Genesys Cloud Outbound Dialing Planning Guide

Genesys Cloud Outbound Dialing

Identify information to have on-hand when configuring Genesys Cloud Outbound Dialing.

GENESYS™
moments connected

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1 Why are we dialing?

What are the reasons for using a dialer? In this table, try to describe a high-level use case your business may use an outbound dialer for. Think about which dialing mode best meets the requirements for a given use case. Please reference the Dialing modes resource center article for more information.

Purple denotes example

Topic	Use case	Dialing Mode
Appointment Reminders	Need to call consumers to remind them of upcoming appointments	Agentless
Payments	Need to call consumers who have a high outstanding balance and who are overdue.	Power/Predictive

2 Who are we calling?

Genesys Cloud Outbound Dialing decides who to call and what to display to agents (if applicable) based on what kind of data is found in the contact list. Genesys Cloud Outbound Dialing is capable of consuming CSV (comma separated values) files to create a new table for each unique contact list.

Column Name	Data Type	Example	Description
Phone1	Text	317-432-3520	Primary phone number, home
Phone2	Text	‘’	Alternate phone number, cell
Zone	Text	America/Indiana/Indianapolis America/New_York	Time zone of consumer. Must be in Tz database notation
AccountID	Text	85305486	Unique ID of consumer
Name	Text	Barry Allen	Name of consumer
AppointmentDate	Datetime	2017-04-20 15:30:00	Datetime of upcoming appointment
DrOffice	Text	Dr. Hunter Zolomon	Consumer’s primary physician

3 When should we place calls?

3.1 Schedules

Campaigns are able to get scheduled to run at specific times, at an interval and for a specific length. When should your campaigns turn on?

Campaign Name	When is it turned on?
Appointment Reminders	Monday – Friday, 5:30pm to 8pm

3.2 Callable Time Sets

When dialing records that are in different time zones, it's important to avoid calling someone too early in the morning or too late at night. If you know what time zones will be dialed, list them here. Genesys Cloud Outbound Dialing requires that the values for time zones fit a unified naming convention known as Tz database or tzdata. Reference the Understand time zone names resource center article.

Note: Utilize the Schedule feature to determine when calls are made. Focus this section on when a time zone is safe to dial.

What times during a day is it safe to call someone without calling too late or too early?
Between 9am and 8pm

4 What are the potential outcomes of our calls?

A wrap up code is assigned to a call at the conclusion of every single Outbound Dialing call. These wrap-up codes determine whether we should continue calling other numbers on that record (if applicable) or if we should continue calling the record at all.

Every possible outcome of a call needs to have a wrap-up code. Fill out the table below and consider calls that are an actual person and the potential outcomes as well as instances where the call may not reach an agent (busy number, answering machines configured to leave a message, etc).

- Contact Uncallable
  - Set to yes Dialer will never call that contact again in the current contact list.
- Number Uncallable
  - Set to yes and the Dialer will never attempt that number again in the current contact list. Only set to yes if the phone number is bad one or is not the correct number for the contact.
- Right Party Contact
  - Set to Yes if the desired person was reached.

4.1 Wrap Up Codes example

Code Name	Keep calling the record?	Keep calling the number?	Did we talk to the right person?	Description
Payment Collected	Yes	Yes	Yes	Agent successfully collected a payment
Machine – Agent Left Message	Yes	No	Yes	Agent got an answering machine and left a message
Machine – Agent Hung Up	Yes	No	Yes	Agent got an answering machine but did not choose to leave a message
Wrong Party	No	Yes	No	Agent spoke to a person and they stated the number was incorrect for who the dialer was trying to reach.

Do Not Call	Yes	No	Yes	Agent spoke to a person and they asked to never get called again
Bad Number	No	Yes	No	The system attempted to place the call but it was a Busy.
Consumer Refused to Pay	Yes	No	Yes	Agent spoke to the right person but they refused to make a payment
Appointment Confirmed	Yes	Yes	Yes	Agent confirmed appointment
Appointment Canceled	Yes	No	Yes	Agent spoke to consumer and they canceled
Appointment Rescheduled	Yes	No	Yes	Agent spoke to consumer and they rescheduled appointment

5 What kind of special rules do we have about our calls?

There may be special outbound dialing rules that are needed. Genesys Cloud Outbound Dialing can evaluate a condition on every single call that is made and take an action. Some examples of the kinds of things that can be done with rules are listed as examples in the table below.

Question: What kind of special dialing rules do we have?
When we place calls to people that live in our Eastern sales region, we need to make sure the caller ID number for them shows as our main East region sales phone number.
When a call ends up as a busy tone, we don't want to send that to an agent and we don't want to call that number anymore
When someone we call says they don't want to receive any more calls, we need to add them to the DNC list
When we call someone, and get an answering machine, we want to try that number again 1 hour later
When we have a VIP customer, we want to make sure the agent has a chance to review their information before they make the call.
I want to automatically play a message for all answering machines