



THE OUTBOUND ENGAGEMENT PLAYBOOK

Your go-to guide for using an outbound
contact center solution to create a proactive
customer experience that sells.

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EXECUTIVE SUMMARY

What type of customer experience does your company deliver from outbound to inbound? Is it consistently positive? Are you in control of the conversation?

When you start looking at selling as a two-way conversation and not separate outbound sales calls and inbound support interactions, elevating every engagement becomes a real possibility.

Most companies manage their inbound customer experience strategy by juggling call volume, agent readiness and engagement, and first-call resolution. However, inbound customer experiences can still be inconsistent, choppy, or time-consuming and the brand and sales suffer.

Outbound communications are an opportunity for businesses to win customers over, beyond a simple sales or collection call. Clue customers in if there has been a change of plans that will impact their schedule. Let them know if their usage patterns are better matched to a different tier of service. All the while, build your sales funnel and keep customers happy long term.

How can you start using outbound to make a two-way customer conversation your greatest advantage, all while leveraging compliance supporting tools? Read this playbook to find out.

What type of customer experience does your company deliver from outbound to inbound?

INTRODUCING OUTBOUND

Sales teams know best: to sell, you've got to be proactive. Outbound enables you to stop waiting for customers to call in and start selling sooner.

Using outbound technology, agents can generate leads, upsell, cross-sell, recruit, complete market research, fundraise, cold call, and more—just by proactively engaging customers. It's a low-cost, high-reward solution that helps businesses stand out against the competition.

Outbound takes customer communications from a one-way waiting game to a two-way conversation.

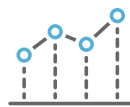
Ready to learn more?
This playbook will cover:

- How outbound fits with your strategy
- What challenges outbound overcomes
- The possibilities of outbound success
- Outbound compliance considerations
- Outbound case studies

1. Why outbound?

HOW OUTBOUND FITS WITH YOUR ENGAGEMENT STRATEGY

Nowadays, it's harder than ever to earn and keep—customer attention. The market is noisy and customers are cautious. When you do connect, you need to make the most of it by adding value to the customer journey and advancing business goals. Outbound can help.



MAXIMIZE AGENT PRODUCTIVITY

Stay productive around the clock with 99.999% uptime. Use that uptime to connect with more customers and fewer answering machines with help from smart dial technology. All the while, generate callbacks and future wins.



INCREASE CUSTOMER LOYALTY AND SATISFACTION

Every inbound interaction is an opportunity for follow-up. Better the customer experience by checking in, ensuring satisfaction, and leaving customers knowing that you care.



WIN EVERY ENGAGEMENT

Elevate your agents with progressive features like easy access to customer information, guided engagement flows, and easy-to-implement, real-time coaching. With outbound, the setup for success is simple.

DON'T LEAVE OUTBOUND OUT OF YOUR SELLING STRATEGY

Does your organization use outbound dialing today? In [a recent webinar with contact center industry experts](#), the following was reported



- **46.2%** Yes, blended
- **30.8%** No outbound
- **23.1%** Yes, outbound in a separate group
- **0%** Yes, automated outbound

2. Challenges

USE OUTBOUND TO BYPASS CUSTOMER CHALLENGES

Today's customers are hard to reach and even harder to win over. They're frustrated by data misuse, robocall madness, and spam. And it's up to you to be proactive in changing their perspective.

By reaching out to customers through outbound, you can enhance the customer experience and avoid frustration.



CUSTOMER PAIN POINTS

Short attention spans due to constant, often unengaging calls

Distrust after negative experiences with spam

Frustration with no follow-up

Inconsistencies between inbound and outbound interactions

CUSTOMER WISH LIST

➤ Purposeful engagements with follow-ups and desirable offers

➤ General trust for the agent and company, plus ability to opt out of unwanted interactions

➤ A two-way conversation with proactive follow-ups and check-ins

➤ A consistent and engaging positive brand experience

USE OUTBOUND TO BYPASS AGENT CHALLENGES

Agents look to technology to empower them to do their best work. They need to be able to rely on the tools they use to improve, not hinder, their day-to-day performance. That means finding a solution that minimizes downtime, gets rid of friction-causing static scripts, and supports positive, productive calls.

When you empower agents with access to these tools and technology, you're giving them the ability to make selling customer-centric, meaning more wins and fewer hangups.



AGENT PAIN POINTS

Mix-and-match tools that hinder productivity and put customer engagements at risk

Fragmented, hard-to-find customer information

Missed sales opportunities due to poor speed-to-lead

Lack of on-call guidance

AGENT WISH LIST

› One simplified solution that improves productivity with smart dialers, native blending, and more

› Quick access to one view of all customer information

› Ability to reach customers quickly, before competitors

› Real-time, winning engagement prompts

USE OUTBOUND TO BYPASS BUSINESS CHALLENGES

With the right technology, businesses can do more—and better. Still, some companies are left spending large dollar amounts on solutions that simply aren't helping.

The right outbound technology can streamline the tasks of selling and sales management, plus provide opportunities for improvement and bigger bottom lines.

BUSINESS PAIN POINTS

Missed sales opportunities due to poor speed-to-lead

Lost opportunities and poor productivity due to system downtime

A frustrating, piecemeal technology experience that makes it hard to guide agents

The struggle to keep up with complex compliance governances

Lack of insight into real-time and historical performance

BUSINESS WISH LIST

- › Technology that helps agents reach customers quickly, before competitors
- › A dependable platform that can scale to meet growing business demands, with no operational interruptions
- › One simplified technology solution with intuitive UI from prospecting to closed deal
- › Compliance-supporting technology
- › At-a-glance, up-to-date information that can guide leadership and agents



3. Key criteria

Not all outbound communications solutions are created equal. In fact, when choosing the right outbound technology, there's more to consider than you might think.

USER EXPERIENCE

Why it matters: A quality, seamless user experience allows you to onboard agents full speed ahead and ensure your platform acts as a competitive advantage, not a frustrating roadblock.

RELIABILITY

Why it matters: Being able to count on your technology is critical. Agents rely on uptime to stay productive and profitable; customers rely on uptime to call back and connect whenever they need.

MANAGEMENT TOOLS

Why it matters: Having an efficient management strategy can mean the difference between meeting sales goals and exceeding them. The best management tools help control abandonment rates to improve agent talk time.

AGENT SCRIPTING

Why it matters: Making a sale is hard work. Scripting tools ease the burden on agents and provide helpful tailored cues, creating more positive, consistent customer interactions.

PRODUCTIVITY FEATURES

Why it matters: Time is money. Productivity tools like caller ID matching, voicemail detection, and Intelligent dialer algorithm optimization help agents use talking time wisely, connect with more customers, and close more deals.

COMPLIANCE

Why it matters: Regulations are more than suggestions—they're law. Choosing outbound technology that makes compliance easy and obtainable helps businesses follow the rules and avoid costly penalties.

SCALABILITY

Why it matters: Growth is good; growing pains, not so much. Outbound call center technology should be able to shift to meet changing needs, including seasonal or unexpected traffic bursts.



4. Outbound success

DON'T JUST FOLLOW YOUR CUSTOMER'S JOURNEY.

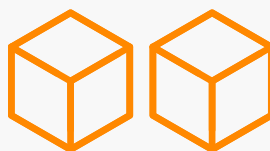
LEAD IT.

Outbound isn't a one-size-fits-all solution. It's a customizable business tool that can be tweaked to support specific business goals and changing needs. Through outbound, businesses can:



SET AND MEASURE KPIs, SUCH AS:

- › Average handle time
- › Conversion rate
- › First-call close
- › Occupancy rate



IMPROVE TRAINING INITIATIVES BY:

- › Tracking and measuring agent performance
- › Creating a closed, consistent feedback loop
- › Providing tailored scripts to better the agent and customer experience



SELECT A STRATEGY THAT SUITS YOUR BUSINESS, SUCH AS:

- › Predictive dialing
- › Progressive dialing
- › Preview dialing
- › CRM-driven dialing
- › Blended

HAVE A TWO-WAY CONVERSATION THE WHOLE WAY THROUGH

If you're waiting, you're not selling. Outbound enables companies to make the first move and engage customers wherever they are in the sales journey, leading to open lines of communication, more positive customer experiences, and increased opportunities to foster sales-oriented customer relationships.



PRE-SALE

- › Reach out, the right way
- › Compliance supporting tools with technology like DNC list integration and safe-dial features
- › Manage every campaign by incorporating data and setting rules to establish who you're calling, when you're calling, and how often
- › Beat competitors to customers with speed-to-lead improvements from automated dialers and blending technology

SALE

- › Make meaningful engagements
- › Maximize productivity with predictive dialers that work while you're already connected to tee up your next customer
- › Win over customers by knowing who you're talking to, thanks to easy-to-access customer information
- › Smooth out your sell, up sell, and close with an intuitive UI, custom-tailored scripting, and on-call coaching

POST-SALE

- › Keep communication open
- › Improve for your next call with up-to-date data insights and closed feedback loops
- › Encourage customer communication with 99.999% system uptime that's always ready for callbacks

5. Compliance

Sometimes the most intimidating part of outbound is playing by the rules. With regulations that are always changing, staying compliant is no small task. Choosing a proactive, rule-aware outbound partner can give your business the peace of mind you need to save your focus for what matters: selling.



1 TELEMARKETING SALES RULE

The Federal Trade Commission (FTC) created the Telemarketing Sales Rule to allow consumers to control the number of telemarketing calls they receive at home. This rule sparked the National Do Not Call (DNC) Registry, which allows consumers to opt out of unwanted sales calls.

If the rule is broken, your business could face \$40K in fines for each call made to a person on the registry.

EXCEPTIONS

- Calls from political organizations, charities, and surveyors
- Calls to consumers that already have an established relationship with the business
- Calls to consumers that have made inquiries or submitted applications to the business
- Calls to consumers not on the DNC Registry

2 DECEPTIVE OR ABUSIVE CALLS

Rules surrounding deceptive or abusive calls were put in place to shield consumers from what can be an invasion of their day-to-day life—or worse, an attempt at fraud. This standard of contact was put into place by the FTC to keep telemarketers in check.

RULES

- Telemarketers can't call consumers before 8 a.m. and after 9 p.m.
- They must promptly disclose the identity of the business or charity they represent and the fact that the call is a sales or charitable solicitation.
- Sellers are required to share all material information about the goods or services they are offering.
- Agents are prohibited from lying about any terms of promoted offers.

3 ROBOCALLS

For businesses, robocalls are a great way to boost productivity. But customers still need protection. Calls with purely informational messages are allowed as long as the business doesn't use the call to promote the sale of any goods or services.

ALSO PERMITTED

- Political calls
- Calls from certain healthcare providers
- Debt collection
- Banks, telephone carriers, and charities

4 ABANDON RATES

Abandon rates are directly linked with wait times, increasing in frequency the longer it takes for consumers to connect with live sales agents. In outbound, this places pressure on maximizing efficiency and connecting calls in a timely manner.

ACCORDING TO THE FTC

- Companies are allowed a maximum of a 3% abandon rate per campaign per day. (This is when the consumer picks up and there is no agent on the line).
- Telemarketers are required to connect their call to a sales rep within two seconds of the consumer's greeting.
- No recorded sales pitches are allowed in cold calls.
- Telemarketers cannot hang-up on unanswered calls before 15 seconds or four rings.
- Predictive dialers must give control on a per-campaign level.

OVERALL

You need an outbound partner that takes compliance as seriously as you do.

Compliance is tricky, and it can be intimidating to make sure your strategy stays safely within the rules. Make sure your outbound partner is offering technology that simplifies compliance, not adds to the confusion.



6. Case study

OUTBOUND CALLS LEAD TO INBOUND SUCCESS

Client: **CollegeBound**



CollegeBound wanted to increase dial rates and provide an outstanding customer experience at every touchpoint. They were interested in a more customizable solution that would enable them to meet their customer service goals.



“The reporting tools are significantly better in every way. List management has changed drastically, as have the answer rates.”

—Alex Levy, CollegeBound

METHOD

CollegeBound left their old platform behind, switching entirely to the RingCentral Engage Voice comprehensive suite of contact center applications, no additional hardware setup hassles required.

IMPACT

- › Tripled their dial rates
- › Increased customer satisfaction
- › New operating efficiency leading to more hires
- › 38% decrease in costs
- › Improved average call time from 10 minutes to 7 minutes

7. Solution

MORE WAYS TO ENGAGE. MORE WAYS TO WIN.

Frustrated customers are not easily transformed into sales. Fragmented business interactions rarely lead to positive impressions. To succeed, today's call centers need to consider every angle of customer interaction—and that means creating a two-way conversation that's consistent, whether outbound or inbound.



“An engaged customer is worth 51% more than a non-engaged customer.”

—Gallup

THE RIGHT OUTBOUND TECHNOLOGY EMPOWERS YOUR BUSINESS TO:

- › Transform customer relationships into a two-way conversation
- › Proactively set up for your next sale
- › Increase customer satisfaction with a consistent, engaging sales experience
- › Stay within the lines of compliance and regulations
- › Win every engagement

THE BOTTOM LINE

Outbound is more than just collections or sales. It's a proactive way to get ahead of customer frustrations, boost loyalties, reduce the number of inbound calls, and improve business. Positive engagements win sales. Why not engage first?



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