CHAPTER 8

Automated Outbound Campaigns

This chapter shows you how to create and manage Automated Outbound Campaigns that are automatically 'blended' with other inbound and outbound call traffic. The following topics are covered in detail.

What are Automated Outbound Campaigns?

TFB's Automated Outbound Campaigns (AOC) feature is a powerful tool for prioritizing, launching, and managing outbound campaigns as an integrated part of call center and agent activities. Through *Infolink*™, real time information on call-progress, agent status, and queue status, allows APM to monitor and direct call center functions. APM initiates Outbound Campaign calls based on a sophisticated priority scheme that incorporates the above criteria, as well as agent "skills"(grouped by split), and specific campaign parameters. The campaign database, including outbound phone numbers, can be stored and managed on CTI Server**,** and can reference pre-established customer information from the end-user organization.

AOC functionality can also be fully integrated with **TFB Workstation Agent** products to ensure efficient control of agent resources, without interruption for manual change of assignments or positions. Dynamic access to database information allows coordinated call/screen "pop", which presents agents with a desktop window of caller information when the outbound call is launched. Options also include a provision for pre-recorded prompts and telephone display information to further assist the agent.

Unlike traditional predictive dialers that reside outside ACD environment, TFB's Automated Outbound Campaigns provides true call "blending" *within* ACD functionality.

Features Summary

Use the following directory to identify important AOC features, and to quickly locate the related topics.

FEATURE	?	HOW?	Application
Full 'blending' of outbound campaign calls with existing call traffic	Y	APM handles this automatically. To fine tune blending priority see also page 9, "To enter campaign parameters" Step 6	To optimize agent efficiency through call-loading peaks and valleys.
Configurable outbound call launch 'windows' to accommodate both your staffing schedules, *and* your target customer's predicted schedule	Y	See page 9, "To enter campaign parameters" Steps 2 and 3	To tailor campaigns to the schedule of qualified agent personnel, AND the schedule and time zone of your target callers!
Drive campaigns using your existing customer database	Y	See page 10, "Creating Campaign Data Files"	To provide data for screen pop and target phone numbers.
"Skills-based" routing on outbound calls in each campaign	Y	See page 9, "To enter campaign parameters", Step 5, AND page 16, "Configuring the ACD/PBX", Step 2	To ensure the most appropriately trained agents handle calls for each campaign.
Agent screen 'pop' of caller data coordinated with outbound calls	Y	See page 9, "To enter campaign parameters", Step 11	To speed call-handling, and account revisions.
Agents hear spoken announcements in their headsets – both an agent prompt to announce the outbound call, and caller specific account number	Y	See page 9, "To enter campaign parameters", Steps 9 and 11	To ease call-handling, and allow agents to bring up account information as call is generated.
Automatic Campaign Start and stop based on time of day	Y	See page 18, "Launching and Stopping Campaigns"	To run your campaign "hands-free" from start to finish, with no manual input.
Manual campaign start and stop	Y	See page 18, "Launching and Stopping Campaigns"	To allow a full manual control in unforeseen situations.
Automated Outbound dialer automatically uses any special Phone Company-required dialing rules/formats	Y	See page 13, "Configuring Special-Case Outbound Dialing Formats"	To allow for special-case area codes that don't require a '1' prefix, and/or exchanges that require inclusion of the local area code when dialing.

FEATURE	?	HOW?	Application
Pre-recorded message can be played to target callers, without ever involving a live agent!	Y		Some call centers require relaying simple pre-recorded messages to the target caller. EXAMPLE: A school district that dials parents to tell them their child was absent from school on a particular day. The IVR asks the parent to key in a password before speaking a pre-recorded message.
AOC can be linked with an automated IVR application that asks callers for a password before playing a pre-recorded message to them.	Y		

SPECIFICATIONS AND MAXIMUMS

The following is a list of nominal limitations on significant campaign parameters and options.

PARAMETER	VALUE	NOTES
Max. campaigns Maximum number of unique, active campaigns that can be run simultaneously	9998	Practical limits are external factors such as call loading and staffing considerations.
Max. campaign calls in queue Maximum number of total campaign calls in queue	300	May be further limited by queue depth specified in ACD.
Max. campaign customers Maximum number of *total* target customers for all active campaigns.	10,000	Campaign data is loaded in to RAM on CTI Server. This limit can be revised upwards as available memory allows.

TECH

Configuration

This section describes the complete configuration process for Outbound Campaigns. Implementing outbound campaigns involves carefully balancing the requirements of personnel scheduling, agent training levels, data acquisition (customer phone numbers), and presentation of outbound calls to agents. AOC is designed to help you effectively manage and control these multiple objectives. Campaigns are automatically blended with all current activity, and calls for each campaign can be specifically routed to the agent groups with the most appropriate skills. AOC can be further configured to ensure that campaign calls are generated *only* during lulls in inbound activity, and only during pre-set periods that are both convenient for your customers, and aligned with your staffing schedules. The following is a checklist of the major decisions that will help accommodate important campaign objectives, and dictate how you configure AOC.

- **Which split will handle calls for each campaign?**
- **During what period of the day should the call center handle campaign calls?**
- **During what period of *their* day should target customers get campaign calls?**
- **Which regional area codes/exchanges require special dialing patterns?****
- **What is the source(s) of your campaign phone numbers/customer data?**
- **What are the available options for exporting your pre-existing customer data?**

You can get started without fully determining everything on this list, but be aware that each item is important to one or more configuration steps.

**APM's outbound dialer must know which local exchanges require inclusion of your *local* area code with the dialed number, and whether any surrounding area codes require that the '1' prefix be omitted when dialing. The outbound dialing configuration is used both for Callback features, and for Automated Outbound Campaigns.

Configuring Outbound Campaigns on CTI Server

This section shows you how to configure CTI Server to initiate and manage fully "blended" outbound call campaigns. There are three major steps required to complete server configuration:

Step 1 **Specify campaign parameters**

Step 2 **Generate "campaign data files" from your customer database**

Step 3 **Configure APM for special-case outbound dialing patterns**

Campaign-specific parameters are specified in the Outbound Call Campaign forms, however, outbound dialing patterns are configured in two separate ASCII **.cfg* files. The "campaign data file" is the source of phone numbers and screen pop information for the "target customers" that APM will be dialing. Typically, the campaign data file is generated from your pre-existing database, or from a third-party marketing directory. The exact method used to generate this file depends entirely on how the data is currently stored, and on the existing options for retrieval.

Specifying Campaign Parameters

All campaign-specific parameters are defined in the Outbound Call Campaigns (OCC) form, which is accessed from the TFB Configuration menus. This form allows you to define multiple campaigns, each with its own unique name, campaign number, start and stop times, automated call retries, ACD priority, outbound calling pilot, and agent audio prompt. The campaign number is the configuration "key", so by definition, all parameters are specified uniquely for each campaign number.

First, open the OCC form and enter campaign data in all the relevant fields.

To open the Outbound Call Campaigns form

- Click the **TFB Config** icon on the CTI Server desktop.


TFB Configuration

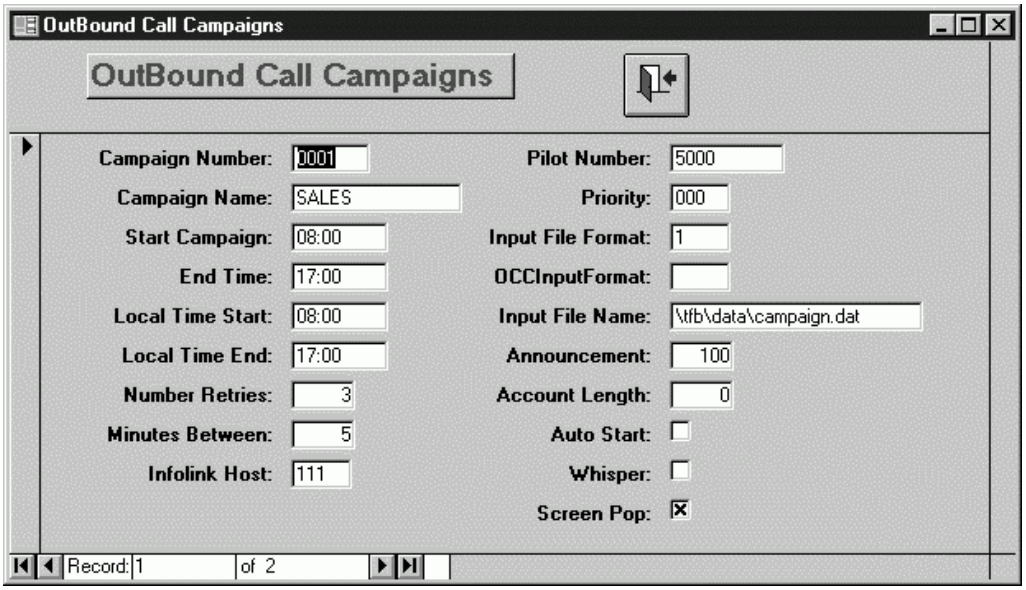
- Click the **Config** button from the panel


Config

- Click the Outbound Campaigns button


Outbound Campaigns

- The Outbound Call Campaigns form will appear.



Outbound Call Campaigns Form

Field	Use
Campaign Number	User-defined Campaign Number (0001 – 9999)
Campaign Name	User-defined campaign name (16 characters)
Start Campaign	Local *call center* time to start the campaign. (HH:MM)
End Time	Local *call center* time to end the campaign. (HH:MM)
Local Time Start	*Customers* local time to start campaign. (HH:MM)
Local Time End	*Customers* local time to end campaign. (HH:MM)
Number of Retries	Number of call attempts (after first attempt). (0-9)
Minutes Between	Number of minutes to delay between retries. (0-99)
Infolink Host	*Reserved*.(Defaults to '111')
Pilot Number	Pilot to use for outbound calls.
Priority	ACD priority (0-255) ('0' leaves priority unchanged from ACD setting)
Input File Format	'1' = comma delimited ASCII file. This is currently the only format supported.
OCCInputFormat	*Reserved.*
Input File Name	Campaign data file name, including path.
Announcement	Number of the Announcement to be played to agents when call arrives at the agent's phone. (1-9998)
Account Length	*Reserved*.
Auto Start	Enables automatic campaign launch at **Start Campaign** time. Otherwise, campaign must be started manually.
Whisper	Enables caller's account number to be spoken to agent when call arrives.
Screen Pop*	Enables call-coordinated screen "pop" on agent workstation screens.

*Note that you *must* have both the APM ***Screen Pop Workstation Agent*** modules for this feature to be fully functional.

To enter campaign parameters

1 Enter the **Campaign Number** (1-9999) to be configured. You can also click the left/right arrow buttons at the bottom of the form to scroll through existing campaigns. The number in this field denotes the campaign that will use the current configuration. Note that '0000' is not a valid campaign number! Also enter a campaign **Name** for reference. (Don't leave blank! **Name** is used in campaign-control dialog boxes).

2 Enter your call center's local start and end times for this campaign in **Start Campaign** and **End Time**. Campaign calls are dialed *only* between the two times specified. Specify values in military time format, <HH:MM> (where HH=0-23, MM=0-59).

3 Enter the customer's (target's) local start and end times for this campaign in **Local Time Start** and **Local Time End**. Campaign calls are dialed *only* between these two times in the *customer's* time zone. Specify values in military time format, <HH:MM> (where HH=0-23, mm=0-59).

NOTE The outbound dialing 'windows' for call campaigns are restricted by BOTH the 'target' customer's local start and end time, AND the call center's local start end end time. APM automatically calculates the call center time that corresponds to the target customer's local time based on the target area code. The time zone associated with each U.S. area code is specified in the *ac.cfg* file. **More Information** – See Appendix B, *Configuration Files*.

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4 In **Retries**, enter the number of times APM should redial this number upon successive failed connections. In **Minutes Between**, enter the number of minutes APM should delay between consecutive redials.

5 Enter the **Pilot Number** to be used for this campaign. When you configure the ACD, the CCV for this pilot should queue calls to the split most appropriate for this campaign. (See ACD Configuration)

6 In **Priority**, enter the ACD priority (1-255) to assign to outbound calls queued to the split for this campaign. Note the significance of this field in determining the priority of AOC calls relative to that set for inbound calls. *This parameter directly controls call "blending" between inbound and outbound calls.* By entering a very low priority (higher numeric values indicate lower priority) relative to other pilots, you can cause the ACD to queue AOC calls only when

agents are *not* busy with inbound calls. Enter '0' for campaign calls to retain their original priority.

7 Enter '1' in **Input File Format** to indicate ASCII format for the "campaign data file". No other formats are currently supported.

8 Enter the path and filename of your campaign data file in **Input File Name**. This is the file that contains the list of target phone numbers for APM to dial, and must be created/generated by your organization. **More Information** – See page 10, *"Creating Campaign Data Files"*.

9 In **Announcement**, enter the announcement number to play for agents when the outbound call is generated. You can used a pre-recorded announcement supplied by TFB or record your own. **More Information** – See *Recording Custom Announcements* in Chapter 1.

10 Select **Auto Start** for APM to launch the campaign *automatically* at the time specified in **Start Campaign**. If **Auto Start** is not selected, this campaign must be launched manually from the CTI Server **Tools** menu.

11 Select **Whisper** for APM to speak the current customers account number to the agent. Select **Screen Pop** to display information about the target call on the agent workstations.

12 **Repeat theses steps for each campaign to be defined.** To exit and save your entries, close the form by clicking the button.

Creating Campaign Data Files

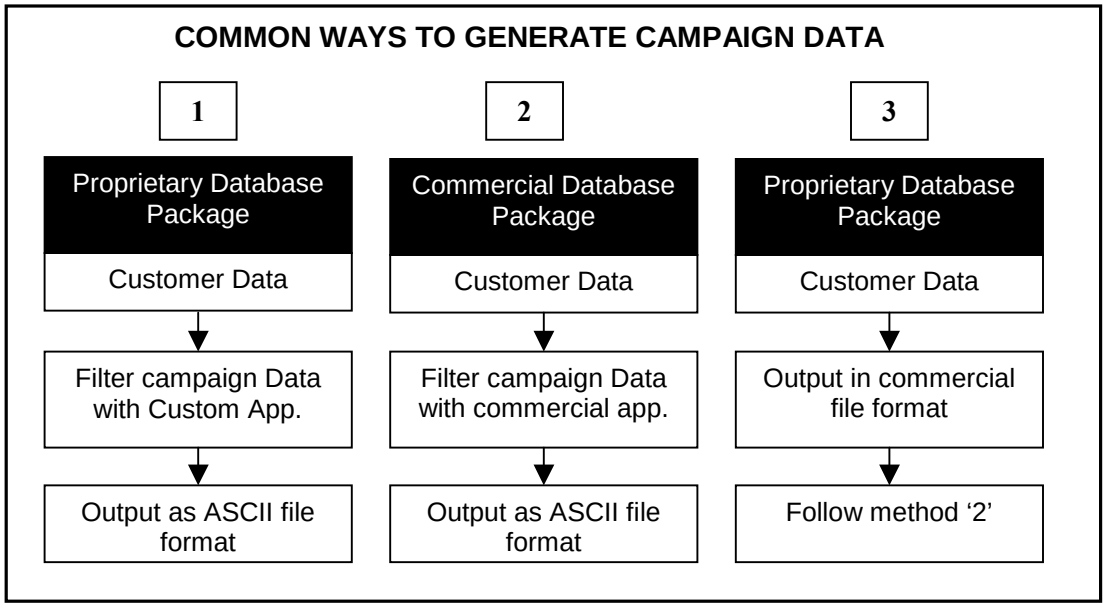
After defining the governing parameters for each campaign, AOC needs to know who your 'target' customers are. When you launch a campaign, AOC dials the outbound telephone numbers listed in the associated "campaign data file", an ASCII text file that you must create and save on CTI Server. As shown in the previous section, the name and path of this file are specified uniquely for each campaign in the **Input File Name** field on the OCC form. Each campaign file contains a list of customer records with 5 fields each – the campaign number, the customer ('target') phone number, account number, a miscellaneous field, and name. When you select **Screen Pop** in the OCC configuration, APM uses these three fields to populate agent screens with caller information along with the outbound call (requires APM ***Screen Pop*** and ***Workstation Agent*** modules). When you select **Whisper** in the campaign configuration, the value in the **Account** field is 'whispered' (spoken) to the agent when the outbound call is launched.

You can define a unique data file for each campaign, or put customer records for multiple campaigns in one file, as long as the file name and its location matches the **Input File Name** field in the OCC form. How should you decide whether to use multiple campaign data files or just one? That decision will likely be dictated by convenience, and by the method used to generate the file. AOC is flexible enough that whether you use one file or many files, the characteristics of any given campaign will not be altered.

Determining how to generate campaign data files

The method you use to generate campaign data depends upon the way your pre-existing customer data is stored. AOC accepts campaign data in ASCII records because it's a versatile, widely supported, and readily generated format that will accommodate the data export options in almost any MIS environment. Off-the-shelf database/spreadsheet packages such as MS Excel™, MS Access™, and similar programs can also filter the desired fields, and output existing data as comma-delimited ASCII records. Your proprietary programs may already be able to export data either directly in ASCII format, or in a format that can be read and converted by another application.

The following chart outlines the three most likely processes for converting your pre-existing customer data to the campaign data file format.



The Campaign data file format

All campaign data files must consist of a list of customer records in the following ASCII format. Note that NULL fields must always be delimited with a comma. The fields in each customer record are,

`CampaignNumber,PNO,AcctNo,Misc,Name,`

Where,

Field	Use
`CampaignNumber`	User-defined campaign number. Corresponds to the **Campaign number** field in the Call Campaign form
`PNO`	The 10-digit 'target' phone number to dial.
`AcctNo*`	Customer account number. Spoken to agents (optional)
`Misc*`	User-defined data. Displayed on agent screens (optional)
`Name*`	Customer name. Displayed on agent screens (optional)

The only truly *required* fields are the campaign number and customer phone number. Because it's ASCII format, you can review and modify campaign data files with any standard text editor, such as Windows Note Pad. The following example shows a portion of a typical campaign data file.

EXAMPLE 8-1 Outbound Campaign Data File, "sales.dat"

These calls are dialed based on the definition of campaign '0001' in the Call Campaigns form.

These calls are dialed based on the definition of campaign '0003' in the Call Campaigns form.

These calls are dialed based on the definition of campaign '0002' in the Call Campaigns form.

```
!! Campaign,pno,acctno,misc,name,
0001,2133797777,123456,,,
0001,3104546677,223441,,,
0001,2123436666,333333,,,
0002,2133797777,111111,,,
0002,3104546677,222222,,,
0003,3104546677,182763,,
0003,2142431982,536728,,,
0003,2145433566,887616,,,
0003,2136436639,987377,,,
0003,2147433888,192837,,,
0003,2138432563,675849,,,
0003,2149437722,957788,,
0003,3147432537,665262,,,
```

Using campaign data files effectively

In the example above, the configuration for campaigns '0001', '0002', and '0003' *must* reference this file (*"sales.dat"*) and its path in their respective **Input File Name** fields in order for the customers listed to be dialed. When APM encounters an entry that does not match an active campaign number, it skips that record.

At first glance, the campaign data file format appears to allow little room for customization. Actually, this file is quite versatile. Outbound Campaign records can supply agents with useful screen "pop", and you are not limited to just "popping" a name and account number. Although the three fields after **pno** – **acctno**, **misc**, and **name** – are labeled to suggest a very specific use, in practice these fields can be assigned almost any data you desire, with very few restrictions. If **whisper** is enabled, you should only assign a numeric value to the **acctno** field, but that value could be a social security number, a PIN number, or some other numeric parameter that suits your purposes. The **misc** and **name** fields can be similarly co-opted to contain driver's license, mother's maiden name, codes that indicate buying habits, or any other alphanumeric data that may be useful in the context of your campaign.

Once you have assigned the desired data to the **acctno**, **misc**, and **name** fields, you can cause that information to "pop" on agent workstation screens in coordination with the outbound call. To do this, simply check the **Screen Pop** box in the desired campaign configuration. Note that displaying screen "pop" also requires that the ***Screen Pop*** and ***Workstation Agent*** modules be installed on both CTI Server, *and* agent PCs.

Configuring Special-Case Outbound Dialing Patterns

Outbound dialing patterns are configured separately from campaign-specific parameters, in two ASCII text files on CTI Server: *'lld.cfg'* and *'exchange.cfg'*. Normally, APM simply dials AOC phone numbers by omitting the area code for local calls, and adding a '1' prefix to calls outside the local area code. However, for particular area codes and exchanges in your area there may be *exceptions* to those dialing patterns. When APM initiates an outbound campaign call, it first checks the following configuration files for the area code and/or exchange it is dialing. If it finds a match, APM dials the number according to the rule associated with that particular *.cfg* file as detailed below. It's important that these files contain complete and accurate information in order to avoid incomplete calls caused by incorrect dialing. Using a standard text editor, modify each file as your requirements dictate.

Configuring local long-distance dialing: "lld.cfg"

"Lld.cfg" is a list of area codes and exchanges that don't require a '1' prefix to be dialed. If a campaign target number has an area code/exchange combination that appears in this list, APM omits the standard '1' prefix when dialing this number.

To edit local long-distance dialing patterns,

- Click **Config.** | **Local Long Distance** in the CTI Server window.

- Add any areacode/prefic combinations that don't reqire you to dial a '1', and click **File** | **Save** when done.

  OR

- Open *tfb/data/lld.cfg* directly using a standard text editor.
- Make the necessary changes and save the file in text format when done.

Configuring dialing format for exchanges: "exchange.cfg"

"Exchange.cfg" contains a list of exchanges that require inclusion of the local area code when dialed. If a campaign target number has an exchange that appears in this list, APM includes the local area code when dialing this number.

To edit exchange-related dialing patterns,

- Click **Config.** | **Exchanges** in the CTI Server window.
- Add all the local exchanges that require your local area code when dialed, and click **File** | **Save** when done.

  OR

- Open tfb/data/*exchange.cfg* directly using a standard text editor.
- Make the necessary changes and save the file in text format when done.

More Information – For more details on the file formats, or if you need help modifying these files, see Appendix B, "Configuration Files".

TIP *Exchange.cfg* can alternatively be a list of exchanges that *DON'T* require inclusion of a local area code when dialed. To configure APM to use the file in this way, open tfb.cfg in a standard text editor, and set the '`EXCHANGES_ARE_LOCAL`' boolean to `FALSE`. Also, ensure that '`HAVE_EXCHANGE_FILE`' is set to `TRUE`. **DO NOT MODIFY ANY OTHER PARAMETERS IN THIS FILE.**

NOTE *Restrict.cfg*, which you may have configured for callbacks, is *NOT* referenced for outbound campaigns. APM will attempt to dial any number listed in your campaign data file without regard to the configuration of *Restrict.cfg*.

Agent Phone Configuration

Certain settings on agent phones can impede the proper functioning of AOC outbound dialing functions. Three important aspects of agent telephone configuration should be noted.

- **Outbound Dialing Restrictions**
- **ACD Line Assignments**
- **ACD Split Configurations that may affect phone behavior**

Be sure to review these topics to ensure that agent phones are properly configured to allow outbound calling.

Can cause outbound calls to fail!

Agent Phones: Outbound dialing restrictions

When a Callback is generated, the call is literally made from the agent's PBX telephone, just as if the agent dialed an outbound call manually. This means that any restrictions placed on outbound dialing at an agent's position will also affect Callback. To avoid failed callbacks based on phone restrictions, ensure that agent phone hardware is configured to permit outbound calls as desired.

Agent Phones: ACD Line Assignments

Because of design idiosyncrasies, ACD lines should only be assigned to the top 2-rows of an NEC 24-button phones. Not doing so may cause Callback to work incorrectly.

Agent Phones: Split configuration

The ACD allows you to configure split parameters such that certain phone characteristics are altered when logged into that split. Be aware, for instance, that when agent phones change mode automatically after a Callback, that it may be the result of the way the designated callback split is configured in the ACD. APM applications cannot directly affect phone settings, but related ACD configuration might!

Completing Server Configuration

With the "campaign data file" created, and outbound dialing patterns defined, all the configuration elements required on CTI Server should be complete. Use the following configuration checklist to ensure all campaign elements have been configured on CTI Server.

Checklist of AOC Configuration on CTI Server

- □ Campaign parameters specified in the OCC form?
- □ Campaign data file(s) created and path/file names specified in OCC form?
- □ All special-case dialing patterns entered in *"lld.cfg"* and *"exchange.cfg?"*
- □ All campaign-related agent prompts recorded and specified in OCC form?

With other APM modules, CTI Server can be reset once all APM configuration is complete. However, AOC must be treated differently because it's a purely outbound feature, and doesn't rely on the ACD for activation. In fact, all campaigns with **Auto Start** enabled will become active when you restart the CTI Server window, so be sure to first configure the PBX/ACD as shown in the next section.

Configuring the PBX/ACD for Outbound Campaigns

Two PBX/ACD elements must be configured for Automated Outbound Campaigns to ensure that IVR ports are available for agent prompt features, and that outbound calls are routed to the desired split for each campaign.

First, define a dedicated UCD group starting at IVR Pilot+1. These ports are used for speaking outbound call prompts and account information to agents. Second, in the CCVs for each pilot specified in the **Pilot** field of the OCC form, queue calls to the desired split for that campaign.

To configure the PBX/ACD for Automated Outbound Campaigns

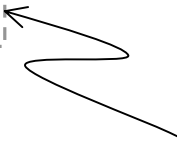
1 Create a new UCD Group starting at **IVR pilot + 1**

For example,
```
First analog port   5000
Main IVR UCD Group  5000
New UCD Group       5001
```

NOTE This UCD group can be shared by ASAP Callback, Scheduled Callback, and Automated Outbound Campaigns modules. It does not need to be recreated for each feature. If you've already set up a separate IVR UCD group for one of those features, AOC can use that, and you can skip to step 2!

UCD Groups for an 8 port system

5000 UCD Group 1 IVR Port 1
5001 UCD Group 2 IVR Port 2
5002 UCD Group 2 IVR Port 3
5003 UCD Group 1 IVR Port 4
5004 UCD Group 1 IVR Port 5
5005 UCD Group 1 IVR Port 6
5006 UCD Group 1 IVR Port 7
5007 UCD Group 1 IVR Port 8



UCD Group for speaking outbound call information / prompts to agents

APM automatically uses the UCD group defined beginning at **IVR Pilot + 1** for outbound calling functions, whether you define it or not! Make sure also, that the configuration in *"acd.cfg"* reflects the DN's assigned to your IVR ports. **More Information** – For more on setting up *"acd.cfg"*, see the topic entitled, "General APM Configuration", in Chapter 1 of this manual.

2 Queue outbound calls to the most appropriate agent split for each campaign. Do this in the CCV for each campaign pilot specified in the Outbound Campaigns form. The following example shows a typical outbound campaign CCV.

EXAMPLE 8-2 Outbound Campaign CCV

```
1) Pause        6
2) Queue to     7    // split for AOC calls
```

By coordinating the campaign pilot and the split queued by its associated CCV, you can ensure that the appropriately trained agents (by split) are handling calls for each campaign.

Using Automated Outbound Campaigns

This section shows you how to implement, start campaigns, stop campaigns, and use AOC's built-in reporting features. AOC provides a versatile tool set for managing call campaigns based on customer information from your pre-existing databases. Consider the options provided:

- **Full Control of Call Launch Timing.** The ability to automatically launch outbound calls within time windows that are acceptable to both your call center *and* the target customer.
- **Getting Agents the Information they Need**. The ability to provide agents with customized voice prompts, spoken account numbers and screen pop information that makes AOC call handling simple for the agent, and seamless for the customer.
- **Over-riding Campaign Automation**. Complete supervisorial control, including the ability to manually start and stop campaigns selectively.

Implementing Campaigns

After you have configured OCC parameters, generated your campaign data files, and configured the ACD, restart the CTI Server window to initialize your campaign data. If **Auto Start** is selected for any campaign in the OCC configuration form, that campaign will automatically launch at the start times specified. From the CTI Server window you can start and stop campaigns, and generate status reports of all current campaigns.

Launching and Stopping Campaigns

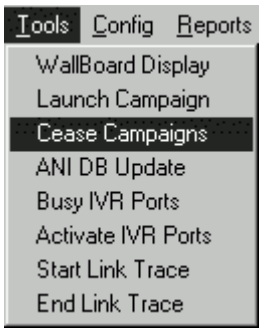
Campaign start and stop times are governed by the configuration data, but any campaign may be *manually* stopped and started as well. If **Auto Start** is not selected in OCC configuration, you must launch that campaign manually.

To launch a campaign

- Click **Tools** in the CTI Server main menu bar.
- Click **Launch campaign**.
- All configured campaigns no already running will launch if it's within their specified call launch window.

To stop a campaign

- Click **Tools** in the CTI Server main menu bar.
- Click **Cease Campaigns**.



When a campaign is stopped manually, it cannot be resumed where it left off. If the campaign is re-launched, it will start dialing from the beginning of the campaign data file.

IMPORTANT Even when you launch a campaign manually, APM only generates outbound calls within the call center local time frame and target number local time frame specified in the OCC form.

Determining Call-Launch 'Windows'

The call-launch 'window' for a given campaign will vary with the time zone being dialed. It's defined by the overlap between the call center's timeframe and the customer's local timeframe specified in the OCC form. APM converts the customer's local time frame to your call center's local time, and launches calls accordingly. APM determines the time zone associated with the call by looking up the TZ code associated with the outbound area code in *'ac.cfg'*.

NAME	TZ Code*	LOCAL TIME
Hawaiian	**0**	**Pacific Time – 1hr.**
Pacific	**1**	**Pacific Time**
Mountain*	**2**	**Pacific Time + 1hr.**
Central	**3**	**Pacific Time + 2hr.**
Eastern	**4**	**Pacific Time + 3hr.**

*Note that Arizona is 'special', and does not shift clocks for daylight savings time. Please write your congressman, and adjust your campaigns accordingly.

EXAMPLE 8-3 Specifying a Call-Launch Window

Consider a call center located in California (the Pacific time zone). You set the call center's timeframe based on your work shift:

Start Campaign = 9:00 (9 A.M.), **End Time =**16:30 (4:30 P.M.).

Suppose you are targeting customers with a home office, so you decide to set the customer's timeframe to:

Local Time Start = 10:00 (10 A.M.), **Local Time End** = 17:30 (5:30 P.M.).

How would this affect the launch of outbound calls? The following chart shows the outbound calling window determined by the above settings relative to each U.S. time zone.

Target customers in this time zone…	Would only be called between the following local times…
Hawaiian	**10 A.M.– 3:30 P.M. (Hawaiian)**
Pacific	**10 A.M.– 4:30 P.M. (Pacific)**
Mountain	**10 A.M.– 5:30 P.M. (Mountain)**
Central	**11 A.M.– 5:30 P.M. (Central)**
Eastern	**Noon – 5:30 P.M. (Eastern)**

This campaign wouldn't even launch a call to Eastern time zone customers until Noon *their* time, because **Start Campaign** is 9 A.M. Pacific, Noon Eastern. It would stop calling Eastern customers at 5:30 P.M *their* time.

Note that it's possible to inadvertently configure the combination of your local timeframe, and your customer's timeframe such that customers in certain time zones are never called! Take care that the campaign start and end times for your call center, and those for your customers, overlap adequately for all the time zones targeted in your campaign.

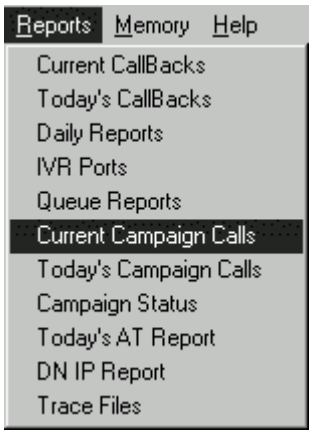
Using Call Campaign Reports

Call Campaign reports are useful for monitoring the progress of a given campaign and for assessing performance after completion. You can generate a variety of campaign status reports at any time from the **Reports** menu in the CTI Server window. Reports are displayed in a Notepad window, so they can be printed, or saved to another file name for later review or archive.

Using the "Current Campaign Calls" Report

The "Current Campaign Calls" report shows the status of all "target" calls currently in memory for a specified campaign.

To generate a report of current call campaigns



- Click **Reports** in the CTI Server window.
- Click **Current Campaign Calls.**
- Select the desired campaign from the list box
- The report appears in a Notepad window. Click **File** | **Print** to print the current report window.
- Click **File** | **Save As,** and enter a new file name to save the current report window.

Reading the Current Campaign Call report

The "Current Campaign Calls" report looks similar to this:

Control Num	Status	Flag	Phone Number	In Time	Last Time	Next Time
00000001	START	0044	213-3797777	15:35	15:35	15:35
00000002	START	0044	310-4546677	15:35	15:35	15:35
00000005	START	0044	213-3797777	15:35	15:35	15:35
00000006	START	0044	310-4546677	15:35	15:35	15:35
00000007	START	0044	212-3436666	15:35	15:35	12:35

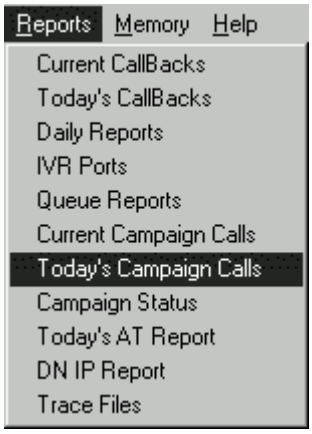
"Current Campaign Calls" Report Fields

Field	Use
Control Num	*TFB assigned tag* (for APM internal tracking)
Status	Campaign's current activity
Flag	*Internal APM use*
Phone Number	10-digit target phone number
In Time	Campaign Number defined in OCC form
Last Time	Most recent time target number was dialed
Next Time	Scheduled time to dial (or redial) target number

Using the "Today's Campaign Calls" Report

The "Today's Campaign Calls" report shows the status of calls for all campaigns – both pending and completed.

To generate a report of call campaigns for the entire day



- Click **Reports** in the CTI Server window.
- Click **Today's Campaign Calls.**
- The report appears in a Notepad window. Click **File** | **Print** to print the current report window.
- Click **File** | **Save As,** and enter a new file name to save the current report window.

Reading the Today's Campaign Calls report

The report looks similar to this:

```
Control          Status  Flag T Campaign Pilot  CB Phone      In    Last  CB
                         DN     Priority                      Time  Time  Time
-------------------------------------------------------------------------------------
00000001 IN QUEUE 0002 0   0001     5000   2133797777 15:35 15:35 15:35
                  0        000    111111
00000002 IN QUEUE 0002 0   0001     5000   3104546677 15:35 15:35 15:35
                  0        000    222222
00000003 ENDDAYL  8800 0   0001     5000   2123436666 15:35 15:35 12:35
                  0        000    333333
00000004 IN QUEUE 0002 0   0001     5000   2131436666 15:35 15:35 15:35
                  0        000    333333
```

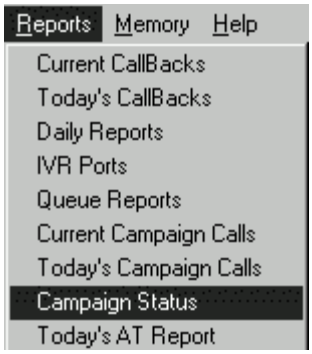
"Today's Campaign Calls" Report Fields

Field	Use
Control	Internal TFB use
Status	Campaign's current activity
Flag	*Internal APM use*
DN	Dialed Number
T	Number of tries
Campaign	User-defined campaign number
Priority	ACD priority
Pilot	Pilot number used for campaign
CB Phone	10-digit Target telephone number
In Time	Campaign Number defined in OCC form
Last Time	Time of most recent call
CB Time	Time number will be redialed

Using the "Campaign Status" Report

The "Campaign Status" report shows summary information for all campaigns currently configured in the OCC form.

To generate a "Campaign Status" report for all defined call campaigns



- Click **Reports** in the CTI Server window
- Click **Campaign Status**
- The report appears in a Notepad window. Click **File** | **Print** to print the current report window
- Click **File** | **Save As,** and enter a new file name to save the current report window.

Reading the summary Campaign Status Report

The report looks similar to this:

```
No.  Name          Flags   Status    Cnt Mem Que  Term  Wait  Ready  Alloc
-------------------------------------------------------------------------------
0001 SALES         0002  ACTIVE    4   3   3     1     0     0      6
0002 Collections   0002  ACTIVE    18  7   7     11    0     0      6
0003 New Service   0002  ACTIVE    0   0   0     0     0     0      6
```

"Campaign Status" Report Fields

Field	Use
No.	Campaign Number, as defined in OCC form
Name	Campaign Name, as defined in OCC form
Flags	*Internal APM use*
Status	Campaign's current activity
Cnt	Total number of calls pending for this campaign
Mem	Total number of pending calls in RAM for this campaign
Que	Total calls currently in queue for this campaign
Term	Total calls currently with an agent for this campaign
Wait	Total calls waiting for this campaign
Ready	Total calls ready for this campaign
Alloc	Total slots allocated for this campaign

Possible values for **Status** field

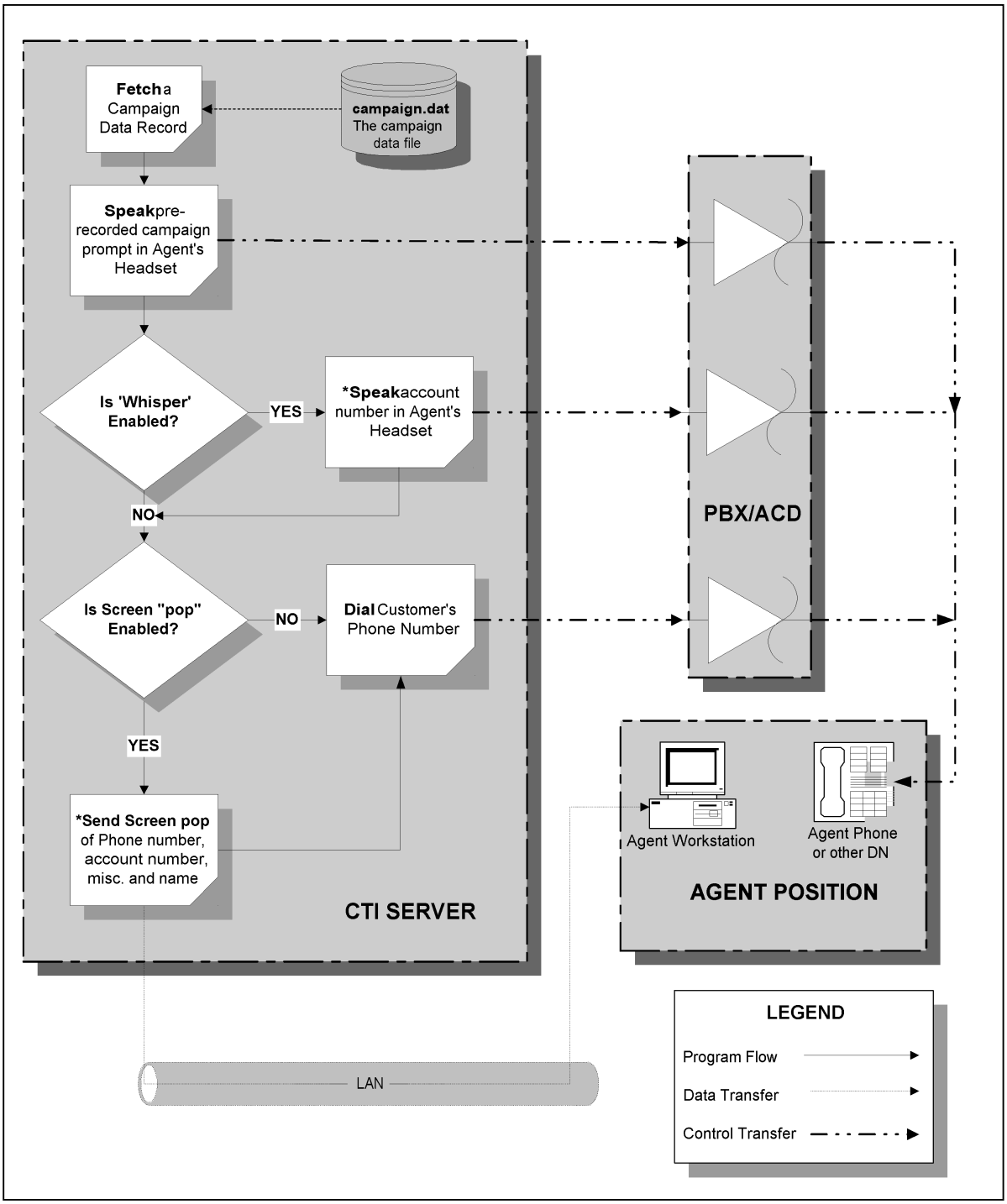
Start - Campaign not yet started

End - Campaign complete

Active - Campaign underway

Automated Outbound Campaign Module Interactions

The following chart shows the component interaction that accompanies the launch of an outbound call.



Troubleshooting and Maintenance

When campaigns are properly configured, no maintenance or manual intervention is required. AOC will dial your target customers in the manner specified until it has tried each entry in the campaign data file.

Under the pressure of full call loading, however, you may discover ways to better configure your next campaign. The following section re-examines the most important configuration parameters, and how they can influence the effectiveness of a campaign.

If you have any difficulty with configuration, or your campaigns aren't running the way you intended, check the troubleshooting guide on page 28 for solutions to common problems.

Tips for Streamlining Outbound Campaigns

A successful outbound calling campaign requires a number of elements to come together in seamless and coherent fashion. While APM automatically arbitrates between campaign functions and other CTI activity, your configuration settings play a pivotal role in the way campaigns are run.

Even if you have a campaign up and running, there may yet be steps you can take to improve the efficiency of your configuration for the next campaign. AOC is designed to help you manage important campaign priorities, including factors that ultimately affect customer satisfaction and cost-efficiency. Note that you cannot change configuration parameters or campaign data files in mid- campaign, without restarting the campaign from the top of the customer list.

Changing the Balance of Inbound and Outbound calls

The ACD Priority number gives you control over the queue priority of campaign calls relative to that of inbound calls. You can manage priority either from the OCC form or from the CCV associated with the pilot of a given campaign. To allow CCVs to govern the ACD priority set of campaign calls in particular queue, set the ACD Priority field to '0' in the OCC form.

You can also ensure that the most qualified agents handle calls by assigning the appropriate split to each outbound campaign.

Controlling the Way Calls are Presented to Agents

The more customer-specific information an agent is given prior to being connected to the call, the more quickly and smoothly the call is likely to be handled.

Three fields in a campaign data file are designed to be used in almost any way that's most useful for your requirements. These fields are,

- **Account Number**
- **Misc.**
- **Name**

Despite their suggestive labeling, they can be used for almost any data that suits your campaign. Almost any relevant customer data that you already have in your in-house databases can be extracted and used to fill these fields. from your existing customer database. Presentation of the 'right' data can ultimately help personalize the customer interaction, and reduce the agents' time on call.

All three fields can also be displayed as Screen pop on agent screens in conjunction with the outbound call. The account number can also be spoken ("whispered") in the agents headset as the call is launched. The only related limitation is that the **account number** field can only contain numeric data if whisper is enabled.

You can record an agent campaign Prompt uniquely for each campaign as well. Nominally, the prompt can simply help prepare agents for the call, especially if they're logged into multiple campaign splits. But it can also be used to remind agents of important campaign details or tasks to complete during the call.

Preventing Incomplete Calls

Incomplete (or failed) calls often come from some surprising sources. As an important measure of the success of a campaign, there are two effective steps you can take prior to launch that will reduce the incomplete/abandoned call rate for a campaign.

1. Make sure agents have read and understand the section on Outbound Campaigns in the **APM Agent User's Guide**. Handling campaign calls isn't a complex task, but agents who aren't familiar with the system may be confused by the sequence of ACD and PBX calls and prompts. Some agents may simply hang-up as the outbound call is generated!

2. Ensure that all special-case dialing patterns are accounted for in the related configuration files. If APM can't dial calls to certain area codes or exchanges successfully, those calls will show up as 'Failed' in the call campaign reports.

Troubleshooting Guide: Automated Outbound Campaigns

Problems / Questions	Solutions 
No outbound calls are being generated even after the campaign was manually launched.	▪ There are two time-windows specified in the OCC form. For an outbound call to be launched, it must fall within *both* specified time windows simultaneously. For the target local time, APM calculates allowable times to dial calls based on the area code of the outbound call. ▪ Ensure that an outbound UCD group is defined within the IVR pilot group, starting at IVR Pilot + 1. ▪ Ensure that a valid pilot number was specified in the OCC form. ▪ APM uses ac.cfg to calculate the local time of the target call, based on its area code. Check the entry for any area codes that aren't being dialed, and ensure the TZ (time zone) field of ac.cfg. The value of TZ is 0-Hawaii, 1-Pacific time, 2-Mountain time, 3-Central time, 4-Eastern time. See Appendix n, Configuration Files.
Because of the way our organization generates campaign data files, it would be convenient to use multiple campaign data files for the same campaign. How can I do this?	▪ Because the Call Campaign form lets you associate only one file with each campaign, the only way to use multiple files is to define multiple campaigns – one for each data file – with identical governing parameters. You can name each campaign identically, but each must have a unique campaign number.
Calls for some campaigns are being consistently routed to the wrong split!	▪ Ensure the Campaign Pilot Number specifies the desired pilot for that campaign. ▪ Ensure the CCV associated with the Campaign pilot number queues calls to the desired split.

Problems / Questions	Solutions
All defined campaigns are working well, but APM is generating outbound calls far too frequently, even when we have high inbound call volume!	▪ Consider the reducing ACD Priority for the campaigns in question in the Outbound Campaign Calls form, by *raising* the number in **Priority***. If APM is generating too many outbound calls, make sure this value is high relative to the ACD priority you have assigned to incoming pilots. See ACD documentation for details. *-Recall that '1' is the highest ACD priority, and '255' is the lowest, so reducing the number increases the priority!
How does APM determine when to launch a call for customers in different time zones?	▪ When you specify valid times for the customer to receive AOC calls, APM determines the corresponding call center times based on the customer's area code. APM looks up the time zone associated with the area code in ac.cfg.
How does APM determine that a call is incomplete?	▪ A tri-tone, a busy signal, a ring with no answer, and a fast-busy signal all constitute calls in this category.
APM is launching campaign calls outside the timeframe that was specified in configuration.	▪ Remember that the customer's (target's) local start and end times for this campaign are specified in **Local Time Start** and **Local Time End**. The corresponding local times depend on the time zone of the customer. ▪ These values must be in military time format, <hh:mm> (HH=0-23, mm=0-59). ▪ Check the system clock on CTI Server by double-clicking the display on the Taskbar.
All campaigns seem to work fine except for campaign '0000'. What's going on?	▪ '0000' is not a permissible campaign number! Change the campaign number to a unique value from 1-9999, and make sure the campaign numbers for associated entries in the campaign data file are changed accordingly.

Quick Reference Guide: Automated Outbound Campaigns

What it Does	**Automated Outbound Campaigns** provides tools for configuring and managing fully blended, integrated, outbound call campaigns.
Executeable	Embedded in APM
Configuration **CTI Config.**	▪ Configured by campaign in the TFB Outbound Call Campaigns form ▪ Outbound dialing preferences must be configured in related .cfg files
Configuration **ACD Config.**	▪ CCVs must be configured to queue outbound calls to the appropriate split(s). ▪ A dedicated UCD group must be configured for speaking call-coordinated prompts to agents.
Configuration **Related .cfg Files**	▪ lld.cfg (lists AC/Exchgs that don't require a '1' prefix) ▪ exchange.cfg (exchanges that must include local AC)
Related Modules	---
Related file locations	---
Notes	---