I-TEL DIALER

Dialer Overview

Harnessing the power of I-Tel

I-Tel Dialer Overview

We are going to review some of the more prominent features of the I-Tel Dialer

General overview-Working *smarter* with I-Tel

- ❑ Campaign parameters
- ❑ Working campaigns
- ❑ Maximizing campaigns
- ❑ Getting MORE out of your dialer
- ❑ Must reads
- ❑ Tips and pointers
- ❑ Configuration
- ❑ Closing thoughts

Working *smarter* with I-Tel

Technology can really change the game!   Working technology *smarter* will change your bottom line!

How we use technologies available to us now will most likely determine the competitive edge we will have in the future. So we must choose wisely. An integrated dialer like I-Tel provides a wonderful footing. It is a feature rich dialer with the added benefit of utilizing RMEX features for a comprehensive solution for maintaining a productive environment. Technology is constantly evolving. Using technology to advance *your* initiatives means having to change the way you work and demands that you try the latest advancements.

Today's environment *demands* that we work *smarter*. This means improving our products functionality and creating new methods to meet the demands of tomorrow. Incorporating many of the tools available within I-Tel is the first step…

Working *smarter* with I-Tel

Working smarter means not only improving your productivity but reducing your costs and minimizing your risks so that the most can be gained *and* -~ achieving this in a minimum amount of time! But how do you get there? Embracing change.

∫ Setting up mixed campaigns by adding virtual agents to outbound campaigns
∫ Running agentless campaigns during the evening and weekend hours
∫ Targeting specific data for a campaign e.g., phone numbers provided by a skip tracing company or selecting a specific time zone
∫ Re-sorting a running campaign by a specific phone code, state, area code, score (internal or external) or client
∫ Creating a campaign of new business received today and linking the campaign with a high ratio so these accounts are called immediately and are exhausted first…*before the other linked campaigns*

Once new features are implemented the results will need reviewed!

I-Tel Dialer Overview

Campaign parameters:

o The target abandon rate can now be set as high as 20% - abandoned calls are calls that result in a connect when there isn't an available agent. In Predictive, abandoned calls WILL occur. But, if you want to *increase the calls* and can accept a higher abandoned rate, it is available

o RNA – Ring No Answer time. How long do you want to ring a consumers phone? This can be reduced to 3 rings if your goal is to work through a campaign multiple times in a day to capture live calls only and then for the last run of the day, the RNA time is increased so that answering machines can be included allowing you to leave a message

o Setting the campaign to call multiple numbers and ALL available numbers

I-Tel Dialer Overview

Working campaigns:

o Maybe answering machines are NOT considered contacts. The option 'Rework non-contacts by campaign' is available from the queue consolidations menu. This option allows for all non-contacts including answering machines to be called again
o If new business arrives today and must be called today – can this be done? Yes, a campaign can be built on the fly. Live and virtual agents can work immediately
o How can we make sure these accounts are called right away, all of our agents are on other campaigns? Linked Campaigns!

I-Tel Dialer Overview

Working campaigns (continued):

o 'Linked campaigns' allow for 1 'master' campaign and multiple 'linked' campaigns to be set up. Linked campaigns can be set up based on list size or ratio. We recommend a 'ratio' setting if the accounts in a linked campaign need to be called before other accounts in the links. For example, 1st link is set to 90% and the 2nd link is set to 10%. The accounts in the 1st linked campaign will be called 90% of the time
o Many sorting options are available. If a campaign is running and client #1234 needs called before the other accounts in the campaign, the sort can be adjusted while the campaign is running. What if there are 20 client numbers in the group and only 2 client numbers need to be called immediately – can this be done? Yes, simply modify the sort to present these 2 client numbers first and the campaign will re-adjust

I-Tel Dialer Overview

Maximizing campaigns:

o Incorporating agentless campaigns – increasing call volume when live agents are not available by running agentless campaigns at the end of the day or on weekends
o Mixed campaigns - utilizing virtual agents not only in an agentless campaign but adding them to a campaign with live agents: reducing wait time and increasing call volume
o Adding Call Blending – Call Blending allows an agent to make and receive calls through 1 extension. When an available predictive agent receives the inbound call – the account for the caller is immediately presented to the agent! This reduces the steps taken by an agent to juggle calls on their outbound and inbound extensions, ultimately reducing wrap time and allowing the agent to return to the wait screen for an outbound connection

I-Tel Dialer Overview

Getting MORE out of your dialer:

▪ Permission tracking – requiring agents to get permission from the consumer to call a specific number. Using this feature will reduce complaints and certainly lawsuits

▪ Are other phone codes from skip tracing services gathered and applied to the accounts? If so, the dialer can call all of these phone codes. Additionally, if 10 numbers are coded for the *same* phone code, the dialer can call *all* of the numbers belonging to this phone code in a campaign

▪ Can specific states be targeted in a campaign? Yes, as well as zip codes, area codes, time zones and much more!

▪ Adding Inbound IVR – If an inbound number could be routed to a group of virtual agents, options could be made available to the caller allowing them to get your mailing address, enter payment information to set up a payment arrangement or a credit card payment

▪ Taking advantage of the 'transfer to a hunt group' – an agent can send the caller to the payment portal, allowing the agent to move on to the next account and letting the dialer take the payment
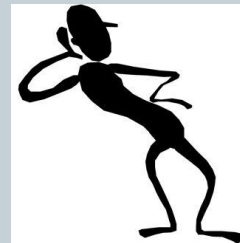
I-Tel Dialer Overview

Must read/view – take some time to listen to the audio-video
files we have available through our website

✦ Queue Consolidations
✦ Contact Series for I-Tel
✦ Linked Campaigns
✦ Call Blended
✦ Blended Transfers
✦ Round table discussions

I-Tel Dialer Overview

Tips and pointers:

✦ While a campaign is running, go to the Dialing Tuning tab and adjust the RNA time (the time spent ringing a consumers phone). Then monitor the Campaign Status viewer results. Wait 10-20 minutes - are connects increasing? Is the percentage of no answers decreasing? Adjusting this field can potentially improve the connect rate. Maybe the ring time is too short – and no answers is quite high. Visit this occasionally to see if the results improve – try changing at different times of the day!
✦ The abandoned rate can also be changed while the campaign is running. Change this value too and view the results through the Campaign Status viewer – are the results improving, without letting the abandoned number increase significantly?

RMEx

QUANTRAX CORPORATION INC.

I-Tel Dialer Overview

Configuration:

The configuration for the dialer server is typically a 2U server with 500-Watt redundant power supply and a quad-core Xeon processor. The server is built to specifications designed and agreed upon by Quantrax, Sytel and Velocite (Manufacturer for the server) for optimum performance for the I-Tel dialer.

Windows Server 2008 Standard is pre-loaded.

Additionally, there is a standard 3 year warranty provided. It is 5x9x4 Next Business Day service.

I-Tel Dialer Overview

With our partner Sytel, we are committed to building technologies that will propel users into the 22nd century….yes, the 22nd century and beyond.

We are committed to bringing the full value of our product to your doorstep, encouraging you to implement new technologies to stay ahead of the competition – then *you* can mange your growth and build on a new foundation.

I-Tel Dialer Overview

We have touched on various ways the I-Tel dialer could be managed differently. These are just a handful of examples allowing you to push the dialer and work smarter…
We would like to see folks incorporate many of these changes ~~ at minimum, *trying something different.*

Thank you for your time!
  The Quantrax Team

What you do today can improve all your tomorrows.
Ralph Marston