D.I.Y. OUTBOUND CONTACT CENTER TOOL BOX

DON WILLIAMS
2-Time #1 Best Selling Author

DIY Outbound Contact Center Toolbox

By Don Williams

CEO, Alliance DMS

Bestselling Author & Speaker

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By Don Williams

The author may be contacted at:
1050 W. Pipeline Rd. Suite 103, Hurst, TX 76053-4730
Phone: 800-706-0608. https://www.alliancedms.com

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This book is the complete A-Z Do It Yourself Outbound Contact Center Manual teaching entrepreneurs and businesses how to launch their own successful outbound contact center campaigns. The easy, fast guide to better market research, lead generation, appointment setting, sales, operations & customer service.

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INTRODUCTION

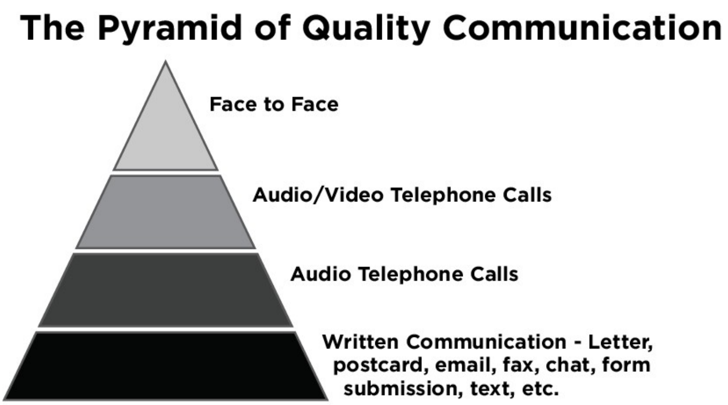
If you're reading this book, then it's fair to say you're at least thinking about adding contact center operations to your organization.

CONGRATULATIONS - whether you build out and manage your own in-house contact center or outsource; you're about to experience real results from an unbelievably powerful channel. This book will explore the advantages and disadvantages of running your own contact center as opposed to outsourcing. There's no one right answer- for some, an internal operation is best, and for others, outsourcing makes the most sense.

Did you know that over 3.5 million people work in contact centers in the United States? To put that in perspective that's almost 4% of the working population of the country and is just about equal to the national number of teachers.

Every Fortune 500 Company utilizes contact center operations because of its speed and efficacy over other channels. And if you want to grow your business you probably should join the crowd. Contact services include inbound phone calls, outbound phone calls, email, chat, SMS (text), and IVR. Some contact centers even monitor and proactively respond to social media like Facebook, Twitter, and Pinterest. In this book, we'll focus primarily on outbound operations. Outbound operations are the most aggressive style of contact center communication and as such frequently provide the fastest most predictable results.

Every person has a preferred method of contact, and that preference should be honored whenever possible. Prospects or customers who prefer email should receive email, those who prefer chat, should receive chat and so on. However, keep in mind almost everyone will climb the pyramid of quality communication on issues of extreme value and importance.



I've had a lot of people tell me "voice is dead." But voice will never die. In face-to-face interactions, the majority of communication is actually non-verbal, it's response and body language.

Verbal communication allows us to pause, inflect and emote. Written communication provides the least thorough communication and is most prone to misinterpretation.

Think of Zig Ziglar's demonstration where he used the same seven words with seven different patterns of emphasis and resulting in seven different meanings.

Zig's Demo goes like this:

> **I** didn't say she stole the money.
>
> I **didn't** say she stole the money.
>
> I didn't **say** she stole the money.
>
> I didn't say **she** stole the money.
>
> I didn't say she **stole** the money.
>
> I didn't say she stole **the** money.
>
> I didn't say she stole the **money**.

In a written communication of these words, I can only be assured that you have a 1/7 chance of receiving the meaning of the message I'm actually trying to communicate. Sometimes old-fashioned telephone calls make the most sense to get your message across and receive nearly instant results.

Outbound contact center campaigns are composed of six components. Like a chain; every link has to be solid for the chain to carry the weight of your company's lead generation demands.

The six links are List, Scripting, Offer, Staff, Technology, and Management. This book will cover each of the six components plus the economic argument for and against the DIY model. So, whether your goal is rapid high-quality market research, surveys, lead generation, and appointment setting, sales or customer service let's get started.

LEGAL/COMPLIANCE

READ THIS - This booklet does not offer legal advice and does not take the place of consultation with an attorney or other professionals with appropriate expertise and experience.

Readers are strongly cautioned to evaluate the information, ideas, and opinions outlined in this booklet in light of their own experience and judgment, and make independent decisions in applying it. The author disclaims any liability or responsibility for loss or damage result from the use of this book or the information, ideas, or opinions contained herein.

In today's world - compliance is a fact of life. It won't matter how successful your efforts are if you end up in legal trouble because you weren't compliant with the myriad of regulation addressing phone calls, data privacy, payment card information, medical information, etc.

Fortunately, compliance vendors exist who can simplify your life. DNC violations are up to
$17,000.00 per errant phone call, so mistakes get really expensive really quickly. What makes compliance so complicated is overlapping regulation.

The FTC, FCC, the States, AG's, Consumer Protection Agencies, and a little old lady in Poughkeepsie (ok the little old lady is a stretch) all have some control over the certain types of phone calls. It pays to do your research or find a reliable compliance partner to help you navigate the waters.

Below is at least an outline for your research:

Information Resources
Federal Trade Commission (TSR, DNC, etc.)
www.ftc.gov
www.donotcall.gov

Federal Communication Commission (TCPA, etc.)
www.fcc.gov

Other Federal regulations exist, PLUS each State has additional regulation(s) in place for contact/call centers.

Compliance Solution Vendors
Contact Center Compliance Corporation
350 E Street, Suite 300
Santa Rosa, CA 95404
866-362-5478
www.dnc.com

PossibleNOW
4400 River Green Parkway
Duluth, GA 30096
800 585-4888
www.possiblenow.com

Professional Associations
The Direct Marketing Association (DMA)
1333 Broadway, Suite 301
New York, NY 10018
(212)768-7277   www.dma.org

SOCAP International
625 North Washington Street, Suite 304
Alexandria, Virginia 22314
(703) 519-3700   www.socap.org

Professional Association of Customer Engagement (PACE)
8445 Keystone Crossing, Suite 106
Indianapolis, IN 46240
(317) 816-9336. www.paceassociation.com

Two Attorneys who are very experienced in Direct Marketing/Call Centers:

Mitchell N. Roth, Esquire
Roth, Doner, Jackson, PLC
8200 Greensboro Drive, Suite 820
McLean, Virginia 22102
Phone: (703) 485-3536   Fax: (703) 485-3525
mroth@rothdonerjackson.com

Michele Shuster, JD, CIPP/US
Mac Murray, Petersen & Shuster llp
6530 West Campus Oval, Suite 210
New Albany, Ohio 43054
Phone: 614-939-9955 Fax: 614-939-9954
mshuster@mpslawyers.com

LISTS

Today in America there are 11,000,000 businesses, over 100,000,000 households and over 300,000,000 people.

The more narrowly you can focus your list, the faster you will see results. For example, you are a plumbing supply located in Omaha Nebraska; then your target market might be plumbers within a 100-mile radius with credit scores over 650.

Lists are available with almost any criteria you can imagine, and money invested in highly focused lists almost always saves you time and money on labor.

This chapter covers the who, how, what, and where questions about lists.

Procurement

After compliance, list(s) are probably the most important part of the equation. It won't make any difference how well your marketing is designed if you're reaching out to the wrong people.

Lists are acquired from list brokers, list owners, your own website(s), digital marketing efforts, direct response (mail, radio & TV), organizations with whom you share an affinity, government agencies, your client database, etc. Locate and procure the largest list of qualified targets possible.

The more qualified the better, generally speaking. Where applicable scrub for DNC and identify Wireless Numbers versus Landline Numbers, and proceed as appropriate and compliant. The Direct Marketing Association compiles a large database of List Brokers, Owners, etc.

You can filter your list on all kinds ofcriteria. Drill down to get the most targeted list you can find. You almost cannot spend too much on the right list. Data is inexpensive compared to labor.

Here's a sample of fairly generic Business Demographic Criteria from which you can select list(s).

Demographic Criteria

Ad Size

The Ad Size select indicates the size of the business's ad in the yellow pages.

Address Type

The Address Type select indicates what type of address the business has.

Asset Flag

The Asset Flag select indicates if sales volume is an asset or sales figure.

Bankruptcy Date

The Bankruptcy Date select is used to identify the date the company filed for Bankruptcy.

Bankruptcy Type

The Bankruptcy Type select is used to identify the type of Bankruptcy filed.

Big Business Indicator

The Big Business Indicator select indicates that the record is a "Big Business." This contains:

Businesses with a location or corporate employment size of 100 or more,

Subsidiary headquarter locations whose parent company has a location or corporate employment size of 100 or more, and

Headquarter locations with a location or corporate employment size of 50 or more. These cannot be classified as a membership organization (two-digit primary SIC code is not "86").

Call Status Code

The Call Status select determines the outcome of the most recent televerification call made. Televerification calls are performed on an ongoing basis to verify and update critical business intelligence.

CBSA indicator

Core Based Statistical Area defines an urban area as Micropolitan or Metropolitan based upon population.

Contact Gender

Contact Gender relates to the available contact name and title.

Cottage Industry

The Cottage Industry select indicates if the business is run from a residence (home office).

Credit Code

The Credit Code select is derived from a proprietary model.

Several (but not all) of the factors involved are the stability of the industry, length of time in business, historical performance and size of the business.

The Credit Code is a single digit code: A=Excellent, B=Very Good, C=Good, I=Institution, P=Professional, U=Unknown or Less than Good.

Credit Grade

The Credit Grade select is derived from a proprietary model.

Several (but not all) of the factors involved are the stability of the industry, length of time in business, historical performance and size of the business.

The Credit Grade is a 2 Alpha code: A+ and A=Excellent, B+ and B=Very Good, C+ and C=Good.

Credit Rating

The Credit Rating select is derived from a proprietary model that identifies a company's creditworthiness.

Assigned through a sophisticated model, this will estimate a business's projected ability to be granted credit and to pay off any credit granted.

Business Database including employment size, type of industry, number of years in business, number of business locations, whether the company is a publically held company, and any documented bankruptcies or other legal filings.

A numeric credit rating on a scale of "000" to "100" where 000 represents least likely to be granted credit and 100 represents highly likely to be granted credit.

DSF Mail Score

DSF Mail Score select indicates the quality of the mailing address as it relates to DSF (Delivery Sequence File) processing.

Employee Size By Location (Actual)

The Employee Size by Location select indicates the number of employees at a given location.

Employee Size By Location (Range)

The Employee Size By Location (Range) select indicates the number of employees that work at a given location.

Employee Size Company Wide (Actual)

The Employee Size Company Wide (Actual) indicates the total number of employees at all locations for a company.

Employer Identification Number Indicator

The Employer Identification Number indicates the company's federal employer identification number. This unique nine-digit number is used by the Internal Revenue Service (IRS) to identify a business operating in the United States.

Expenses - Advertising and Promotions

The Advertising and Promotion Expense model is a proprietary model. It includes the cost ofpurchased advertising and promotional services for medial coverage, promotional, marketing, public relations services and other advertising services purchased from others.

Expenses - Payroll and Benefits

The Payroll and Benefits Expense model is a proprietary model that includes the gross earnings of all employees paid during the calendar year and fringe benefits.

Expenses - Printing

The Printing Expense Model is a proprietary model that includes the cost of purchased or contracted printing services.

Expenses - Rent and Lease

The Rent and Lease Expense model is a propriety model that includes payments made to other companies for the rental or leasing of land, buildings, offices and related structures.

Expenses - Technology

The Technology Expense model is a proprietary model that includes the cost of custom and off the shelf software, system support and design, data processing services, hardware, and supplies.

Expenses - Telecommunications

The Telecommunications Expense model is a proprietary model that includes all costs for communication services purchased from other companies, including the cost of telephone, data transmission, fax, and all other communications services.

Expenses - Utilities

The Utilities Expense model is a proprietary model that includes the cost of electricity and fuels for heating, power or generation of electricity. It also includes the cost of water, sewer, and refuse removal.

Fax Number Indicator

Use the Fax Number Indicator to include records that have a company fax number present on the record.

First Year In Business

The First Year In Business select indicates the year the business/organization was first established.

Fortune Ranking

The Fortune Ranking select indicates the Fortune 1000 ranking for the company. This select is updated yearly. If two Fortune Ranked companies merge, then the number of ranked companies will decrease by one. This field will be blank on all unranked businesses.

Government Segment Code

The Government Segment Code is a model which identifies certain database segments, including various levels of government.

Grow/Shrink Business Indicator

The Grow/Shrink Business Indicator select indicates whether the business is growing or shrinking in size. The growing business flag is provided by comparing employment sizes gathered over several cycles of telephone verification.

High Tech Business Indicator

The High Tech Business Indicator select indicates the record is a "High-Tech Business." This select contains businesses from the computer technology, engineers, some manufacturers, communications, and government - space research/technology.

Import/Export Indicator

The Import/Export Business Indicator identifies businesses that import goods, export goods, or import and export goods.

Last Modified Date

The Last Modified Date indicates when the business was last updated from any source.

Last Update Date (Retiring August 2016)

The Last Update Date select reflects the last date the record was updated in the database (YYYYMM).

Location Type

The Location Type select indicates if the selected business is a headquarter, a branch or a subsidiary location.

Medium Business Indicator

The Medium Business Indicator select indicates the record is a "Medium-Sized Business." Contains businesses which * Have a location or corporate employment size of 10 - 99 and a contact of president or owner title.

Non-Profit Business Indicator

The Non-Profit Business Indicator identifies businesses that are categorized as non-profit.

Number of Tenants (Actual)

The Number of Tenants (Actual) select indicates the actual number of businesses which link to a common multi-tenant building number.

Number of Tenants (Range)

The Number of Tenants (Range) select indicates the bucketed number of multi-tenant locations.

Office Size

The Office Size select indicates how many professional individuals are associated with a firm record. It can be used to estimate size differently than employment size. Available on a limited set of professional SIC codes only.

Omit ATM/KIOSK/Charging Station Locations/1 value selected

This flag allows you to omit records with known primary business types of ATM, KIOSK or Charging Station locations.

Only Records with Zip+4

Owner - Ethnic Code

Owner - Ethnic code indicates the race of the highest contact on record.

Owns/Rents Code

The Owns/Rents Code indicates if the functional facility in which the firm is located is owned or leased.

Physical Delivery Flag

Physical DSF

Physical DSF select indicates the quality of the physical address as it relates to DSF (Delivery Sequence File) processing.

Physical/Mailing Address Match

The Physical/Mailing Address Match select indicates that a given businesses physical address and mailing address are the same.

Primary NAICS Code

The Primary NAICS Code select will identify only those businesses where the primary NAICS codes match the NAICS codes entered in your query.

Primary SIC Code

The Primary SIC Code select will identify only those businesses where the primary SIC codes match the SIC codes entered in your query.

Primary Site Flag

Primary Site Flag indicates which business is considered primary when multiple businesses share a common site number.

Public Filing Indicator

The Public Filing Indicator select identifies a company against whom the filing of a legal action (bankruptcy, etc.) has been recorded.

Public/Private Indicator

The Public/Private Indicator select shows whether a business is publically or privately held. Publically held companies have stocks traded on one of the stock exchanges while the stocks of a privately held company are owned by a small number of stockholders – these stocks are not available for sale to the general public.

Records Per Company/1 value selected.

The Records Per Company select indicates how many records per company will be output in the data file.

Restaurant Service Type

Restaurant Service Type identifies if a restaurant offers Full Service or Limited Service.

Sales Volume (Range)

The Sales Volume (Range) select indicates the annual sales volume reported by the business.

Secondary Contact Title Code

Small Business Indicator

The Small Business Indicator select indicates that the record is a "Small Business." Contains businesses which have a location or corporate employment size of 1 - 9 and a contact of president or owner title.

Square Footage

The Square Footage select indicates the overall space occupied by the business located at a given address.

Stock Exchange Code

The Stock Exchange Code select indicates the Stock Exchange where the business conducts trading activity.

Subsidiary Indicator

The Subsidiary Indicator identifies businesses that are subsidiaries. Subsidiaries are corporations that are controlled by another corporation through ownership of a portion of its capital stock. The subsidiary may have a different name than the controlling corporation.

Telephone Number

The Telephone Number select indicates that a matching telephone number is available for a given record.

Top Contact Name

The Top Contact Name select allows you to choose Business Lists with or without Contacts.

Top Contact Title Code

Top Contact Titles available within an organization.

Website URL Indicator

Utilize the website URL indicator to identify businesses with a URL present on their record.

White Collar Indicator

The White Collar Indicator select indicates whether or not a business is coded as a White Collar Business.

Woman Owned

The Woman Owned select indicates if the primary owner is a female.

Years In Business Range

The Years In Business Range indicates how many years a company has been in business.

Here are two long-term List Brokers with Contact Information:

Melissa Caride
Account Executive
AccuData Integrated Marketing
239-425-4253
888-531-5299 option 3
www.accudata.com

Sandy Francis
Customer Relationship Manager/HR Manager
Nexxa Group, Inc.
12734 Kenwood Lane, Ste 87
Fort Myers, FL 33907
800.566.1217x152
239.225.1516x152
eFax: 239.288.4968
www.nexxagroup.com

Basic List Management

Determine the acceptable number of attempts and frequency of attempted phone calls to any one telephone number in the file.

Call too infrequently and your project will take too long, call too often and you'll irritate the people with whom you wish to speak.

Maintain and comply with all requests to be placed on your DNC list.

Test strategies like alternating time of day for attempts on "no answers," leave voicemails, etc.

SCRIPTING/MESSAGING

In today's world, people are constantly in a hurry. If your introduction or call takes too long, they may become impatient or irritated and end the call prematurely. To keep calls brief but still get your message across, scripting and messaging are a large part of preparing your call center to open.

When consumers see a number they don't recognize come up on caller ID, they are often already prepared to end the call quickly. Your goal is to catch their attention and get your message across to them before they have a chance to move on from the call.

When a message or script is written correctly, the call flows naturally. The caller can adapt and change the conversation to move with what the customer is saying without abandoning your original message. If your script is too formal or stilted, the conversation may become awkward and uncomfortable for both parties.

Developing the appropriate message or script is one of the toughest challenges call centers may face, and we want to simplify the process for you as much as possible.

Important Parts of Every Script and Message

You have your message, now your job is to put it into a script that flows naturally, is comfortable for your agents, and really highlights your message. Our experts believe that the following are essential parts of creating any call center message.

Address the customer's journey – What points do you want to cover with every call? Get a flip chart and do some visual mapping of your customer's journey. Make sure that your message addresses every aspect of your intended customer interaction.

Keep the flow and adapt – The journey of the customer is what's important here, not the company's script. A good script allows your agent to respond appropriately to customer feedback and communication without ignoring the company message completely.

Consider spoken English – Remember that your script is actually spoken to a customer. This requires you to use a totally different type of language than what would be written in an email or text form of communication. The best way to accomplish this is to write your message and have your team read it out loud. Address any parts that seem too formal for a phone call or personal communication.

Role-play – Try pulling someone totally unconnected to your business in to role-play your script. Ask for brutally honest feedback to improve your message. Encourage your agents to learn the script and try role-playing over several different days to allow the message to settle in their minds.

Then practice different situations and conversations to give your agents practice in naturally moving through the conversation.

Test your message – Separate testers into two groups. Have one group use the script, and one goes without it. Measure the outcome of both types of calls to determine if the script is doing what you want it to do.

The Right Script Makes All The Difference In Your Message

Designing a script is vital to how you portray your message to your customers. Writing it correctly can be time-consuming and frustrating if the process is new to you.

Fortunately, companies like Alliance and others offer script writing and call guides as part of a Professional Services Consultant package. Don't waste time or money with a script that doesn't properly represent what you want to do for your customers.

Example of a Good Introduction

> "Hi my name is Sallie Mae Caller, and I'm calling for Sallie Mae Caller Company here in Seattle. I'd like to speak with John Prospect, is John available?"

Example of a Better Introduction

> "Hi, I'm Sallie Mae Caller for Sallie Mae Caller Company calling for JOHN Prospect please."

Draft your message, then edit, next test with live calls, repeat until you’ve optimized your message.

Run into problems? Companies like Alliance and others will write scripting/call guides for you as a Professional Services Consultant.

Remember – Words Matter!

TALENT

Recruiting

You need to hire the very best people you can find.

Think of it like this – you're a football coach getting ready for the new season. You want to win, you need good players, but you really want the very best players you can find.

Even with the very best players, you won't win every game, but at least you have a chance to win the game. With less than the best players, you know you don't stand a chance.

Try multiple sources to generate applicants.

Below are some suggestions:

Indeed.com
Monster.com
Craigslist.org
Employee Referrals
Bandit Signage

Companies like Culture Index (www.cindexinc.com) or Performance Index (www.performanceindex.com can help you put "the right butts in the right seats."

We typically only hire experienced call center communicators. It takes a certain skill set to be able to sit in a chair and make outbound calls for 8 hours a day, and the first 48-hour attrition rate for people with no experience is sky high.

If you are starting small, it's best to hire at least two people. If you only hire one person, your results will be skewed; two provides a balance.

Generally, you need the perspective of two people's results, opinions, and statistics to make the best decisions about how to improve your campaign.

Zig Ziglar used to say …"*most people make decisions based on what happened, not on what's happening."*

Call center campaigns perform better when you make your decisions based on current, not historical events.

MANAGEMENT

Facts:

Exceptional management will help yield exceptional results. Mediocre management will yield mediocre results and so on.

Contact centers are a “hands-on” game. Either devote sufficient time and energy or delegate the management piece to someone who can and will devote the time and effort.

Your manager will be a better manager if they make 100 calls themselves (they’ll be even better if they make 1,000 or have significant experience in outbound calling).

Most managers under or over manage the ideal is to be like Goldilocks (just right). They either don’t manage at all, or they look over their team’s shoulders constantly, neither style is particularly effective. Avoid the far ends of the spectrum, find your sweet spot.

Realize that both outbound and inbound communicators receive a significant amount of rejection and frustration as part of their job. Your team will produce better if you aren't overly critical.

Hire real talent, have reasonable expectations, set goals, be a clear communicator, compensate your talent as richly as you can afford and you'll "stack the deck" for optimal results.

TECHNOLOGY

Call center technology is vital to success and runs a close second to hiring the right talent. Your callers simply can't get your message or script across to the right people if they don't have the right technology to help them. As today's world is constantly changing and updating, it's essential that you are willing to adapt your technological needs as they evolve and your center grows.

Less Expensive, More Successful Options
"Technology" is a term that covers a wide range of products, particularly for a call center. Over time, the technology needed to run a call center has become considerably less expensive, going from almost $10,000/seat to closer to $100/month/seat. Your technological needs may range from simple black desk phones to cloud-based telephony solutions to handle inbound and outbound calls and integrate all avenues of communication. For a new call center just starting out, we recommend a platform that includes the following to ensure you are successful from day one.

Call Recording – Part of a good management strategy is to record your agent performance to assess and increase service quality. Keep track of each agent, no matter what time they are working with call recording. Mangers should listen closely to calls and provide helpful feedback to agents.

Interactive Voice Response – Cut back on wasted agent time and customer wait time with the right IVR. This allows you to send certain calls to certain agents.

For example, after-hours calls are sent to after-hours talent, and technical problems are sent to technical agents. An IVR acts as a secretary and ensures that no calls are dropped through the cracks and that they are always sent to the right agents.

Real-Time Reporting – Reporting tools show managers, supervisors, and agents what they need to work on and how to improve their performance.

Real-time reports give a comprehensive understanding of the performance of the agent, campaign or department to show where adjustments should be made.

Automatic Call Distributor – Cut back on wait times and agent idle time and improve customer experiences with an ACD. This particular tool helps to manage employee time and level call spikes by sending calls to agents that are immediately available.

Predictive Dialer – Be intelligent about when your calls are placed. Predictive dialers have a measurable impact on call ratios and agent productivity by using inbuilt algorithms to place calls at the best possible time.

All call centers have different, specific needs, but these five tools provide a good starting place.

Many companies provide telephone hosting for call centers that can take the load off your plate, including:

www.liveops.com
www.inin.com
www.five9.com
www.avaya.com/usa
www.incontact.com

Remember that legal compliance is a big issue when choosing a technological solution for your contact center. Compliance requirements may change based on the campaign you are currently running.

PROJECT MANAGEMENT

At this point in the process of setting up and managing your call center, you should have completed all the following tasks:

- Legal compliance
- List sourced
- List scrubbed
- List management plan
- Test scripting and message
- Hired talent
- Training
- Technology

You've handled many essential steps to establishing a successful call center, and now it's time to put your efforts into action and start taking or making calls. We encourage managers to plan every aspect of the day, especially at the beginning, to optimize chances for a rewarding experience for everyone.

When you're designing your schedule, keep the following tips in mind. The right project management plan can make all the difference in a successful campaign and a failed one.

Introduction – Ensure that your co-workers and agents know who you are, what you expect, and what you stand for.

Actively listen – You might be the project manager, but every agent has valuable ideas that can improve the process.

Accessibility – Be accessible to a wider range of agents by switching up your working hours.

Observe – Watch employee interaction, be aware of team politics and dynamics and observe closely for culture barriers that discourage innovation.

Encourage ideas – Call center practices are rarely perfect, and you should always listen to questions of current practices while reserving any judgment. Question co-workers about what is important to them.

Example – Don't expect your agents to do something you aren't willing to do with them. Don't be afraid to get your hands dirty in order to show them that you are proud to be involved with them.

Communicate – Your communication skills, in the beginning, can set the tone for your entire tenure with the agents. Keep lines open, from whiteboards to surveys to email, utilizing every avenue to listen and respond appropriately to feedback, questions, and complaints.

Consider the following as day 1 in your new life of Contact Center Manager (for this example, we'll assume an 8:00 am start to your day).

Contact Center Call Manager Schedule

7:30	Plan your day
8:00 – 8:10	Daily huddle with your team (remember an encourager)
8:10	Begin Calls, verify telephony is working properly, and calls are being processed
9:10	MBWA trip one (smile, compliment as appropriate)
10:10	MBWA trip two
11:10	MBWA trip three
12:00	Lunch
1:00 - 1:02	Half time non-huddle
1:20	Begin Calls, verify telephony is working properly, and calls are being processed
1:30 – 1:45	Monitor session
2:00	MBWA trip 4
3:00	MBWA trip 5
4:50	MBWA trip 6 (comment on day's personal production and prep for tomorrow)
5:00	Stop calls
5:01 - ?	List maintenance, data export, telephony maintenance, daily reporting, etc.

A Vital Piece of the Successful Pie

A good project manager can motivate and encourage employees, and steer them in the right direction.

Turnover rates are lower, and customer satisfaction rates are higher with a project manager that is loyal, hard-working and a natural leader.

Keep your day organized, stay visible to your agents, address all complaints or suggestions, and lead strong through good days and bad to improve your chances of running a successful campaign in your new call center.

THE ECONOMICS OF D.I.Y.

VERSUS HIRE PROFESSIONALS

Here's a side-by-side economic comparison of the two alternatives. The below illustration presumes that you have the same knowledge, experience, and assets as an outsourced service provider.

There's no right answer to the question should I operate in house or outsource? Only you can to decide the value of your time and energy. Some Companies choose in house some choose outsource and some do both!

Based on 2 Full-Time Employees plus 10 hours a week of a $100,000.00 per year Manager

*This is where most campaigns fail - DIYers usually under-invest in project management.

	DO IT YOURSELF	DO IT YOURSELF	DO IT YOURSELF	OUT SOURCER
Base Hourly Wage NO Bonus	**$10/Hr.**	**$15/Hr.**	**$20/Hr.**	
Weekly Comp	$800.00	$1,200.00	$1,600.00	$2,400.00
Employer contributions (tax, ins)	$96.00	$240.00	$320.00	$0.00
Total TSR/CSR Labor	**$896.00**	**$1,440.00**	**$1,920.00**	**$2,400.00**
Project Management *	$480.00	$480.00	$480.00	$0.00
Telephony (tech + toll)	$50.00	$50.00	$50.00	$0.00
Real Estate/Utilities/Insurance	$100.00	$100.00	$100.00	$0.00
Total	**$1,526.00**	**$2,070.00**	**$2,550.00**	**$2,400.00**
You Save	**$874.00**	**$330.00**	**($150.00)**	

GLOSSARY

ACD: Automatic Call Distributor is a technology-based method of accepting and routing incoming calls to appropriate destinations within a call center. ACD is a telephony system that ensures that calls are routed to recipients at a predetermined level of training.

ACHT: Average Call Handling Time is the time it takes, on average, to resolve or complete a call from start to finish.

ACW: After Call Work, also known as 'Wrap Time,' is the time it takes for an agent to finish any administrative tasks required after the call is complete.

Adherence: An amount of time, usually in percentage form, that represents a segment of any given working day during which an agent is actively taking or making calls. In a typical working day consisting of 7.5 hours, an adherence of 80% would yield a 6-hour timeframe of on-phone activity.

AHT: Average Handling Time is the sum of ACHT (Average Call Handling Time) and ACW (Wrap Time) divided by the number of calls placed or received.

Appointment Setting: Outbound call activity with the intention of scheduling face-to-face meetings for field personnel to attend with the purpose of introducing a product or service to a new customer.

ASA: Average Speed of Answer is the difference in time between when a call comes into a call center and when it is answered. This average represents hold time for the caller, but not necessarily the time they spend being routed through the IVR.

Assisted Purchase: A term used to describe features like voice or chat assistance for the express purpose of helping a customer to complete a purchase.

Attrition Rate: A ratio or proportion of call center agents who either resign or are terminated within a give time frame.

Automatic Call Back: A telephony feature that allows a caller on hold to be called back upon availability of an agent.

B2B: Business-to-Business. B2B describes call centers that interact on behalf of a business to transact with other businesses. This is different from Business-to-Consumer (B2C). B2B centers sell to other businesses whereas B2C centers sell to end consumers.

B2C: Business-to-Consumer describes calls placed to end-users of a product or service. These consumers are not businesses; they are individuals.

Base Staff: Also known as Seated Agents, Base Staff represents the smallest number of agents needed to reach predefined operational goals for the call center. To account for break time, truancy and absenteeism, Seated Agent calculations need to be factored with respect to the amount of time an agent is physically seated at their station.

Blended: Blended agents are able to place outbound calls and receive inbound calls from the same station using the same equipment.

Bonus: Compensation paid to agents in addition to their base salary or hourly rate. Bonuses are often performance-based and determined according to predefined sales or activity goals.

BPO: Business Process Outsourcing is a term used to describe what happens when a company allows another company to take control and responsibility of a specific business function. An example of BPO would be a manufacturer paying a call center to handle their inbound customer service calls.

Calls In Queue: A dynamic report showing how many calls have been received by the ACD system but still 'in line' to be connected to an available agent.

Call quality: a metric used to describe the outcome of a call as compared with set quality standards. An example of high call quality could be when a customer leaves a 100% satisfied rating at the end of a call.

CCS: Centum Call Seconds is a measurement representing 100 call seconds. The initial C is for the Roman numeral for 100. One hour, or one "Erlang," equals 36 CCS.

CDR: Call Data Record is a telephonic log of call data, often including timestamps, call duration, and IVR navigation route.

CED: Caller-Entered Digits are the digits that a caller may enter on their keypad or touchscreen when prompted by a CTI or ACD system.

Change Management: A term used to describe the administration of any employee, system or process change within an organization.

Churn Rate: Also, sometimes referred to as Attrition Rate, is the rate at which customers are defecting from or choosing to cease doing business with a product or service provider. Customers who leave are said to have 'churned.'

CLI: Calling Line Identity is a CTI-based technology that maps a caller's number with their previous history of interactions with the call center.

Coaching: A term used to describe when a Team Leader or manager observes an agent's call activity and provides on-the-job feedback to enhance their performance and call quality.

Cold Calling: The activity of calling a prospect who has not been contacted before about a specific product or service.

Collections: Efforts to collect money against a debt. Collections calls are made for the purpose of settling debts incurred by either consumers or businesses.

Commission: Usually a percentage of an overall sale amount paid to a call agent who completes the sale. Commissions are generally paid in addition to salary or hourly pay.

Competency Curve: The amount of time it takes an agent to complete training and begin satisfactory performance contributions related to KPI's.

Continuous Improvement: The perpetual effort to constantly improve the quality of people, products, services or processes. Continuous improvements can be made slowly over time or in brief, sharp instances.

CRM: Customer Relationship Manager is a software and/or hardware system used by a company to keep track of interactions with and activity of their customers.

Cross Media Queuing: A term used to refer to the intelligent routing of queries regardless of what form they take (call, chat, email, text message, etc.). This could mean routing an incoming e-mail request to a call agent to place a phone call or vice versa.

Cross-sell: Selling related products or services to customers who have already made a purchase. An example might be cross-selling a used car warranty to a recent buyer of a used car.

CSAT: Customer Satisfaction Score is usually a 1-to-100 point satisfaction metric that usually uses the customer's input related to their level of satisfaction with a product, service or person.

CTI: Computer Telephony Integration refers to the pairing of a call center's computer system with its phone system. CTI often incorporates the ACD or Dialer system as part of an overall solution.

CTPS: Corporate Telephone Preference Service is a centralized registry of phone numbers associated with persons or businesses who have opted out of sales solicitations via telephone. It is illegal to place such calls to numbers listed on the CTPS.

Customer Experience: The term used to describe the overall experience of a customer throughout the entire timeline of interaction with a company, from start to finish. Companies that enhance the Customer Experience enjoy longer, moreprofitable interactions with their customers.

Customer Service: An operational category of a call center that refers to how a customer is treated by an agent or process.

Dashboard: A readout of intraday operational processes – often dynamically changing according to set Key Performance Indicators (KPIs). Dashboards can be implemented for almost any functional department, but they are most commonly used where action needs to be taken based on critical changes in real-time data.

Database Call Handling: A Computer/Telephone Integration application that works with the ACD and a database system to field calls according to existing information. For example, a caller can provide their account number indicating that they are an existing customer. They can then indicate that they need to get a technical answer to a question, which will route the call to tech support and provide relevant hold announcements, etc.

Dialer: Term used to describe a software or hardware system that automatically makes calls on behalf of a call center agent. Dialers are managed by a Dialer Manager so that call data can be provided to the agent when the call is made.

DPA: The Data Protection Act refers to legal rulings that protect personal data. These rulings also govern the use of personal data for marketing purposes.

Erlang: A unit of measurement referring to exactly one hour of telephonic traffic. For example, circuits carrying 120 minutes of traffic in an hour have carried two Erlangs worth of traffic.

Erlang B: A calculation used to determine how many trunks are needed to handle a specific number of calls in a one-hour period. The calculation presumes that callers are getting busy signals never try again and are lost forever (also termed 'lost calls cleared').

Erlang C: A formula representing predicted queue times taking into account three factors: agent volume; queued call volume; and the time required to service each call. Erlang C can also be used to determine what resources might be needed in order to keep hold times within certain parameters.

ERP: Enterprise Resource Planning is a term used to describe software management ability over core functions of a business, like Human Resources or Order Fulfillment. ERP’s are helpful for organizations that want to individually manage individual operational systems within the entire corporate schema.

EWT: Expected Wait Time is the time callers may need to wait before being connected to an available agent.

FCD: Fast Clear Down is a term used to describe a caller who terminates the call upon being presented with an expected delay time.

FCR: First Call Resolution refers to resolved calls that are handled on the first attempt by the caller. First Call Resolution is ideal because it eliminates the need for transfers to other departments and taxing of other resources.

FTE: Full-Time Equivalent is a calculation of scheduled hours divided by the hours in a typical work week (normally 40). Multiple part-time agents may together constitute the FTE of one full-time agent.

Gamification: A term used to describe the application of game mechanics to activities that aren't gamed, to begin with. Gamification could mean using an agent's activity metrics as data to motivate them in the coming week. This creates a self-competitive environment that can stimulate attitude and motivation. Gamification can be applied across entire teams as well, sparking collaboration and camaraderie.

Grad Bay: Graduation Bays are intermediate work areas where newly trained agents can perform under close supervision before being transferred to more permanent teams. Grad Bays generally have agents that work with lower targets until they can prove a solid grasp of the concepts learned in training.

Handling Time: A combination of the time an agent spends during Talk Time and After-Call Work involved in completing a transaction.

Help Desk: A general term used to refer to call centers set up to handling incoming calls from customers needing help with the installation or use of a specific product.

ICR: Intelligent Call Router refers to a telecom networking service that provides real-time information on call queues and agent availability throughout the call center's operational network. The ICR determines the most appropriate agent for a call based on this data. ICR's can be said to function in place of a switchboard operator.

Induction: Inductions are phases of training and development administered to newly hired agents. Inductions can last a few days to multiple months depending on how complex the agent's tasks will be and how much knowledge needs to be acquired in order to perform according to expectations.

Inbound: Describes calls that are placed by an outside caller into a call center. Calls placed from the call center to an outside recipient are described as 'outbound.'

Intra Day Statistics: Data that gives operational activity information related to the call center on a minutely or hourly basis during the workday. Intra Day Statistics are used to arrive at key data points, including peak call times and highest agent activity.

IRA: Incremental Revenue Analysis describes the method of arriving at a cost or benefit conclusion related to adding or removing an agent.

KPI: Key Performance Indicator. Used to compare activity of a call center compared with goals or objectives.

LCW: Longest Call Waiting the lengthiest time on hold a call has to spend before being answered by an agent. LCW is typically measured against preset wait time goals.

Longest Available Agent: An agent who has been idle for the longest period of time. This agent is often placed into priority for handling the next available call.

Metrics: A metric is a quantifiable activity, agent or process measure used to manage key business aspects. The purpose of using metrics is to track costs, but they can also be used to observe overall business performance against preset goals and objectives.

MRR: Monthly Recurring Revenue. Used to describe billed services that recur on a monthly basis. A good example of MRR would be a service plan afforded by a cellular carrier.

Multi-skilled: Agents with the ability to handle multiple different call types. An example of a multi-skilled agent would be one who could process an insurance claim as well as provide an insurance quote.

Next Available Agent: A queue routing method that routes the next available call to the next available agent. The goal is to sustain equal call load throughout all departments. Without a call queue, Next Available Agent becomes Longest Available Agent.

NPS: Net Promoter Score is a consumer satisfaction index metric that measures how likely a customer would be to recommend a company's products or services. A typical NPS prompt might look like this: “ON A SCALE OF 0 TO 10, HOW LIKELY ARE YOU TO RECOMMEND THIS COMPANY’S PRODUCT OR SERVICE?” NPS can be formulated by subtracting detractor (0-6) percentage from promoter (9-10) percentage.

Omni-Channel: An approach to the sales function that seeks to deliver a seamless shopping experience to customers regardless of whether they are shopping in person, online or in print.

OTE: On Target Earnings. OTE are comprised of salary and bonus or commission compensation provided for achieving set targets. OTE can be met exactly, under met, or over met.

Outbound: Term used to describe calls that are placed from a call center to an outside recipient. Calls that are placed from an outside caller to a call center are known as ‘inbound.’

Predictive Analytics: A discipline of data mining related to predicting future probabilities or trends. Key to Predictive Analytics is the Predictor, a variable that can affect future performance of an individual agent, a team or a process.

Predictive Dialing: A telephone or computer system that places outbound calls without human assistance before delivering the connected call to an available agent. A predictive dialer will return a call to the queue if there is a busy signal or if an answering machine is detected.

Probation: A period of mutual evaluation for new employees during which time both the employer and the employee has the chance to determine if the position is a good fit. Probationary periods range from a week to a month or longer, depending on contractual stipulations.

Quantitative Forecasting: A method of forecasting future events using statistics. Time Series and Explanatory are the two most common categories of QF. Time Series modalities rely on past trends to forecast, whereas Explanatory modalities compare two or more variables together to reveal relationships between them.

Retention: The effort a company puts into keeping a customer. Customer retention is particularly used in scenarios where a customer is threatening to stop doing business altogether (canceling a service contract, for example).

RNA: Ring No Answer. This term is used to describe the amount of time a caller waits before the call is routed. Call centers use this feature to make sure that calls are not neglected.

ROI: Return on Investment is a financial measurement of the performance of a single investment or series of investments. Because all investments have a definable cost, there needs to be a way to provide a means to measure the results of the investment after the cost is incurred. The ROI formula is Return minus Cost divided by Cost, expressed as a ratio.

Rotating Shift: A work shift that changes every week in a set pattern. This is different from a Fixed Shift which is the same every week.

Sales: A department or category of business functions strictly related to the selling of a product or service. Calls within a sales-focused call center can be inbound, outbound, warm or cold. Sales calls can also be placed as a follow-up to customer service calls, in an attempt to cross-sell other products or services.

SBR: Skill-Based Routing. This strategy routes an incoming call to an agent with the most appropriate skill set, instead of routing the call the first available agent or to the agent with the longest idle time.

Screen Pop: A function of a CTI application that delivers all relevant call data to the agent on the agent's display, when the call isplaced or received.

Script: A guideline giving the agent specific words to use when on a call. Scripts can be 'hard,' meaning they must be followed exactly, or 'soft,' meaning the are more general. Scripts are often used in regulatory environments like within the financial sector.

Shift Pattern: A rotation of shift scheduling that follows a repetitive pattern. An example of a shift pattern might be early open, late close, weekend, to be repeated every other week, or third week, etc.

Shrinkage: A measure of agent time lost due to breaks, sick time, medical leave or other absences.

SLA: Service Level Agreement. SLA's are contractual agreements entered into by both a client and a call center. These agreements dictate the level of service that will be performed by the call center for the client. Often, the call center service is described down to operational specifics like average hold time, maximum number of rings, etc.

Speech Recognition: A computer-assisted task of recognizing speech from a caller that can be then be used to route the call or associate the caller with historical data in a database.

Target: Goals or objectives determined to motivate agents to achieve desired performance metrics. Often, targets are associated with compensation increases like bonuses or commissions.

Team Leader: An employee who manages a team of 8-15 agents. The team leader is relied upon to coach and mentor agents, so they maintain motivation and progression along their career path within the call center and, in some cases, beyond.

Telesales: Sales conducted over the phone, generally relegated to B2C sales transacted on a single phone call. Telesales agents aim to close the customer within a small timeframe or series of calls, whereas telemarketing may not have the same directive.

Telemarketing: A broad descriptor of phone-based marketing activities in a B2B context.

Touchpoint: Any occasion during which a customer has any direct involvement with a company. These can range from watching a TV advertisement, calling to place an order, or inquiring about a warranty claim post-purchase.

TPS: Telephone Preference Service. The TPS is a registry of phone numbers associated with people who do not wish to receive sales or marketing phone calls. It is illegal to place such calls to these numbers.

Training: A term used to describe the onboarding of a new employee, including steps to take to place or take a call, product or service knowledge, how to deal with problem calls, and what activity targets to aim for during their shifts. Most training is conducted in a classroom environment; however on-the-job training may also be a component of overall onboarding.

Unified Desktop: A popular, modern computer application that incorporates multiple means of interacting with customers, including email, text messages, and telephone. Some unified desktops can have a CRM backend component to track activity with customers.

Up-sell: Selling a customer a more featured or higher-priced product or service instead of or in addition to a less featured or lower-priced product or service. An example of an up-sell would be selling a customer on a higher speed internet service instead of the basic service they may have initially called about.

VoIP: Voice Over Internet Protocol. VoIP is a means of providing telephone services through the internet. It uses digital data instead of telephonic data to accomplish communication, and it can be much less expensive and more efficient than traditional phone systems.

Virtual Agent: Also known as an Intelligent Virtual Rep or a V-Rep, a Virtual Agent is a chatbot-style program which interacts with customers online to address their questions or to prepare them for a call into a call center.

Wallboards: Electronic displays showing team performance in the form of call metrics, sales closed or other relevant data. The purpose of wallboards is to keep agents focused on accomplishing set performance goals or objectives.

Warm Calling: The activity of calling customers who have already expressed an interest in a product or service or who have already purchased in the past. Warm calls are distinctly different from cold calls, which are calls placed to prospects who have no expressed interest or buying history.

Web Self-Service: An electronic support system that gives customers information and assists with requests over the internet. Web Self-Service systems don't require administration from a human being to complete their tasks.

WFM: Work Force Management. WFM systems are software-based tools used to schedule agents, anticipate call volumes and allocate scheduled resources where appropriate.

Wrap-Up Codes: Codes entered by an agent in the ACD during or after a call. Wrap-Up Codes help to classify calls for the purposes of generating reports.

ABOUT THE AUTHOR

Don Williams and his companies run campaigns and consult with businesses worldwide on how to develop and execute wow, wow, wow customer experiences. Don opened his first company in 1986 and has since founded a dozen other successful firms. Don's contact center business Alliance has been in the professional services niche of the industry since 1999 and has 100's of repeat clients. Don lives in the Dallas /Ft. Worth Texas area with the love his life – Leta and their three chocolate Labrador retrievers.

HIRING DON TO SPEAK

Over the last 20 years I've spoken and entertained (and even done a wedding or two). I bring an educational entertaining experience complete with proven tools for success, encouragement and inspiration to every engagement.

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800 823 0403 or
email **speaking@donwilliamsglobal.com**.

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For more information about Outbound Contact Call Centers, contact Don Williams at:

Alliance DMS
1050 W. Pipeline Rd. Suite 103
Hurst, TX 76053-4730
Phone: 800-706-0608
Fax: 817-284-2753
info@alliancedms.com