Identify information to have on-hand when configuring PureCloud Outbound Dialing.

PureCloud Outbound Dialing

PureCloud Outbound Dialing Planning Guide

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| --- | --- | --- |
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# Why are we dialing?

What are the reasons for using a dialer? In this table, try to describe a high-level use case your business may use an outbound dialer for. Think about which dialing mode best meets the requirements for a given use case. Please reference the [Dialing modes resource center article](https://help.mypurecloud.com/articles/dialing-modes/) for more information.

Purple denotes example

| Topic | Use case | Dialing Mode |
| --- | --- | --- |
| Appointment Reminders | Need to call consumers to remind them of upcoming appointments | Agentless |
| Payments | Need to call consumers who have a high outstanding balance and who are overdue. | Power/Predictive |
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# Who are we calling?

PureCloud Outbound Dialing decides who to call and what to display to agents (if applicable) based on what kind of data is found in the contact list. PureCloud Outbound Dialing is capable of consuming CSV (comma separated values) files to create a new table for each unique contact list.

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Example | Description |
| Phone1 | Text | 317-432-3520 | Primary phone number, home |
| Phone2 | Text | ‘’ | Alternate phone number, cell |
| Zone | Text | America/Indiana/Indianapolis America/New\_York | Time zone of consumer. Must be in Tz database notation |
| AccountID | Text | 85305486 | Unique ID of consumer |
| Name | Text | Barry Allen | Name of consumer |
| AppointmentDate | Datetime | 2017-04-20 15:30:00 | Datetime of upcoming appointment |
| DrOffice | Text | Dr. Hunter Zolomon | Consumer’s primary physician |
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# When should we place calls?

## Schedules

Campaigns are able to get scheduled to run at specific times, at an interval and for a specific length. When should your campaigns turn on?

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| --- | --- |
| Campaign Name | When is it turned on? |
| Appointment Reminders | Monday – Friday, 5:30pm to 8pm |
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## Callable Time Sets

When dialing records that are in different time zones, it’s important to avoid calling someone too early in the morning or too late at night. If you know what time zones will be dialed, list them here. PureCloud Outbound Dialing requires that the values for time zones fit a unified naming convention known as Tz database or tzdata. [Reference the Understand time zone names resource center article.](https://help.mypurecloud.com/articles/understand-time-zone-names/)

**Note:** Utilize the Schedule feature to determine when calls are made. Focus this section on when a time zone is safe to dial.

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| --- |
| What times during a day is it safe to call someone without calling too late or too early? |
| Between 9am and 8pm |

# What are the potential outcomes of our calls?

A wrap up code is assigned to a call at the conclusion of every single Outbound Dialing call. These wrap-up codes determine whether we should continue calling other numbers on that record (if applicable) or if we should continue calling the record at all.

Every possible outcome of a call needs to have a wrap-up code. Fill out the table below and consider calls that are an actual person and the potential outcomes as well as instances where the call may not reach an agent (busy number, answering machines configured to leave a message, etc).

* Contact Uncallable
  + Set to yes Dialer will never call that contact again in the current contact list.
* Number Uncallable
  + Set to yes and the Dialer will never attempt that number again in the current contact list. Only set to yes if the phone number is bad one or is not the correct number for the contact.
* Right Party Contact
  + Set to Yes if the desired person was reached.

## Wrap Up Codes example

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Code Name | Keep calling the record? | Keep calling the number? | Did we talk to the right person? | Description |
| Payment Collected | Yes | Yes | Yes | Agent successfully collected a payment |
| Machine – Agent Left Message | Yes | No | Yes | Agent got an answering machine and left a message |
| Machine – Agent Hung Up | Yes | No | Yes | Agent got an answering machine but did not choose to leave a message |
| Wrong Party | No | Yes | No | Agent spoke to a person and they stated the number was incorrect for who the dialer was trying to reach. |
| Do Not Call | Yes | No | Yes | Agent spoke to a person and they asked to never get called again |
| Bad Number | No | Yes | No | The system attempted to place the call but it was a Busy. |
| Consumer Refused to Pay | Yes | No | Yes | Agent spoke to the right person but they refused to make a payment |
| Appointment Confirmed | Yes | Yes | Yes | Agent confirmed appointment |
| Appointment Canceled | Yes | No | Yes | Agent spoke to consumer and they canceled |
| Appointment Rescheduled | Yes | No | Yes | Agent spoke to consumer and they rescheduled appointment |
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# What kind of special rules do we have about our calls?

There may be special outbound dialing rules that are needed. PureCloud Outbound Dialing can evaluate a condition on every single call that is made and take an action. Some examples of the kinds of things that can be done with rules are listed as examples in the table below.

|  |
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| Question: What kind of special dialing rules do we have? |
| When we place calls to people that live in our Eastern sales region, we need to make sure the caller ID number for them shows as our main East region sales phone number. |
| When a call ends up as a busy tone, we don’t want to send that to an agent and we don’t want to call that number anymore |
| When someone we call says they don’t want to receive any more calls, we need to add them to the DNC list |
| When we call someone, and get an answering machine, we want to try that number again 1 hour later |
| When we have a VIP customer, we want to make sure the agent has a chance to review their information before they make the call. |
| I want to automatically play a message for all answering machines |
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