Aspect® Unified IP®
Advanced List and Campaign Optimisation

Advanced list and campaign optimisation tools enable you to easily develop, deploy and analyse sophisticated contact strategies across single or multiple supporting platforms to increase your contact success rates and optimise your sales and/or collections productivity and results.

Guided by real-time business intelligence, advanced list and campaign optimisation tools let you dynamically build high-yield campaigns using disparate host data sources, your customers' interaction histories and complex business rules. You will be able to generate highly refined and very flexible targeted calling lists that will then generate the maximum return from your outbound contact efforts. Manage change more effectively by centralising and automating functionality, standardising across the platform, and benchmarking for improvement.

Key Differentiators for Aspect

✓ **Built to Orchestrate Complex Strategies**
Simplifies processes for sophisticated contact strategies so they are easy to develop, deploy and analyse across single or multiple Unified IP systems

✓ **Optimises Success**
Increases your contact success rates and optimises your sales and/or collections productivity and results

✓ **Sophisticated Capabilities**
Creates highly refined and very flexible targeted calling lists across multiple sites and even across multi-hosted operations

✓ **Advanced Functionality**
Creates the necessary logic to address complex challenges, implement automation, support standardisation, and vary rules by context

✓ **Dynamic Oversight**
Manages records dynamically in an automated fashion throughout the day, with dynamic campaign management, record-based contact strategies, real-time record workflows and automated scripting

✓ **Scalable to the Enterprise**
Manages multiple contact systems, routes in real time across geographically dispersed contact centres, and has a centralised secure server and redundant systems for disaster recovery – all resulting in minimised downtime, reduced idle time and increased security protection for sensitive customer data

Key Functionality

Aspect Unified IP advanced list and campaign optimisation capabilities allow you to build sophisticated outbound contact strategies using a series of customisable criteria and properties. Create business rules that define whom to contact and when to contact them. Data downloads are stored in its database, scheduled from your host systems as you determine, formatted through schema processes and defined with host data mapping. The result, once your agents login to one of the Aspect Unified IP systems, is the determination and prioritisation of which records to attempt next. Completed attempt results, and any selected data from other host systems, are stored for reporting and future campaigns. Best-time-to-call capabilities help initiate phone calls to customers and prospects at the times and places they are most likely to be reached. Call result history is tracked over time to predict the best phone number and hour of day to place calls and then creates an optimised calling strategy based on campaign objectives and prioritises by user-defined criteria. By having this functionality sit above multiple contact platforms, you have a single administration interface for making regulatory changes once rather than doing the same work multiple times separately across multiple systems. The single interface also facilitates outbound operations management for sharing lists across multiple systems and having the consistent ability to identify and deliver only usable records. Functionality includes:

Advanced Counters for Compliance and Penetration Throttling

- A mechanism to restrict calling is available at the phone number field level rather than just by the account level. Within any list, specific dispositions can be defined that increment counters. If the maximum number of attempts for a particular phone is reached, dialing can still continue for the remaining numbers on the account allowing for more precise calling strategy

- Counters can track and exclude more than one number from the dialing sequence when an assigned threshold is met (e.g. borrower and co-borrower home numbers)

- Counters are also available to be used in automated scripts as "Wait Until" triggers. Automation can be based on SUM, Average, Minimum, Maximum, and a Count of the COUNTx values within a list as well as ratios of these values

Advanced Recall Logic

- On a list-by-list basis recall rules can be set by disposition for each phone number (home number recall when busy for five minutes while for a work number is 30 minutes)

Exclusion Control

- Exclusions can be created manually from inbound results based on intra-day processing or imported into the system from external sources such as a lock box or front desk walk-ins (eliminating call for payment received, but not yet posted)

- Exclusions can be set for multiple days and have an expiration date (allow promised payment time to post)

- Exclusions for a specific customer can be applied to one or more lists

- Intra-day exclusions can be system generated on a list-by-list basis for specified dispositions (account number, phone number, social security number, email)

Template Driven Parameter Definition Supports Standardisation and Automation

- The availability of various business rules in areas such as list management, dialing style, counters, etc. can be consolidated into templates for increased administrative control

- Having standard operating procedures provides for more consistent implementation across multiple administrators

- Utilising the available functionality makes intra-day strategy changes quicker and reduces errors

Automation

- Almost any action can be automated (a list can be stopped and started via automation, but automation cannot define a list)

- Automation increases consistency/speed of reacting to intra-day situations

- Automation frees up the administrator's time for higher value activities

- Schedules can be automated for calendar/timed-based events and for recurring rules – such as every Monday at 8:00 am, every 5 minutes, or every 1st day of the month – to trigger an individual action, such as start a list or a script with multiple actions

- Automation can occur for scripts that consolidate a series of actions that take place together or that are triggered by an event. For example, if at 11:00 am List A's penetration is > 75% and List B's penetration is < 25%, then lower List A's priority so that List B receives more activity.

Time Zone Mapping by Phone Number, Postal Code, Host Setting, or Phone/Postal Combination

- Time zone determination can be made by postal code, host system, or a combination of these to overcome number portability issues. For conflicts, the most restrictive calling window can be used or can be overridden by customer's preferred time zone.

Preview Mode Dialing in the Context of a Predictive Campaign

- An individual record can be flagged for preview mode dialing based on certain dispositions (e.g. abandons) continuing with predictive dialing without being excluded for the day and moved to another list

- Functionality also allows you to specify which phone number positions for a record can be dialed predictively (i.e. have the customer's consent), while the remaining numbers in the dial sequence, not explicitly flagged as having consent, will be dialed in preview mode even if it is a part of a predictive calling strategy

Options

Finding the various options that best meet your needs is determined by the scope and record management approach you wish to take to accomplish your contact centre outbound objectives. The three package options are Core, Dynamic and Enterprise. The Call Optimisation feature is available as an addition to each package.

Core

Designed for use with one Aspect® Unified IP® system to manage outbound and blended campaigns and provide optional redundant systems for disaster recovery.

The core components include Schema, List Management, Targets, Dialers, Priority Templates, Host Integration, Time Zone checking, Exclusions, Account Ownership, Automation for Scripting and Scheduling, Real-time reports and System Messages.

These capabilities highlight areas of customisation that can result in higher efficiencies when based on your unique business needs.

Dynamic

For contact centres who wish to dynamically manage records in an automated fashion throughout the day, the Dynamic package adds dynamic campaign management and real-time record workflow to the Core package.

Enterprise

The Enterprise package contains all items in the Core package, plus the capabilities needed for management of multi-site and/or multi-host operations, such as:

- Management of outbound campaigns across multiple systems

- Housing of both business data and call results across the enterprise

- Real-time routing of records across geographically dispersed contact centres

- A centralised secure server

- If one site or system is down, outbound contact can continue with records continuing to be sent to the other locations

Benefits Derived from Architecture with List Management Process Separated from the Aspect® Unified IP® System

- Provides the ability for a single large list to be shared across multiple Unified IP systems with the highest priority records always being worked first no matter the productivity or availability of agents on any one system. This prevents artificial list segmentation based merely on expected contact capacity for individual systems. This also insulates the contact of highest priority records from workforce and system interruptions

- Allows records in a list to have data values updated intraday without taking the list offline from agents

- Allows for individual lists to be stopped, started and have priorities changed without impacting agents by introducing artificial idle time

- Only valid numbers to attempt are provided, which smooths out contacts since unattemptable numbers do not need to be evaluated by the Unified IP system

- More than one list can be utilised simultaneously based on a percentage distribution. For example, one list supplies 75% of the dialing demand while another supplies 25%

  - Allows for balanced penetration between the two lists

  - Allows for lists from multiple clients to be worked simultaneously by a single large agent pool vs. multiple small groups to improve performance efficiency

  - Removes agent and time bias from champion/challenger tests between two lists since you don't need to send records to different agent pools nor work the records in an on/off fashion

- Allows for the separation of list management and distribution from telephony, agents, and host systems. No customer identifying data need cross a border

About Aspect

Aspect is the only software company with a fully-integrated interaction and workforce optimisation platform for enterprise contact centres globally that need to profitably (and seamlessly) orchestrate people, processes and touch points in an era when the contact centre is the new centre of the customer experience. For more information, visit **uk.aspect.com.**