Proactive Outbound Contact Capabilities

Webex Contact Center

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US WebexCC Tech Summit – May 2024

Agenda

- Overview of Current Outbound Capabilities

- Proactive Outreach

  - Configuration Steps Overview

- Outbound Voice Campaigns

 - Configuration Steps Overview

- Demo

- Conclusion

Overview WxCC Outbound Capabilities

Webex Contact Center – Voice Outbound Campaign

- Webex Contact Center Outbound Campaign Management offers automatic outbound calling for contact center through Campaign Management optional feature:

  - Preview Dialing – already available

  - Progressive Dialing (CPA release) – EA April 2024

  - Predictive Dialing (CPA release) – EA April 2024

  - Cisco Native Campaign Management – Roadmap

  What's new link – https://help.webex.com/en-us/article/a1gx3h/What's-New-in-Webex-Contact-Center#topic_D1C27F9C842A4C6CA27898AFFDB474B7

  Documentation link –
  https://www.cisco.com/c/en/us/td/docs/voice_ip_comm/cust_contact/contact_center/webexcc/campaign_user_20/webexcc_b_20-campaign-manager-user-guide/webexcc_m_20-preface.html
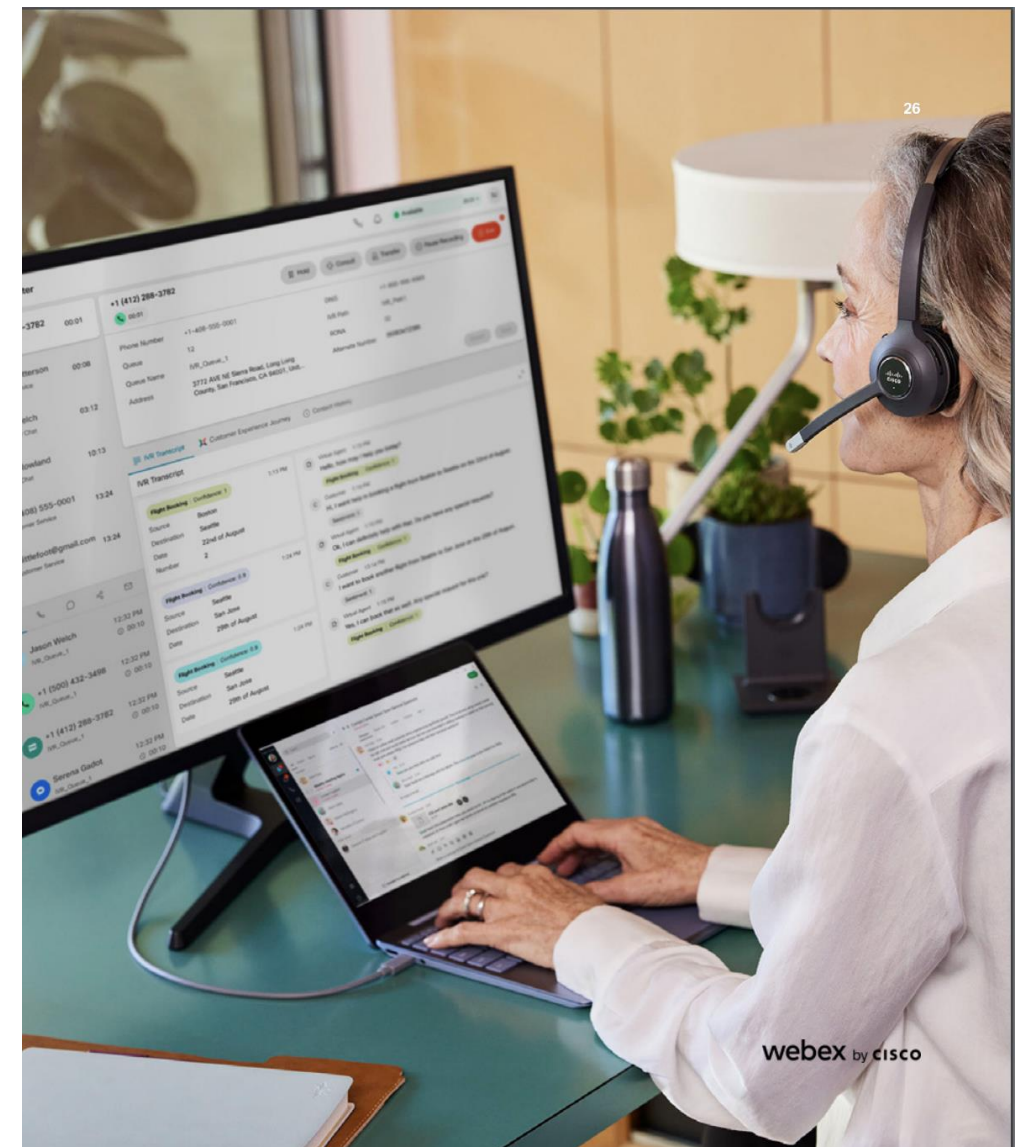
Webex Contact Center – Digital Outbound Notification

- Managed by the Webex Connect
  - Scheduling a SMS or Custom Event (email, programmable in flow)
  - Per message charge
  - No Limitations, No Guard Rails

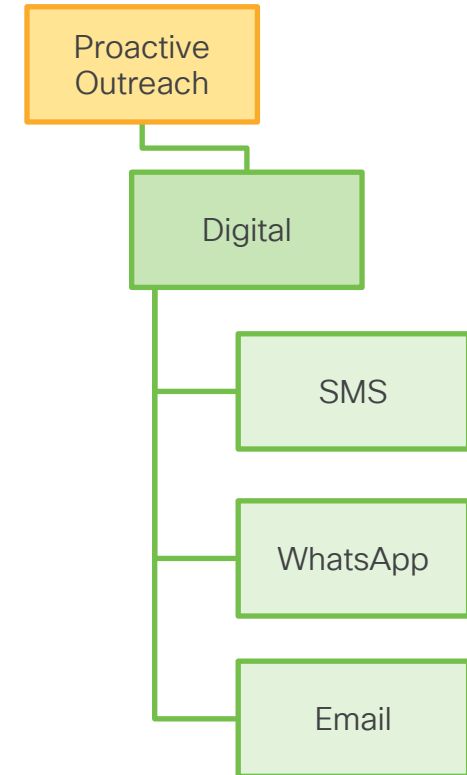# Proactive Outreach Digital

Proactive Outreach

Initiating communication with customers to provide relevant updates, preemptive issue resolution, timely reminders, support, and feedback solicitation.

It helps businesses stay ahead of customer needs by:

- delivering important updates to customers in a timely manner
- catering to customer preferences
- reducing the volume of incoming customer inquiries or support calls

Proactive Outreach

Digital

SMS

WhatsApp

Email

Research by Salesforce shows that 95% of customers expect businesses to provide them with proactive notifications.

Research by Salesforce reveals that proactive notifications can lead to a 73% increase in cross-selling and upselling opportunities.

Customers wants the power of Reply

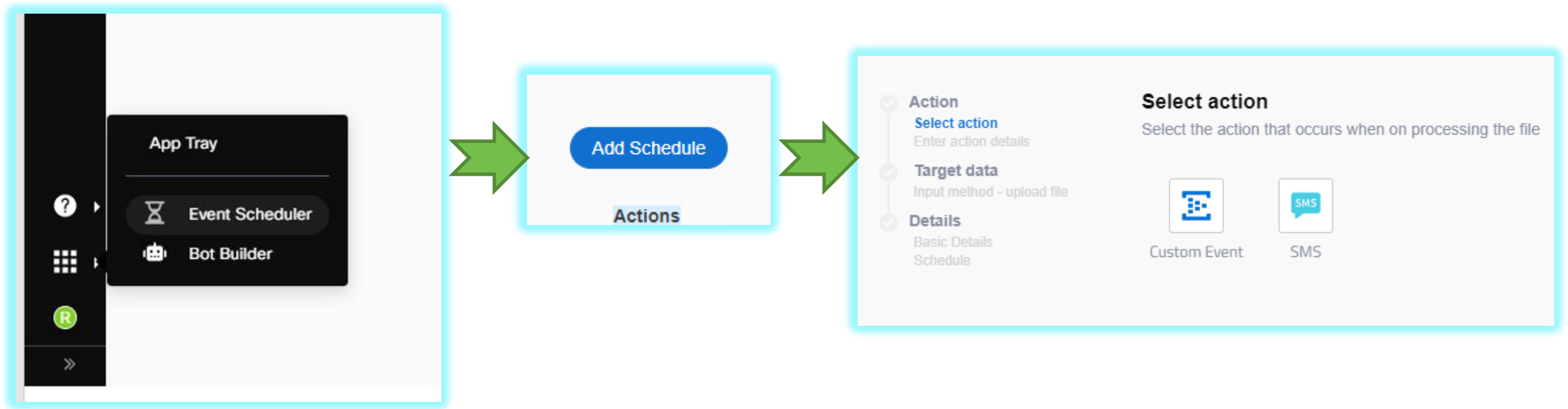One-way notification   **to**   Conversation messaging

Proactive Outreach Configuration

Proactive Outreach – Event Scheduler

Event Scheduler on Webex Connect allows you to schedule outbound digital messages to be sent to your customers as per the configured time schedule.

Event Scheduler – SMS

SMS – Allows you to send SMS messages simply by processing the file. One of the columns in the uploaded file must contain the recipients' phone number(s).

SMS Configuration

Action
Select action
Enter action details

Target data
Input method - upload file

Details
Basic Details
Schedule

Enter action details
Configure the required parameters for selected action.

Select Service

Shared WxCC Flows Do Not Modify ▼

SMS Type

Text ▼

Sender ID

12068487300 ▼

Extra Parameters (Optional)

Parameters ⓘ

e.g., template_id

Value ⓘ

e.g., 5299675520196137 ⊗

⊕ Add

Message Validity In Minutes (Mandatory)

e.g., 1000

Upload file

Action
Select action
Enter action details

Target data
Input method - upload file

Details
Basic Details
Schedule

Target data

Bulk data on which the action needs to be applied.

(•) Upload File   (○) SFTP

Upload .csv/.xlsx files or .txt files with delimiters

Drag and drop file to upload or

CHOOSE FILE

Data Upload Requirements

Note:
- In case of SFTP only .csv and .xlsx are supported and not .txt.
- SFTP now supports uploading a key file which is required to connect to certain SFTP systems.

Limitations
- Webex Connect Event scheduler can process file sizes of up to 75 MB. Also, the file name of the uploaded file should be less than 75 characters in length. Not subscribing to these limits can lead to schedule failure during execution.
- Only **one** file can be uploaded per Schedule.
- To schedule an event using Event Scheduler, it is mandatory to create a custom event and a rule that is configured with custom event.
- To invoke an event successfully, it is mandatory to match uploaded files' header parameters with the event parameters.

Map Columns

Name and Trigger Details

Basic Details

Enter the name and configure whether you want to be notified when a trigger occurs.

Action
Select action
Enter action details

Target data
Input method - upload file

Details
Basic Details
Schedule

Name

Notification

☑ Send Trigger Notification Via Email

Email

ricsimon@cisco.com

Notification Selection

☑ Trigger Execution Summary
☑ End Date/Occurrences Alert

☐ Failure - Folder Path Not Found
☐ Failure - File Header Mismatch
☐ Failure - File Size Too Large
☐ Failure - File Not Found
☐ Failure - No Valid Records Found In The File
☐ Failure - Invalid Zip Password
☐ Failure - Failed To Connect To FTP
☐ Failure - Failed To Connect To SFTP
☐ Failure - End Of File Not Found
☐ Failure - Social Hours

Set Schedule

Finalize

Type	Schedule Name	Total Runs	Pattern	Status	Actions
SMS	**Notification - DJALX** Created on 31-01-2023 by Rick Simon	0	Repeat Pattern - ONE TIME	Enabled	▾

Search

Add Schedule

Trigger Execution Summary

Success - Webex Connect Event Scheduler - Trigger Execution Summary

WC ○ **Webex Connect Support <support@imiconnect.com>**   Today at 16:00
To: ⊗ Eliane Gasparotto (lgasparo)

webex Connect

Trigger Execution Summary

Hi,

A scheduled trigger has been successfully executed.

Trigger Name - lgasparo_newAppointmentTest

Trigger ID - 4KASH

Execution Time - 2023-08-04 03:00:13 PM UTC-04:00 America/New_York

Summary :

Total Records : 3

Duplicate Records : 0

Invalid Records : 0

Processed Records : 3
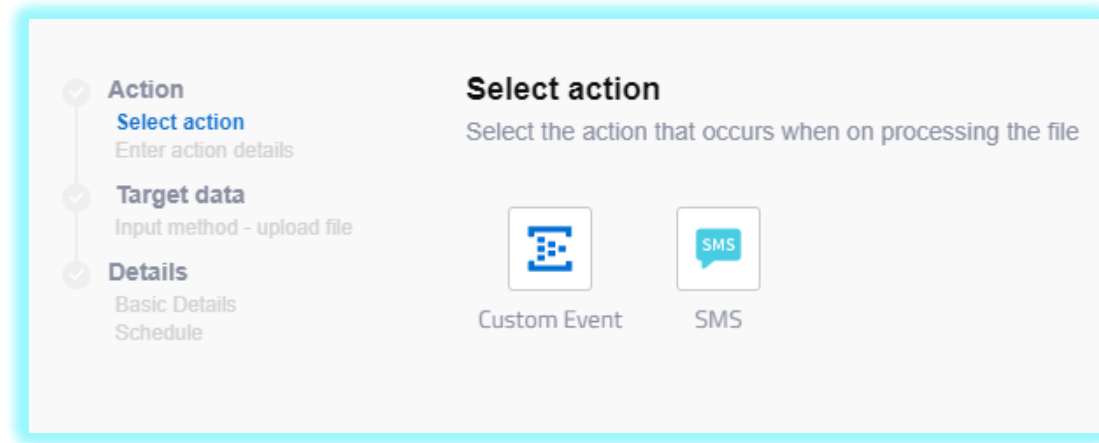
Failure Records : 0

If you have any questions, please reach out to us using the Contact Support options
mentioned in your Webex Connect account.

Thanks,

Team Webex Connect

Event Scheduler – Events

Custom Events – Allows you to trigger rules or flows associated with the selected custom event. The variables required to trigger the custom event and for the successful execution of concerned flows/rules should be available in the file.
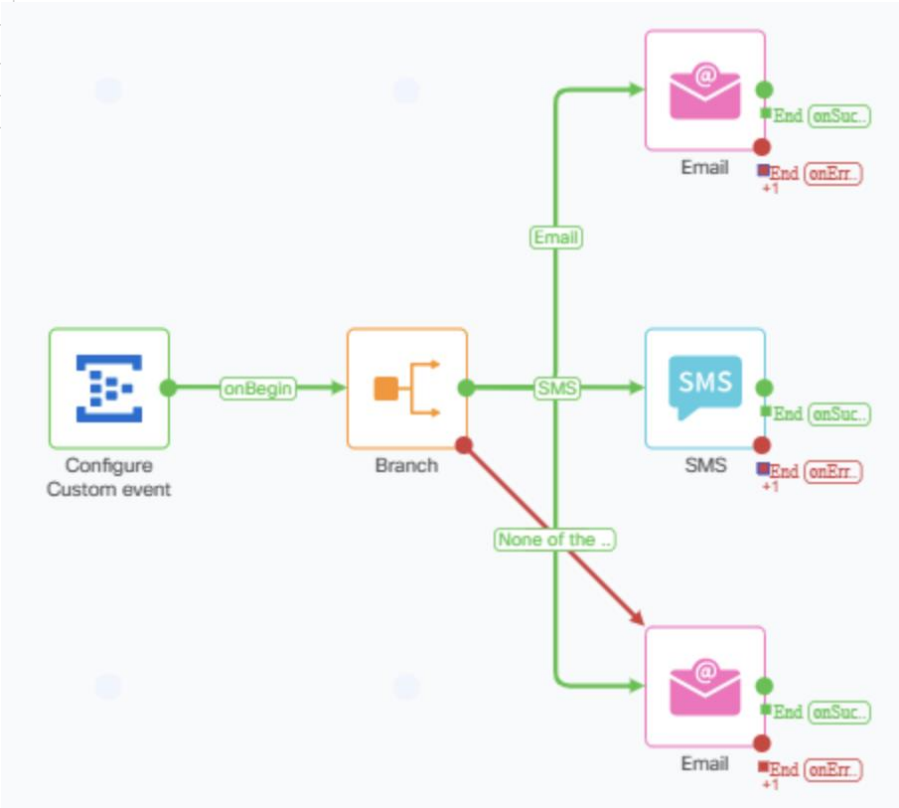

Custom Events on Webex Connect are used to notify Webex Connect of events on business systems which in turn can trigger a rule or flow on the platform.

Sample Flow

	A	B	C
1	Channel	Caddress	CMessage
2	SMS	61422601027	Your Order is on its way
3	Email	customer@gmail.com	Youe Order is confirmed
4	WhatsApp	61422601027	your payment method was declined
5			
6			

SFTP

Custom Event

Action
Select action
Enter action details

Target data
Input method - upload file

Details
Basic Details
Schedule

Select action
Select the action that occurs when on processing the file

Cu

Action
Select action
Enter action details

Target data
Input method - upload file

Details
Basic Details
Schedule

Enter action details
Configure the required parameters for selected action.

Select Service

CCBootCamp ▼
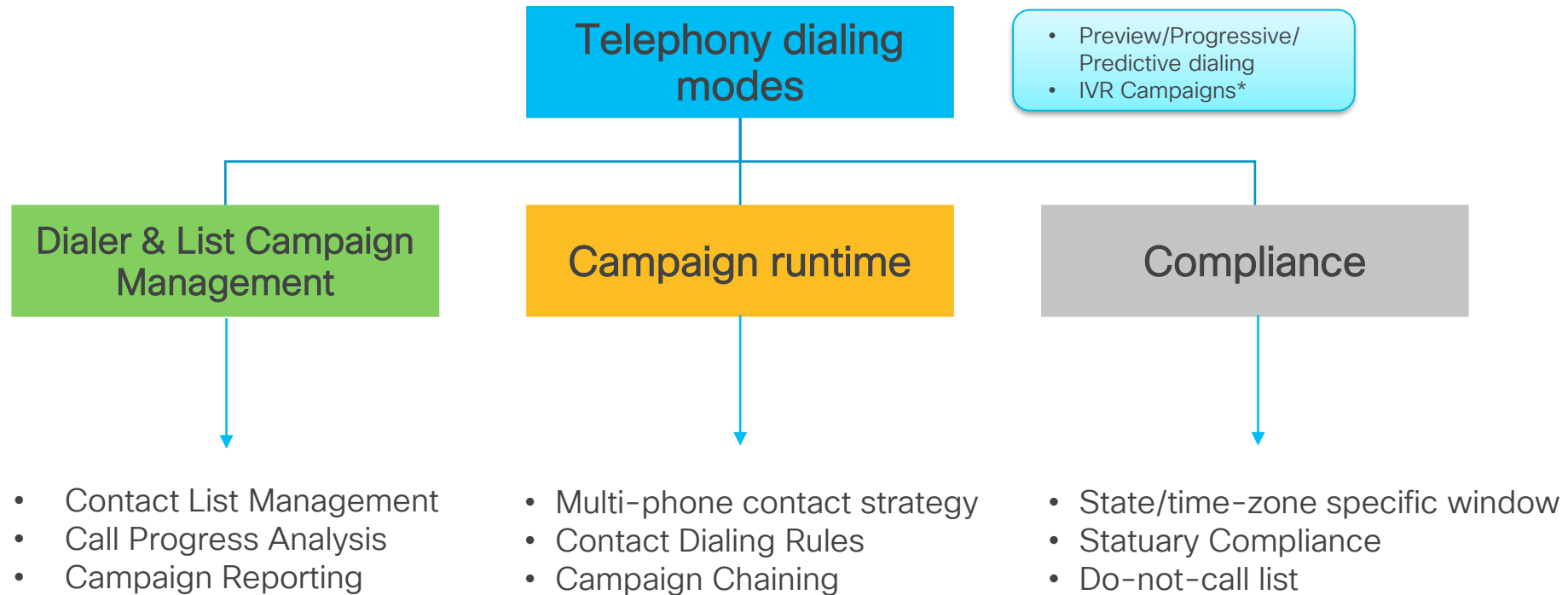
Select Event / Inbound Webhook

CCBOOTCAMP_LAB4_AI ▼

The following flows are configured on CCBOOTCAMP_LAB4_AI event.
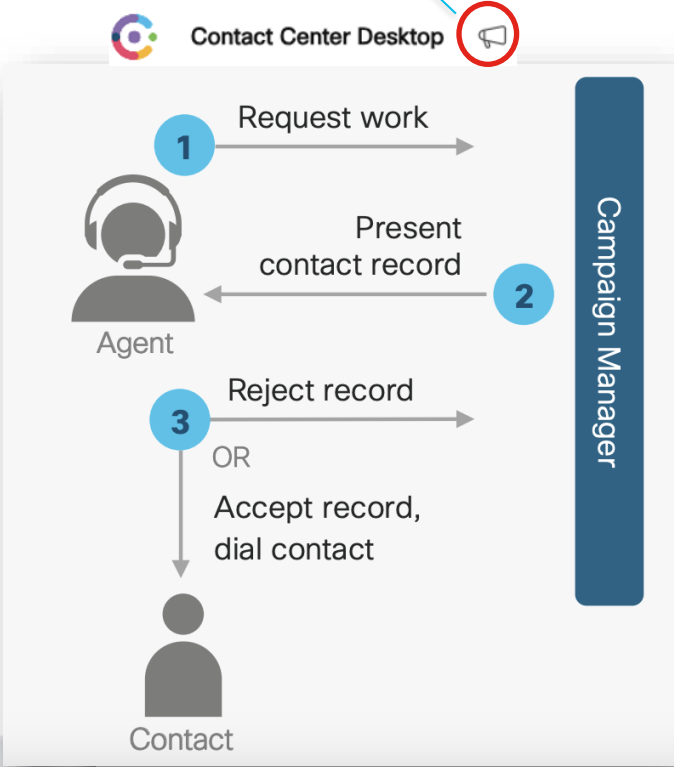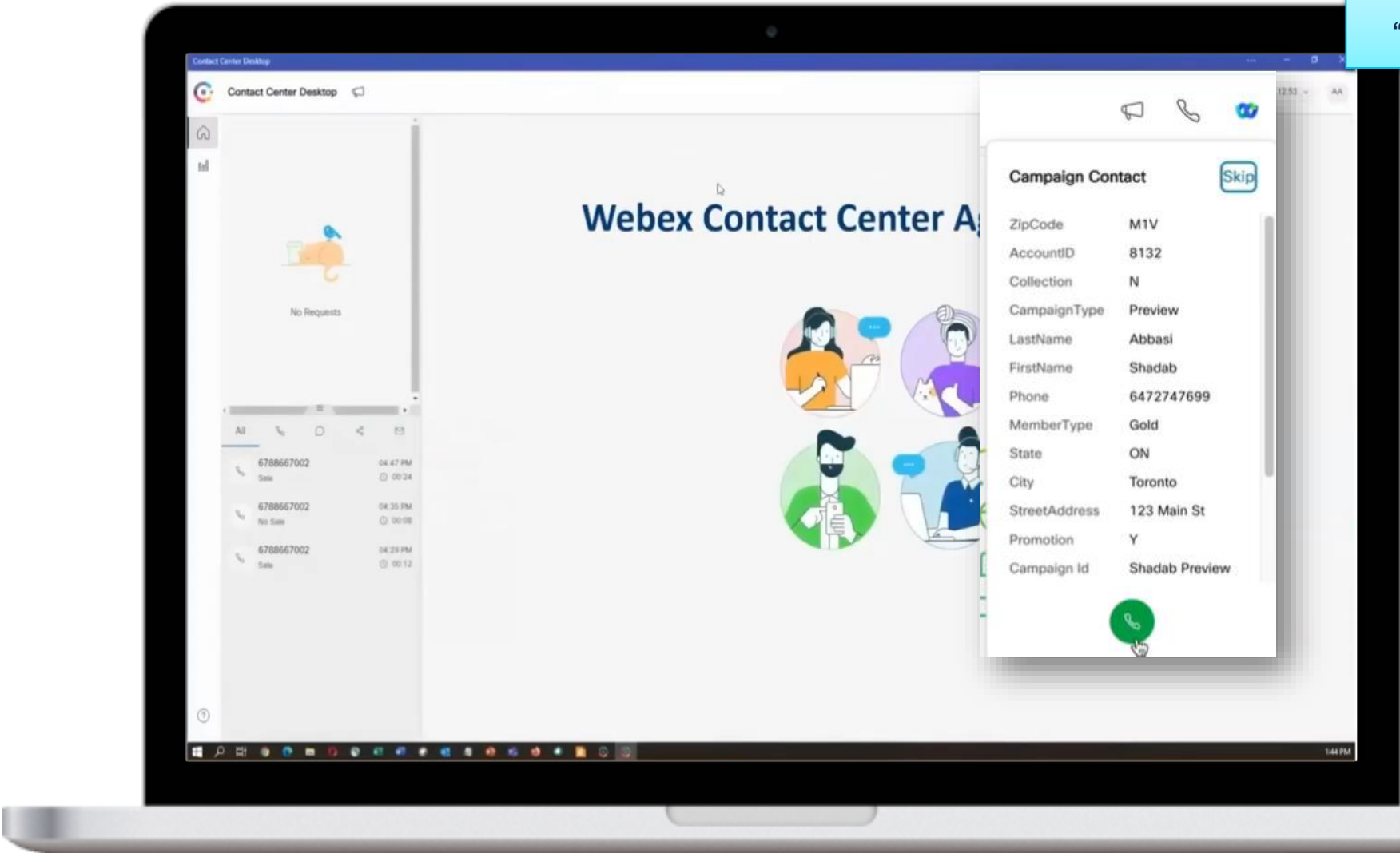1. CCBOOTCAMP_Lab4_AI

Outbound Voice Campaigns

Outbound Campaign Features

Outbound campaign starts with a Contact list, and Webex Contact Center Outbound Campaign Management support the following:

Telephony dialing modes

- Preview/Progressive/Predictive dialing
- IVR Campaigns*

Dialer & List Campaign Management

- Contact List Management
- Call Progress Analysis
- Campaign Reporting

Campaign runtime

- Multi-phone contact strategy
- Contact Dialing Rules
- Campaign Chaining

Compliance

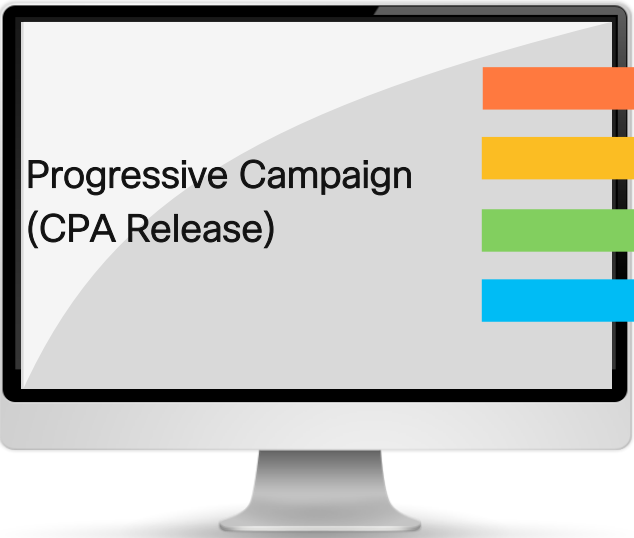- State/time-zone specific window
- Statuary Compliance
- Do-not-call list

Outbound Voice – Preview Dialing

Two config objects in Desktop Layout. Check documentation for "advancedHeader" and "CALL_GUIDE"

Contact Center Desktop

Campaign Manager

1. Request work
2. Present contact record
3. Reject record

OR

Accept record, dial contact

Agent

Contact

Progressive Campaign – CPA Release

Progressive Campaign (CPA Release)

Best Practice

Enable CPA in the configuration so that AMD/Voicemail/Fax/No Answer/Busy to be handled by system.

New Progressive Campaign Report

A new progressive report available in the Analyzer. Available in Historical & Real Time.

CPA Enablement Option

CPA parameters available in Campaign Group configuration

New Call progress analysis event handler in the flow

Pacing Mode (1:10)

Pacing Mode increased from 1 to 10

Agent Experience

- Agents will hear a silence until customer live voice is connected.

- Agent will hear a beep tone when customer call leg gets connected

Progressive Campaign CPA – Agent Experience

Webex Contact Center

Available 25:23 SJ

Campaign Call — Calling
IVR_Queue_1

Campaign id:	Credit Card Offers
Offer:	Platinum
Customer:	Premium
Conversion:	High
State:	Florida

1 Incoming Pop over shows up to 6 fields and is displayed to agent when call is ringing. Cancel button removed

Webex Contact Center

Engaged ⓘ SJ

+1 (412) 288-3782 — 00:01
IVR_Queue_1

+1 (412) 288-3782
00:01

Hold | Consult | Transfer | Pause Recording | End

Phone Number	+1-408-555-0001	DNIS	+1-800-900-8989
Queue	12	IVR Path	IVR_Path1
Queue Name	IVR_Queue_1	RONA	32
Address	3772 AVE NE Sierra Road, Long Long County, San Francisco, CA 94001, Unit...	Alternate Number	00083472385

Revert | Save

📄 Call Guide   ⧉ Screen-Pop

Call Guide

May I please speak with Mr./Mrs.,? Hi this is Randal Parker. The reason why I am calling is I work for a local company. We recently partnered directly with Visa and Mastercard in your state so weare now able to offer the lowest rates in the entire state/. Our Rep Alfonso Rodriquez lives roght there in your city and is already stopping by businessto a side by side comparision to make sure your are getting the best deal possible. Would you be in later around(time) so our rep Alfonso can come in for a 10-12 minute and give you that side by side comparison? who are you currently prcoessing with if you dont' mind me asking? What you think you process in cards in a typical month> 5K? 20? a million? Since you took the apppintment today and grab a pen so we can get you this special promo code for the FORTUNE 500 Discount. It is F500 aAre there any others involved in the decision making process? And you have the access to the merchant statement? The monthly bill from you current provider?
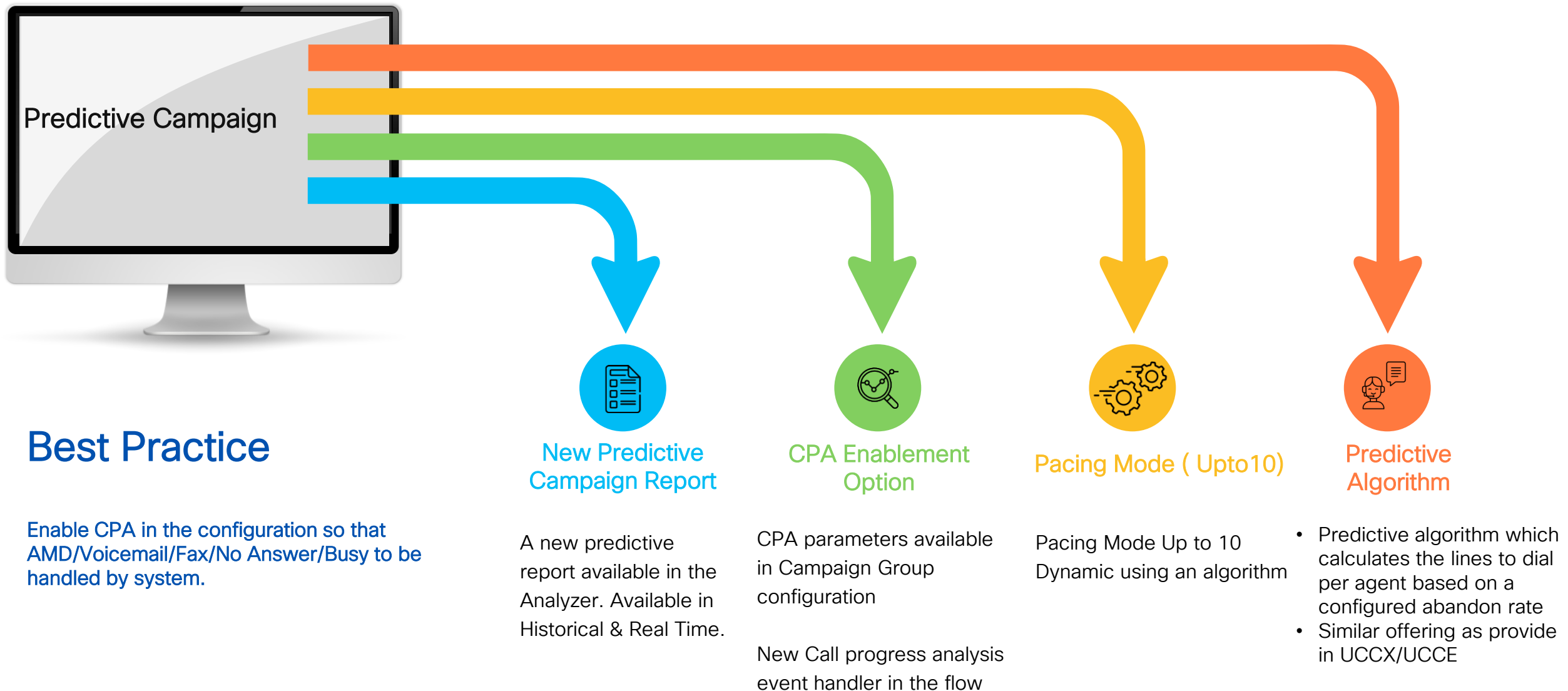
☑ Not Interested I am happy where am I?
☐ I will consult with my friends.
☐ I am no interested now, may be I will reach out in future.
☑ I don't use credit cards for personal spending

All | 📞 | 💬 | ⧉ | ✉

+1 (500) 432-3498 ✎
Service group... | 🕐 00:10 12:32 PM

+1 (500) 400-3466 ✎
Service group... | 🕐 00:10 12:32 PM

2 Interaction panel can be configured to show 29 unique variables

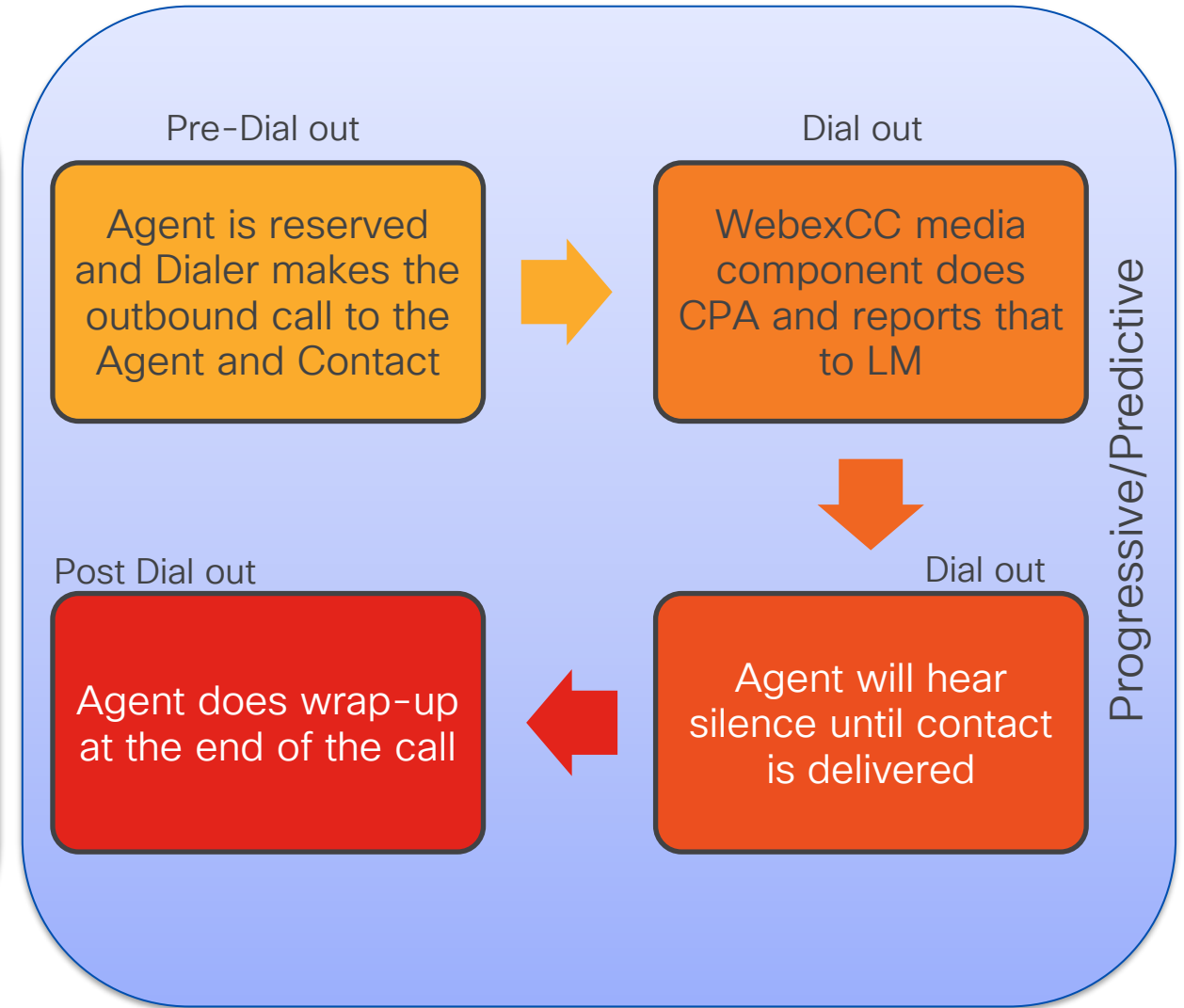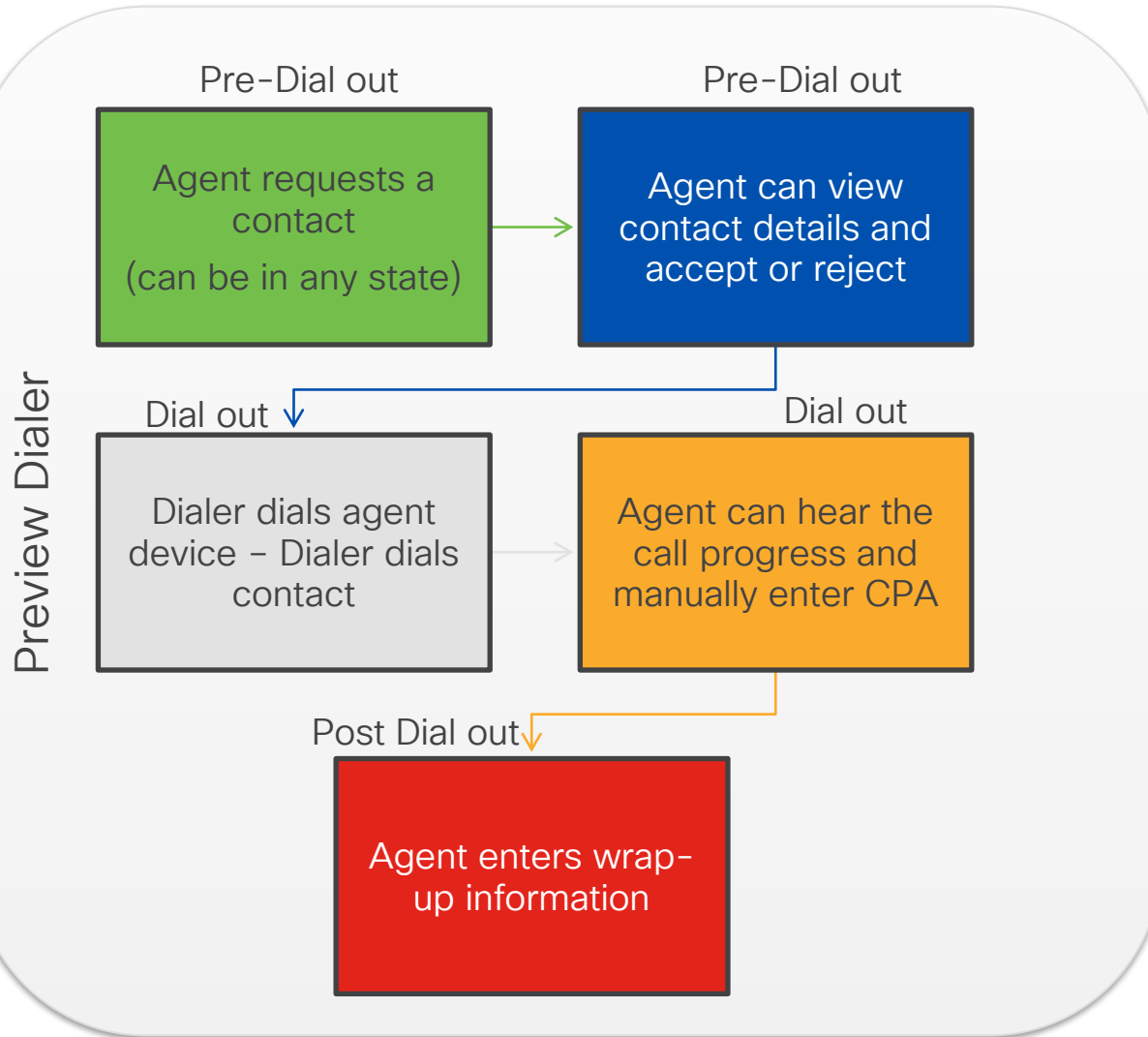**3** Call Guide can be configured in Acqueon to display call script to agents
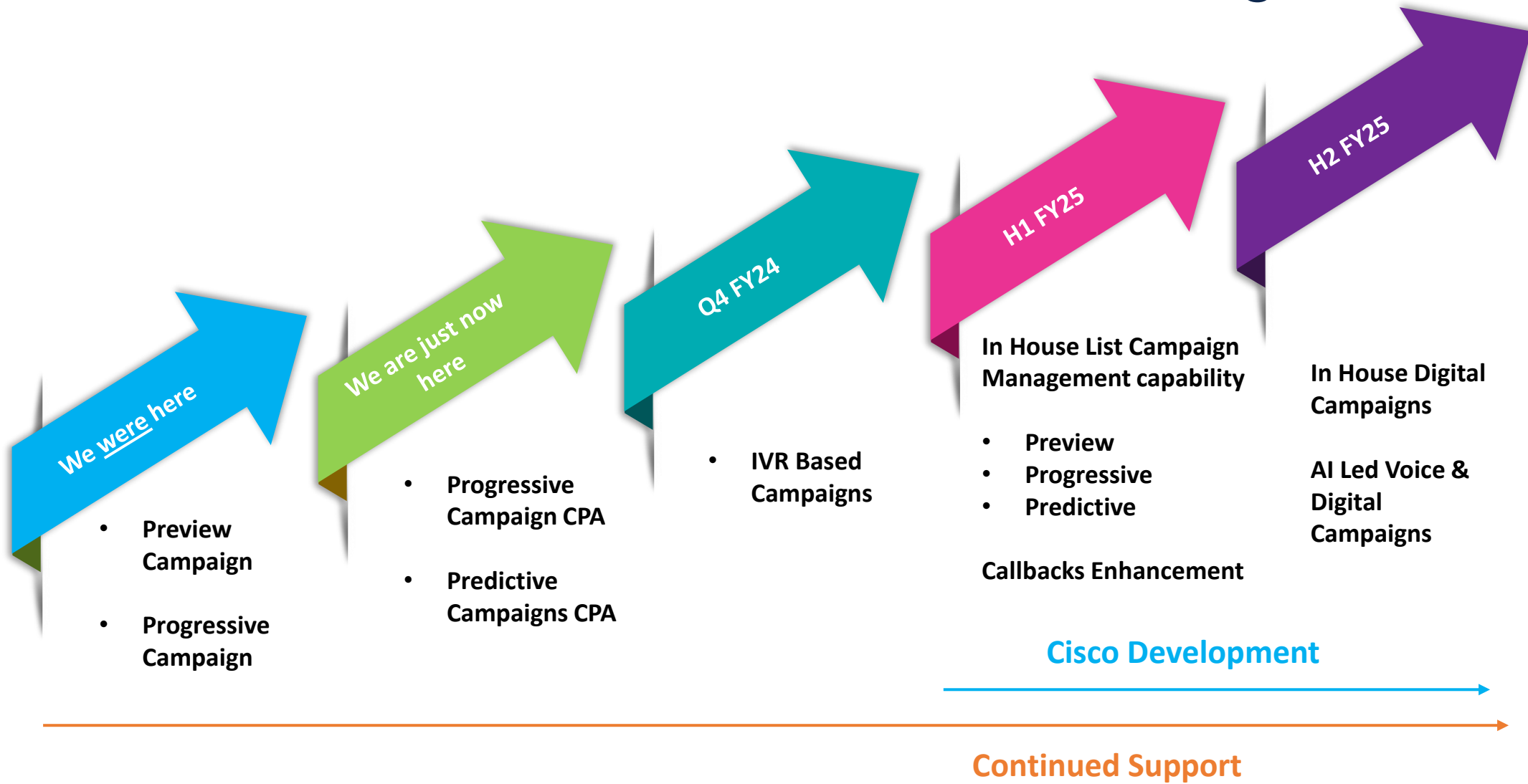
Predictive Campaign – CPA Release

Predictive Campaign

Best Practice

Enable CPA in the configuration so that AMD/Voicemail/Fax/No Answer/Busy to be handled by system.

New Predictive Campaign Report

A new predictive report available in the Analyzer. Available in Historical & Real Time.

CPA Enablement Option

CPA parameters available in Campaign Group configuration

New Call progress analysis event handler in the flow

Pacing Mode (Upto10)

Pacing Mode Up to 10 Dynamic using an algorithm

Predictive Algorithm

- Predictive algorithm which calculates the lines to dial per agent based on a configured abandon rate
- Similar offering as provide in UCCX/UCCE

Preview vs Progressive/Predictive Campaigns

Preview Dialer

Pre-Dial out
Agent requests a contact
(can be in any state)

Pre-Dial out
Agent can view contact details and accept or reject

Dial out
Dialer dials agent device – Dialer dials contact

Dial out
Agent can hear the call progress and manually enter CPA

Post Dial out
Agent enters wrap-up information

Progressive/Predictive

Pre-Dial out
Agent is reserved and Dialer makes the outbound call to the Agent and Contact

Dial out
WebexCC media component does CPA and reports that to LM

Dial out
Agent will hear silence until contact is delivered

Post Dial out
Agent does wrap-up at the end of the call

Webex Contact Center Outbound Phasing

We were here

- Preview Campaign
- Progressive Campaign

We are just now here

- Progressive Campaign CPA
- Predictive Campaigns CPA

Q4 FY24

- IVR Based Campaigns

H1 FY25

In House List Campaign Management capability

- Preview
- Progressive
- Predictive

Callbacks Enhancement

H2 FY25

In House Digital Campaigns

AI Led Voice & Digital Campaigns

Cisco Development

Continued Support

Webex Contact Center Outbound Licensing

License Type	Included	Agent Type
Standard Agent	• Preview Campaign	Named
Premium Agent	• Preview Campaign • Progressive Campaign • Predictive Campaign	Named
Standard Agent	• Preview Campaign	Concurrent
Premium Agent	• Preview Campaign • Progressive Campaign • Predictive Campaign	Concurrent

IVR Campaign Pricing In Discussion

Demo

WxCC Campaign Configuration

Control Hub Connector

> **AcqueonLCM**
>
> | Connector ID | 7b87646d-e9c3-41be-b797-d87eb7558776 |
> | --- | --- |
>
> **Credentials**
>
> Name *
>
> AcqueonLCM
>
> Resource Domain *
>
> https://apmm.ae.acqueon.com/APMMLCMWebservice/
>
> User Name
>
> API_User1@acqueon.com
>
> Password
>
> ●●●●●●●●●●●●●●●●●●●●●●●●●●●●
>
> Validation URL

A Custom Control Hub Connector must be configured, as all requests/updates made to LCM are now authenticated by Acqueon.

Provisioning Overview

Control Hub/ Portal

```
Outdial Entry Point
        ↓
Outdial Queue
        ↓
Team
        ↓
Agent
```
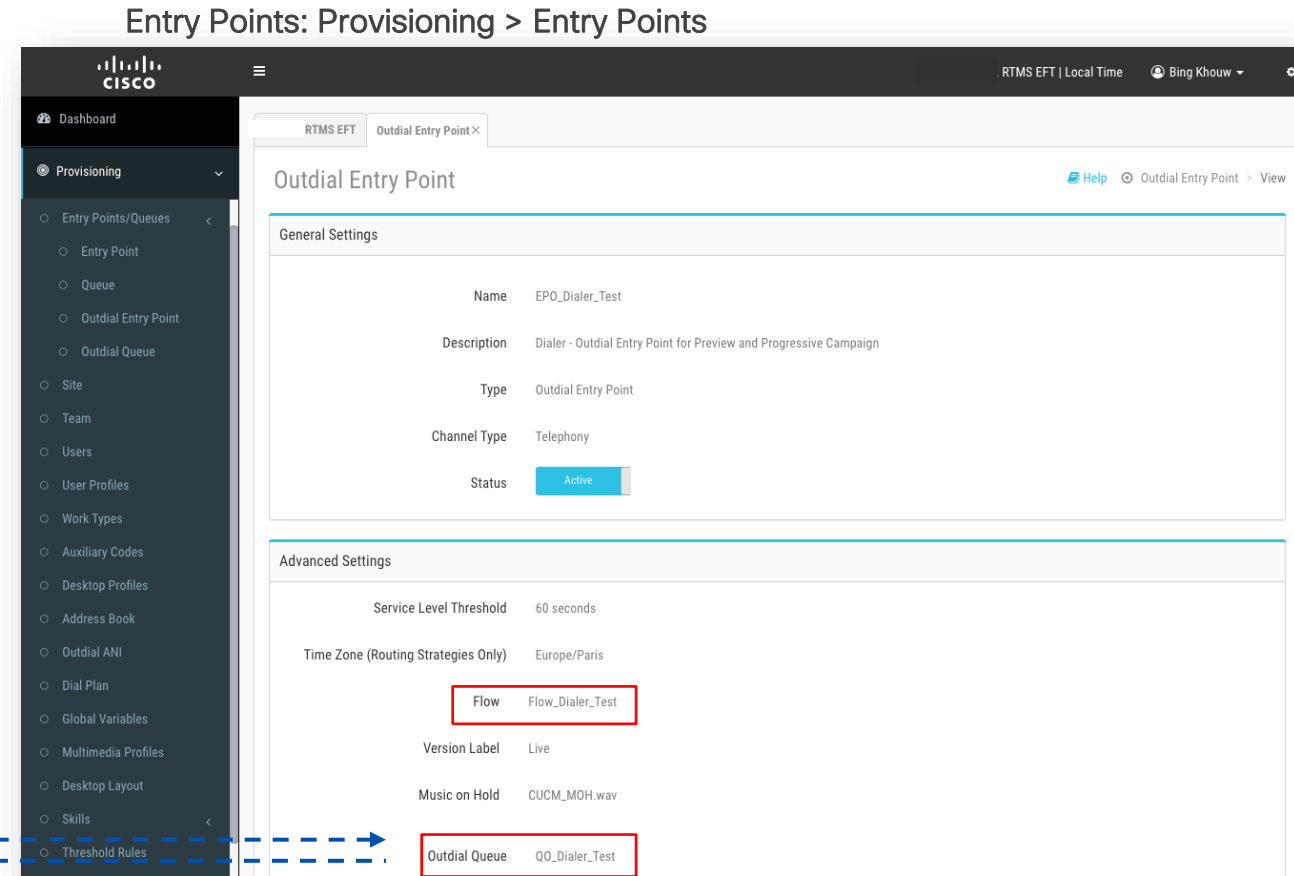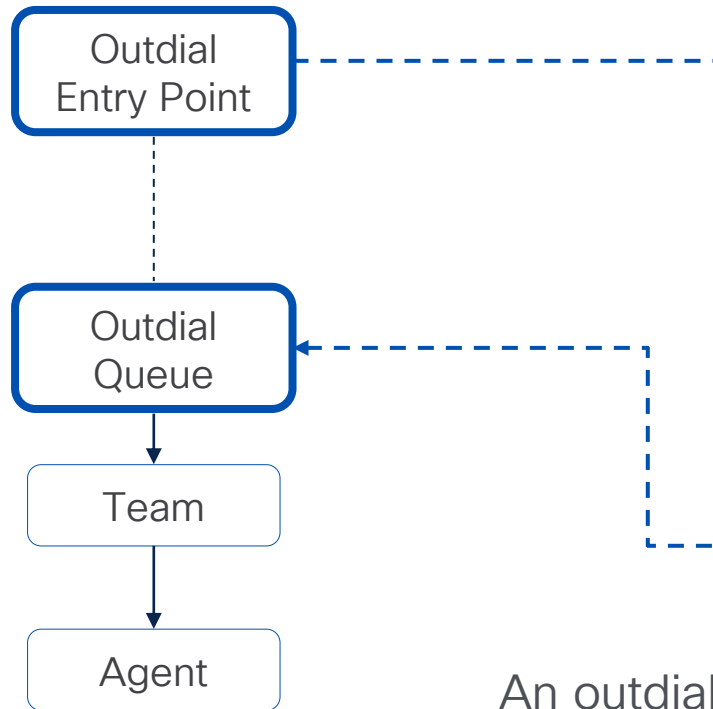

An outdial entrypoint must be configured for every campaign. The entrypoint is linked with the Campaign (Campaign group in Acqueon) in LCM and associates the outdial queue created above and the flow.

Provisioning Overview

Control Hub/
Portal

Outdial
Entry Point

Flow
Builder

Outdial
Queue

Team
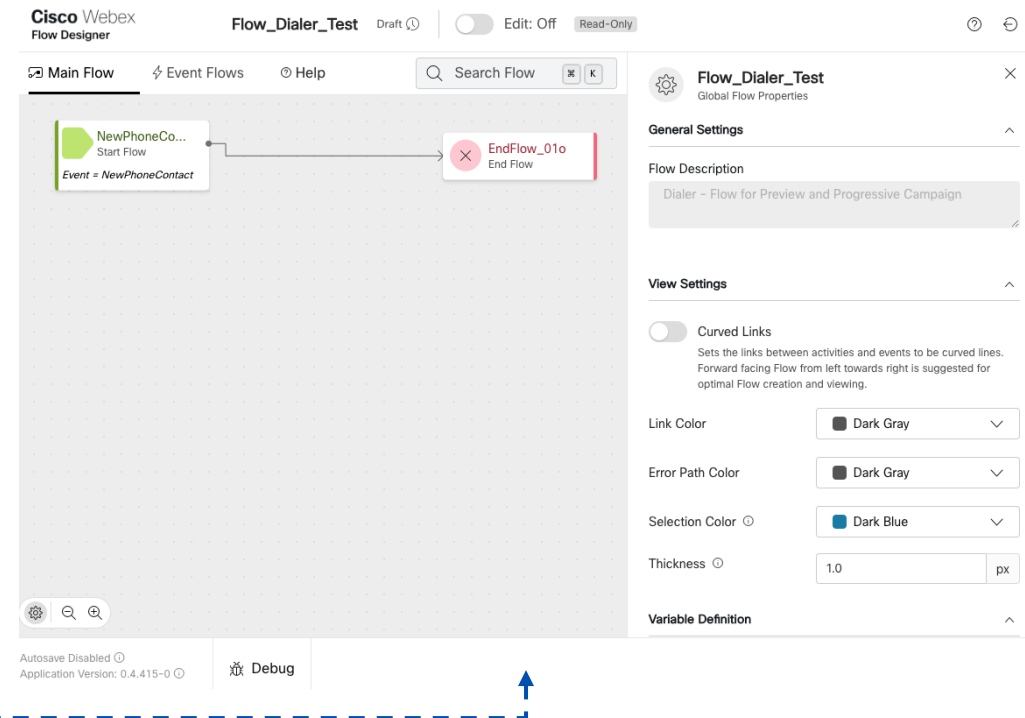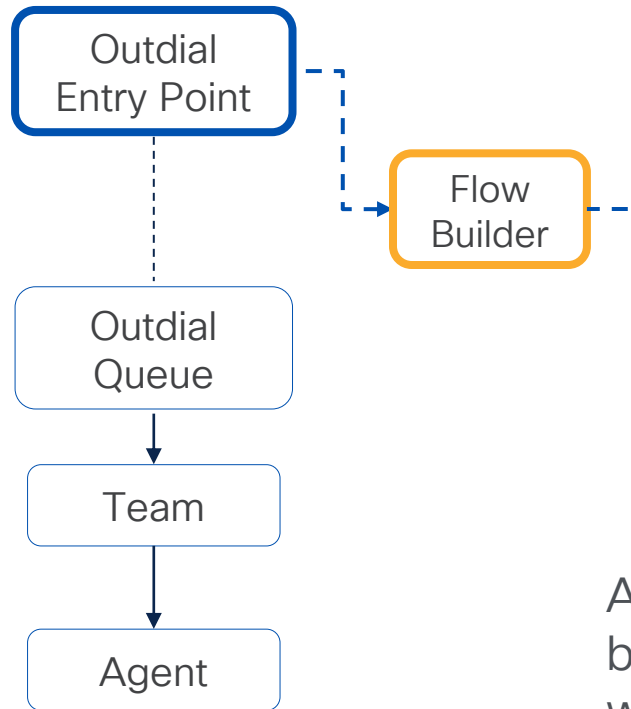
Agent

A **flow** must be configured with each **campaign**, referenced by the outdial entrypoint. The flow is simple but dictates which variables are shown on the agent desktop and in which order. This is done via **global** variables.

Provisioning Overview
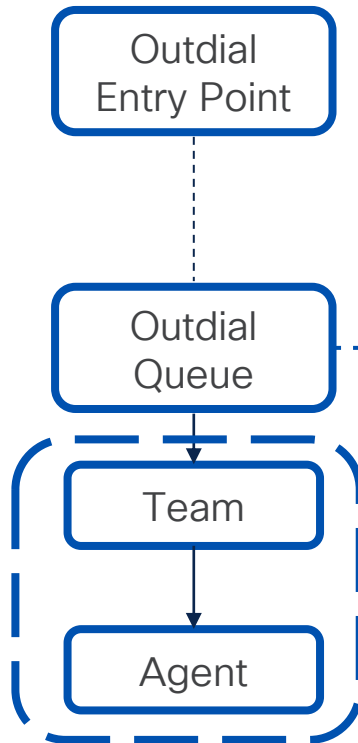
Control Hub/ Portal

Outdial Entry Point

Outdial Queue

Team

Agent

- An outdial queue must be configured for every campaign. Enable Outbound Campaign is selected.
- The queue is always Longest Available Agent and note that only a single call distribution group can be added.
- The agents in the teams selected will be utilized for the progressive campaign and will be reserved by the dialer once they are in the available state.

WxCC Campaign Flow Configuration

Customize ANI for Multiple Call Scenarios

- ANI feature provides the phone call recipient with the caller's phone number.

- There are scenarios where the system sends a default ANI to the call recipient device which leads to the customer disconnecting the calls as the number is not identified by them.

- This feature will help the flow developer define the ANI in Flow Control which can be sent to the service provider.

- ANI feature always for Region mapping (RTMS)

- Scenarios are covered as part of this feature:
  - Inbound Call
  - Outbound Call
  - Transfer/Consult
  - Courtesy Callback
  - Outbound Campaign
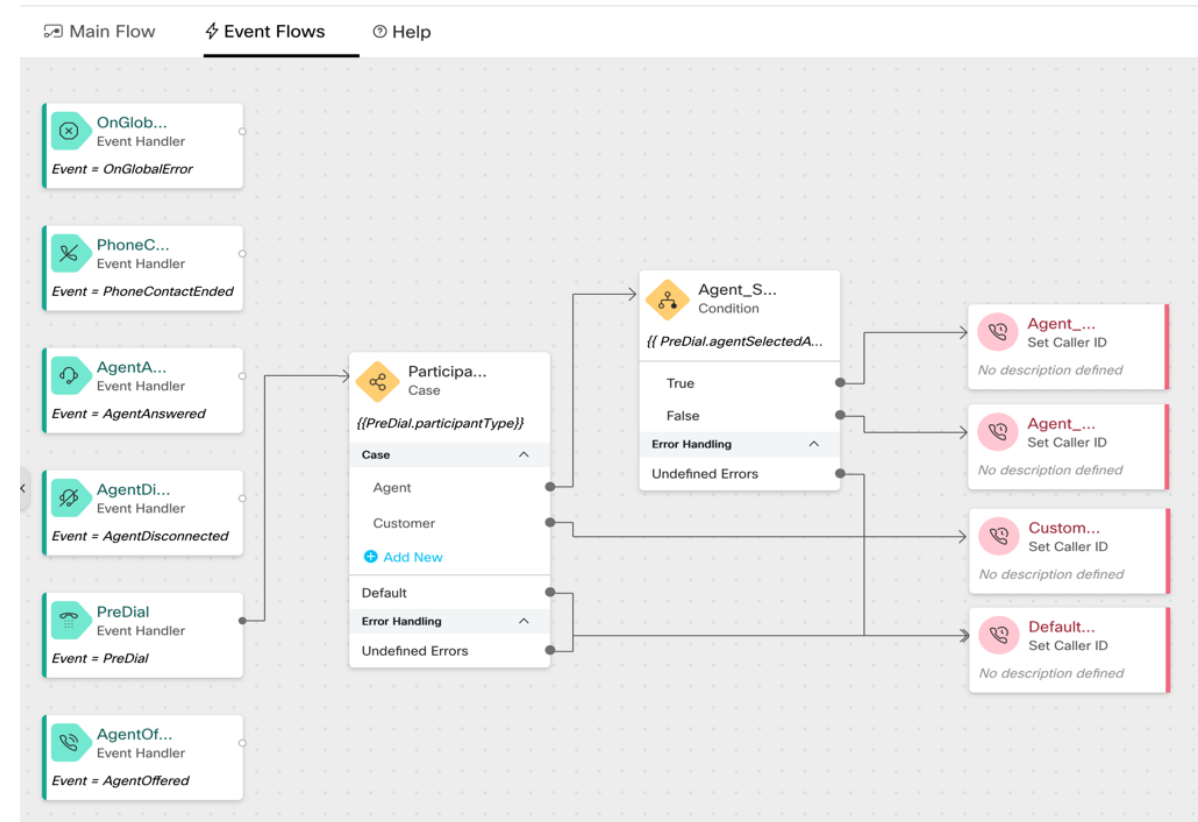
Customize message in case of Voicemail/Answering Machine

- Flow Designer > Event Flows > OutboundCampaignCallResult handler Allows to trigger a message when the call has terminated at a voicemail/Answering machine or will be abandoned.
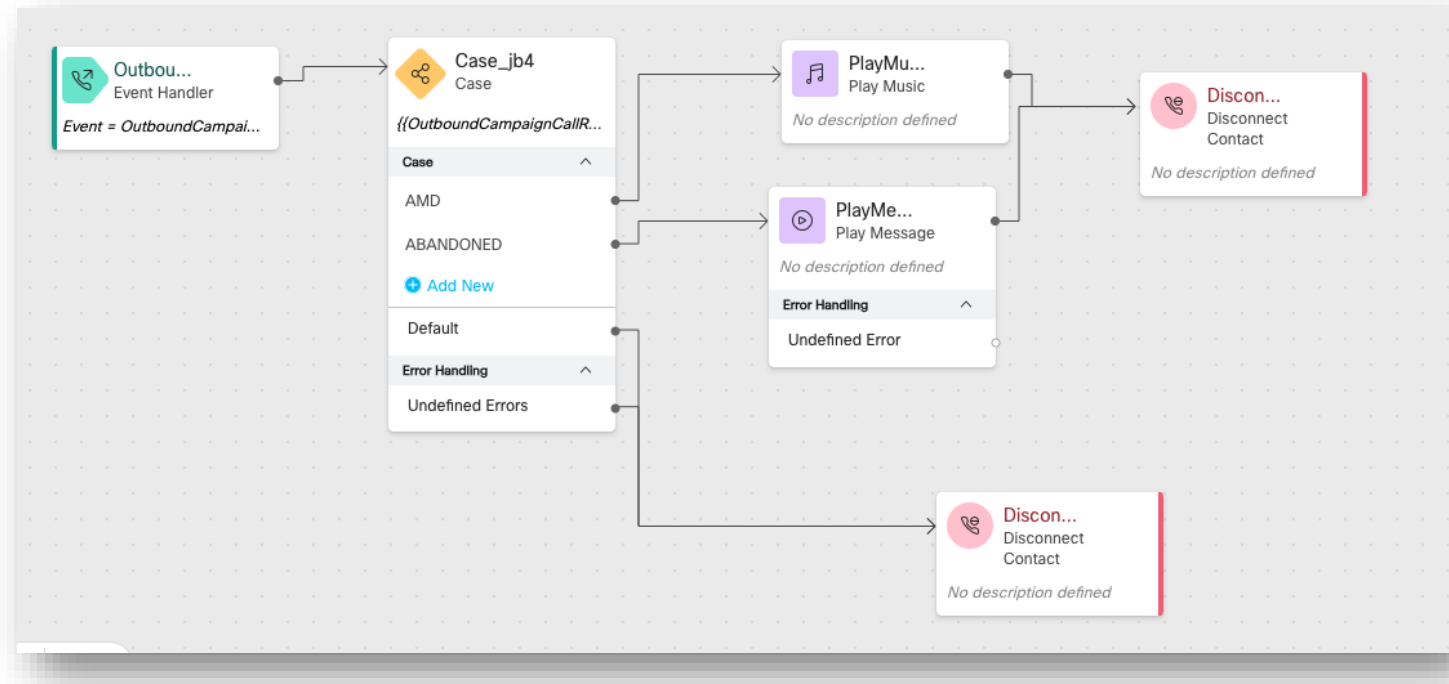
Campaign Flow Incoming Popover Layout

Incoming popover is displayed when call is ringing at agent device.
Up to 6 fields may be shown.

Advisable to present the Campaign id to the agent so that they are aware of the Campaign call they are working on.

Note: For both Progressive and Predictive 1:N Dialer with CPA, No customer data (Campaign Business Parameters) can be shown on the incoming popover as at the time of agent reservation end customer is unknown.

Agent Experience - Incoming popover example

Webex Contact Center

Campaign Call
AngelsProgressiveQueu...   Calling

Phone Number   17771110110
Queue Name   AngelsProgressiveQueue_GT1
Campaign Name   BXBProgressive
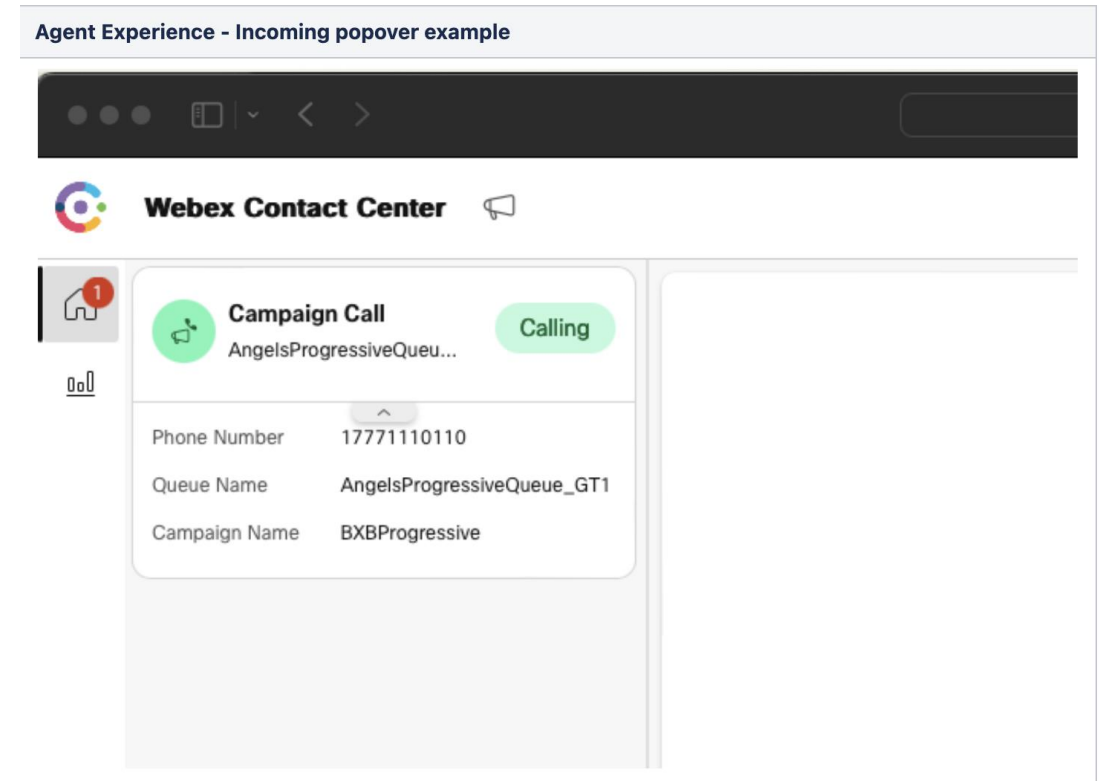
Campaign Flow Interaction Panel Layout

Interaction Panel layout is displayed when call is Engaged at agent device.
Up to 29 unique global variables can be arranged and shown on the agent desktop.

Agent experience - Interaction panel example
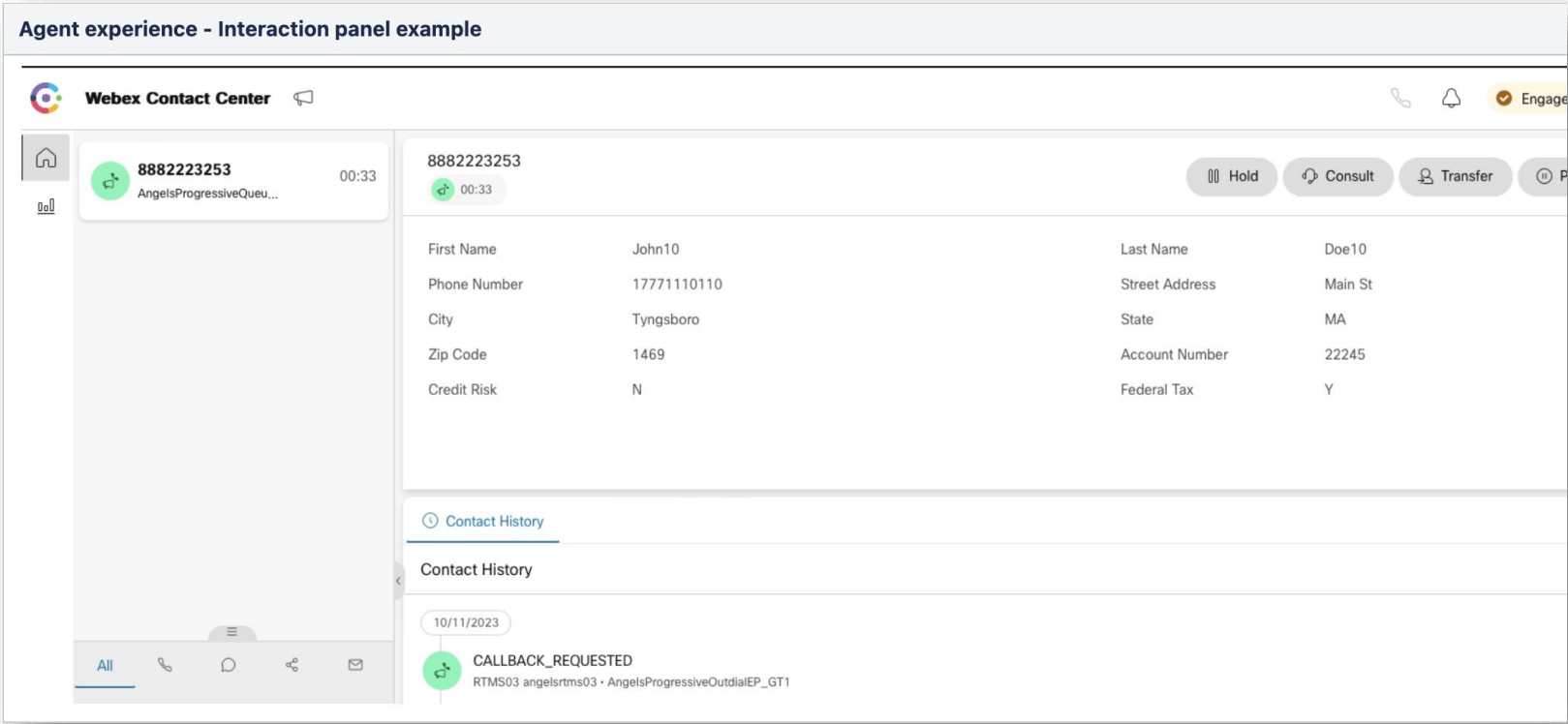
CustomerNumber	CompanyName	ContactFirstName	ContactLastNa	ContactWork	ContactHome	ContactMobile	ReasonCall	FollowupCall	FollowupDate	
PH00084945MCCREGHQ06	ALL DAYS MOVERS	FirstName	LastName	31203570000			MA_KC_06	Yes	4-Nov-21	
PH00047858MCCREGHQ06	123GO GROUP INC	Accounts	Payable	31203570000			MA_KC_06	Yes	4-Nov-21	
PH00132496MCCREGHO06	LOGISTICS CORPORATION	Accounts	Payable	31203570000			MA CE 06	Yes	4-Nov-21	

WxCC Campaign Reporting

Reporting User Experience (Progressive & Predictive Campaign)

Top Level Report

Campaign Historical Report Agent Drill Down

Campaign Historical Call Drill Down

Conclusion

CISCO
The bridge to possible

Appendix

LCM Configuration

Accessing AE List and Campaign Management

Campaign Management

Campaign Configuration

Campaign Business Parameters

Campaign Manager Version 4.2.1.2310 & above

Campaign Group – CPA/ AMD

The CPA parameters are considered advanced and are not typically modified.

CPA is performed on the call by the dialer directly, there is no agent awareness.

We can detect the following:
- Fax Machines
- Busy
- Reorder tones
- No answer
- Answering Machines/Voicemail

Campaign Group – Predictive Dialer Details

Configure Campaign Group (BXBPredictive)

Pacing Mode — Predictive

| CampaignDetails | **Dialer Details** | CPA Parameters | Contact Parameters |

Outbound Caller ID — 17771110110

Dial Rate (1 - 10) — [-] 3.2 [+]

No Answer Ring Limit (1 - 100) — [-] 32sec [+]

Max Dialing Rate (1 - 10) — [-] 10 [+]

Abandon Rate Percentage (1 - 100) — [-] 3 [+]

Predictive Correction Pace (10 - 5000) — [-] 1862 [+]

Predictive Gain (0.1 - 3.0) — [-] 1 [+]

Reservation Percentage (1 - 100) — [-] 100 [+]

➡ Campaign Manager Version 4.2.1.2401 & above

Dialer Details specifies the dial rate when CPA and AMD are needed for the call.

- Dial Rate(1-10) – Define dial rate for dialling

- Max Dial Rate – Max dial rate to achieve configure abandon rate

- Abandon Rate – Define abandon rate for the campaign

- Predictive Correction Pace – size of number of voice calls that a major correction is taken to the predictive calls to be dialed.

- Predictive Gain :– Multiplier on how rapidly it moves upward or downward.

Resources

Cisco Webex Contact Center Setup and Administration Guide

https://www.cisco.com/c/en/us/td/docs/voice_ip_comm/cust_contact/contact_center/webexcc/SetupandAdministrationGuide_2/b_mp-release-2/wcc_oem-integration-with-acqueon.html

Cisco Webex Contact Center Campaign Manager User Guid

https://www.cisco.com/c/en/us/td/docs/voice_ip_comm/cust_contact/contact_center/webexcc/campaign_user_20/webexcc_b_20-campaign-manager-user-guide/webexcc_m_20-campaign.html

Custom Events

https://help.imiconnect.io/docs/custom-events

Event Scheduler

https://help.imiconnect.io/docs/event-scheduler

Acqueon Provisioning Request Form (Partner)

https://app.smartsheet.com/b/form/32df31c83b2c41ffb2c713420ceeb3d3