MiContact Center Outbound General Information Guide

VERSION 6.0



Chapter 1: About This Document	3
Overview	3
Audience	
Product Naming Conventions	
About MiContact Center Outbound Documentation	3
Chapter 2: MiContact Center Outbound Overview	4
Overview	
Benefits	
MiContact Center Outbound Portfolio MiContact Center Outbound Features and Licensing Overview	5
Configuration Table 1: Soft and Hard Dialer Comparison	7
Chapter 3: MiContact Center Outbound Components	9
Call Scripting	
Data Import/Export	10
Reporting	10
Web Services APIs	
Tactical Call Center CRM	11
Types of Outbound Dialing	12
SNoDrop™	13
LPD™ (Live Person Detection)	14
Campaign Management	15
Call Blending	15
Chapter 4: Professional Services	15
Overview	
Installation	
Training	
Extended Software Assurance and Support	16

Chapter 1: About This Document

This guide provides an overview of the Mitel MiContact Center Outbound portfolio of outbound dialing, campaigning, and agent scripting solutions. MiContact Center Outbound is designed for Mitel unified communications platform customers that are looking to drive agent productivity and quality customer experience, increase revenues, control operating costs, and simplify IT management.

Overview

This guide includes a general discussion of the MiContact Center Outbound portfolio, including the following topics:

- MiContact Center Outbound Overview
- MiContact Center Outbound Components
- Professional Services

Audience

This guide is intended for the following audiences:

- End customers
- Resellers
- Sales executives

Product Naming Conventions

In this document only the first mention of product names include the term "Mitel", for example: Mitel MiContact Center (first mention) and MiContact Center (subsequent mention). Throughout the guide we use "MiCC" as an abbreviation of MiContact Center.

About MiContact Center Outbound Documentation

The following guides are available for assistance with architecting, deploying, using, and understanding the various aspects of the MiContact Center Outbound solution:

- MiCC Outbound Installation Prerequisites
- MiCC Outbound CTI Integration with MiVoice Business V2.0
- MiCC Outbound Advanced Dialer Configuration Guidelines
- MiCC Outbound CRM Web Service API
- MiCC Outbound Dialer Web Services API
- MiCC Outbound Call Manager SIP integration with Mitel systems
- MiCC Outbound Integration with Mitel Interaction Recording (ASC)
- MiCC Outbound Telephony & Dialer SDK

Chapter 2: MiContact Center Outbound Overview

This section provides an overview of the MiContact Center Outbound portfolio of applications. For more information, refer to the following topics:

- Overview
- MiContact Center Outbound Portfolio
- MiContact Center Applications
- Configuration
- Extended Software Assurance and Support

Remark: In this document, the term "scripted app" is used to denote a construct akin to a call script. "Scripted apps" are an advanced form of call scripts which deliver more in the way of process logic and system integration than the more commonly used call scripts. As the name may suggest, "scripted apps" are more concerned with the logic flow of an interaction than the precise words that an agent may use.

Overview

MiContact Center Outbound is much more than a simple outbound dialing solution, it is a comprehensive, integrated outbound strategy management suite. MiContact Center Outbound supports all modes of outbound dialing (preview, progressive, power, and predictive), multi-channel campaigns (email and SMS), and includes a wide range of campaign management tools. In addition to this, MiContact Center Outbound includes a tightly integrated light touch Customer Relationship Management (CRM) system and agent scripting modules to form a complete solution that meets a wide range of outbound and inbound contact center requirements.

In an inbound scenario for instance, MiContact Center Outbound combines the resources of a scripted app editor and the telephone to optimize the process of call handling. All scripted apps are visually designed by the customer and easily deployed in either an outbound or inbound context. For instance, in an inbound scenario, a DDI (Direct Dial In) telephone number is attached to the scripted app. When a caller phones the number, for example in response to an advertisement, the call comes into the business through the Mitel platform, is passed through Mitel's Automatic Call Distribution (ACD) system and is routed to the next available agent.

Using Computer Telephony Integration (CTI) the ACD is linked to the MiContact Center Outbound software, located on the server. MiContact Center Outbound associates the incoming call with the appropriate campaign scripted app. As the agent answers the call, the relevant scripted app is popped on their computer screen. MiContact Center Outbound guides the agent through the scripted app and fully prompts them at each question. Information collected from the customer is stored on the MiContact Center Outbound database, on the server.

Benefits

MiContact Center Outbound gives businesses tools to:

- Automate outbound dialing to improve agent efficiency
- Give agents tools that facilitate first-contact resolution and ensure business process and regulatory compliance
- Empower your business with tools to accelerate lead generation and close sales
- Remove the administration burden from IT and empower managers and supervisors

By leveraging the outbound dialing, CRM, scripting, and contact center capabilities of MiContact Center Outbound, businesses can:

- Increase agent productivity through minimized non-productive time
- Facilitate first-contact resolution and business process compliance
- Provide knowledgeable, high-quality customer experiences
- Increase profitability per customer interaction and buyer conversion rates
- Improve customer retention through proactive customer interactions
- Maximize campaign performance with sophisticated campaign tools
- Improve supervisor decision making with real-time and historical business analytics
- Minimize downtime and risk by ensuring business continuity and regulatory compliance
- · Make complicated problems easy to solve with visual diagramming interfaces

MiContact Center Outbound Portfolio

Our outbound contact center solution is tailored to meet the needs of any organization with a significant focus on lead generation, telemarketing, financial services, proactive customer care, or converting their traditional inbound contact center that may be operating as a cost center into an outbound-enabled revenue generator. The solution is beneficial across a wide range of market segments and verticals, for example: outsourcing, insurance, media, services, legal, fundraising, utilities, and debt collection.

Our Outbound solution offers several levels of licensing packs, each offering an additional selection of features, enabling you to easily select the range of features you need for your contact center.

We recognize that every contact center is different, so we offer our MiContact Center Outbound suite of solutions through modular licensing. As your requirements evolve and grow over time, you can easily and cost-effectively add-on functionality to your existing operations.

MiContact Center Outbound Features and Licensing Overview

MiCC Outbound Process Scripting

Agent portal with CTI toolbar

Dynamic Visual Call Scripting

Language Translation Support (for scripts)

Full script Version Control

In-script automated Email

In-script code-free Web Services consumption

Self-configuring script database structures

User Management without/with AD Integration

Live Dashboards

MI Report Suite

Full integration with MiVoice Business

Inbound screen pop by DDI or Call Path

Team administration

Configurable automatic call dispositions

VB.NET code snippets supported

Iterative invocation of scripts from other scripts

Automatic integration to user-written DLLs

Blind, Consult & Conference Transfers (MiVB)

MiCC Outbound Tactical CRM

Fully configurable, unlimited CRM entities

Visual fully relational entity structures

User friendly data import wizards

CRM Entity/History Web Services API

Full customer history

Customisable data presentation layers

Native integration with scripting

Inbound customer details CLI screen pop

Native integration with campaign management

MiCC Outbound Preview/Progressive Dialer

Advanced Campaign Management

Visual Data Segmentation

Live enabling/disabling of data segments

Inbound/Outbound call blending

Powerful visual Call Recycling tools

Dialer Web Services APIs

Real time priority calls

Configurable Calling Line Identity presentation

Configurable dialing ordering

SMS & email campaigns (personalised blast)

Agent owned callbacks

Automatic agent assignment by list priority

Outbound list blending

Live dialer statistics API

Automatic list selection API

Outbound skills and ability routing

MiCC Outbound Power/Predictive Dialer

High performance Predictive Dialer Patented Script Aware Predictive Dialer

Scales down to 6 agents Self-pacing algorithm

Predictive can be blended with Inbound

Unattended dialing (IVM)

MiCC Outbound Advanced Dialer

Answer Machine Detection (AMD)

Patented LPD™ (Live Person Detection)

SNoDrop™ (Predictive with 0% Abandoned Calls)

Full SDK for integration to 3rd party UIs

MiCC Outbound Call Manager

Standalone Call Centre SIP Telephony Platform

'Over the top' integration to all Mitel platforms

'Over the top' integration to non-Mitel platforms

ACD - Automatic Call Distributer

IVR - Interactive Voice Response

Call Recording (stereo & dual channel)

Call Player (Retrieval) with web streaming

Search recordings by CRM record

Full SDK for integration to 3rd party UIs

Supports all SIP end points (phones)

'Opening hours' & remote emergency mode

Skills & priority-based routing

Blind, Consult & Conference Transfers

Personalized call routing

Direct agent DDIs

Transfer to queue

ACD statistics API

The Preview dialing option works as follows:

- Agent clicks to request the next CRM record to call
- Agent familiarizes themselves with customer info
- · Agent clicks Dial
- Agent classifies all calls (including non-productive)
- · System automatically recycles non-productive calls for next attempt
- Agent handles productive calls

The Progressive dialing option works as follows:

- Agent is idle for a configurable number of seconds
- System screen pops the next CRM record on the agent desktop and dials
- Agent classifies all calls (including non-productive)
- · System automatically recycles non-productive calls for next attempt
- Agent handles productive calls
- · Agent dispositions all calls through the script

The Power dialing option works as follows:

- · Agent becomes free
- System automatically places a call to the next CRM record
- System dispositions automatically non-productive calls (busy, no answer, unobtainable, etc.)
- System automatically recycles non-productive calls for next attempt
- System delivers a connected call and a screen pop simultaneously
- Agent handles productive calls
- · Agent dispositions productive calls through the script

The Predictive dialing option works as follows:

- System over-dials CRM records in advance of agents becoming available
- System dispositions automatically non-productive calls (busy, no answer, un-obtainable, etc.)
- System automatically recycles non-productive calls for next attempt
- Agent becomes free
- System delivers a connected call and a screen pop simultaneously
- · Agent handles productive calls
- Agent dispositions productive calls through the script

Configuration

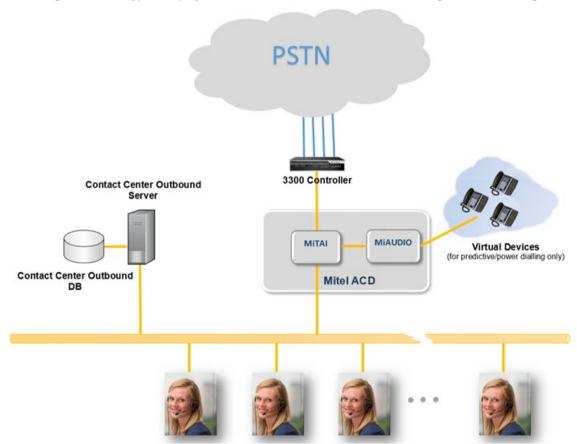
There are two core configurations for MiContact Center Outbound: Integrated Dialer and OTT (Over-The-Top) Dialer. The OTT dialer leverages the MiCC Outbound Call Manager interoperability across SIP trunking.

The following table details the advantages of using one configuration over the other.

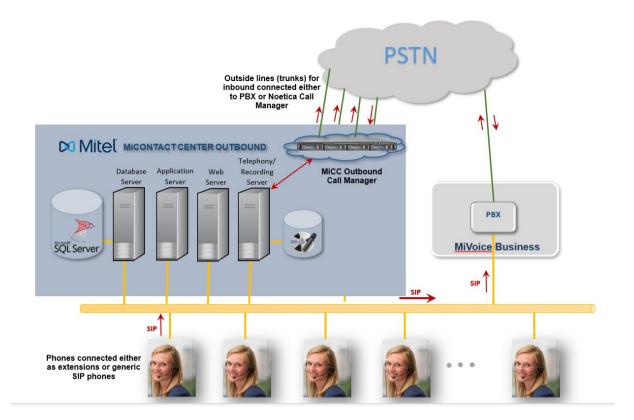
Table 1: Soft and Hard Dialer Comparison

ADVANTAGE	INTEGRATES	OTT
No MiAUDIO port licenses required		x
Support for Answering Machine Detection (AMD & LPD)		x
Support for native Voice Recording & Full Integration with Mitel Interaction Recording (ASC)		х
Reduced stress on the MiVoice Business controllers		X
Call monitoring (live listen in)		X
Call blending with MiCC Business	х	
Integrated with MiCC Ignite User Interface	х	

The following illustrates a typical deployment of the MiContact Center Outbound integrated dialer configuration.



This next figure illustrates a typical deployment of MiContact Center Outbound OTT dialer configuration.



MiContact Center Outbound fully supports virtualization.

MiContact Center Outbound has been fully tested to co-exist with all Mitel unified communications platforms (including MiVoice Business) and the MiContact Center Business and Enterprise suites of software on both the client and server levels.

Furthermore, there exists now an integration between MiCC Outbound and MiCC Business Web Ignite meaning that users can have the benefit of the dialer and MiCC Business Web Ignite within a single pane of glass.

MiContact Center Outbound offers a wide range of network configurations for scalability and resiliency purposes:

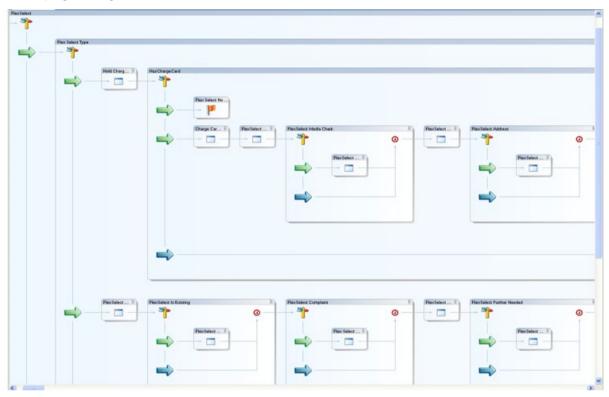
- Stand-alone topology
- 1+1 topology
- Scaling Resilient topology
- Distributed Resilient topology

Chapter 3: MiContact Center Outbound Components

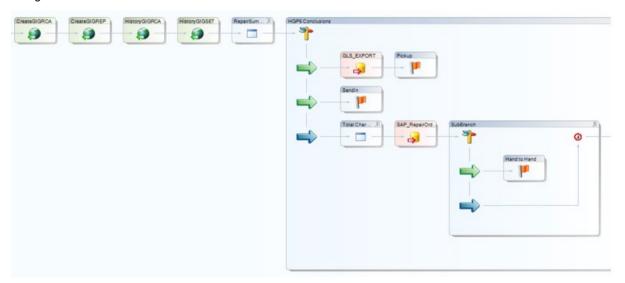
Call Scripting

In the same way that a GPS satellite navigation system can integrate with traffic, weather and other live sources of information, the MiContact Center Scripting tool can use existing customer systems or web services to guide the agent through the most appropriate route, avoid known pitfalls and arrive at the correct destination in the most efficient and effective way. On the other hand, the agent has the freedom to make her own choices and the route will re-adjust accordingly.

The MiContact Center Scripting agent call scripting tool is a user friendly visual environment that allows non-technical users to map business processes in a rigorous fashion easily and deploy these processes in real time and without programming.



MiContact Center Scripting provides built in components that allow the script designer to easily interface to external web services, send emails, write to external databases or files and much more automatically, behind the scenes with no agent involvement whatsoever.



In addition to this, and possibly more crucial to any contact center operation, MiContact Center Scripting manages to achieve a rather subtle but crucial feat. It converts a telephone conversation (or any interaction) from a collection of noises (or free text) into a data record in a database and links these records to the telephony information relating to each call. This provides the missing link between the telephony statistics and the actual content of each call. Also, it provides a link threading together disparate transactions on various back office systems as part of one front office interaction.

Why is this so important? Just as an example, let us assume that you are analyzing your calls and have observed that 10% of your calls are longer than 15 minutes. From the telephony data, you will be able to derive some basic limited knowledge relating to these calls (such as time of day, DID, agents and teams they were delivered to, etc.), but you will know almost nothing about the content (i.e., what was actually discussed) of these calls, without actually listening to hundreds or thousands of recordings.

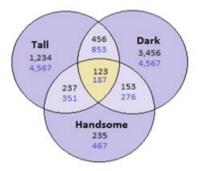
With MiContact Center Scripting, you will know not only the precise route that each interaction has taken through the process map, but also the information that was exchanged between your agent and your client (and links into your other systems for further information). You will know, for instance which calls resulted in an order, the products and prices that were sold or perhaps which calls were customer complaints and what each complaint was about.

Now you can start to make some more meaningful decisions in relation to your longer calls and understand whether the time spent on them is justified and what may be the best way to improve efficiency without damaging the business.

Data Import/Export

User friendly, non-technical, wizard-based tools are provided for customer data import and export. Data can be imported directly from files (CSV mainly) across FTP or SFTP or directly from external databases. Import scheduling is available: wizards can be used to define the import parameters (metadata) which can then be used to run imports scheduled at regularly recurring specific times/days. Imports come in two stages: Import into CRM + Import into Dialer (Call Queuing/Segmentation). Each stage can be performed separately or both stages can be merged into on step.

Unique Selling Point: MiContact Center Outbound provides a visual method based on the on-screen manipulation of Venn diagrams for the selection of records for either CRM import or call queuing.



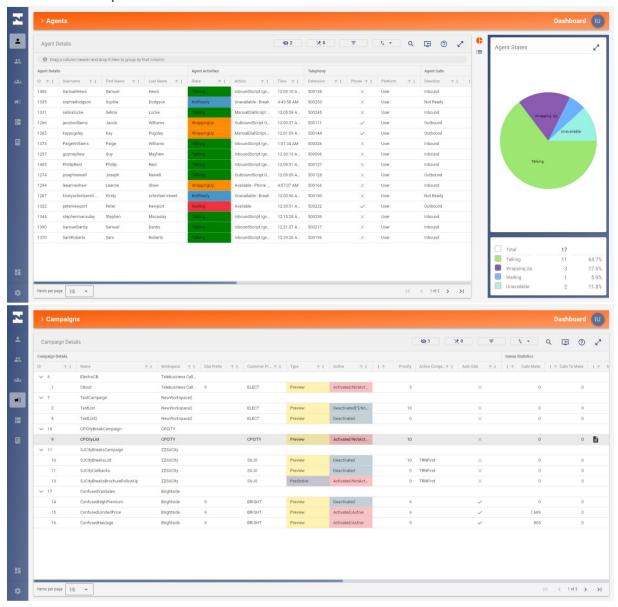
Data can be exported directly IN REAL TIME (i.e. at the end of each call) into files (CSV mainly) or directly into external databases. MiContact Center Outbound provides a visual method based on the integration with its own Call Scripting and CRM modules for the definition and automation of data exports.

Reporting

At present, reporting is separate from the MCD and the rest of the MiContact Center suite. Four types of reports:

- Dashboard: This presents to administrators a real-time view of campaigns, agents, teams and dialer performance. Updated every 5 seconds.
- 2. Report Viewer: A portal hosting MS SSRS reports. Some 30 report templates with drill down capability provided as standard (including Agent Utilization, Campaign Outcome, etc.). End users encouraged to add their own reports. Open and fully documented database.
- 3. *Report Scheduler:* Reports can be scheduled to run at regular intervals or after each call and delivered via email, printer, web, SMS, etc.
- 4. Web Services API: All the Live Monitor stats can be polled by a user application and displayed in a customized (usually browser based) manner to supervisor's desktops, wallboards or mobile devices.

Dashboard Examples:



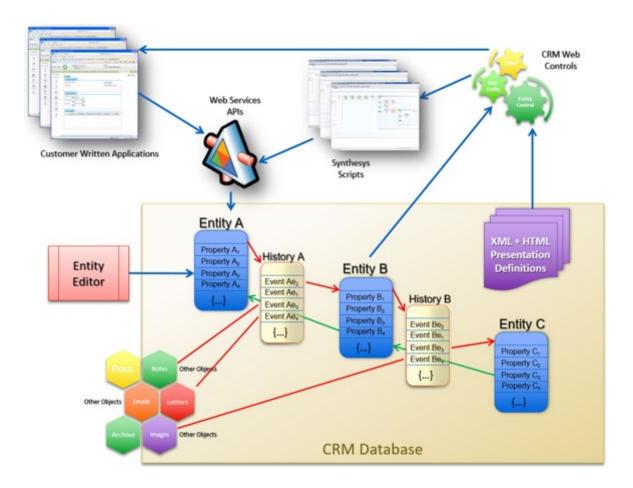
Web Services APIs

MiContact Center Outbound exposes several Web Services APIs. Here is a selection:

- CRM API: This allows access to CRM entities for search, insert or update as well as the ability to add history items to CRM entity records. Typically used to insert or update data from websites directly into the outbound system.
- 2. *Dialer API:* This allows external applications to manipulate dialer lists programmatically. Typically used for automation of dialer functions such as web "call me" buttons, price comparison sites or high priority calls.
- 3. Dashboard API: This provides dashboard data on demand. Typically used for custom dashboards, wallboards or mobile devices.
- 4. Dialer & Telephony SDK: provides a modern web services collection of methods and events that allows any user application to integrate to MiCC Outbound telephony and dialer technology without having to sacrifice any real estate on the call center agents' screens by integrating it directly into their interface.

Tactical Call Center CRM

Tactical call center CRM offers screen pop, customer interaction history with thing like notes, documents and events. Visually defined data structures. Intuitive automatic data import and export wizards, data insertion and update web services API.



The CRM system is integral to the dialer and instrumental in delivering key features which are important to any outbound contact center. However, it is NOT an enterprise CRM system and does not compete against the established players (Oracle, Microsoft, Salesforce, etc.) but rather complements these.

Types of Outbound Dialing

MiContact Center Outbound offers four types of outbound dialing: Preview, Progressive, Power and Predictive dialing.



The Predictive Dialer offers advanced algorithms designed to DOUBLE the amount of productive talk time (typically from 40% to 80%). It can cut agent costs in half. All predictive dialers generate what is often termed "abandoned calls", for example: calls connected to a customer being abandoned because no agent is available. The Abandoned Call Rate is regulated by law in most countries. It is a "per list" setting in the dialer. The MiContact Center Outbound predictive dialer provides self-pacing algorithms for the optimum balance between efficiency and compliance with the strictest regulations.

In addition, MiContact Center Outbound provides

new and unique technologies which can deliver major commercial advantages against all other competitive products. The latest addition to the product is the SNoDrop™ innovation:

SNoDrop™

All predictive dialers generate 'abandoned' (also known as 'dropped') calls. This is a direct consequence of the nondeterministic nature of the fundamental algorithms which all predictive dialers rely upon. To be precise, dropped calls are largely the result of a probabilistic overestimation of the number of calls a dialer should be making at any point in time in relation to the volume of agents it is required to service and the connection rate of the data in use.

Therefore, the consensus to date has always been that dropped calls are an inevitable and unavoidable side effect of all and any predictive dialing activity. The only palliative measure on offer up to now was to limit the number of dropped calls to what might be considered 'acceptable' levels by limiting the pace of dialing once an agreed limit is breached.

However, as regulation surrounding the use of predictive dialing and abandoned calls tightens around the world, what might be considered 'acceptable' with regards to tolerance towards dialer dropped calls is drawing ever closer to zero. Under normal circumstances, this should be sounding the death knell for predictive dialing as an acceptable practice.

At Noetica we have recognized this trend well before time and have been working closely with our dialer clients to develop new technologies that address these concerns. As a result, we have recently announced our new SNoDrop technology which delivers responsible predictive dialing with virtually zero abandoned calls.

Of course, this may seem a little too good to be true, so here is a high-level explanation of this new technology. Fundamentally, it relies on combining our predictive dialer with Noetica's Voice Platform (NVP™) (also known as **MiCC Outbound Call Manager** within the Mitel family of products) and our call blending technology to eliminate dropped calls or indeed reduce them to a completely negligible level.

The method can be summed up as follows (please refer to the diagram below):

1. On the NVP™, define an ACD inbound queue (known as a 'strategy) dedicated to SNoDrop™. The SNoDrop™ queue is not intended to route any inbound calls (although the method does not prevent it). The queue is set up with a maximum 2 seconds wait time during which period a call in the queue will either be delivered to an agent or dropped with a message.



Primary (pure) Outbound Team

*N is a user controlled parameter (Synthesys™ 'passive' blending)

- 2. For each dialer campaign, define two teams: a pure outbound team A and a secondary team B which uses MiContact Center Outbound call blending to accept calls from the dialer and from the SNoDrop™ queue. Team B can be as large as the entire agent contingent (meaning that team A is empty) but cannot be smaller than a minimum calculable number of agents.
- 3. MiContact Center Outbound blending (see also below) requires a parameter N (N ≥ 1) which designates the target number of agents that should be kept available for inbound at any given point in time. For instance, if N is set to 1, a single agent in the blended team will be kept available to handle possible inbound calls. When that agent receives an inbound call, the next outbound agent to become available is taken out of the dialer and becomes the current agent earmarked for inbound duties. Conversely, if more than one agent is seen as waiting for inbound, then one of them will be returned to the dialer.

- 4. By enabling SNoDrop on the dialer campaign, any call that the dialer would normally drop (abandon) would be placed into the SNoDrop queue and will be delivered to one of the blended agents on the B team who is on 'inbound' duty.
- 5. The NVP™ will inform the dialer of the final outcome for each call placed in the SNoDrop™ queue. Most if not all of these will reach agents in team B. In all these cases the dialer will deduct one from its abandoned call count. As a result, the abandoned call rate should hover around zero.

The SNoDrop™ technology has been in live trials for some time and is indeed meeting all our expectations. We are confident that SNoDrop™ is a game changer in the industry and proves that it is possible to deliver responsible predictive dialing with zero or near zero abandoned calls.

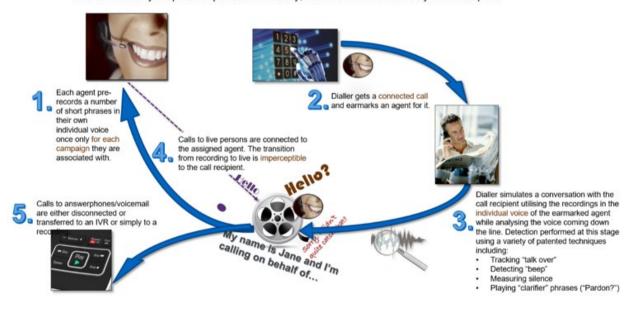
LPD™ (Live Person Detection)

LPD™ is a globally patented new, safe and accurate method for ensuring that call center outbound agents are only presented with live customer calls. Specifically, it provides the following features:

- Filters out almost all answering machines
- Filters out a great proportion of instant rejections
- Maintains call introductions consistently of a high quality
- Eliminates repetitive call introductions

LPD™: How does it work?

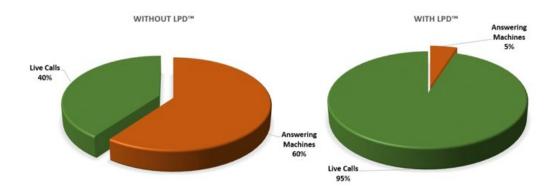
This is a radically simplified explanation. In reality, the method is considerably more complex.



LPD delivers several major benefits which no other product on the market is able to deliver at present:

- Safe: LPD™ generates virtually no "false positives" 1
- Accurate: The percentage of calls delivered to agents that are connected to answering machines/voicemail typically drops from up to 60% to under 5%
- Effective: Measured uplift in Successful calls Per Hour (SPH): 40%
- Unique: LPD™ is now patent protected in the UK, US, Canada and the EU

¹ A "false positive" is a call identified as an answering machine which is in fact a real person, therefore resulting in a silent call.



Campaign Management

MiContact Center Outbound offers a comprehensive, visual and user friendly campaign management experience offering a host of options:

- Visual data segmentation & list creation
- List prioritization
- List blending (with weighting)
- · Visual, powerful and intuitive call recycling strategy builder
- Web services API for list insertion/update
- Easy dynamic assignment of agents to campaigns with no down time
- · Real time record suppression utility avoids unnecessary and possibly awkward calls
- Quota management
- Bulk queue changes
- Multimedia enabled (email & SMS blasts)
- Advanced CTI agent tools (various call transfers, hold, break, etc.)

Call Blending

Inbound / Outbound blended agents are supported for all forms of dialing (including predictive). As a rule, blending ALWAYS prioritizes Inbound over Outbound.

There are two ways in which call blending can be utilized: Reactive or Active Blending.

In Reactive Blending, one or more agents (a parameter) can be reserved and waiting for the next inbound call at any time. This guarantees that callers would never have to wait in a queue and tight inbound SLAs can be adhered to.

In Active Blending, no agents are reserved, but as soon as an inbound call is queuing, the blending mechanism requests an agent to be released by the dialer to handle the inbound call. In this mode, caller may have to wait until an agent becomes available.

Chapter 4: Professional Services

This section provides an overview of the MiContact Center Outbound professional services offering. For more information, refer to the following topics:

- Installation
- Training
- Extended Software Assurance and Support

Overview

MiContact Center Outbound professional services – currently offered as installation, consultancy, and training – are provided by Mitel Solutions Alliance (MSA) OEM partner Noetica.

Installation

At present, MiContact Center Outbound can only be installed (usually remotely) by Noetica qualified engineers.

The typical installation, configuration and setup takes 4 days. A full training course takes 3 days for up to four attendees. An allowance of at least 5 days Professional Services is required for project management, consultancy, and initial assistance.

In Summary:

Installation 4 days Training 3 days

Professional Services 5 days (minimum)

Total: 12 days

Prior to installation, a set of infrastructure pre-requisites need to be in place. These include server, network, database and remote access detailed specifications, as described in the MiContact Center Outbound: Installation Prerequisites document. Installation cannot proceed unless all of the infrastructure pre-requisites are in place.

Training

At present, MiContact Center Outbound training is provided directly by Noetica qualified trainers. A training course consists of 3 full days and each course is limited to up to 4 attendees.

At the end of the course, each attendee should be able to design, implement, and deploy reasonably complex campaigns from start to end using MiContact Center Outbound modules. Courses can be tailored to emphasize subjects which are of specific relevance to the customer and can be delivered remotely or at Noetica's training facility in central London (UK), at Mitel HQ in Ottawa (Canada) or on a customer's site (following installation). If delivered on site, the trainer's expenses will be recharged at cost.

Extended Software Assurance and Support

MiContact Center Outbound Software Assurance and Support is recommended for customers to help optimize the performance and value of their contact center solutions. It delivers excellence in software support, providing access to software updates and new functionality.

Full support is included for all monthly subscription customers, whether hosted or on premise.

For this release of the MiContact Center Outbound offering, all premium support and professional services are provided by Mitel Solutions Alliance OEM partner, Noetica.

When you purchase MiContact Center Outbound software from Mitel you receive premium service and support. This **includes:**

- Non-urgent technical support, Monday to Friday from 9:00 A.M. to 5:00 P.M. GMT
- Emergency technical support, 24/7/365 (Category A incidents)
- Emergency Service Level Agreement (SLA) of 45 minute response time and 24 hours for fix or workaround resolutions

NOTE: For non-urgent support inquiries, email is the desired method of contact.

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