Outbound Engagement:
*Change the Conversation by Proactively Communicating with Customers*

A Frost & Sullivan White Paper
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INTRODUCTION

Businesses today face an increasingly challenging marketplace, especially considering the ease with which customers can move their business from one company to another. All it takes is a few keystrokes and the click of a button for a customer to purchase your competitor’s product instead of your own.

Is customer loyalty still achievable?

Yes. Organizations can attain customer loyalty—but doing so requires a comprehensive outbound communications strategy. Proactive communications ensure customers are kept informed and are given fewer reasons to contact the organization. This improves their overall experience, lowers support costs, and leads to increased loyalty. By focusing on outbound communications, organizations can transform the customer experience across the lifecycle of a relationship, ultimately seeing the benefits reflected in the bottom line.

This paper will identify the key components of a comprehensive outbound engagement strategy and detail the benefits organizations can achieve with outbound communications.

WHY OUTBOUND CUSTOMER ENGAGEMENT IS CRITICAL IN TODAY’S BUSINESS ENVIRONMENT

Today’s consumers are active, empowered, mobile, and extremely comfortable with technology. Most important, they expect companies to anticipate their needs, wants, and preferences.

As part of these lofty expectations, customers want businesses to proactively reach out to them, sharing relevant information to improve their experiences with the products and services they use. Customers also want companies to meet them where they live: some customers prefer text messages to emails; others opt for phone calls. Regardless of the channel, customers expect a great, personalized experience every time they interact with an organization.

Business Benefits of Outbound Engagement

![Diagram showing business benefits of outbound engagement]

- Build customer loyalty
- Improve customer service
- Grow revenue
- Reduce service and support costs
- Protect and enhance brand
- Measure and respond to customer sentiment
These expectations put the burden on companies to effectively manage the entire customer journey. To a customer, all interactions with a given organization form a single impression of that business. Hence the critical need for companies to have a comprehensive solution in place that can orchestrate all outbound communications, proactively delivering information, properly setting expectations, and making it easy for customers to always find what they need when they need it, from the channel they prefer.

No wonder a recent Frost & Sullivan survey of more than 300 contact center decision makers revealed that more than 60% of respondents expect the volume of outbound customer care, and resulting sales and payment interactions, to increase over the next two years. As a proportion of total customer interactions, social media, mobile, Web self-service, video, and chat are growing, while the volume of live-agent voice, inbound IVR, and email interactions are declining. That has direct implications on the ways in which organizations should approach their outbound efforts.

There is another advantage to outbound communications: by proactively surveying customers, companies gather direct feedback about recent experiences and customers’ overall impression of the brand. Businesses can then use the data to improve future interactions. Best-of-breed survey programs also quickly close the loop by identifying unhappy customers and responding with timely and personalized follow-up; if an agent can solve the problem or offer a special promotion or benefit, many of these “at-risk” customers can be swiftly brought back into the fold.

MOBILE DEVICES CHANGE THE EXPERIENCE

With the majority of consumers now owning smart phones and tablets, they are always connected to the Internet—and to the companies with whom they do business. Organizations can use this reality to change the customer experience, making it immediate, personal, and effective.

Today’s consumers take advantage of their smartphones and tablets in all aspects of their daily lives, including:

- **Communications**, including voice, text, email, push notifications, chat, and video calling;
- **Content**, such as mobile apps, Passbook, entertainment, and Web access;
- **Value-added services**, like customer care, payments, and scheduling appointments; and
- **Social media**, for marketing, advertising, feedback, and networking.

MAKE OPT-IN A PRIORITY

The benefits of honoring customer channel preferences are two-fold. Not only does adhering to customer channel requests improve the customer experience, but there are a growing number of regulations that require organizations to obtain consumer consent before they send certain types of communications. Rules for opt-in requirements vary based on the communication channel, the nature of the message, and the recipient’s location. For example, in the United States, consent is required to call customers via outbound IVR on a landline phone with an automated telemarketing or sales call; opt-in is required for all automated outreach to mobile phones using outbound IVR, predictive dialers, or text messaging for any purpose; and authorization is required for emails whose primary purpose is advertising or promotion.
To manage the varying opt-in regulations across channels and geographies, companies need a complete solution from a vendor that fully understands the requirements and can balance them with business needs. The goals are to maximize the size of your opt-in database and to make the ongoing management of it significantly less complex than attempting to maintain it in-house by providing automated opt-out processes, removing contacts from the opt-in database as needed, and seamlessly integrating into your outbound campaigns.

An outbound engagement strategy cannot be complete until mobile communications are fully incorporated into a single solution. Thanks to smart phones and tablets, mobile is not simply one communication channel or technology. Mobile includes voice calls, text messaging, email, chat, apps, Passbook, push notifications, and mobile web. It is critical to unify these channels so customers can utilize their preferred channel and experience optimal interactions with companies.

**Mobile Devices Have Changed Customer Interactions**

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![Mobile Devices Have Changed Customer Interactions](image-url)
WHAT TO LOOK FOR IN AN OUTBOUND ENGAGEMENT SOLUTION

Outbound engagement solutions should support an omnichannel environment so companies can interact with customers on their terms and via their preferred communications method.

There are six key components to consider when planning a comprehensive outbound engagement solution, including:

1. **Utilize a Variety of Integrated Outbound Channels**: Specifically, outbound IVR, predictive dialing, text messaging, email, and push notifications.

2. **Easily Create and Manage Your Own Campaigns**: Use self-service tools for list management and campaign management.

3. **Communicate Across Channels**: Coordinate blending and escalation contact strategies as part of a single customer interaction.

4. **Simplify Compliance with Self Service**: Utilize tools to help you meet evolving regulatory requirements and business policies.

5. **Capture and Maintain Customer Opt-in Preferences**: Preserve the customer experience and satisfy evolving regulatory requirements.

6. **Leverage Integrated Analytics**: Improve campaign and agent performance.

Here are a few outbound campaign examples that have been successful across industries:

- **Enrollments**: Help keep consumers informed and engaged while reducing costs and resources. Plus, the enrollment period is an ideal opportunity to capture opt-ins and future communication preferences.

- **Automated Welcome Messages**: Create a positive first impression and start building loyalty by proactively reaching out and welcoming new customers. This can mitigate inbound inquiries, while validating customer data, asking for channel preferences, and offering FAQs or other information.

- **Time-sensitive Alerts**: Include recalls, fraud, and usage updates. These communications notify customers of critical information, and minimize negative impacts and potential liabilities.

- **Schedule Reminders and Confirmations**: Provide timely reminders and confirmations for appointments, orders, and billing to reduce no shows, product and service mistakes, and overdue payments.

- **Closed-loop Surveys**: Capture the “voice of the customer” to quickly address issues and concerns, track net promoter scores, and deepen customer loyalty. Increase survey completion rates using a cross-channel strategy. Quickly identify detractors and provide immediate closed-loop follow up and resolution. Reward promoters with special offers in real time.
CONCLUSION

As consumers increasingly make purchasing decisions based on reputation and recommendations, companies must proactively manage their brand and the customer relationship. Outbound engagement solutions offer a set of capabilities to let businesses gather data, provide information, and manage customer accounts in a streamlined manner to provide the best customer experience.

A complete outbound customer engagement strategy must support an omnichannel environment across the customer journey, including voice, dialer, text, email, and push notifications. Plus, it must deliver easy-to-use list, compliance, and campaign-management capabilities that enable organizations to easily customize a variety of proactive customer communications campaigns covering everything from real-time alerts to renewal notices to customer surveys. This will build customer loyalty, improve satisfaction, lower inbound customer contacts, and drive new revenue opportunities.
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