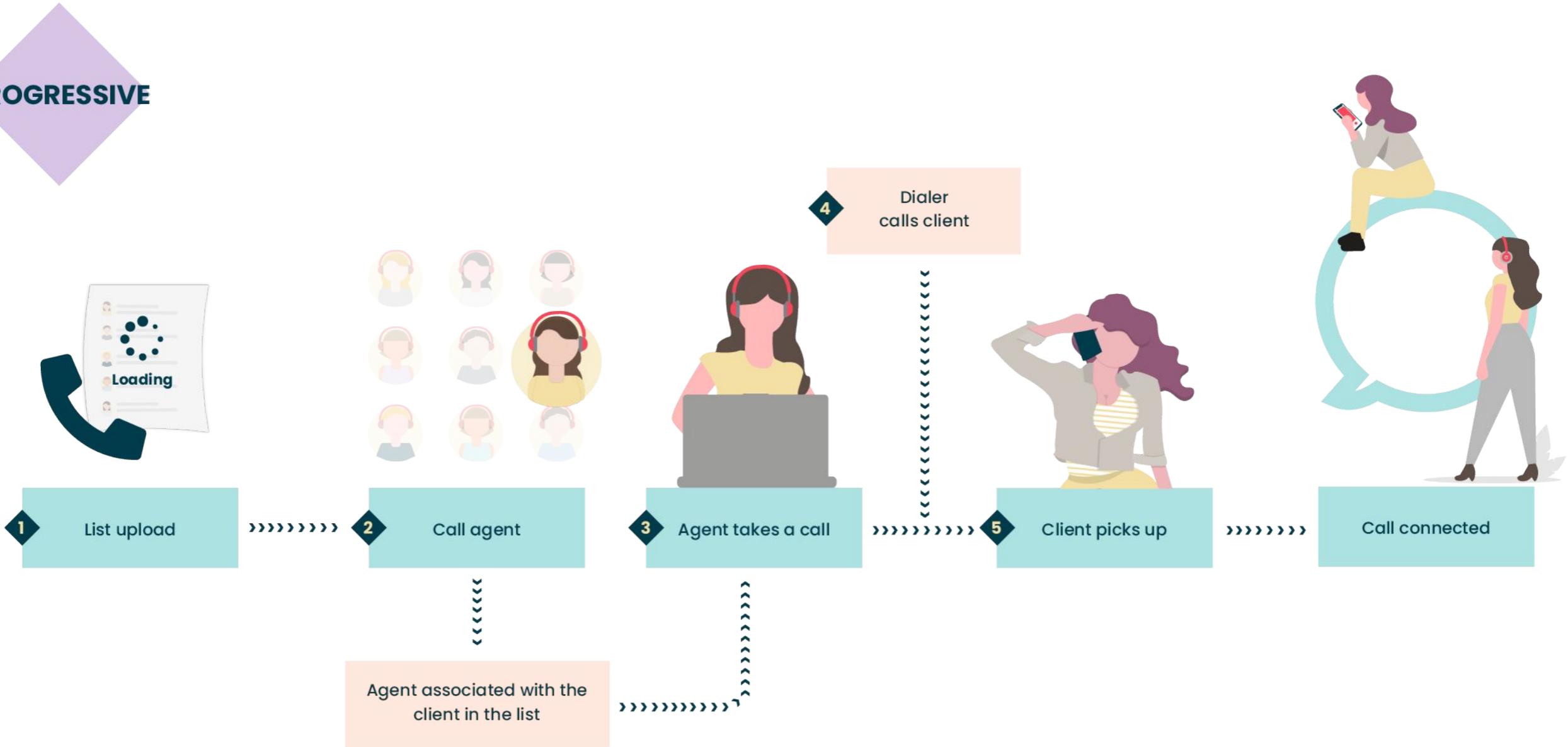
Contact Centers **with little (or moderate) call volume**, since they **simplify the marking process**, just like the Progressive markers, but without the contact property.

◆ Progressive Dialer.

This dialer works in a very similar way to the Preview, with the only difference that, in this case, each client has a specific agent associated and only interacts with him. This means that every time a client calls or receives a call from you, it will have to be made only by the agent assigned to his contact information.



PROGRESSIVE



Why Progressive ?

Since it is the only dialer that can assign contacts to a particular agent, when making or receiving a call, the dialer will display all the information about previous interactions with the client. This enables a **more personal, two-way relationship between the agent and the client.**

Allows **better segmentation and helps improve Customer Satisfaction** because of its agent assignment feature.

They are perfect for:

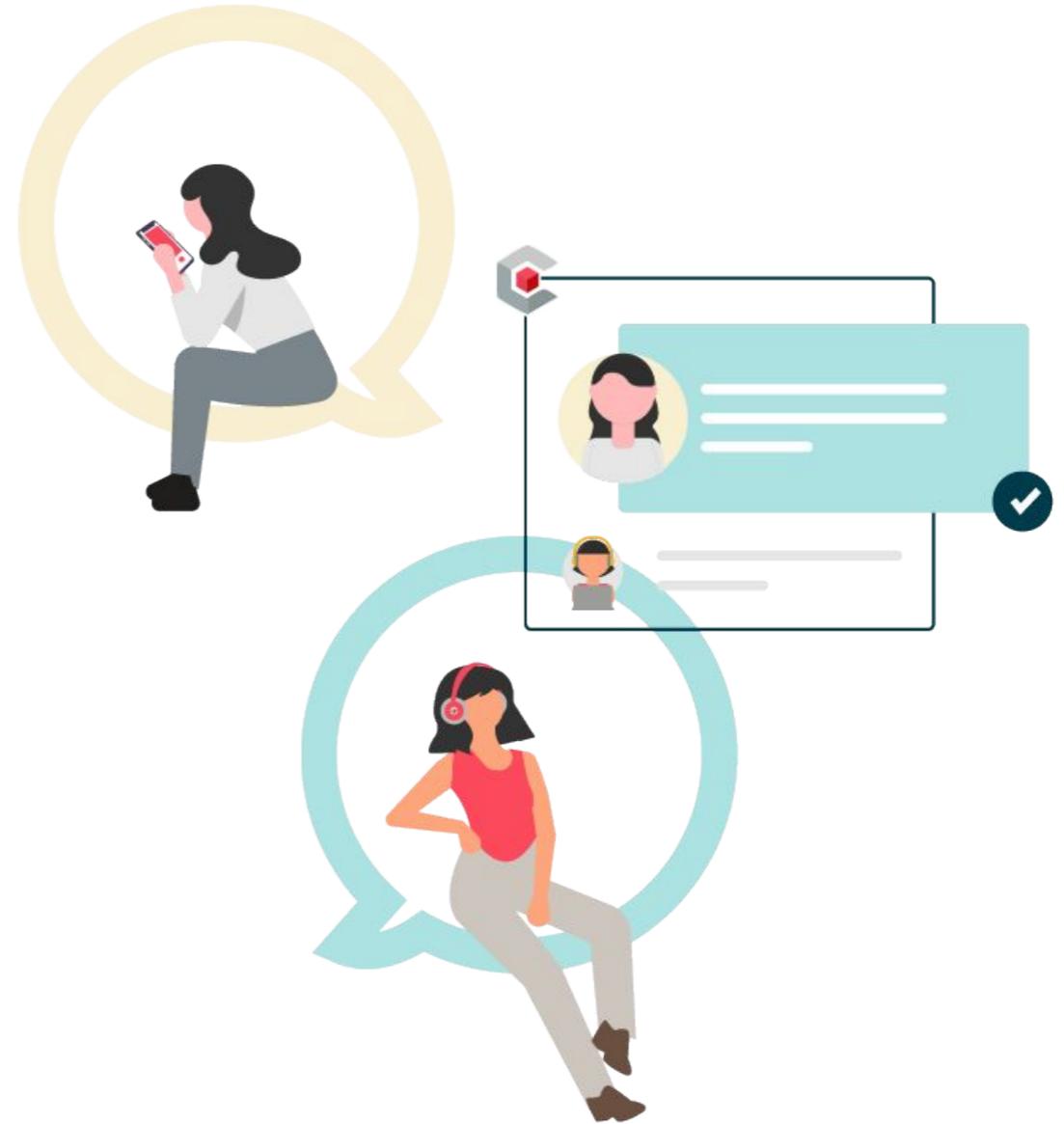
Contact Centers with low or moderate volume of calls, since it helps streamline the process. They provide calls to agents after their wrap-up phase, which allows the agent to have more time to recollect information for the next call.

Similar, yes; but not the same.

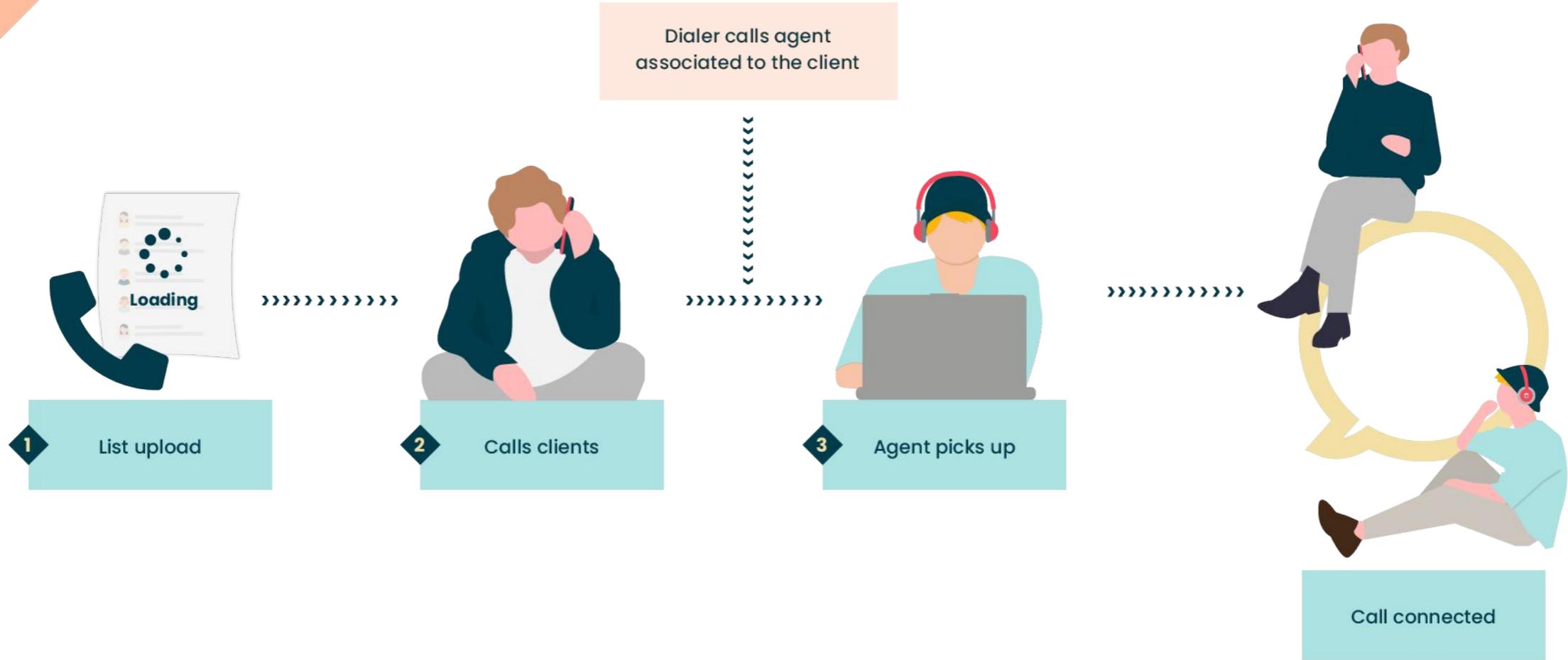
Basically, the Preview & Progressive dialers are almost the same type, since they perform under the same workflow. The only thing that differentiates them is that **the Preview calls any agent available at the time, whilst the Progressive has to wait until the agent that is assigned to the client in question becomes available.**

◆ Reverse Progressive Dialer.

The Reverse Progressive dialer is a new configuration of uContact's Progressive dialers. This mode enables the system to call clients first and then transfer the call to the agent he was assigned to. This way, not only do you identify voicemails easier, but you save up your agents' time as well.



**REVERSE
PROGRESSIVE**



Why Reverse Progressive?

Since each call made is associated to one particular agent, the dialer **does not overdial** and makes the exact number of calls as clients on the list.

It is **easier to control the number of calls on each agent's schedule**, since it assigns one specific call for each agent.

Since this dialer calls the client first, **the agent does not have to hear the call ring or go to voicemail.**

They are perfect for:

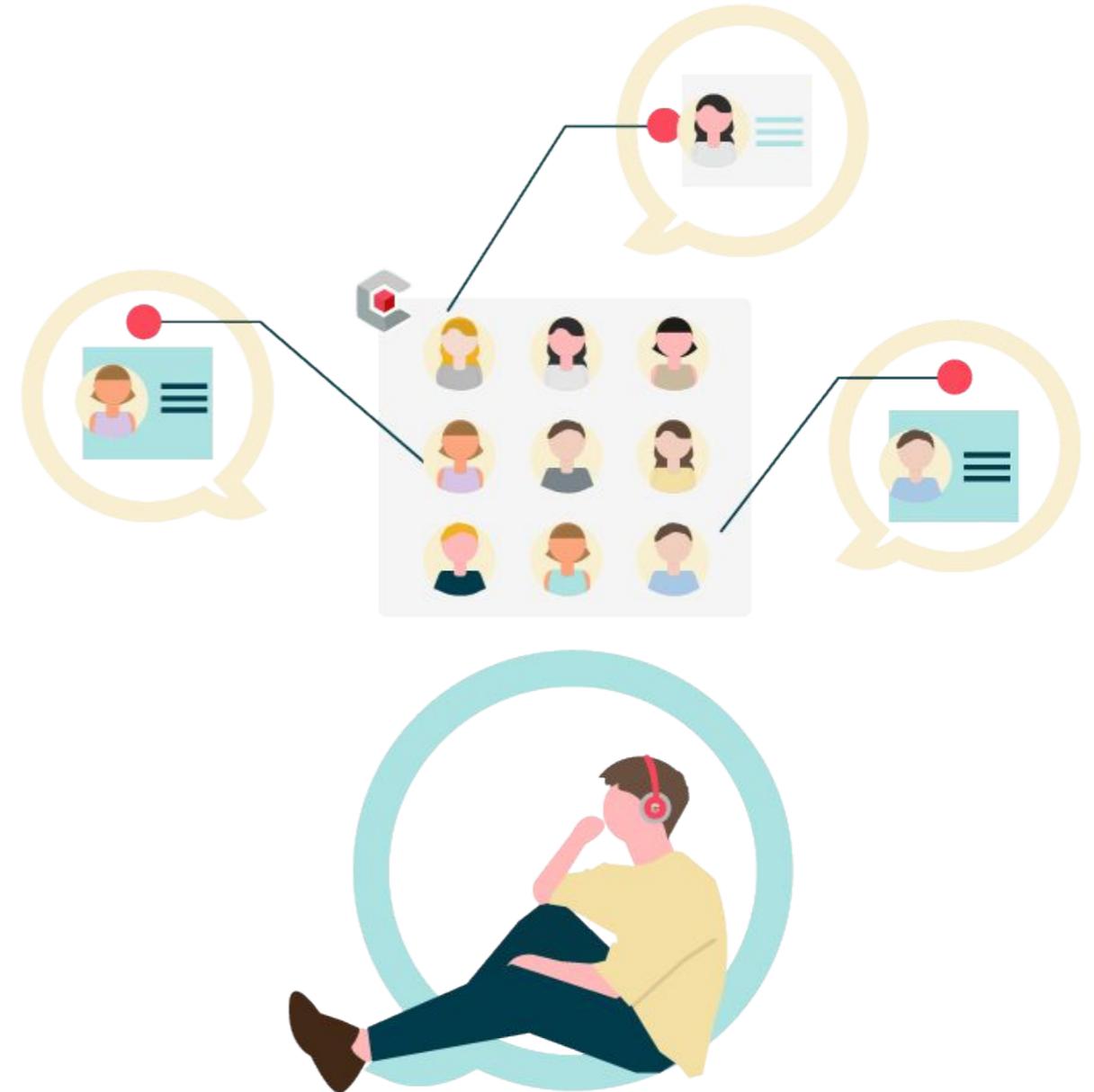
Businesses that work with collection campaigns, which benefit from the client-agent association.

Also, they are perfect for any company that wants to avoid the agent cutting the call while it is ringing.

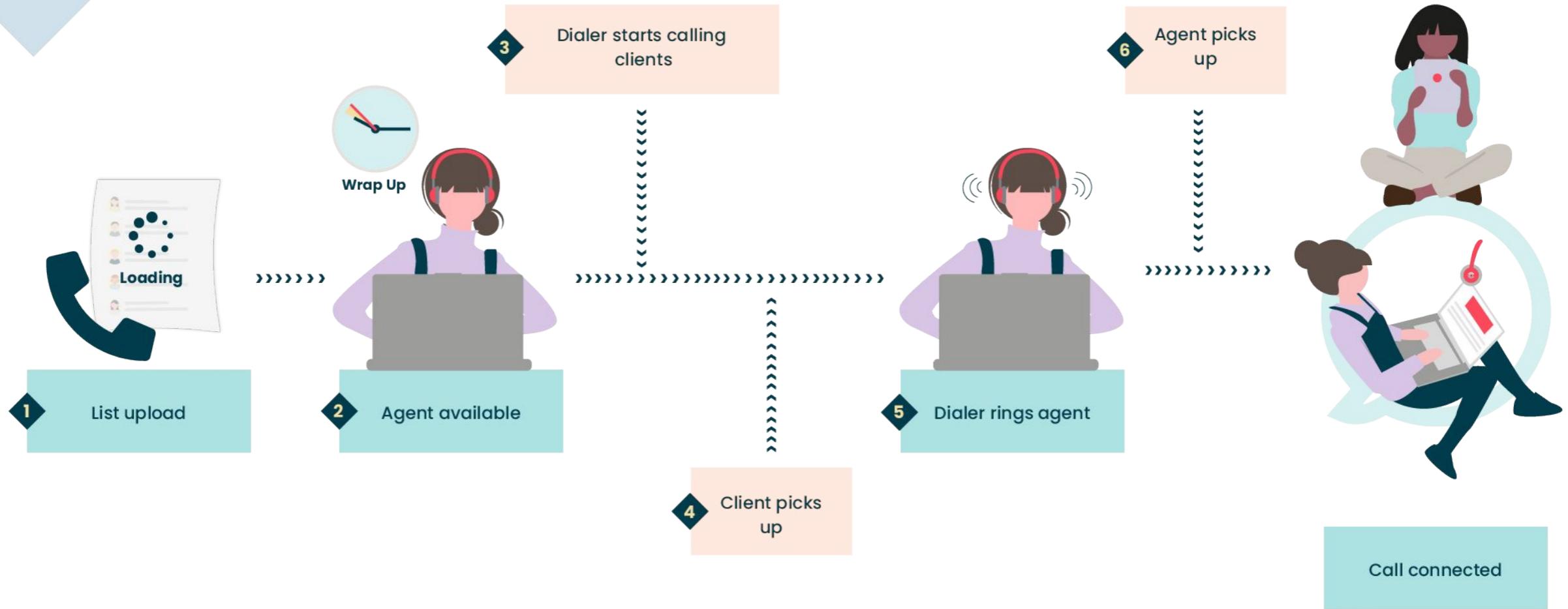
◆ Predictive Dialer.

uContact's Predictive dialer calls multiple numbers at once and, as soon as the client answers, it connects the call with the agent available. What's good about this type of dialer is that it 'predicts' when the agent will be available again and begins calling based on his average wrap-up time.

It should be clarified that, because of how this dialer works, the client may have to wait a little bit, until the agent becomes available. Nevertheless, this can be avoided by adjusting the 'Abandon Rate' which, generally, is below 5%.



PREDICTIVE





Maximum channels per agent

This number must be revised based on the contactability rates of your calling list.



Abandon Rate

Maximum number of calls that are dropped or abandoned. If this percentage increases considerably, it automatically adjusts in order to dial less intensively



Time-Out

How long you want the call to ring before dropping and typifying it and moving to the next number on the list.



Time between calls

Minimum time the dialer has to wait before moving on to the next phone number on the database.



Retries

The maximum amount of times the same contact is going to be called before moving on to the next.

Why Predictive?

Multiple numbers are called simultaneously by calculating the overdial rate in a statistical way.

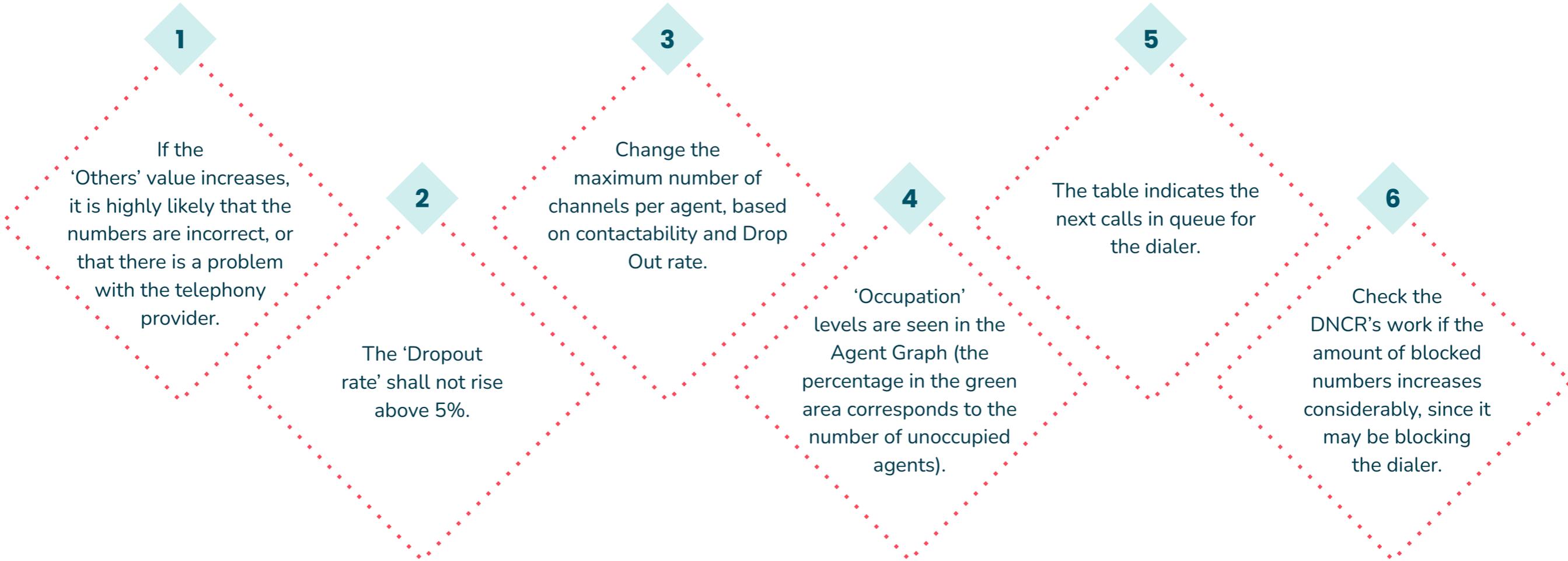
With a higher percentage of calls done simultaneously based on learned availability, **agents spend less time inactive.**

You will need **less agents** in those campaigns that use these type of dialers, because the computer is doing all of the screening simultaneously.

Low waiting time for the agent, since the dialer calls him when he is in 'Wrap-Up'. Also, it does not require a minimum number of agents or 'Wrap Up' time.

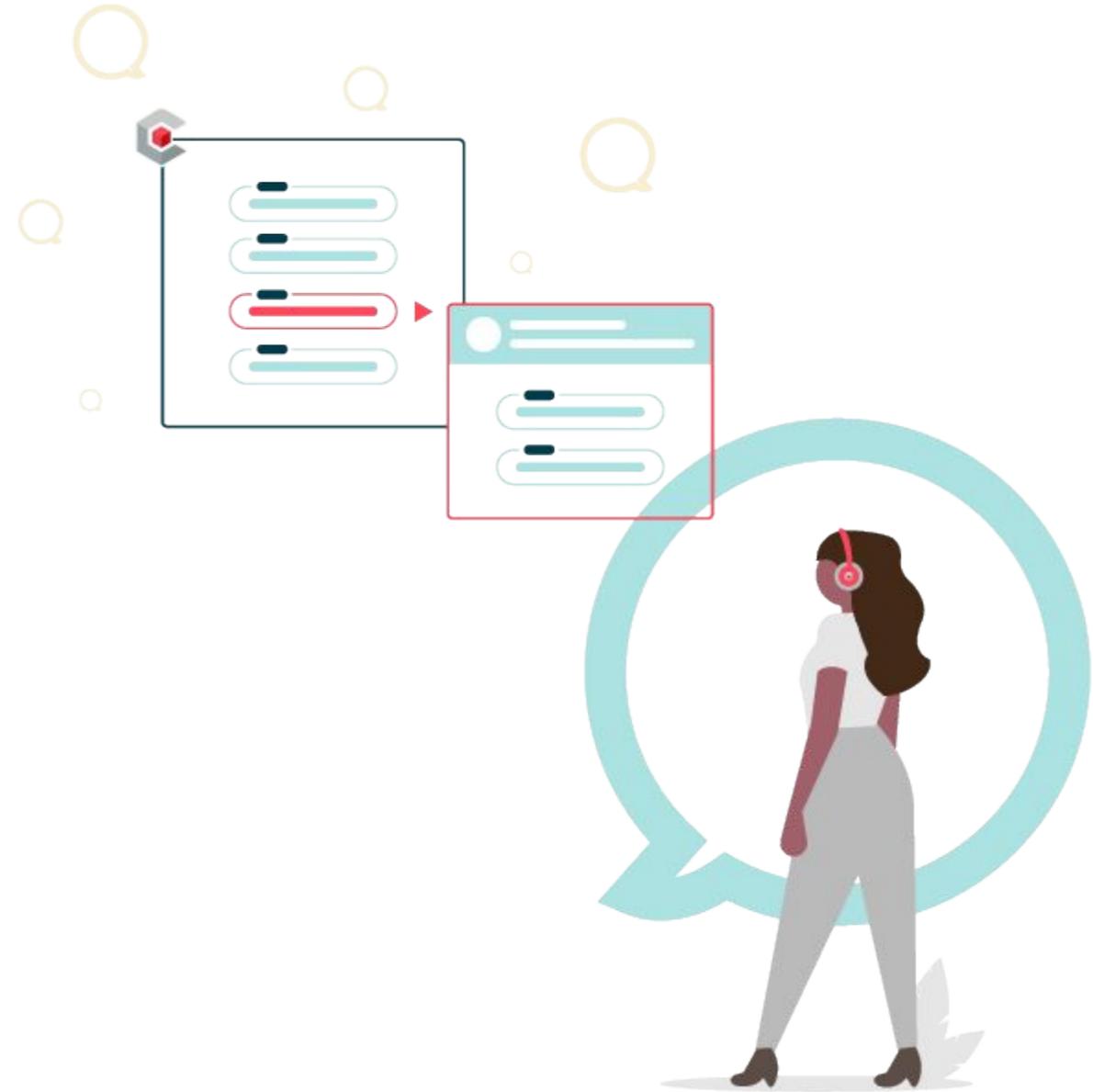
They are perfect for:

Cold-calling businesses that want to reach out to a larger list of clients and generate qualified leads. Predictive dialers push volume and connect agents with clients, favouring the earning of leads and lowering the downtime for agents.

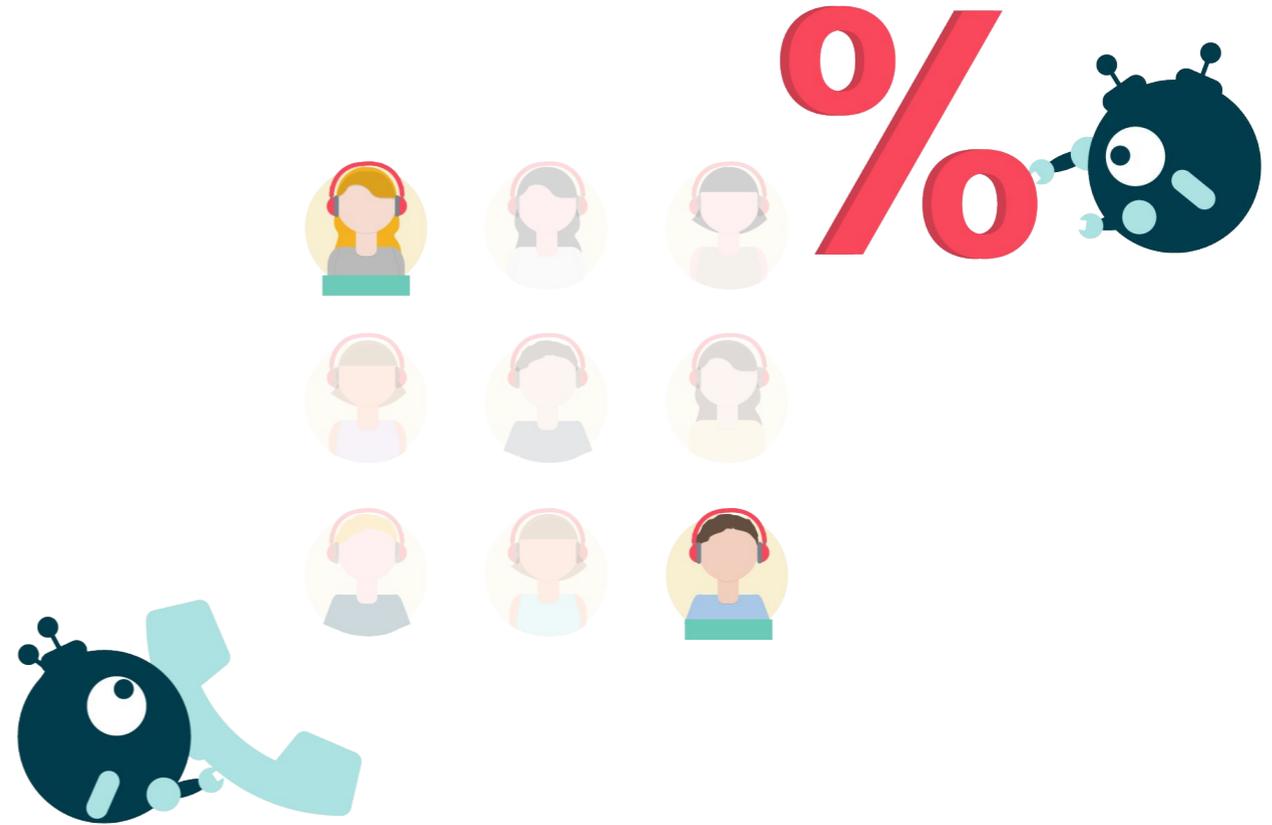


◆ Power Dialer.

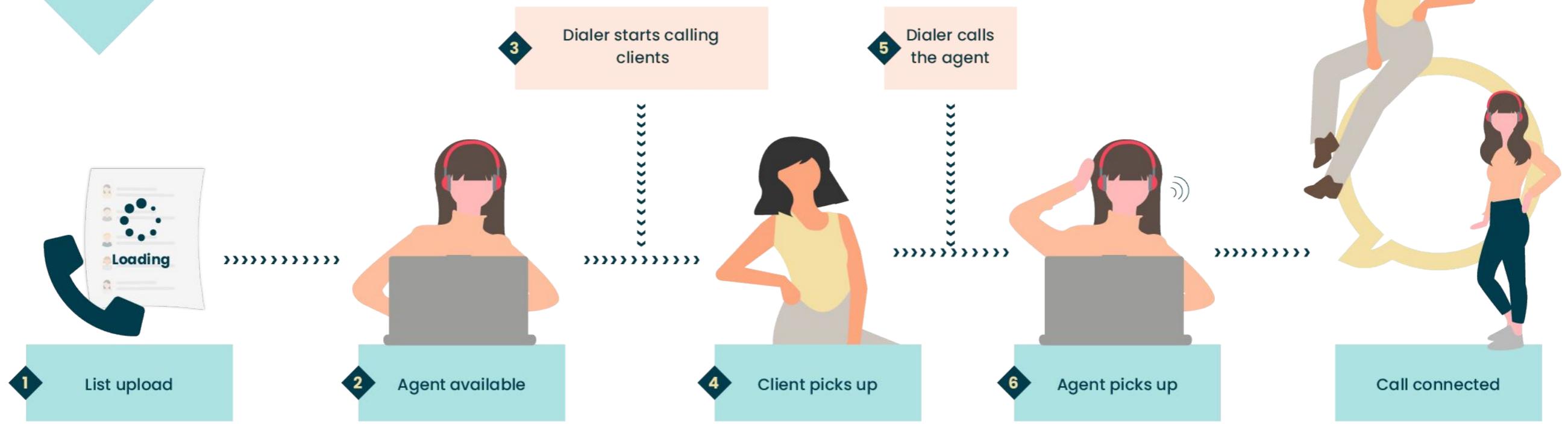
Like the Predictive, the Power dialer calls the client first, but with a more real-time calculation of the overdial. This system keeps agents from having to manually dial each number by automatically connecting prospects with agents sequentially, only when there is a 99% chance of them answering the call instantly.



What this dialer does is detect an available agent and makes the call to the next contact on the list, taking into account the **overdial parameter**. In other words, the **amount of calls that the dialer should make, based on the maximum amount of channels and agents available on the campaign.**



POWERDIALER



Why Powerdialer?

All the numbers are generated by the dialer, which allows agents to leave voicemails and set callbacks in an easier way.

It is a 'rapid dialer' because, despite the human component, dialing is still automated. This allows the agents to make hundreds of calls per day.

They are perfect for:

Contact Centers with large teams, because they **enable a better, more personalized Customer Experience**. Even though there are a lot of calls being made, the time between client pick-up and the start of the conversation with an agent is minimal.



Predictive & Powerdialer

Let's compare them.

The way
overdial is calculated

Fixed with a %

The overdial is defined by the number of calls the Power dialer has to make based on the number of agents available, **without overpassing the maximum number of channels established for the campaign.**

VS.

The way
overdial is calculated

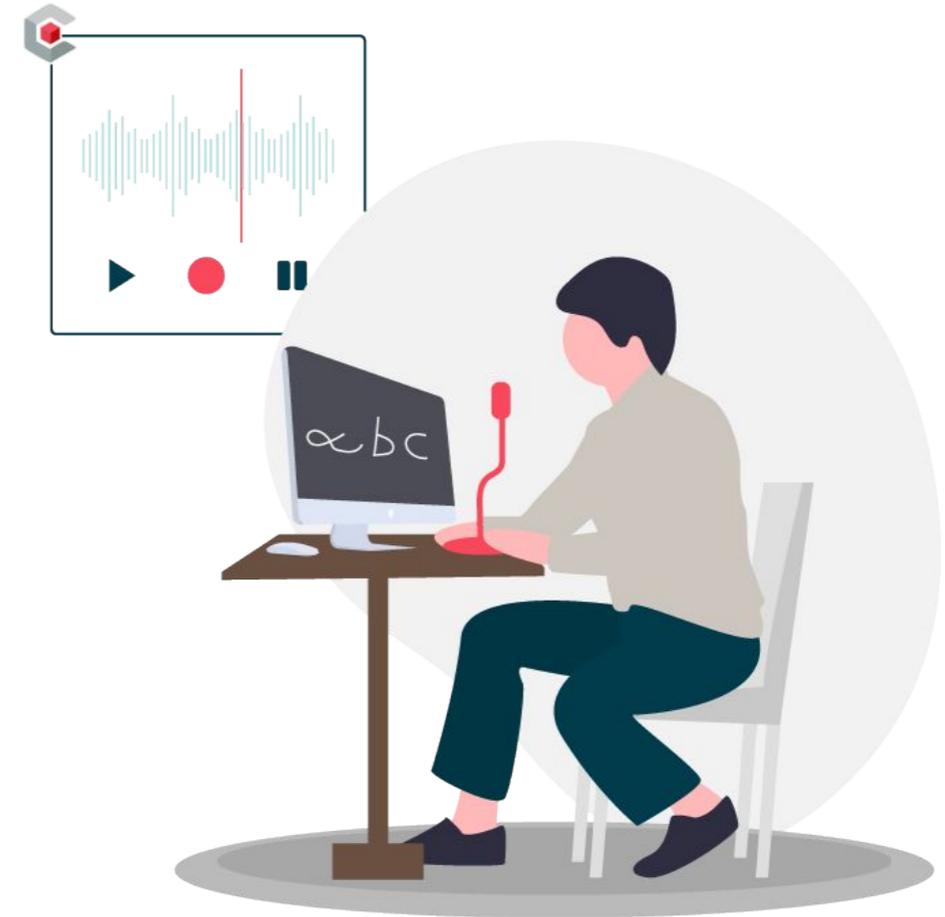
Statistical way

The overdial is **calculated statistically according to the predictions done by the dialer based on previous information**, and taking into account the number of channels per agent.

◆ Voice Broadcast.

Voice Broadcast is a type of dialer that allows you to send pre-recorded messages, surveys, reminders, and other contact points to a list of contacts, within a certain period of time. This way, you can avoid having live agents on certain queues and campaigns if not strictly necessary.

The Voice Broadcast dialer has a variant that is mostly known as the 'Press-One' campaigns. In this cases, **you use the Voice Broadcast to send a pre-recorded message indicating the client to press one if interested in what the service has to offer.** If the client accepts and effectively presses 1, the dialer will redirect him to another campaign.



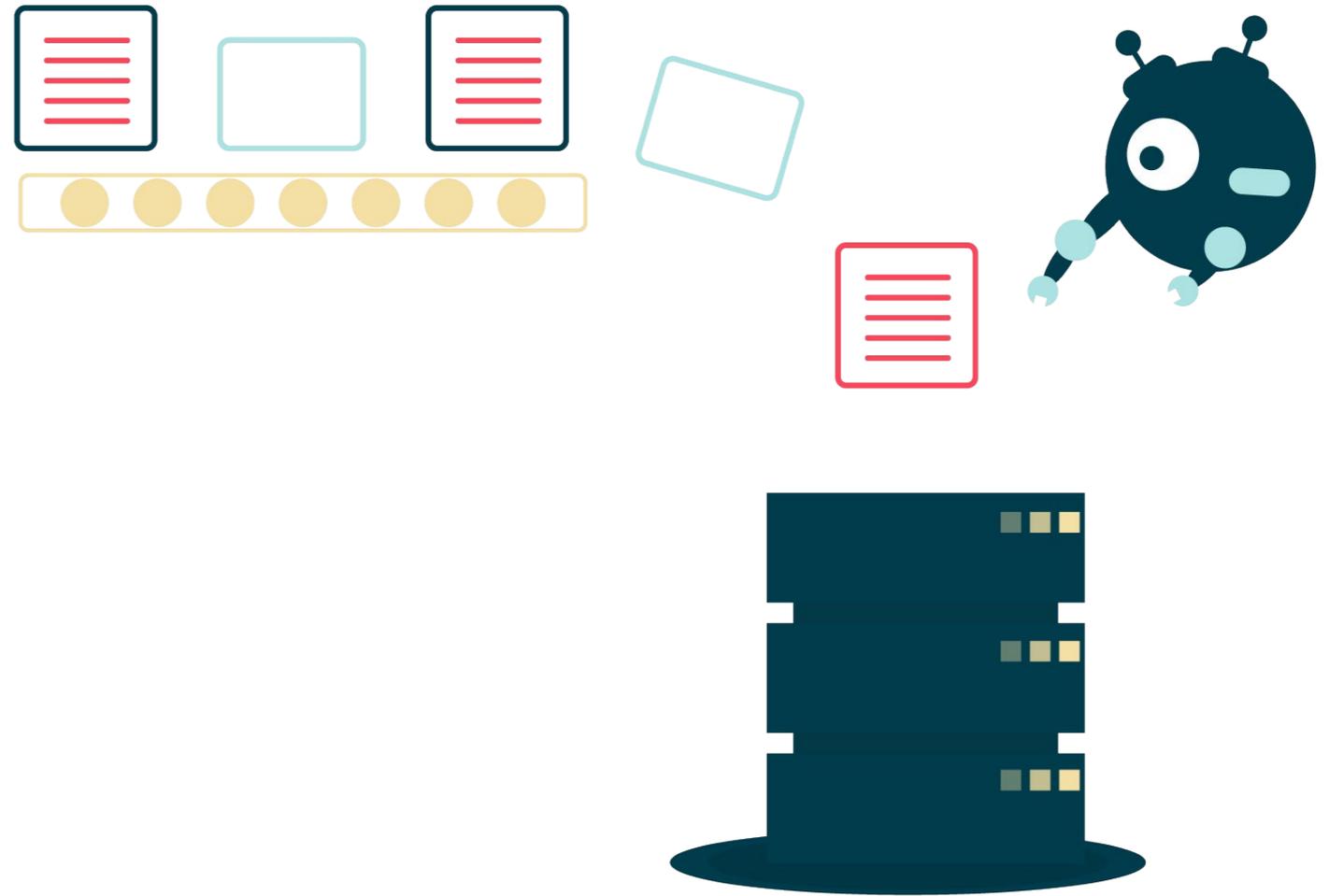
Voice Broadcast is perfect for:



The launch of Sales & Marketing campaigns, the announcement of new promotions, sending surveys, and many other actions that do not strictly need the participation of live agents.

Lists & Schedule.

As stated previously, **all dialers work based on one or more contact lists and call schedules.** In other words, they do their work taking into account the database of contacts associated to the campaign and the calls they have scheduled in their work agenda.



As its name indicates, a list is a group of names, phone numbers and other data that you must upload for the dialers to contact them. Nevertheless, there are more than one type of lists possible to upload:

Enabled lists

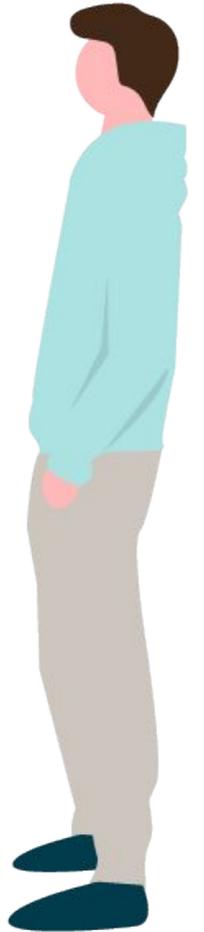
Lists of contacts to call.

Disabled lists

List that has contacts, but is ignored because it appears to be out of time.

Black List or DNCR

(Do Not Call Registry)
List of contacts you do not wish to (or cannot) contact. This way, those numbers will be blocked when the dialers tries to make the call.





The **Do Not Call Registry (DNCR)** is used to avoid dialing certain numbers. Therefore, under no circumstance the dialer will not be allowed to contact those clients; they can be set to apply for a particular campaign or to all campaigns in general.



All lists must include:



Campaign

The lists are uploaded to the dialer in question, that must be associated to a campaign.



Phone number & Number type



Data

All the information and variables you want the dialer to take into account (date, time, debt amount, and more).



Alternative numbers

Number to call in case the main phone number appears to be occupied or unable to be reached.



Priority

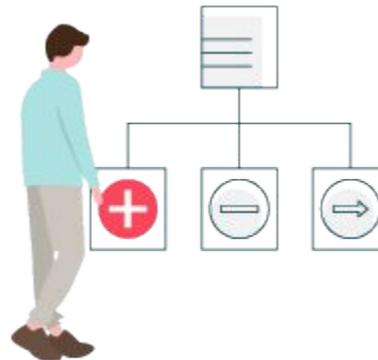
The order in which you wish the dialer to make the calls. If you want a certain client to have priority, you need to establish it in the list.

For a list to be dialed, it must:

Be active



**Have a % of
priority between
lists.**

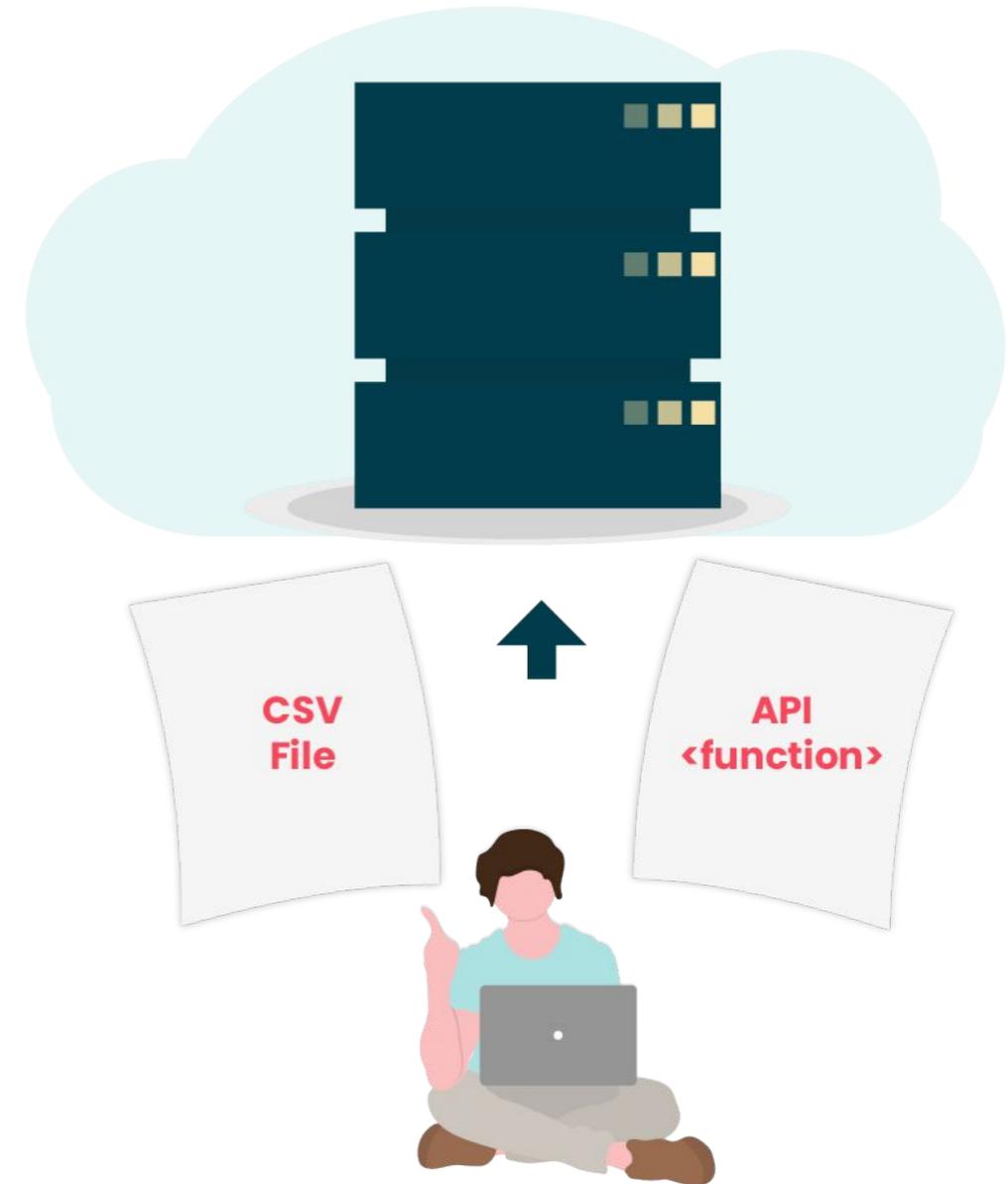


**Have the timezone
on time.**



Lists & Schedules | List generation

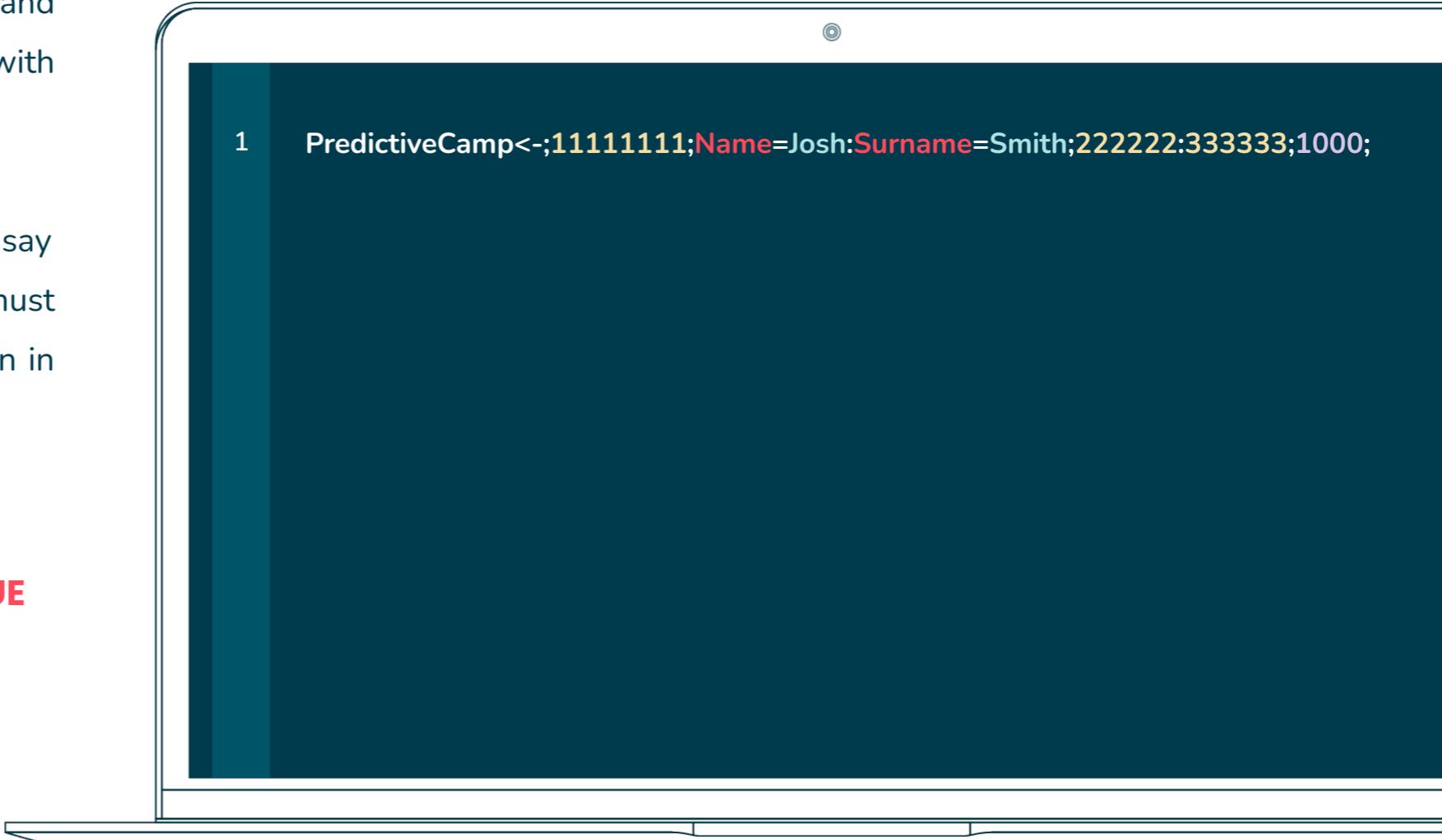
Lists can be generated from a business vertical (CRM, Sales & Marketing, etcetera) or be recycled from previous lists. To upload a list of contacts you must **select a timezone and then upload a .csv file** with the phone numbers to be called, and the dialer will call them depending on its schedule.



In the 'Additional Information' field of the uploadable .csv, it is possible to indicate parameters with values. This is particularly useful because it enables this information to be used in IVRs and forms, and because it allows the agent to be shown a form with useful information of the client.

For example, if you want the Voice Broadcast to say the client's first and last name, every contact must be uploaded in the following way (and as shown in the image):

PARAMETER=VALUE : PARAMETER=VALUE



1 PredictiveCamp<-;11111111;Name=Josh:Surname=Smith;222222:333333;1000;

Lists & Schedules | Example

- Data

Campaign	test1
Telephone	099 344 848
Data	variable=value1:variable=value2
Alternative Telephones	099111111: 099121212
Priority	9999

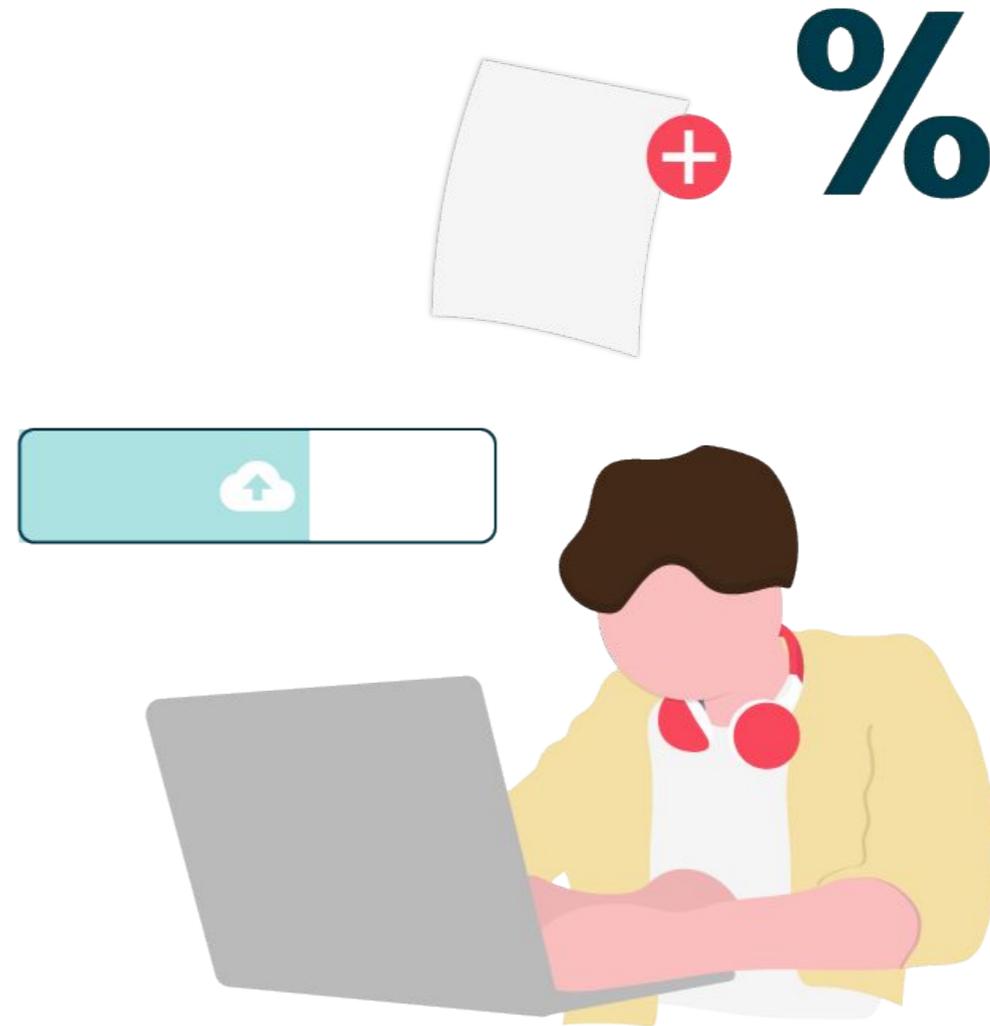
- .CSV format



When uploading a list you can **assign priority (%)** to a particular list above the other, or assign priority between different contacts inside a specific list.

In other words, you can give one list a percentage of priority above other lists and, inside a specific list, you can also give priority to one contact over the other.

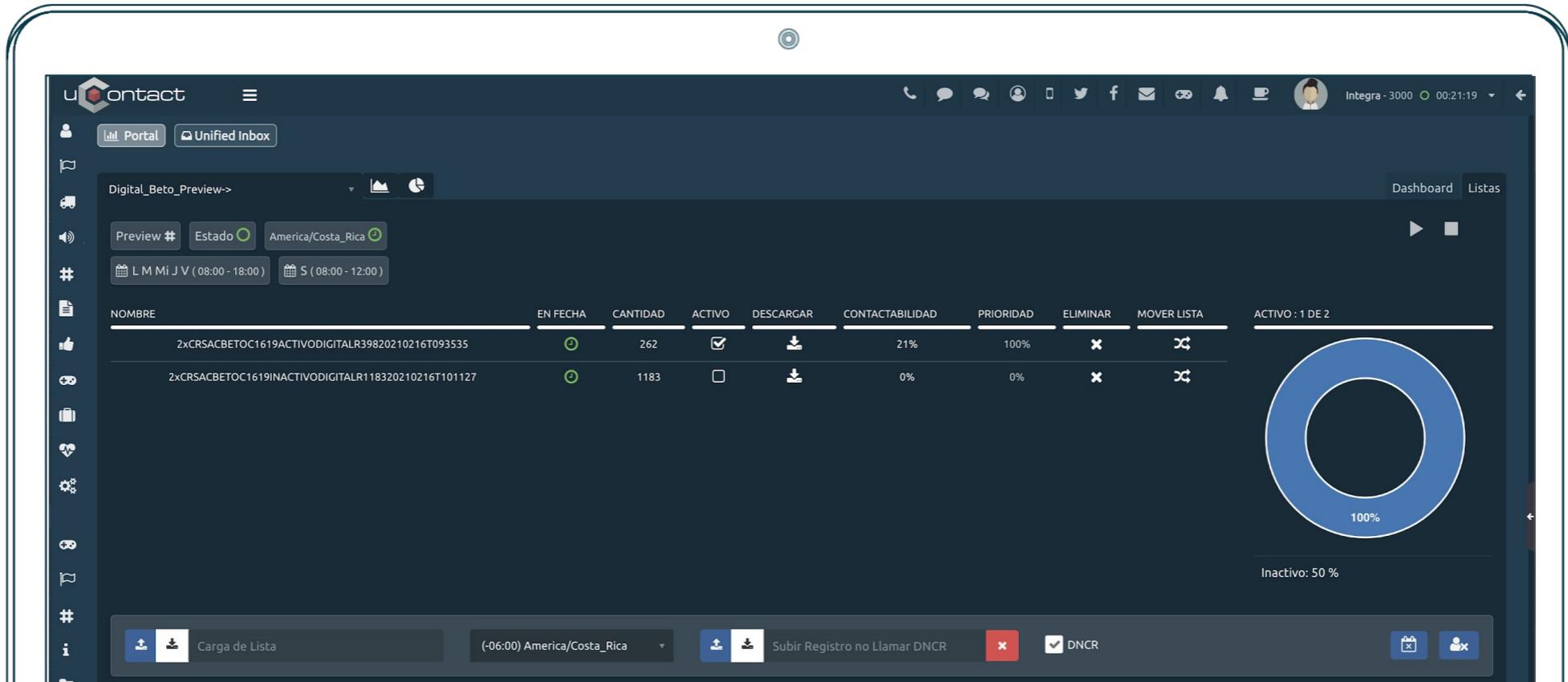
Note: You cannot delete a list with Priority.



List Priority.

To give priority to a list of contacts you have to change the percentage (%) shown in the 'Priority' column. You can change the way you distribute this percentages, as long as the sum of all the active lists is 100%.

Note: The first list uploaded to the dialer and the campaign will have a default priority of 100%, which can be changed in the future when adding a new list.



Also,

Percentages of priority are not assigned to the recycled lists automatically. If this were the case, we would change the defined behavior, that initially remains at 0%. You can start taking a percentage if one of the existing lists is finished and has been configured as an active list since the % of the finished list is evenly distributed among the existing lists.



To be considered:

When a list ends, its percentage of Priority is distributed automatically between the remaining assets in order to achieve 100% contactability.



The check will be red if priority is 0%

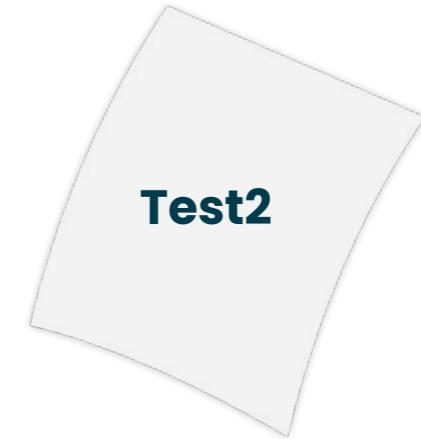
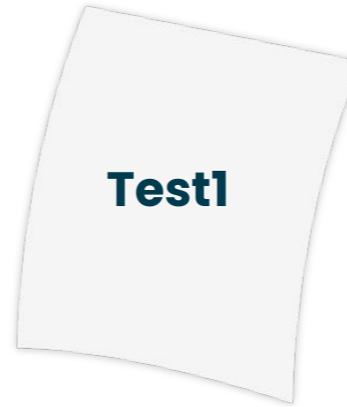


The check will be yellow when the list has 60 seconds left to be finished.

- **Contact Priority.**

As it was said before, contacts on a list can be prioritized. In this case, instead of a percentage, the priority is stated numerically.

All contacts on a list come with a default priority number, that is **9999**; which can be modified manually afterwards. Also, the system automatically changes it if the client in question does not pick up the call, or wants to be called afterwards.



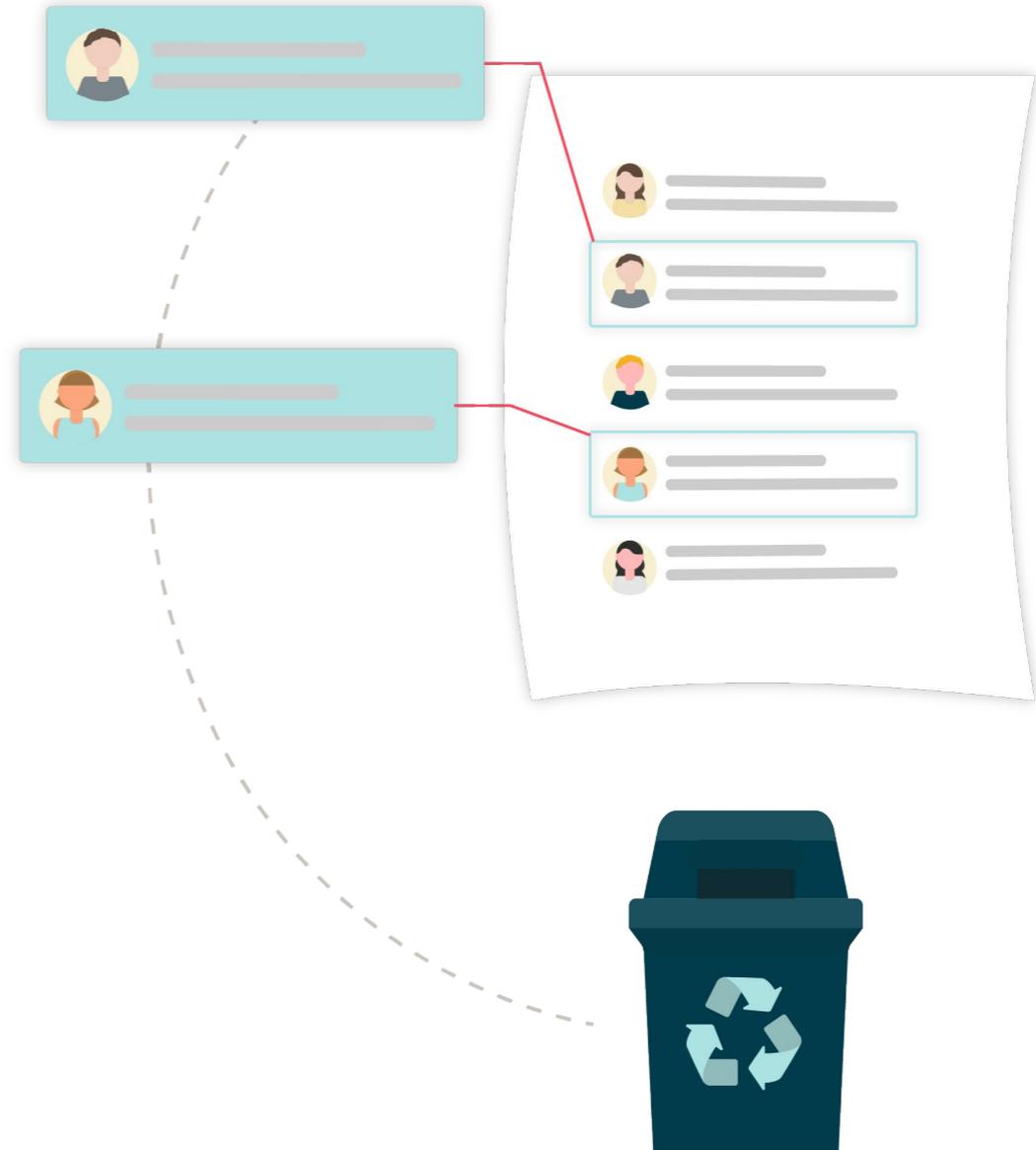
Campaign	test1
Telephone	099 344 848
Data	variable=value1:variable=value2
Alternative Telephones	099111111: 099121212
Priority	1192

Campaign	test2
Telephone	099 574 953
Data	variable=value1:variable=value2
Alternative Telephones	099769542: 097211352
Priority	2234

Once the dialer finished calling all the contacts on a list, there are always some contacts that, for some reason, were not reached in any of the retries. But, that does not mean they are unreachable.

With uContact, you can select which contacts you wish to keep trying to reach and generate a new list that includes them. In other words, **recycle your database**.

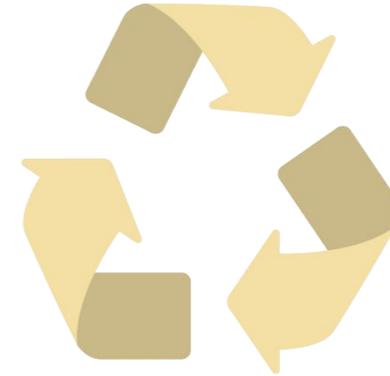
Note: Lists are only eligible for recycling once their dialing process has been finished.



To recycle your lists of contacts, you can choose to do it based on the contact's status (Do Not Call, AMD, and more), or its disposition (Call Back, VoiceMail, and more).

In both cases, the system generates a new list based on the parameters chosen and names it the same way as the original list, but with an 'R' in the beginning. For example, if the original list was called 'test1', the recycled one will be named 'Rtest1'.

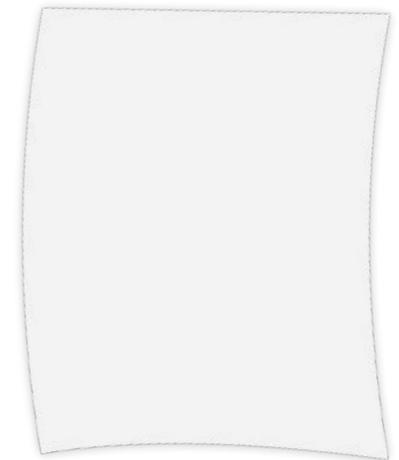
Note: There will be as many 'R's as the amount of times the list was recycled, which makes it easier to evaluate its saturation level.



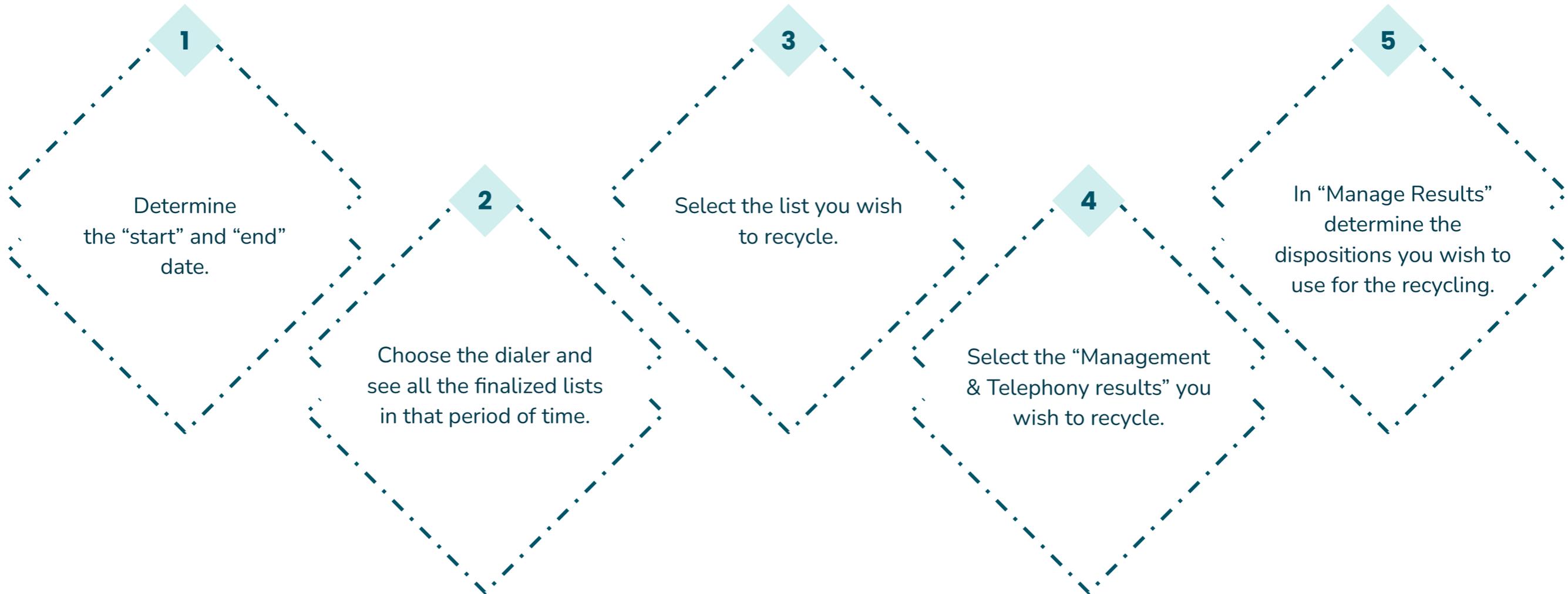
Test1



RTest1



Step-by-step:



Tips:



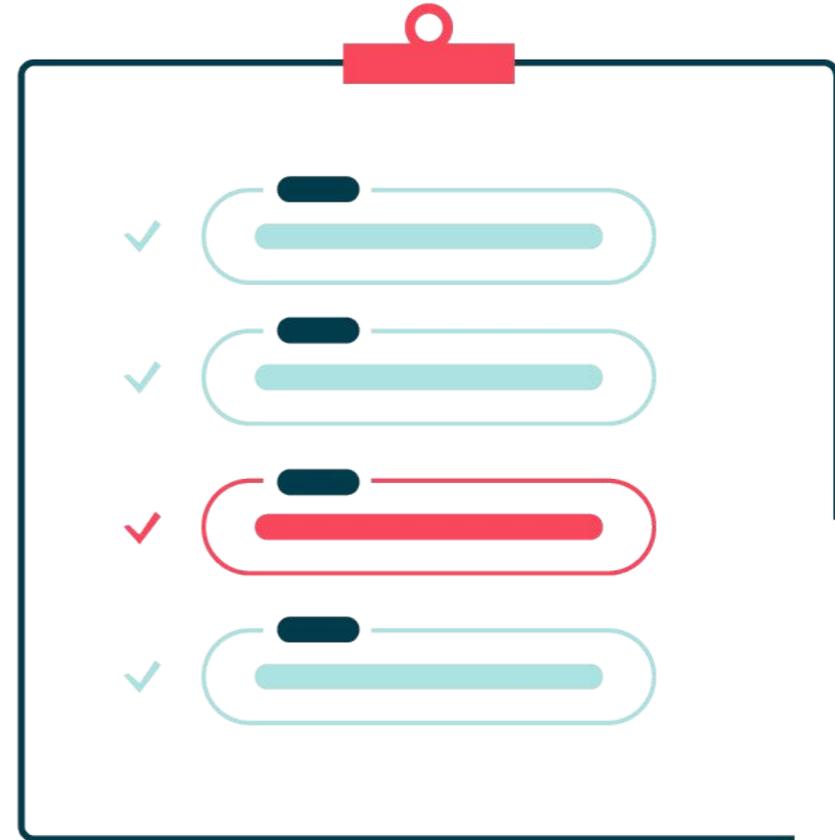
It is always useful to mix recycled lists with new ones in order to maintain high contactability and keep agents busy.

All recycled lists (manual or automatic) can be found on the 'Scoreboard Management' dashboard of uContact.

It is advisable **not to recycle more than 3 times**, as it is very likely that what is left in the fourth one will not be contactable.

In order to modify or change the system's dialing options and obtain better results, you can apply several filters to your recycled lists.

On the other hand, uContact allows you to modify and customize your recycled lists to help you adapt them to new marking methods that allow the originally designated dialing option to be removed, ordered or changed.



uContact's recycled lists work with a **dialing criteria** that is established by default, and **contemplates two commands**:

Custom → Solo_XXX

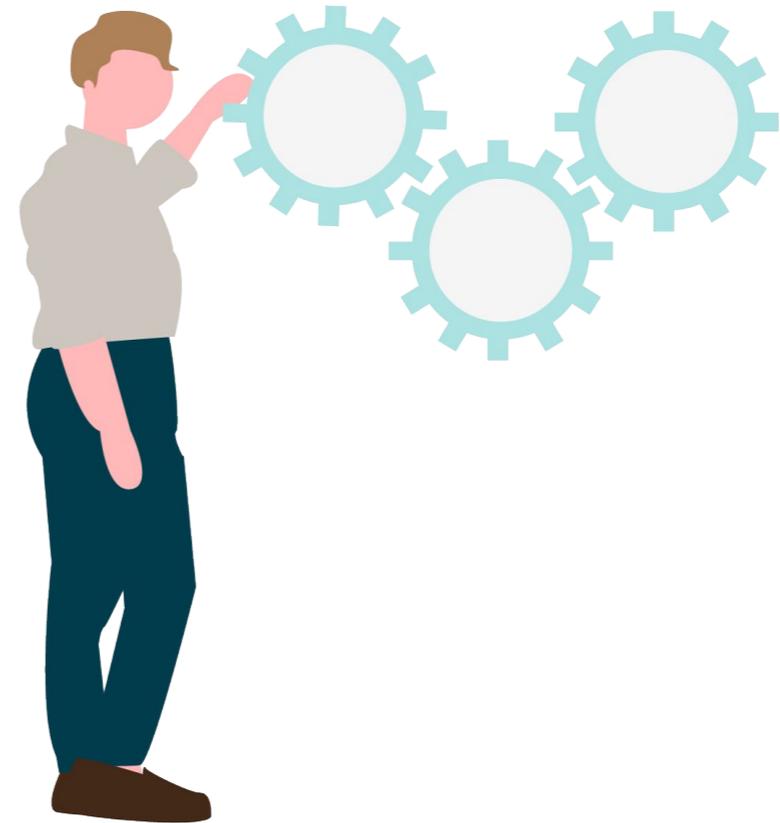
It allows you to filter the numbers in the list, keeping only the ones specified in XXX (eg: if we choose Only_MU, we are keeping the contacts M=Mobile and U=Unknown). It is important to note that 'P' contacts are always present.

Custom → Horizontal_Order

It allows the list to be arranged horizontally rather than vertically. By default, lists are called in a vertical way trying with a contact and if this one doesn't answer, the dialer will call the next one. When the dialer calls in a horizontal way, the dialer will try calling the contact with all the retries before moving on to the next contact. Note that if you call horizontally the same contact will receive many missed calls in a short time, this is only used in very specific scenarios.

Nevertheless,

even though uContact works, by default, based on the criteria stated previously, **it also allows adding new criteria that better suits the client's needs.**



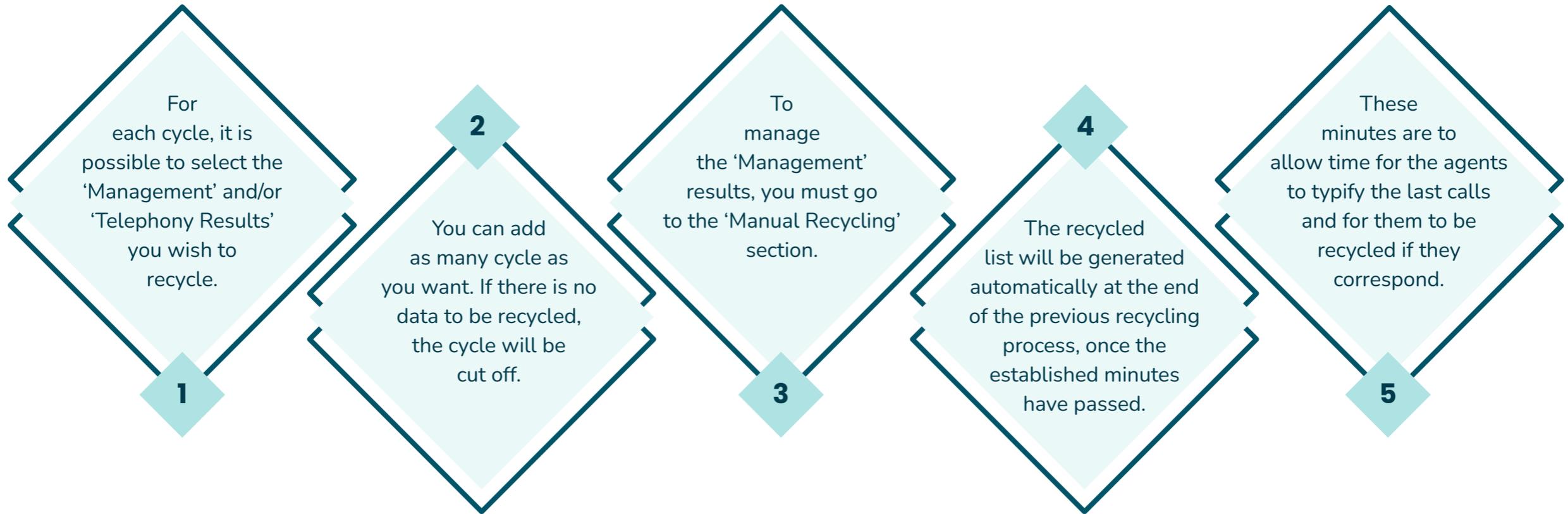
Recycling cycles are **defined to run automatically after a specific amount of minutes (configurable) after the list ends**. Nevertheless, the automatic activation of the new list is optional.

These cycles are configured with the same parameters as manual recycling, and each recycling cycle can have different parameters.

Note: All recycled lists (manual or automatic) can be found on the 'Scoreboard Management' dashboard of uContact.

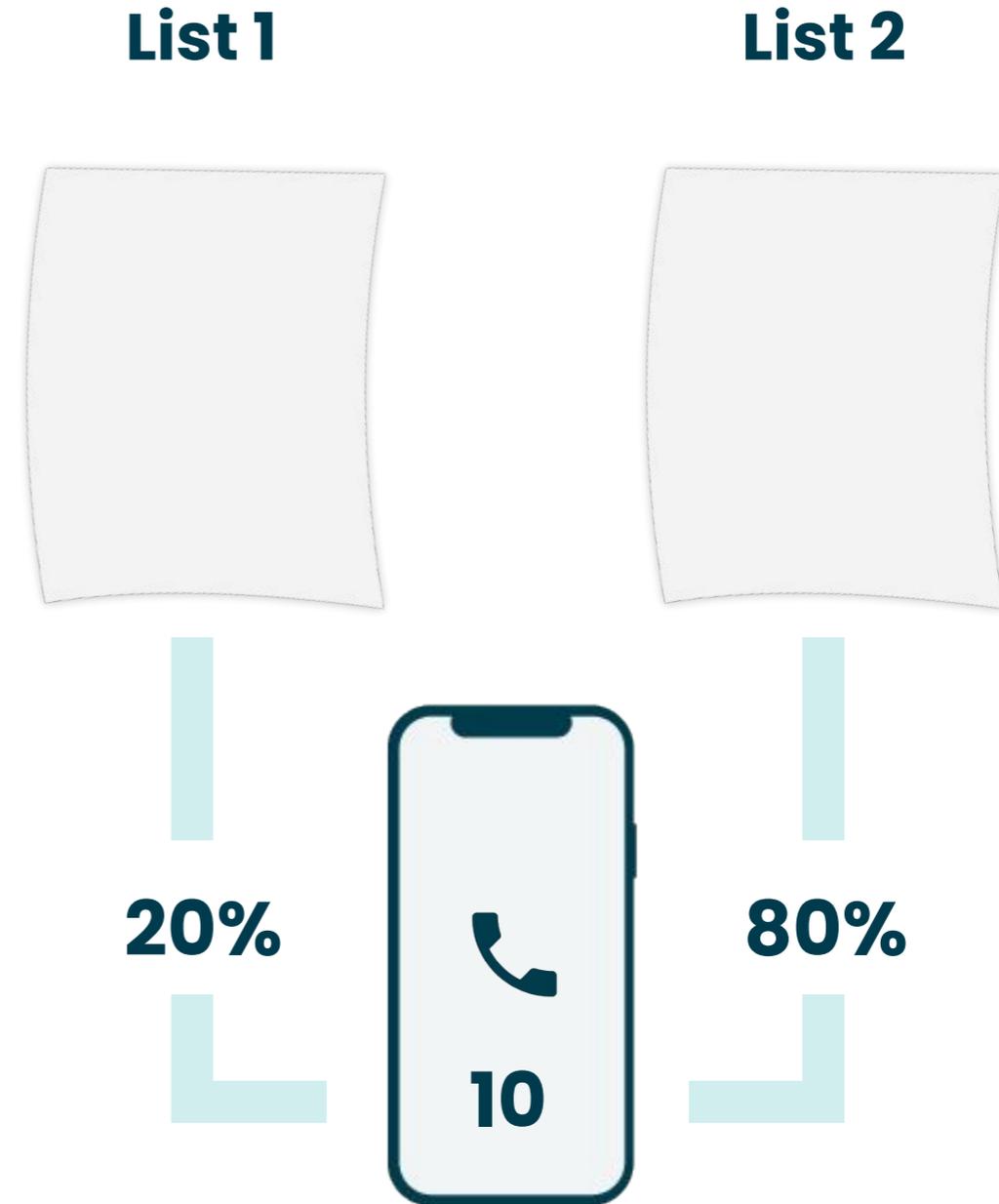


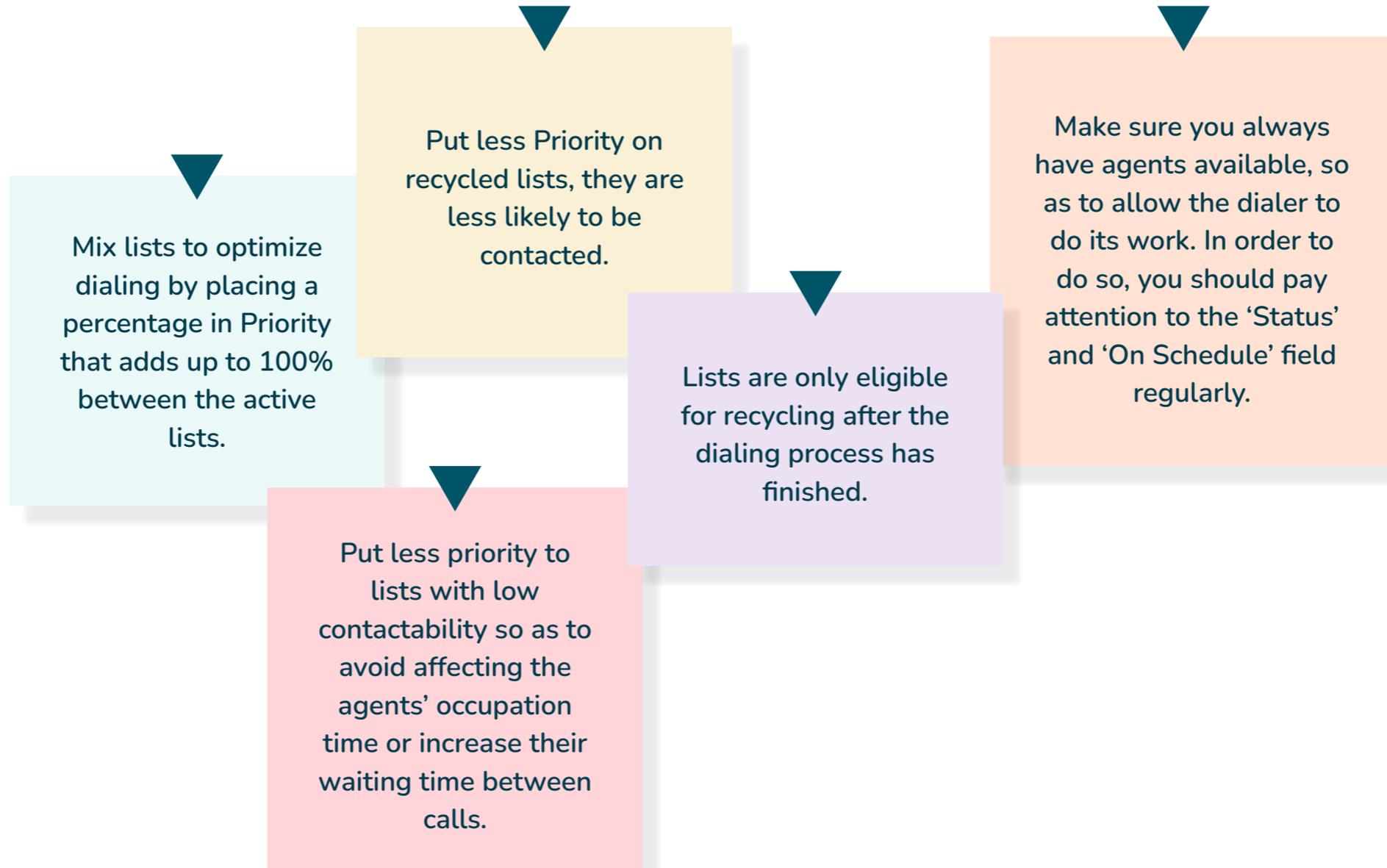
Summary:



uContact offers the possibility of mixing the lists, allowing you to maintain a high percentage of contactability in your Contact Center and your agents to have short, average time between calls. The **list-mixing function assigns dialers a different percentage of dialing -in order words, Priority- for each list.**

This means that, for instance, if you have two lists, one with 20% of priority and another with 80%, and a dialer that has to make 10 calls to keep its agents busy; it will take 2 contacts from the 20% list and 8 from the other.





AMD.



As its namesake gives away, an Answering Machine Detector (AMD) is a **technology included in dialers that is meant to detect calls that get sent to voicemail inboxes.** How? By actively listening to the line.

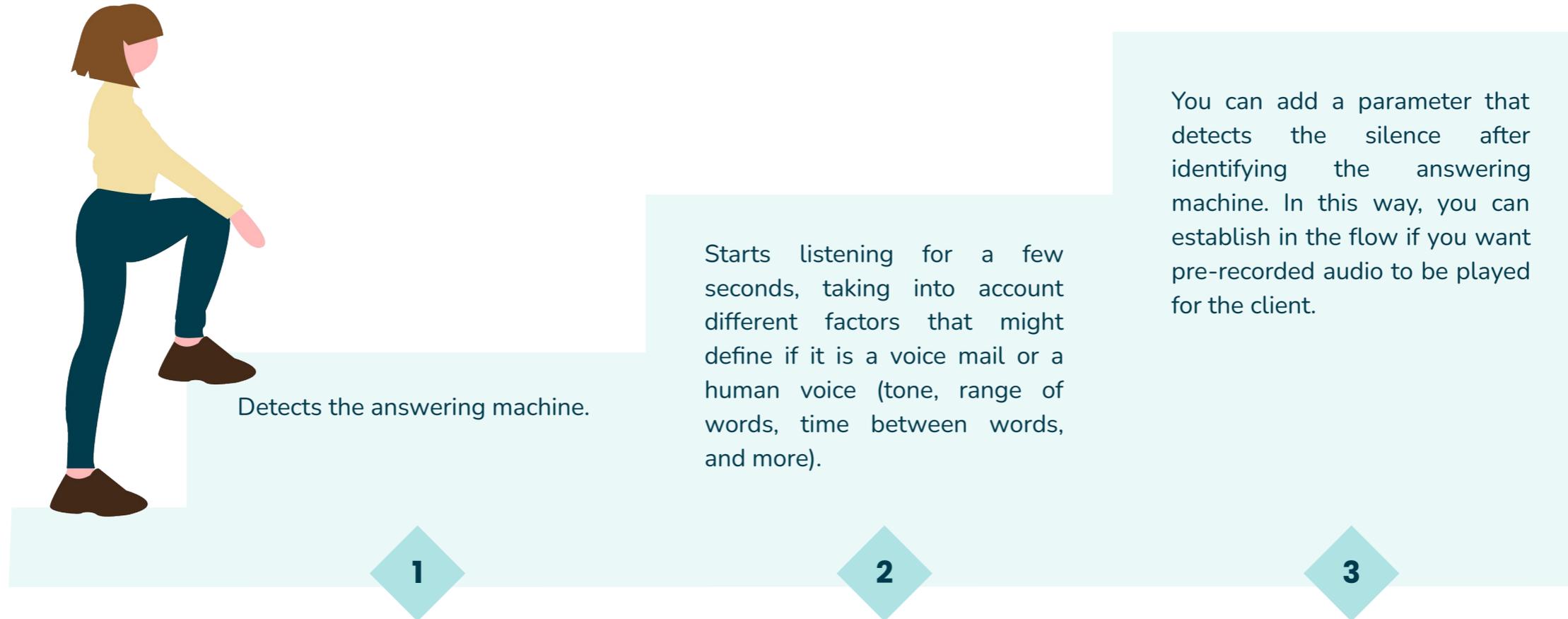
The process done by the AMD is not 100% effective, since it is impossible to truly detect in a direct way if the one answering the phone is a human or an answering machine. In order to be able to define this, **it works based on several patterns:**

Background noise

Range and time
between words.

Tone & more.

Step-by-step:

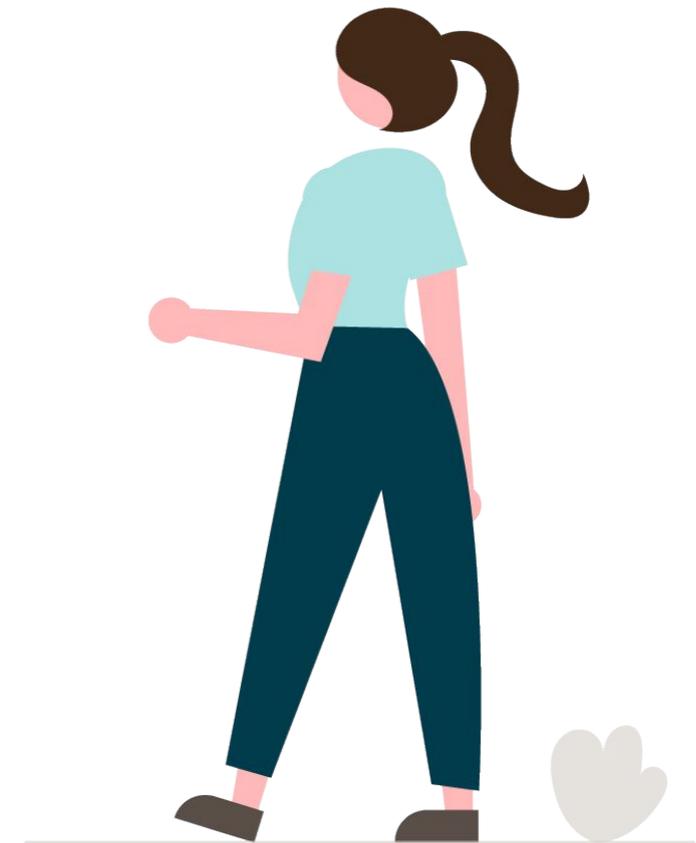


In order to tune your AMD, it is necessary to have the answering machines' recordings from all the telephony providers. Also, it is possible to do a real-time tuning by recording the calls and then evaluate why it detected an answering machine. Finally, based on this information, you can just your AMD.



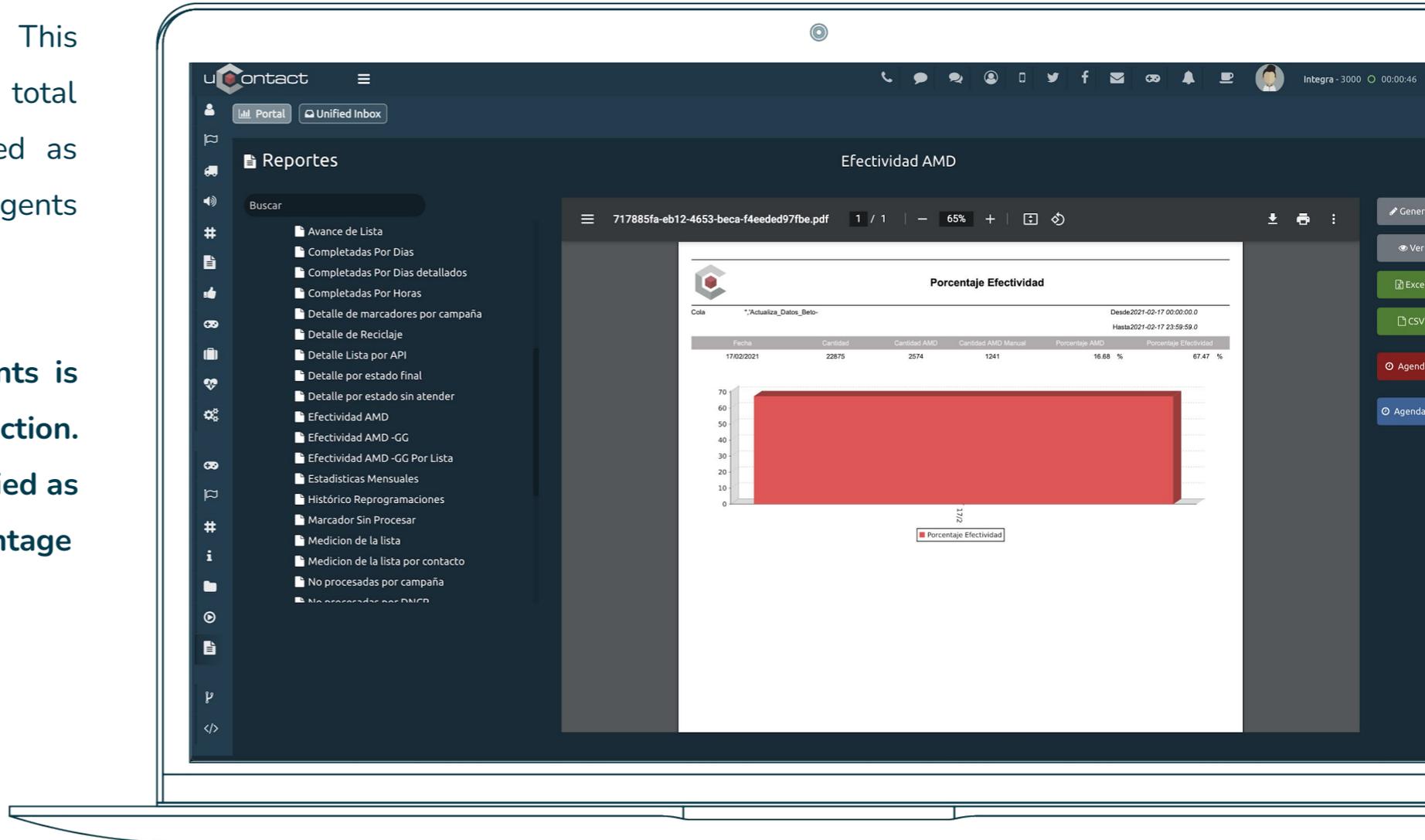
On average, uContact's AMD has between 90% and 98% effectiveness, depending on the country in question. This can be measured based on the total number of calls made using the AMD, taking into account the percentage of answering machines detected by the system.

Note: Having a percentage of effectiveness higher than 98% is counterproductive, since it indicates the system might be wrongly classifying regular calls as answering machines.



This report shows the percentage of effectiveness of uContact's AMD and the amount of calls that went to voicemail. This percentage is measured according to the total number of calls that the dialer detected as voicemails, adding the ones that the agents typified as Voice Mailboxes.

From this total, the % typified by agents is shown as the 'error' within the detection. Therefore, if out of 100 calls, one is typified as 'Voicemail', the AMD effectiveness percentage will be 99%.



There are countries where mobile phone providers set a voicemail audio to reproduce before the call is answered, charging the caller with the cost of the phone call. In order to avoid this, uContact has a system called 'Early Media', which **detects these voicemails before the call is answered and, therefore, cuts the call short before the provider charges us with it.**

Note: This is only applicable if your telephony provider allows it.



Agent's waiting time.

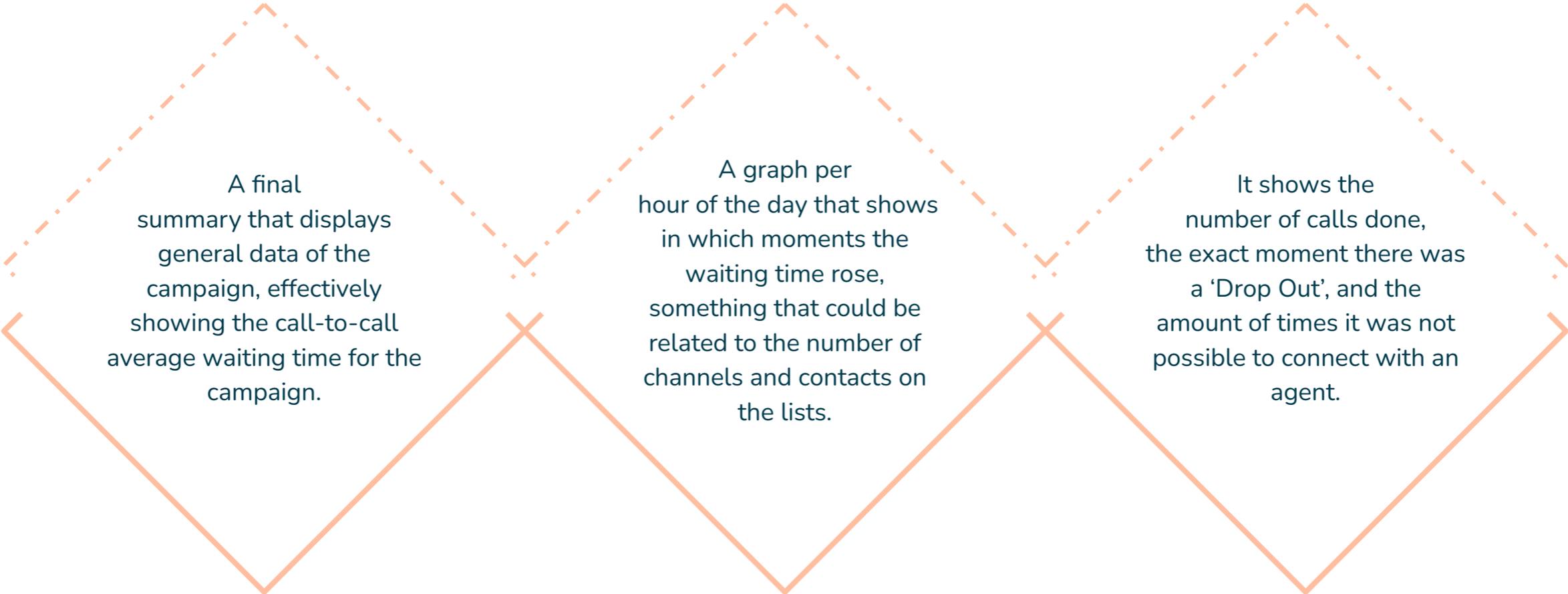
Agent's waiting time

In order to be able to visualize the agents' waiting time between calls and the calls they are actually having, it is recommended that you follow the following steps:

1. Filter only 'Available'.
2. Filter only those that are not in 'Rest'.
3. Sort the 'Status Time' column from 'Major' to 'Minor'.



As it is indicated by its name, the 'Agents' Waiting Time' report shows the agents' maximum, minimum and average waiting time between calls, taken from each dialer used in the campaign.



A final summary that displays general data of the campaign, effectively showing the call-to-call average waiting time for the campaign.

A graph per hour of the day that shows in which moments the waiting time rose, something that could be related to the number of channels and contacts on the lists.

It shows the number of calls done, the exact moment there was a 'Drop Out', and the amount of times it was not possible to connect with an agent.

FAQs.



Is there a way to load lists externally?

Yes, there is a REST API that allows the loading of lists from other systems.

Is it possible to schedule a call from another system?

Yes, there is a REST API that allows you to do it.

Is it possible to type from another system and that the dialer complies with its rules?

Yes, there is an API which if we have configured the typifications in the system and the external software calls the API, the Call Tag is activated, it keeps the text and executes the actions of the dialer.

Is it possible to deactivate AMD or DNCR?

Yes, by dialer.

Why does the time between calls increase in the agents?

This can be due to low contactability of the lists or quantities of Channels, remember that if the AMD is activated the number of channels must be higher since they are calls that never reach the agent.

Where can lists be generated?

Lists can be generated from customer systems, from our CRM, from Recycling Lists, or can be purchased from third parties.





Thanks!

