



Call Center Dialer Optimization: *It's Easy* *If You Do It Smart*

*Use-Cases, Common Mistakes,
Strategies and Solutions*

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01

Introduction

1.1 What is a Call Center Dialer?

1.2 Increasing Popularity

What is a Call Center Dialer?

In a broad sense, a modern dialer is a software that automates the outbound calling process by using pre-determined calling and routing rules.

Some of the main goals of a dialer:

- Increase Calling Efficiency
- Reduce costs
- Reduce human error
- Maximize agent talk time
- Increase Conversion Rate

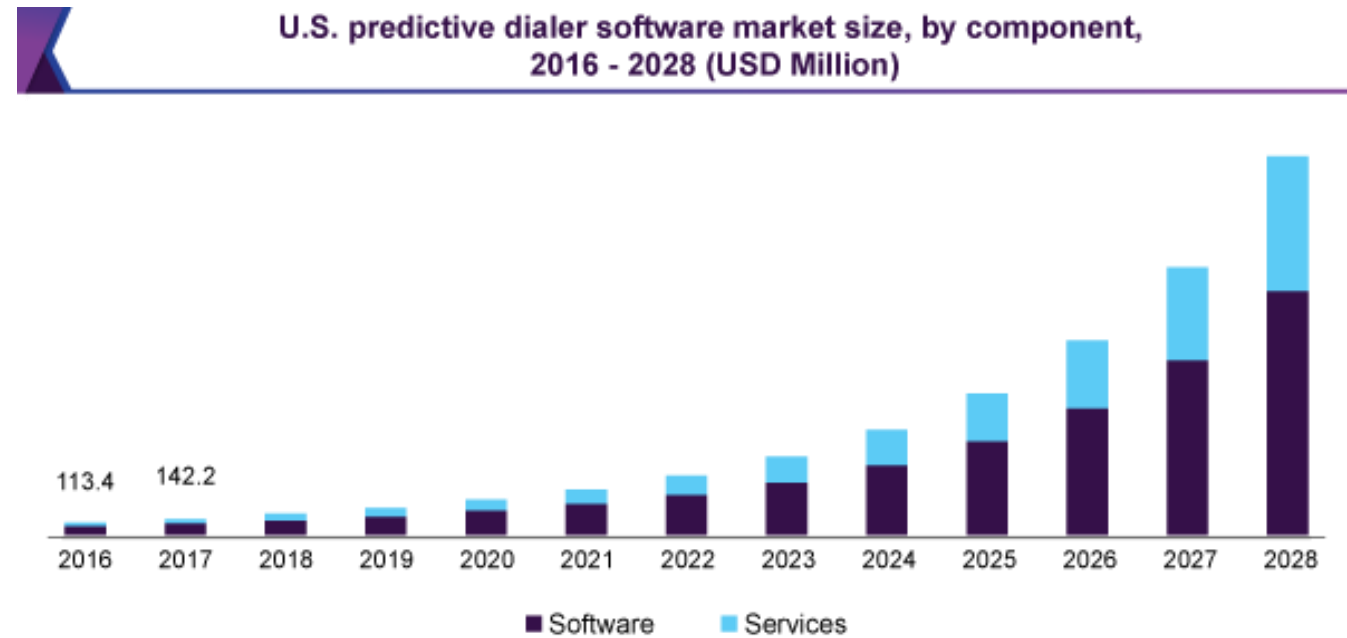
The more advanced types such as the Predictive Dialer can potentially detect and filter out disconnected numbers, busy lines, answering machines, and unanswered calls.



Increasing Popularity

The global predictive dialer software market is expected to grow at a compound annual growth rate of 37.0% from 2021 to 2028 to reach USD 12.2 billion by 2028. -

[Source](#)



Source: www.grandviewresearch.com



02

Importance

2.1 Improved Efficiency

2.2 Improved Agent
Experience

Improved Efficiency

It is estimated that a salesperson makes 52 calls daily (with 15% of the time dedicated to leaving voicemails). – [Source](#)

In a regular set-up, where agents manually select, dial, and wait for the call to connect is estimated that a total of 36 hours is being wasted each month – per rep.

It's easy to see how an automated tool to select prospects, dial, and route the call can optimize the outbound process.

For example, Predictive dialers can reduce the time between calls to just 3 seconds, saving an average of 45 minutes per day, PER AGENT.

If you have 15 agents, that is a total of 11.25 additional hours of team talk time PER DAY...
or 56.25 additional hours of talk time per 5-day work week.

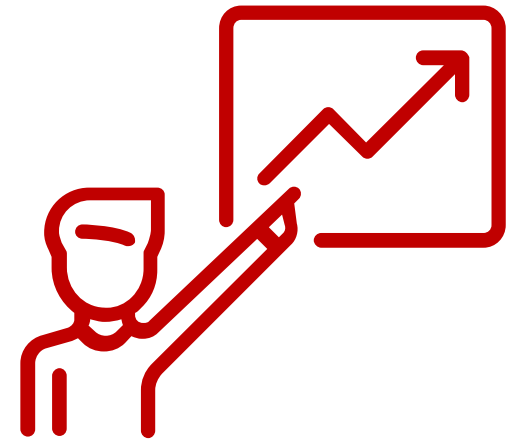


Improved Agent Experience

Long wait times for a call to connect lead to boredom, disengagement, and eventually, demotivates agents. A dialer can easily eliminate these unwanted wait times.

Some dialers (Preview or Automatic Preview) will pull client data out of the CRM and show it to the agent before a number is dialed.

Dialers are often designed to provide a streamlined experience, where every step is calibrated to minimize the agent's effort.





03

Types and Use Cases

3.1 Click to Dial

3.2 Predictive Dialer

3.3 Automatic Preview Dialer

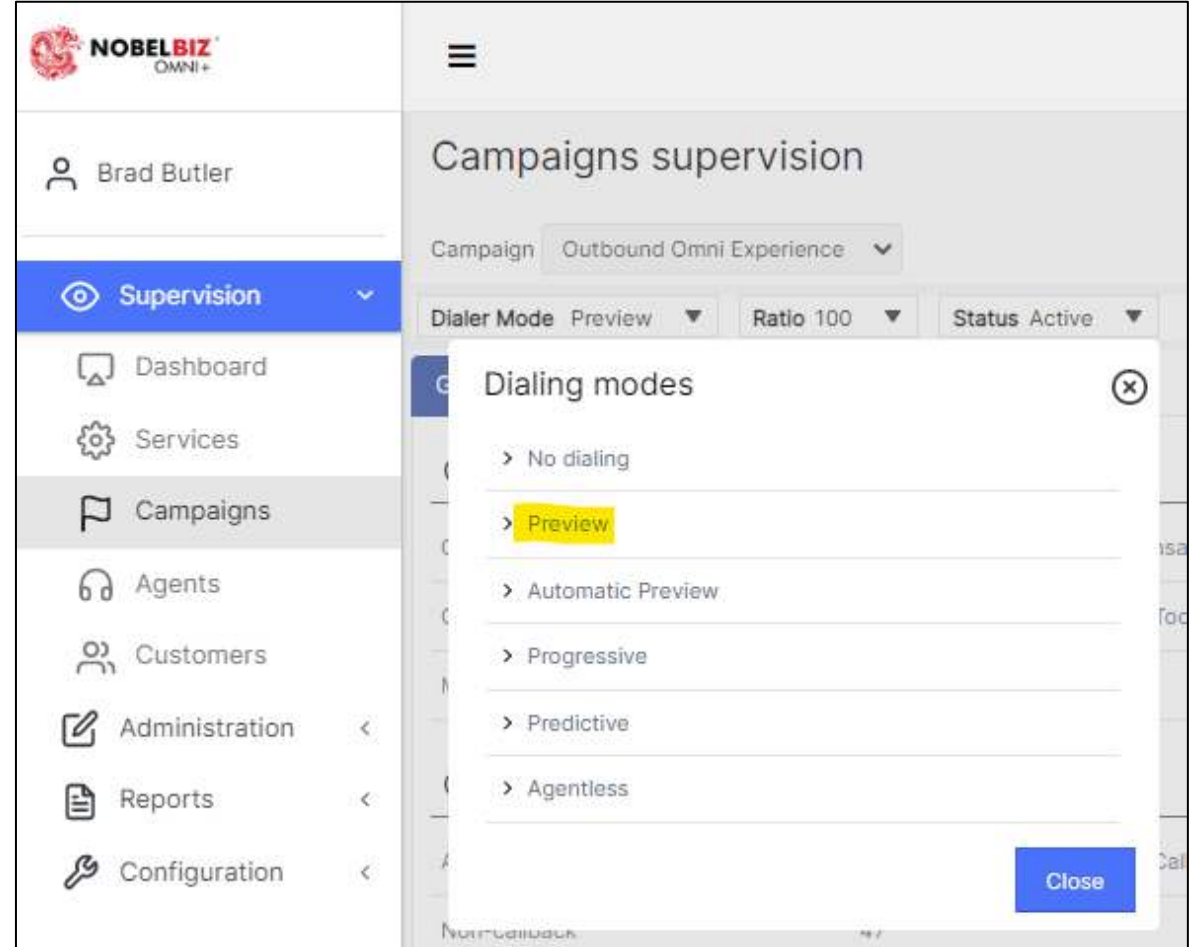
3.4 Progressive Dialer

Click to Dial (Preview)

When using Click to Dial, client information is displayed to the agent alongside the contact information. After reviewing the data, the agent decides if and when to make the call.

Use Case:

Although Click to Dial is one of the more straightforward dialing methods, it is probably the best choice for campaigns that need a more thoughtful calling process, such as complex sales or any type of call that requires some preparation beforehand.



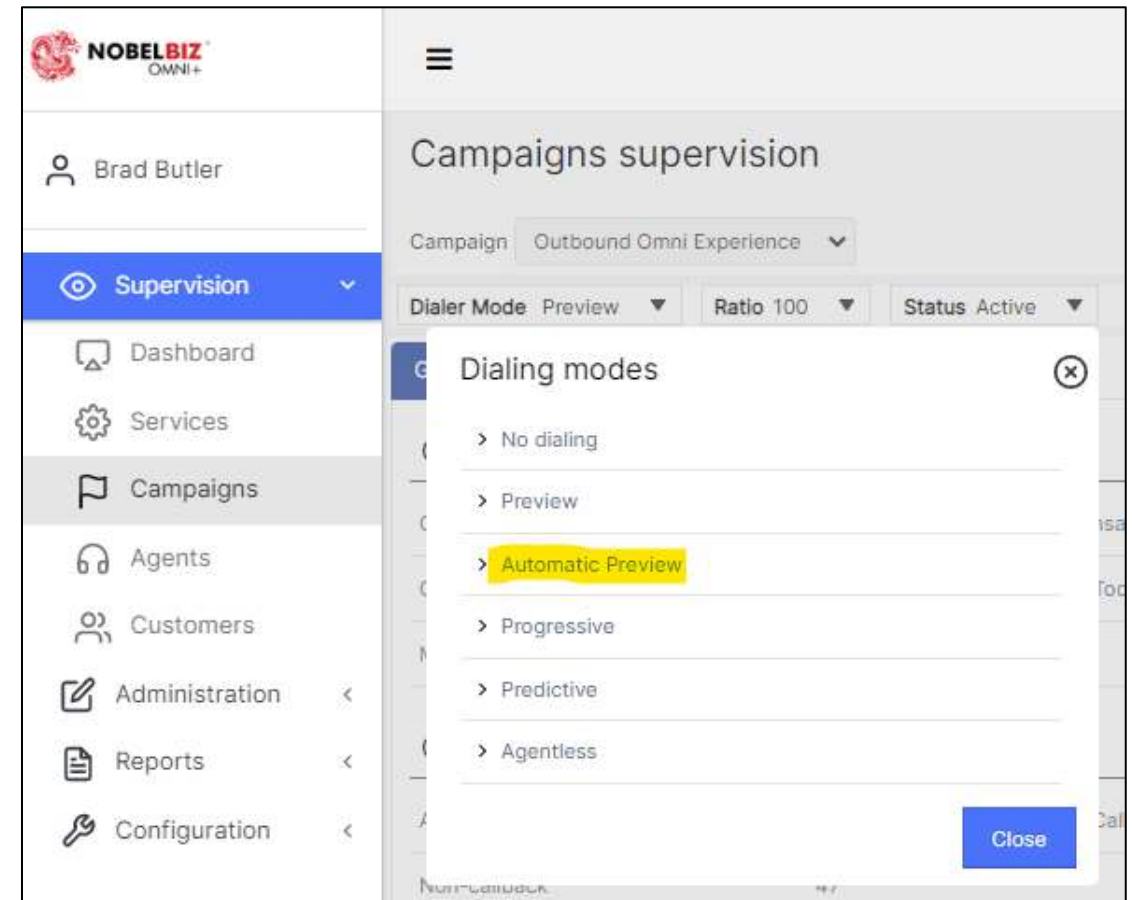
Automatic Preview Dialer:

Automatic Preview Dialing pulls client records and information and displays them to the agent to be reviewed, while the system automatically dials and calls the prospect: a middle ground between Preview and Predictive.

Unlike Predictive Dialing, where the system dials more numbers at once and transfers the one that connects, Automatic Preview Dialing dials on a 1-to-1 ratio while displaying client data to the agent within the Agent Dashboard.

Use Case:

The Automatic Preview Dialer is highly versatile, adding time efficiency to complex campaigns where agents need to review client data before the call, take notes, personalize scripts, and so on.



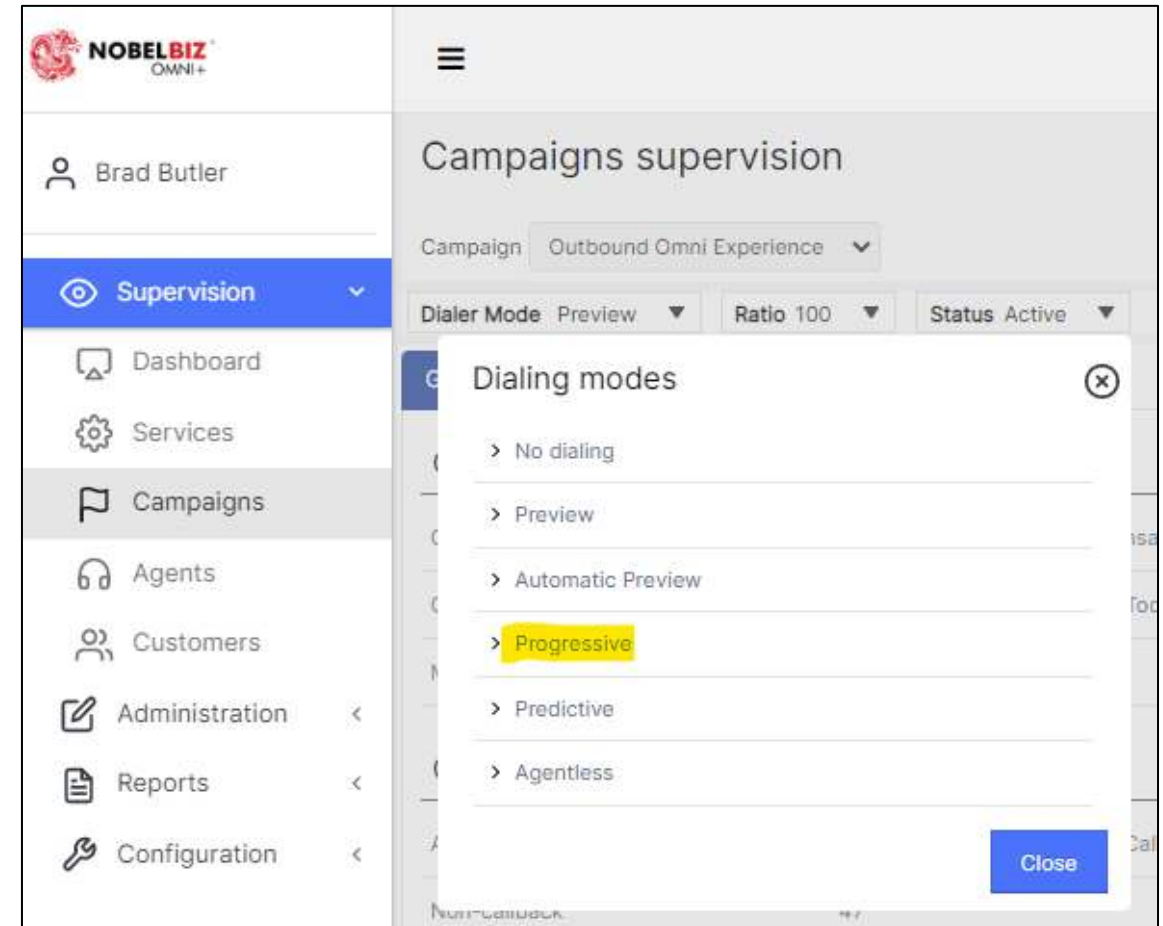
Progressive Dialer

The Progressive Dialer goes to work as soon as an agent is available. Calling ratios are set by administration or supervisors to adjust the number of calls the dialer makes PER AGENT.

- Answering machine detection is adjustable to either disconnect a call or drop a pre-recorded voicemail.
- Requires Larger amounts of data to “churn” if higher ratios are set.
- Abandon Rate must be monitored as progressive does not measure agent or customer statistics.

Use Case:

Progressive dialing is useful when a center has large data lists to dial through and plenty of overflow agents to capture connects. When set up correctly, Progressive can be one of the most efficient methods of increasing connection %.



Predictive Dialer

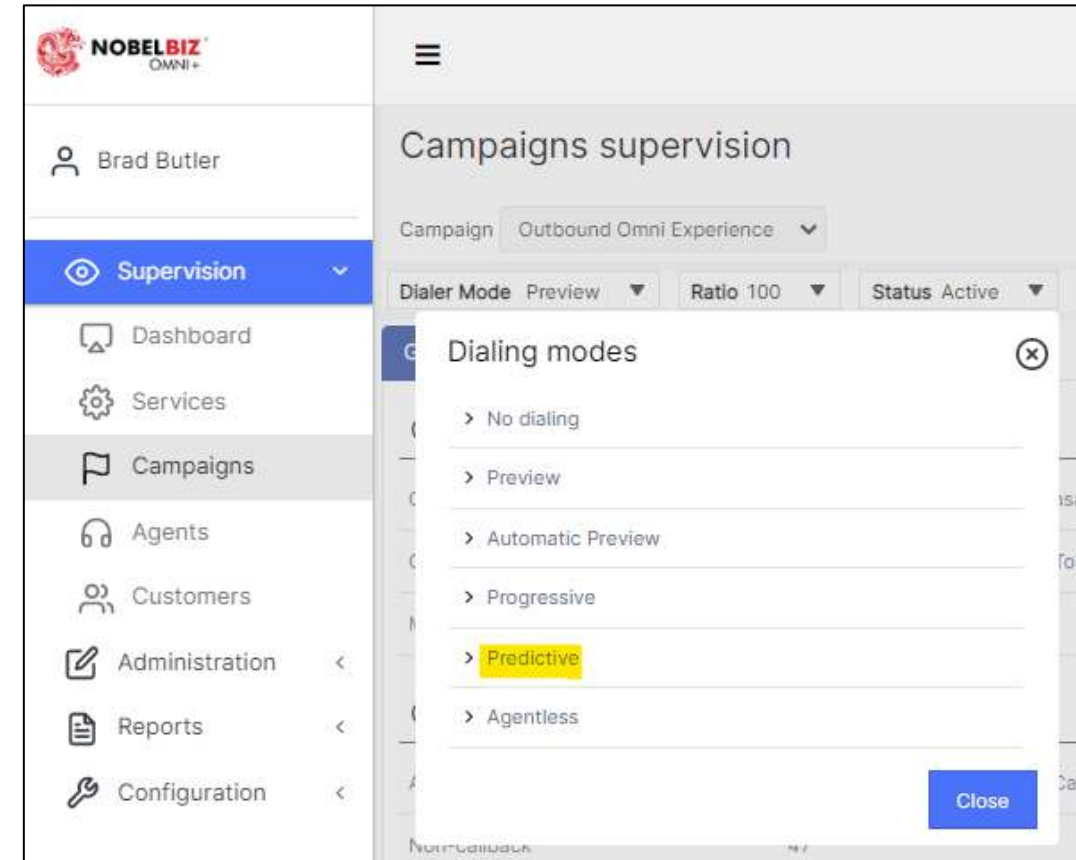
Predictive Dialer will use predictive statistical data of an agent's dialer tendencies and customers' data to determine when and how many calls to place from the dialer. It achieves this by adjusting calling ratios in real-time. Its main goal is to send agents confirmed connects or "hellos" methodically and consistently.

Agent-related data includes statistics like average talk time, wrap-up time, and "call ready" rhythms to learn when to reach out to multiple contacts simultaneously. It then delivers connects / "Hellos" to a single agent or group of agents in a pre-determined algorithm.

Customer-related data include filters based on demographics and historical connection rates based on time of day to determine how many lines to call out per agent.

Use Case:

Because it tends to get better and better as more data is thrown at it, the Predictive Dialer performs best with large outbound campaigns, usually suited for the B2C niche.





04

Common Oversights & Pitfalls

4.1 CRM-Related

4.2 Technology- and Strategy Related

4.3 Compliance-Related

CRM-Related

- **Outdated Call Information:** unused or outdated telephone numbers need to be removed periodically.
 - Establishing “FINAL DISPOSITIONS” can streamline the process of organizing contacts within a dialer.
 - Old data can clog a dialer’s effort in any dialing strategy.
- **Failing to create contact fields necessary to a department’s needs:** When starting a new campaign, identify the information required for an agent to capture and see when talking to a customer/lead.
 - Make sure your dialer has the ability to create custom fields and map data to it.
- **Contacting customers who’ve opted out of your list:** make it easy for agents to update the list with the Do Not Call option.

The screenshot displays the NOBELBIZ OMNI+ CRM interface. On the left is a sidebar menu with options: Brad Butler, Supervision, Administration (selected), Worktops, Users, Campaigns, Services, Scripts, Scripts DBR, SIP Servers, Recorders, Messages, Events, Reports, and Configuration. The main area is titled 'Bind the corresponding table fields' and contains instructions: 'Bind the fields in the table Lead_Template_Omni_ERxperience.JimLarkin.csv to customer additional data Outbound Omni Experience. Fields with (*) are mandatory. Records to import 50'. Below this is a table for mapping fields from the CSV to the CRM. The table has two main sections: 'Customer data' and 'Additional data'. The 'Customer data' section includes fields like CLIENT_ID, NAME, LAST_NAME, PHONE, ADDRESS, CITY, ZIP_CODE, STATE, COUNTRY, FAX, BIRTH_DATE, REGISTRATION_DATE, LANGUAGE_ID, REMARKS, REACHABLE_FROM, REACHABLE_UPTO, TIPID, SEGMENT_ATTRIBUTE, SKILL_ATTRIBUTE, EMAIL, EMAIL2, CELLPHONE, CELLPHONE2, PRIORITY, COMPANY, PERSONAL_DOCUMENT, FULL_NAME, SEX, PREFERRED_CHANNEL, TEXT1, TEXT2, TEXT3, NUM1, NUM2, NUM3, and NEXT_CONTACT. Each field has a dropdown menu to select a corresponding field from the CSV. At the bottom, there are checkboxes for 'Use alternative phones' and 'Upload additional customer data' (which is checked).

Field	Value	Field	Value	Field	Value
(*) CLIENT_ID	ID	(*) NAME	First Name	(*) LAST_NAME	Last Name
SECOND_LAST_NAME	None	(*) PHONE	Phone	PHONE2	None
ADDRESS	Address	CITY	City	ZIP_CODE	Zip
STATE	State	COUNTRY	None	FAX	None
BIRTH_DATE	None	REGISTRATION_DATE	None	LANGUAGE_ID	None
REMARKS	None	REACHABLE_FROM	None	REACHABLE_UPTO	None
TIPID	None	SEGMENT_ATTRIBUTE	None	SKILL_ATTRIBUTE	None
EMAIL	email	EMAIL2	None	CELLPHONE	None
CELLPHONE2	None	PRIORITY	None	COMPANY	None
PERSONAL_DOCUMENT	None	FULL_NAME	None	SEX	None
PREFERRED_CHANNEL	None	TEXT1	None	TEXT2	None
TEXT3	None	NUM1	None	NUM2	None
NUM3	None	NEXT_CONTACT	None		

Use alternative phones ☐ Upload additional customer data ☒

Technology- & Strategy-Related

- **Poor Number Management:** using outbound numbers that are labeled or blocked.
 - Utilizing a Local Touch product can significantly prolong the “life” of a phone number.
 - Certifying numbers also ensures your efforts are not being blocked by labels.
- **Not factoring in voice quality:** Get the tech team involved from the start. Ensure your network is built to spec for VoIP and CCaaS solutions.
- **Not using an Omnichannel (or at least Multichannel) approach:** Begin offering your clients and agents the ability to communicate with more than a phone call. Find a solution that integrates SMS, Email, web chat, and social media into an agent’s desktop environment.
- **Not having a proper call-back infrastructure:** Take the time to work out the call flow of inbound calls. Utilize IVRs or agentless seats to manage and distribute inbound traffic to the proper department.



Compliance-Related

- **Not filtering out the National Do Not Call Registry**
- **Not using compliance filters:** Time zone, Holiday Restrictions, Calling Days, and Calling Hours.
- **Not being up to date with national AND state compliance laws.**
- **Not having the infrastructure to store history and recordings in a compliant manner.**
- **Not being able to add a client on a DNC, during the call, upon request.**
- **Ignoring FTC's abandonment rate laws:** in 30 days, only 3% of outbound calls can be abandoned.





Thank You!

For more contact-center-related resources or if you need help with your technology, infrastructure, or operations, visit www.nobelbiz.com

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