Outbound Calls Management

Who Should Attend?

This course is designed for staff who want to learn how to maintain proper relationships with clients on a large scale.

Course Scope

1. Overview: Main Outbound Processes.
    In this section we will discuss major areas of outbound calls. Each campaign strategy listed has own specifics, business target, procedures, and expectations. Choosing the right campaign for your company depends on your company strategy, current business needs, and available resources. Although a company can use several types of campaigns simultaneously, the overlap between them must be controlled tightly to avoid contacting the same customer multiple times. This is where Outbound Strategy and implemented tools comes in.
    - Marketing campaigns – e.g. products, services, handset sales, and typical outbound calls.
    - Retention campaigns – churn prevention for specific groups of customers.
    - Collection Actions – improving the collection and vindication process.
    - The Welcome SMS – contacting newly activated customers – building loyalty.
    - Third-party Campaigns – campaigns realised either by or for other companies (e.g., banks, insurance companies, television companies, or politicians).
    - Customer Satisfaction Surveys: monitoring customer satisfaction with a company's services.
    - Continuous Campaigns: campaigns dedicated to a specific task (e.g., monitoring customer opinions; often one of the campaigns mentioned above).
    - Ad hoc Campaigns (caused by events, technical failure, etc.)
2. Database Preparation: a Crucial Aspect of Outbound Call Management Selecting the right group of customers to target is crucial to a campaign's success, since this determines its success rate. In order to do this, data mining and standard reports must be designed and implemented.
    - Criteria – standard and auxiliary criterions for dataset selection.
    - Data mining – multiple analyses of the customer base to improve call efficiency.
    - Standard Reports.
    - Necessary Fields – obligatory fields for a campaign (including telephone numbers and many other fields).
    - Exclusions – whom we should not call (e.g., the Prime Minister).
    - Validation – general rules for dataset validation.
3. Outbound Tools.
    Using either programs like Excel or Access or a dedicated tool, companies must be able both to distribute and to collect information from agents about their customers and products. If many campaigns are being processed simultaneously, tight control is needed to avoid contacting a customer multiple times.
    - Dividing Lists among Agents: methods of dispatching lists of customers.
    - Agent Desktop and Tools.

- Automatic Dialling Tools: increasing an agent's efficiency.
- Coding of Answers (critical for the next steps).
- Campaign and Talk Monitoring: staff management, campaign tracing, and call monitoring quality.
- Cross-action: how to manage actions simultaneously.

4. Camping Processing.

Scripts of detailed phone calls should always be prepared in advance; however, sometimes additional questions must be added without preparation during a customer call. Companies should set up and keep standards of communication, and their agents must be trained to follow their standards.

- Script Preparation and Usage.
- Pilot Campaigns – small campaigns prior to the main campaign.
- Ad hoc Campaign Improvements.
- Company Standard for Outbound Calls.

5. Reporting.

Every campaign should be monitored on many levels: operational, financial, strategic, etc. A campaign overview allows the campaign to perform well, reduces or eliminates errors and failures, and improves the current and future campaign planning.

- Campaign, Base, and Agent Efficiency.
- Standard Reports.
- Resource Planning.
- Long-term Campaign Analysis.

6. Law and Social Aspects.

Many aspects of a soft campaign policy can help avoid conflicts when dealing with customers, increase call efficiency, and reduce the negative impact caused by contacting the customer repeatedly.

- Customer contact numbers.
- Agreements/disagreements during calls.
- Common target groups.
- Multiple interactions with the same customer.
- Third-Party – Often databases are given or acquired from/to other sources. Care must be taken when handling this kind of data.

7. Telemarketing: Campaign Planning.

Many steps must be taken to ensure the financial or non-financial profits of a campaign. The success or failure of the campaign depends on the quality of the planning. If a company finances many campaigns, they should be executed following a predefined strategy.

- Campaign Strategy.
- Products Selection.
- Target Group Recognition.
- IT Tool Preparation – tools for configuration, building, and special requirements.
- Pilot Campaigns and Training.
- Documenting Standard Campaigns.

8. Telemarketing: Budget Issues.

Each action means some cost to the company. Since these costs must be covered by the company, loss analysis is necessary. A concrete definition of victory or failure can help

avoid low-profit actions.
- ○ Campaign Scope / Target Selection.
- ○ Estimating Profits.
- ○ KPI Setting: the definition of victory or failure.
- ○ Budget Planning – profit-loss analysis and detailed cost identification.
- ○ Campaign Settlement (verification if KPI is achieved).
- ○ Campaign Closing –the end of the project.

Training Structure

Three-day training divided into logical sessions.

Methodology

Instructor-led training.