

Avaya Proactive Outreach Solutions

Make the Most of Outbound Customer Contact

Does your outbound dialer link to your business systems? Are you able to provide your customers with information that is relevant to them the moment it becomes available? Can you give your customers the ability to act immediately on the information provided? Avaya Proactive Outreach lets you do all of that – giving relevant information to your customers, the way they want to receive it so they can react to it immediately. And your agents can close cases more quickly. The result: your customers are more satisfied and your customer service processes are more efficient.



Outbound Customer Contact Today

Outbound calls can be a depersonalized experience for your customers. The outbound dialer may not be linked to business systems, thus a customer call may not be related to any current event in the business relationship, let alone be personalized. Information provided to customers is consequently often irrelevant, and even if it is useful, there is usually no option for customers to immediately act on the news – the call ends abruptly without concern for what the customer may want to do next. Other media, such as email, is easier to personalize and link to business systems and processes, but often still suffers from the same limitations. And for some companies, backing high-volume notifications with live agents to enable transactions on the spot is cost prohibitive.

The potential to deliver up-to-date, personalized information through channels beyond email in an automated model is far from exhausted. There are many opportunities for your company to combine technologies and deliver easy-to-use self-service transactions proactively to your customers within a closed-loop system.

Let's look at an example. A sizable medical center sees hundreds of patients every day. Many may forget appointments or neglect to cancel them. Dialing patients to confirm appointments may not be cost effective because of the volume and pressure this puts on staffing. An appointment scheduling system that emails reminders will help in some instances, but does not reach patients who are not web-savvy or do not check email regularly. Personalized information and transaction options from a simple dialer are usually limited to allowing the patient to just confirm or reject the appointment. Traditional, stand-alone notification systems will not enable the medical center to tap the full potential available.

Change the Game With Intelligent Communications

Inserting intelligent communications into the customer service process flow is the key to delivering the desired improvements. This can be achieved by linking customer service systems that exist today in most companies, such as outbound dialers, IVR platforms and contact centers, and integrating them with the business systems.

Intelligent Communications make it feasible to provide customer service that is:

- proactive
- customized
- interactive
- automated

Using business data to drive outbound contact helps ensure the information reaching the customer will be desired, personal, relevant, and timely – pre-empting a possible inbound inquiry by the customer. With the information comes an opportunity for the customer to act via self service. Should the transaction become overly complex for self service, the customers and their information can be transferred to a live agent – without the need for the customer to authenticate his or her information a second time. In any case, the service is provided over the customer's communication channel of choice.

What does that mean for our medical center? Linking multi-channel outbound contact systems to the existing scheduling system enables reliable notifications using the appropriate channel for every patient. With the notification comes a transactional opportunity, such as sending customized reminders drawn from the scheduling systems. These can remind patients about procedures to follow for the appointment. They can also collect confirmations, or offer opportunities to reschedule via self or assisted service or web transactions. Additionally, customers can be queried automatically when cancellations occur, should they want an earlier appointment. That makes it possible to fill open appointments quickly, at low cost, without manual intervention. And it is a better use of resources and provides more flexible options for the patient.

This same system can be used for other transactions in the medical center such as informing customers about outstanding payments and offering payment options, or providing annual check-up reminders that include the option to schedule an appointment in the self-service portal.

By automating transactional contacts, companies *across all industries* have the opportunity to differentiate their customer service. Many transactions that were handled by inbound customer calls can now be pre-empted, automated and handled via self service, freeing up agents to focus on high-value or more complex transactions.

Operational Benefits

Enabling agent-independent, personalized contacts using any available media type to provide reminders or regular information can significantly reduce costs. These automated contacts can also provide information updates such as order or account status, or even confirm that a customer is home for an installation appointment. This all helps to reduce the likelihood of appointment / service call no-shows or missed payments — improving your business operations. Options to execute and complete transactions, such as appointment rescheduling, payments, or fraud notifications automate many aspects of the customer service process and help reduce the burden on employees while increasing the number of customer touch points.

How Avaya Can Help

As the clear leader in the worldwide contact center and predictive dialer markets, Avaya is at the heart of customer service operations. The Avaya portfolio includes all required elements for a successful Proactive Outreach solution from the contact center, including inbound call routing and agent selection, outbound dialing, interactive voice response and speech recognition, as well as communication web services; all supported by world class consulting and integration.

These market leading solutions and consulting services are specifically designed to help you and your organization achieve desired results. The portfolio is not an array of stand-alone products, but integrated end-to-end solutions. Execution and implementation of a comprehensive, multi-media customer services strategy with Avaya becomes fast and simple, and allows you to focus on your business priorities.

GOOD CUSTOMER SERVICE:

- provides personalized, useful information to customers,
- creates value by, giving customers the opportunity to act on the information immediately.

Industry reports agree that while customers do not like recorded messages being played to them, they appreciate automated calls with valuable information.

Avaya works with clients to analyze communication needs and customer service processes, determining the integration points with business systems, and helps build the business case for the solution. Based on this analysis, Avaya can suggest the right solution to achieve your goals, leveraging existing capabilities where possible, while building a powerful, yet economical solution for proactive customer services with proven business value.

Avaya can help customers quickly implement the Proactive Outreach solution, combining a shorter return on investment with a low total cost of ownership. A case in point is the University of Alabama's Avaya Health Services Foundation. They were able to improve their collection processes using Proactive Outreach, yielding an increase of \$600,000 per year in returns from late accounts that had previously been written off.

Deploying equipment in-house for customer service contacts creates a scalable platform to run easy-to-configure campaigns on short notice – at the cost of a regular phone call, email or text message. This helps to ensure the confidentiality of valuable customer data since it never leaves

the company, greatly reducing security risks and liability issues. The success metrics for the outbound campaigns can be monitored by the same Avaya reporting systems that are in use in contact centers today, providing a comprehensive picture of all customer communications across your organization.

Case Study: Financial Services Customer Life Cycles

In the financial industry, the customer relationship is often categorized in three segments:

- **Acquisition** – Acquiring/on-boarding new customers, up-selling new products to existing customers
- **Retention** – Maintaining customer satisfaction
- **Collection** – Managing late and delinquent accounts

In the **acquisition phase**, customer information is needed, often for multiple transactions. Missing customer information can delay process; customers may experience poor service or encounter unexpected fees; ordered checks or debit cards may not arrive; and often cross-sell opportunities are missed.

During on-boarding, an Avaya Proactive Outreach solution can automatically:

- **provide helpful information** during account on-boarding
- **gather missing information** from customers to complete the account opening
- **verify that checks and cards have arrived** and activate them
- **suggest useful additional products and services to the customer** by observing account usage patterns

Some organizations see the risk of attrition to be highest at the beginning of the customer relationship. Using Avaya Proactive Outreach, the quality of the account opening process helps to improve customer satisfaction and retention. This reduces the number of customer inquiries

due to mistakes and delays. And, because the customer interaction is automated, there is no additional burden on branch employees or contact center agents.

In the **retention phase**, as customers do business with you, you can use Avaya Proactive Outreach for other customer contacts. For instance, you can provide customers with real-time notifications about unforeseen events such as overdrafts or overdue payments. It is events such as these that often lead to unexpected fees and penalties, as well as dissatisfied customers, and financial institutions understand that excessive fees are high on the list of reasons cited by customers to switch providers. The transactional capabilities of Proactive Outreach enable the customer to react immediately to these types of notifications, with options to transfer money from one account to another or to pay a credit card bill from a linked account

Despite all notifications, some accounts enter into the **collections cycle**. Proactive Outreach introduces many new options in the collection strategy for financial institutions by connecting proactive communications and self-service to your billing system. The cost and capacity of collection agents have often imposed limitations on full list penetration for delinquent accounts, especially in early past-due stages or for those with low outstanding balances. However, the earlier customers are contacted about their late accounts, the higher the likelihood to obtain payment. Proactive Outreach makes it feasible to contact all late accounts, regardless of balance or past-due stage, through multiple channels, and provides easy payment options immediately. If the immediate payment option is not chosen by the customer, Proactive Outreach can collect a promise to pay a stated amount by a specified date and then remind the customer accordingly.

| Vertical Market | Potential Applications |
|------------------------------|--|
| Financial Services | Notifications for account events: <ul style="list-style-type: none"> • overdrafts with balance transfer option • warnings for fraudulent activities with option to confirm or reject transaction |
| Government Fed, State, Local | Proactive alerts to citizens during all phases of a disaster |
| Healthcare | Prescription refill reminders including offers to schedule prescription pickup |
| Transportation | Verify customer presence for shipments with options to reschedule or clarify address |
| Universities (Education) | Notify and update students/parents on safety threats such as natural disasters or campus intruders |
| Utilities | Notify customers on exceptional bills, offer payment plans and up-sell energy consulting |

Figure 1: Example Proactive Outreach Applications by Industry

Proactive Outreach benefits for the Financial Services Industry:

- High quality on-boarding for top customer satisfaction
- Personalized, more immediate up-selling with automated enrollment for higher revenue and increased customer wallet share
- Immediate overdraft notification to improve retention rates and customer satisfaction
- Automated, early messaging and payment options for earlier and more likely collection to reduce bad debt write-off.
- Automation of routine calls and reduction of incoming calls lowers the burden on contact center agents and customer service staff to improve staff efficiency

Case study: Field Services Management

At Avaya, we know from talking to our customers in services businesses, that up to 20% of service calls are missed because of absent customers. That means technicians spend up to a quarter of their day in transit attempting to assist absent customers. Also, because technicians need some flexibility in their daily schedules to deal with unforeseen issues, customers are often given a four-hour window in which to wait for a technician or service person.

Linking Proactive Outreach to a Scheduling System provides relief for both the service company and its customers. After a reminder call the day before the service, giving the customer an opportunity to reschedule,

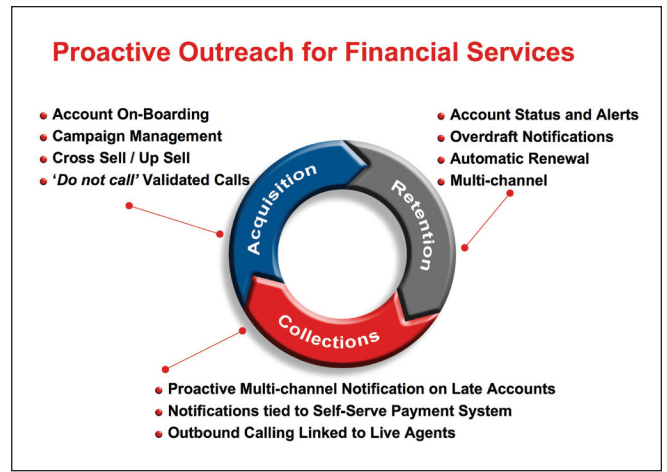
Proactive Outreach can again notify the customer on the day of service. Using up-to-the-minute technician status, the system can be set to notify the customer again shortly before the arrival of the technician, and also verifies the customer's presence. This can increase the number of customers met; customers reduce the time they need to be 'on call' and need be available only when the notification call arrives.

Additionally with dynamic scheduling, Proactive Outreach can wait list customers for earlier appointments, and contact them with any newly available times. This then can provide customers with earlier service with the added benefit of filling an empty slot for a technician. It can also deliver a quick survey once the technician closes the work ticket and leaves the customer to help you determine if everything is in order, and provides the opportunity to immediately correct any issues that arise.

Avaya Proactive Outreach Solution Benefits

Implementing Proactive Outreach and adding intelligent communications to customer service processes can have significant benefits for your organization by:

- Providing relevant, up to date, real time information to customers automatically



- Creating a closed-loop link between business processes and customers
- Enabling immediate customer action through a notification call
- Delivering more customer service calls without adding agents
- Freeing up agents to be available for higher-value transactions

Learn More

For more information on how your customer services operations can benefit from Avaya Proactive Outreach solutions, contact your Avaya Client Executive, or visit the Solutions A-Z area under Do Your Research at www.avaya.com

For more specifics about Proactive Outreach in Financial Services, please visit www.avaya.com and review the Fact Sheet on this solution and the White Paper 'Getting to First in Line'.

About Avaya

Avaya is a global leader in enterprise communications systems. The company provides unified communications, contact centers, and related services directly and through its channel partners to leading businesses and organizations around the world. Enterprises of all sizes depend on Avaya for state-of-the-art communications that improve efficiency, collaboration, customer service and competitiveness. For more information please visit www.avaya.com.

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