

# The outbound engagement playbook



Your go-to guide for using an outbound contact centre 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

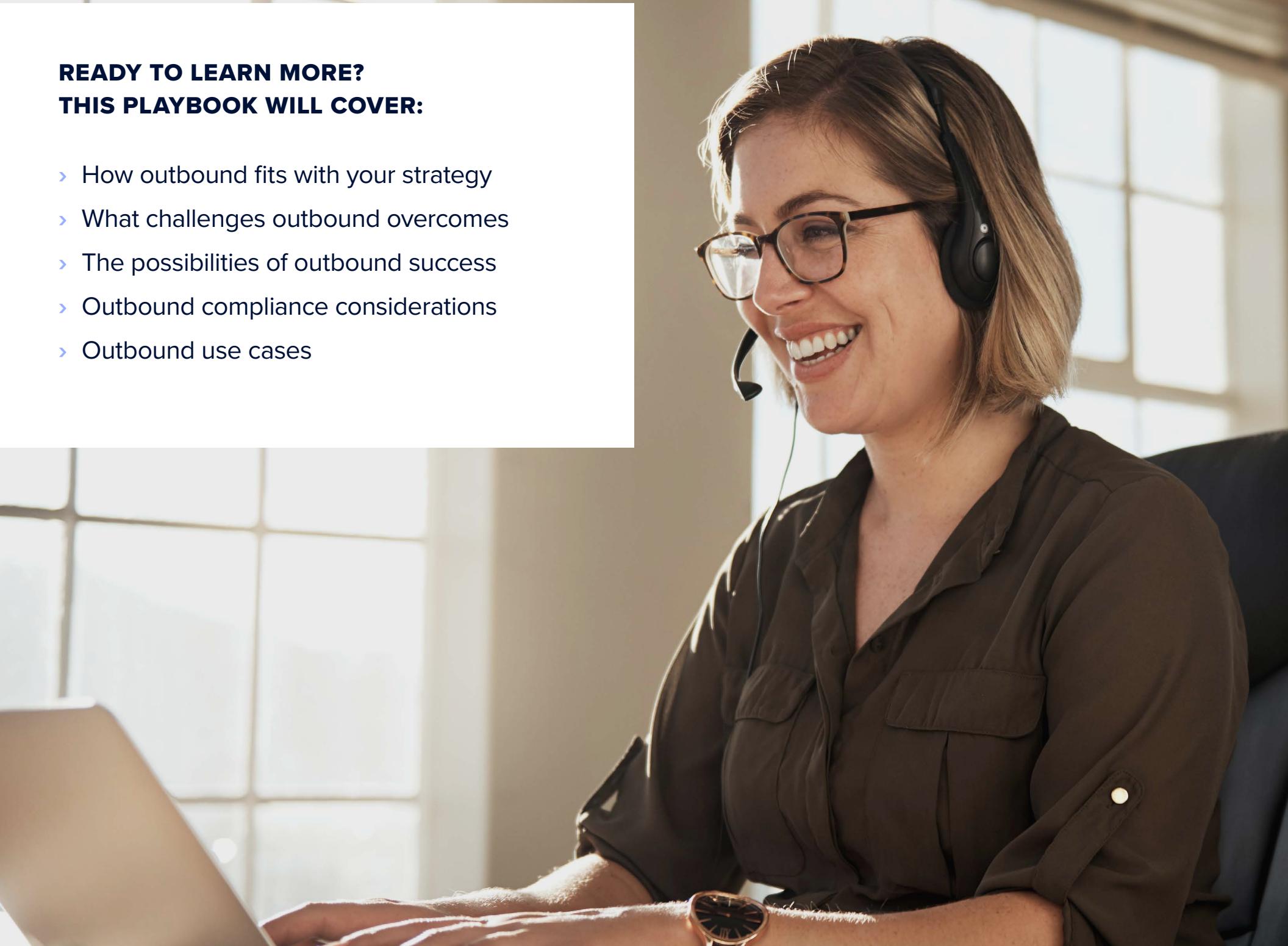
Sales teams know best: to sell, you've got to be proactive. Outbound enables you to stop waiting for customers to call in and start selling sooner.

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 use cases



01

# 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.



## Maximise 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 while generating 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.



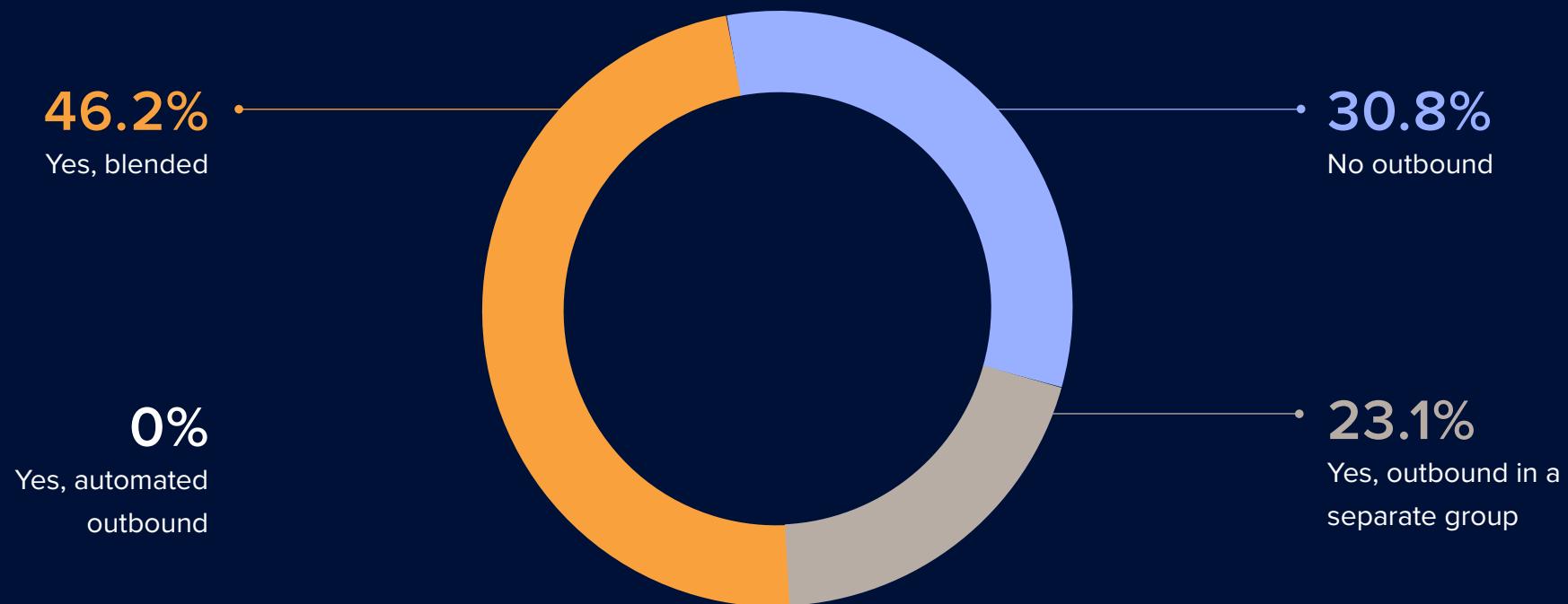
## Win every engagement

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

In a [recent webinar with contact centre industry experts](#),  
the following was reported:

**Does your organisation use  
outbound dialling today?**



# 02 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 minimises 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 diallers, 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 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

03

## 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.**

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## **1.**

### **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.

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## **2.**

### **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.

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## **3.**

### **Management tool**

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.

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## **4.**

### **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.

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## **5.**

### **Productivity features**

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

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## **6.**

### **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.

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## **7.**

### **Scalability**

Why it matters: Growth is good; growing pains aren't. Outbound call centre technology should be able to shift to meet changing needs, including seasonal or unexpected traffic bursts.

# 04

# Outbound success

# Don't just follow your customer's journey. Lead it.

Outbound isn't a one-size-fits-all solution. It's a customisable business tool that can be tweaked to support specific business goals and changing needs.

Through outbound, businesses can:

01.

## SET AND MEASURE KPIS, SUCH AS:

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

02.

## 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

03.

## SELECT A STRATEGY THAT SUITS YOUR BUSINESS, SUCH AS:

- Predictive dialling
- Progressive dialling
- Preview dialling
- CRM-driven dialling
- 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.

## 04. **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 diallers and blending technology

## 05. **SALE**

- Make meaningful engagements
- Maximise productivity with predictive diallers 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, upsell, and close with an intuitive UI, custom-tailored scripting, and on-call coaching

## 06. **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

# 05 Compliance

**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.**

## TELEMARKETING SALES RULES

Ofcom has powers to take enforcement action against those who persistently misuse electronic communications networks and services. If the rule is broken, your business could face up to £2 million in penalties.

## ROBOCALLS

If you pick up the phone and hear a recorded message playing rather than a live person speaking, you have received a recorded message call, or “robocall.” Using recorded messages to make marketing calls is illegal, but if an overseas company calls you from abroad, then their calls are not covered by UK law. Recorded message calls that are not for marketing purposes are legal, for example:

- › Delivery companies using recorded messages to notify you when an item is going to be delivered
- › Neighbourhood Watch schemes keeping people informed of local incidents
- › Recorded message calls that are carrying out genuine market research
- › Debt collection companies using recorded message calls to remind you about overdue payments

## ABANDON RATES AND SILENT CALLS

An abandoned call is one that is terminated when you pick up the receiver. Instead of a person on the other end of the line, you hear an information message from the organisation that is trying to call you.

A silent call is where you receive a call, but you can hear nothing and have no means of knowing whether anyone is at the other end of the line.

## ACCORDING TO OFCOM

The abandonment rate is the calling party's responsibility to set. Previously, the abandonment rate must be no greater than 3% of all live calls for a 24-hour period. (There is now no maximum given, and the 3% rule has been removed. Investigations will be determined by the number of complaints.)

### **The phone must ring for a minimum of 15 seconds (5 rings) before disconnecting with a disposition of ring-no-answer.**

- The calling party number must be presented to the called party.
- The number displayed cannot be a premium rate number. Local or national rate numbers should be displayed as the CLI.
- Abandoned call numbers need to be excluded from being redialled for 72 hours unless there is a guaranteed agent on the next attempt.

### **Abandoned calls may be redialed in Preview mode, ensuring an agent is available.**

- Abandoned calls must hear a recorded message two seconds from the beginning of speech of the called party—the “H” in “Hello.”
- The recorded message cannot contain personal details of the reason for the call or advertising messages.
- Calls must be connected to an agent within two seconds from the beginning of speech of the called party.
- A reasoned estimate of false positives must be applied to the abandonment rate.

### **A 24-hour period is clarified as the time between midnight and midnight on a calendar day.**

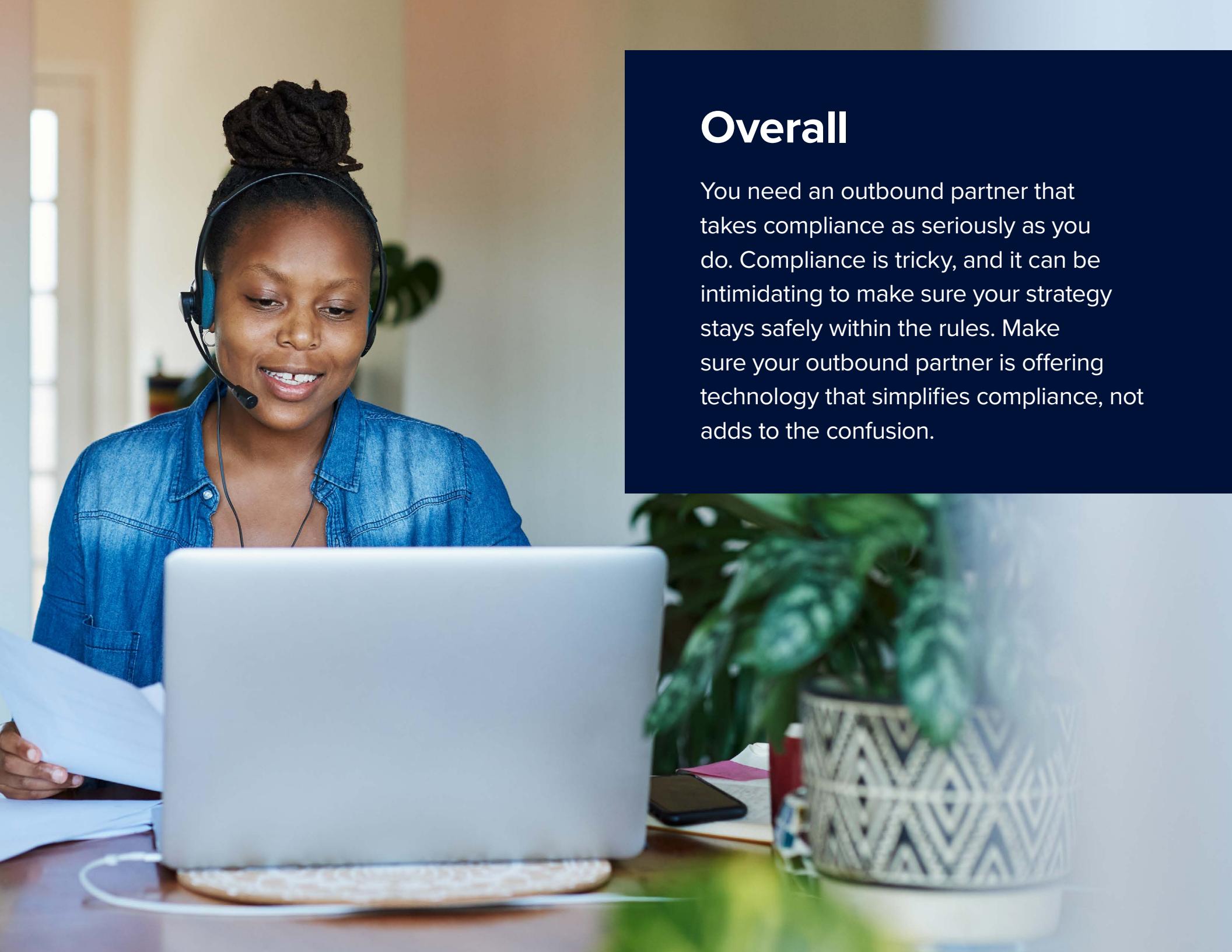
- When a call has been identified as being picked up by an answering machine (including AMD false positives), any repeat calls to that specific number within the same 24-hour period may only be made with the guaranteed presence of an agent.
- The abandonment rate may exclude a reasoned estimate of calls abandoned to answering machines.
- 0845 numbers have been reinstated as an option to include within an information message (played in the event of an abandoned call). Companies can use a geographic number (01/02/03) if they so choose. Companies will be required to provide a 080 or a 0845 or a 01/02/03 number that a consumer can use to opt out of future marketing calls.
- The use of IVM can be used for non-marketing calls so long as it can be shown to be a benefit to the consumer.
- Any call centre employing IVM to help eliminate AMD false positives must ensure that recipients of these messages are always transferred to a call centre agent should they choose, informed of the identity of the company making the call, and given no marketing information within the short message.

## SILENT CALLS

Silent calls are a prime example of misuse and one of Ofcom's current top priorities to tackle. When a call recipient experiences one of the following, Ofcom considers that recipient as having received a "silent call":

- › They hear nothing upon answering the phone.
- › They are disconnected by the calling party as soon as or shortly after they pick up the phone.
- › They hear background or distant noise, whether spoken or otherwise, such as chatter (but the conversation is not directed at the call recipient), breathing, or electronic beeps.
- › They hear something else that falls short of a message (whether spoken or otherwise) directed at the call recipient.
- › They experience a combination of the above, such as a short period of silence followed by disconnection by the calling party (known as a "short duration call").

**See the Ofcom policy for more information. The RingCentral solution not only enables voice but also SMS and pre-recorded messages.**



## 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.

# 06

# Use cases

# Use cases

## HOW DOES IT WORK?

While no single communication channel can ensure customers pick up more calls, there are effective ways to ensure exceptional customer experience and brand awareness. To achieve this, outbound calls should be specific to certain customer journeys, allowing organisations to anticipate clients' needs and therefore exceed their expectations.

For example, customers complete a form on the website registering an interest in a product or service. This is automatically registered within the customer relationship management (CRM) and immediately sent over to the outbound team who can contact the customer without any delay.

While the customer is live with an agent, an appointment can be made and all details confirmed.

Nearing the time of the appointment, the CRM notifies the outbound application of the upcoming date and the dialler application sends an automated SMS with the appointment details to the customer as a reminder.

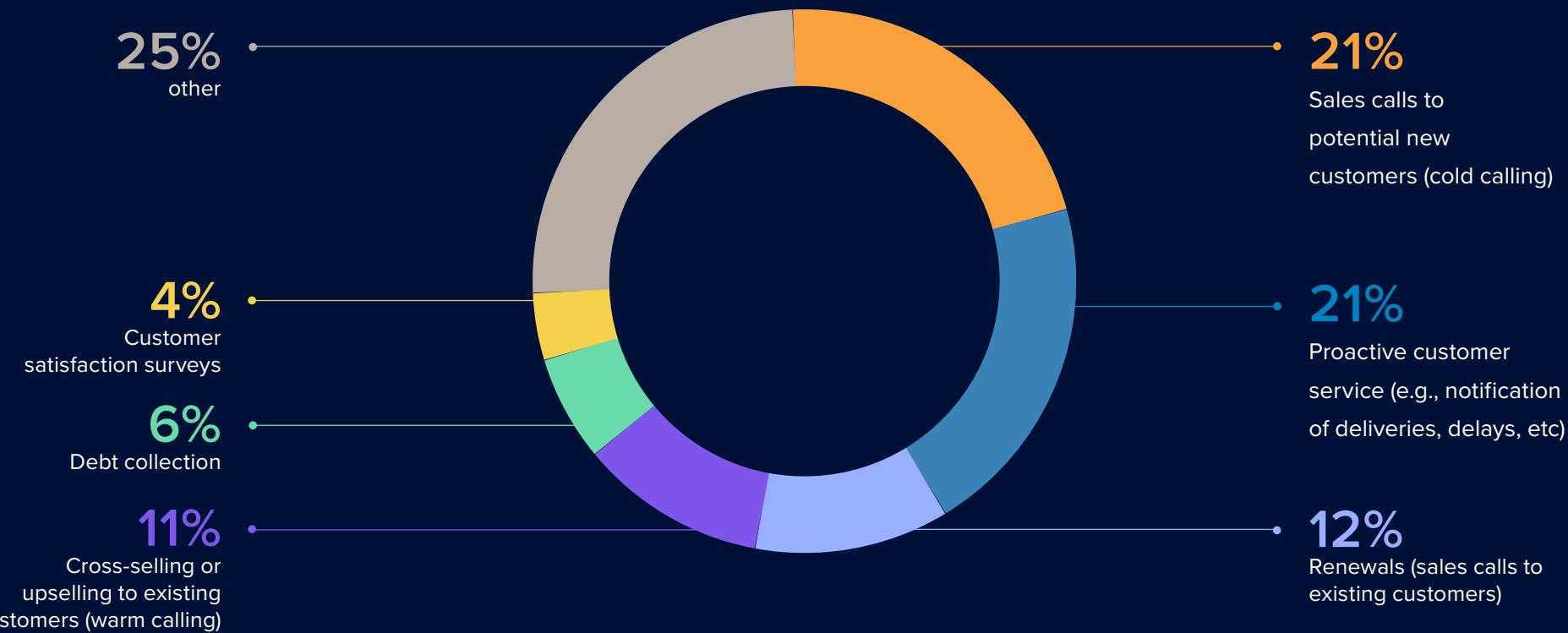
## BENEFITS

- Increased connect rates for immediate conversations
- Select the best dialling method based on the business situation—predictive, progressive, preview, or agentless
- Control the flow and synchronisation of data automatically to and from third-party systems

## OUTBOUND ACTIVITY

[The Inner Circle Guide to Outbound & Call Blending 2016](#)

### How businesses currently segment their outbound activity



# 07 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 contact centres need to consider every angle of customer interaction—and that means creating a two-way conversation that's consistent, whether outbound or inbound.

## 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?



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

—Gallup

# About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact centre based on its Message Video Phone™ (MVP™) global platform. More flexible and cost effective than the on-premises PBX and video conferencing systems it replaces, RingCentral helps employees communicate across devices from wherever they are. RingCentral offers three key products. RingCentral MVP™ combines team messaging, video meetings, internet phone and other functionalities

in a single interface. RingCentral Video™, along with its team messaging feature, enables Smart Video Meetings™. RingCentral Contact Centre™ gives companies the tools they need to connect with customers across channels. These are available on an open platform that integrates with hundreds of third-party apps and makes it simple to customise workflows. RingCentral is headquartered in Belmont, California, USA, and has offices around the world.

For more information, please contact a sales representative.  
Visit [ringcentral.co.uk](http://ringcentral.co.uk) or call 0800 098 8136.

