CallShaper

A Comprehensive
Guide to Call Center Systems
for Business

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Introduction

The telephone has been used as a sales tool for almost as long as it has been in existence. Industries like steel and finance were using it to contact potential customers beginning in the early 1900s. But the modern call center did not come to be until the early 1980s, when business expenditures for telemarketing first surpassed direct-mail advertising. Since then, the industry has grown and changed rapidly, constantly adapting to new regulations, restrictions and technologies. The options available for call center software and systems have evolved and proliferated as well, with each offering more technical and advanced features than the last.

Here, you'll learn about all the features available in a modern dialing system and how they can benefit or improve your business. You'll also find a rundown of the regulatory and compliance measures that dialers must follow, as well as the four questions you need to ask when choosing the best call center software for your business. Let's begin!

The first decision you need to make when selecting a call center system is whether you want it to be premise-based (also known as site-based or onsite) or cloud-based.

Premise-Based Call Center Systems vs. Cloud-Based Call Center Systems

Premise-Based: As the name suggests, a premise-based call center is based in a single location. All of the company's software and information is housed on a server at that location, as well as all the hardware that agents use. Everything is owned by the company, so the company's internal IT department is responsible for upkeep and maintenance of the servers, software, phones, headsets and any
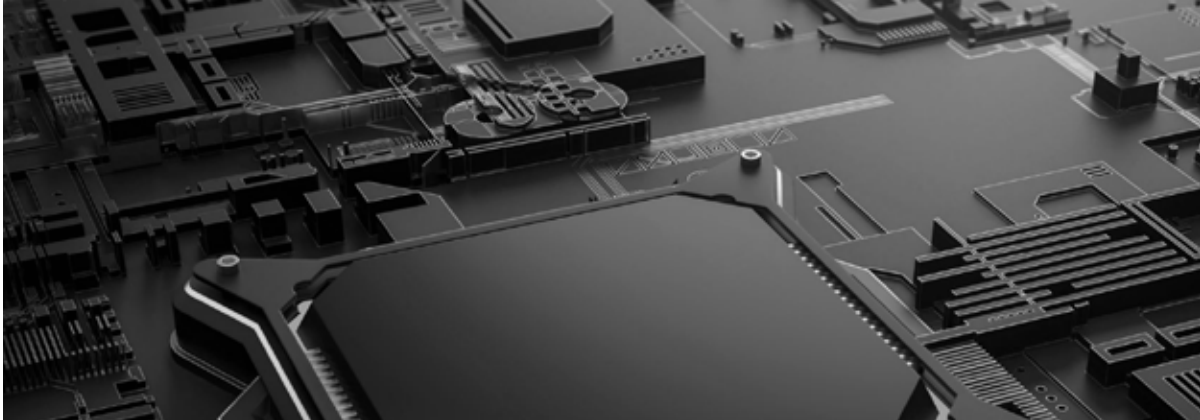
other materials or tools used by the agents. The company will also be responsible for updating and replacing the hardware and software every five years or so, as needed, which is where the majority of the costs of a premise-based system will come from. With a premise-based system, the company's IT department is also responsible for putting in place the proper security measures to protect the company's, agents', and customers' data from hackers and thieves looking to steal and profit off of such data.

Cloud-Based: With a cloud-based call center, everything is hosted offsite in the cloud by a call center service provider. To access it, agents need sufficiently strong internet access, as well as quality routers and the proper configuration to keep connections clear. Set up is fast and easy and maintenance is not as intensive, with many cloud-based systems not requiring IT professionals to handle operation and upkeep. Cloud-based systems are subscription-based, so may require a more frequent monetary investment, but are often less expensive in the long run than premise-based systems. The provider who runs your cloud-based call center is responsible for handling security and ensuring that data is secure, so this task does not fall to anyone at your company.

Once you've determined where your call center system should be housed, the next thing to consider is the type of call center your business requires.

Types of Call Centers for Different Businesses

Inbound Call Center: An inbound call center is one that receives calls from customers. Inbound call centers process things like:

- Customer service inquiries
- Orders and returns processed over the phone
- Tech support
- Reservation services
- Help desk services
- Customers responding to advertisements

Outbound Call Center: An outbound call center makes calls to potential customers and clients. Outbound call centers do things like:

- Call potential customers from lead lists
- Call potential customers who have requested more information or expressed interest in the product
- Call previous or repeat customers with new offerings

For companies that rely on outbound call centers, maximizing the number of calls that are placed and the quality of those calls is crucial. Depending on the needs of the company and the campaign, there are different types of dialers that can be utilized. Some of them include:

- Manual: Manual dialing is used when a company wants the call center agents to physically dial phone numbers. This method also helps campaigns comply with TCPA guidelines for dialing wireless numbers for which express written consent has not been obtained.

- Preview: Especially useful for business-to-business campaigns, this dialer allows the agent to see detailed data about the lead prior to the automatic dialer placing the call. This way, the agent is able to prepare for the call and maximize the opportunity to make a sale should a live connection be established.

- Progressive: Specifically designed for teams smaller than three agents so that they aren't overwhelmed, a progressive dialer dials at a 1:1 ratio of agents to calls in order to reduce unanswered and abandoned calls and maximize connections and sales.

- Predictive: The predictive dialer uses a cutting-edge algorithm, recalculating every second based on the 30-day history of the campaign, call results and number of agents available in order to determine the number of calls that can be made while keeping the campaign under the 3% abandonment rate limit. It also calculates the optimal number of lines per agent that will lower unanswered calls, limit long wait times and reduce dead numbers.

Possible Dialer Features

The options and features available in today's call center software packages are vast and varied—if you could think of anything you want in your dialer, chances are there's one out there that has it. Over the next pages, you'll find a detailed rundown of the numerous features available in the leading call center software programs, as well as the ways that each can benefit your business.

Lead Tracking and Management

Leads are the lifeblood of any telemarketing campaign. Without quality leads, the campaign stalls, the client suffers and the agents are left spinning their wheels. And almost as crucial as possession of quality leads is an efficient system with which to organize, process and rate them. Some of the lead management strategies that can help call center clients easily and effectively manage leads include:

- Bulk File Uploading: Depending on the size of a campaign, manually inputting leads into a dialer can be a literally never-ending task. What's more, uploading files that are not in the proper format and need to be adjusted can cost agents valuable time. Importing large numbers of leads at once should be quick and easy, as should making sure that the right information is uploaded and saved into the right field so that the dialer can read it and use it immediately.

- Real Time Lead Posting and Prioritization: Leads posted in real time should be easily tracked and immediately available for dialing. Likewise, flexible lead prioritization makes it easy to control or change the mix of leads and sources from which the dialer is pulling based on real-time results or new information.

- **Lead Source Reporting**: Lead sources may vary, and in some cases it may be initially unclear whether a source is producing viable leads. Real time reports on call results can quickly determine whether a new source has produced worthy leads or if it is a dead end.

- **Regulatory Compliance Assurance**: Tight regulations on the types of numbers that can be dialed through certain campaigns mean that leads need to be triple checked in order to assure compliance. A dialer that will check multiple databases to determine if leads are landline or wireless and then apply the appropriate rules will protect the client against potentially damaging litigation as a result of receiving bad leads.

Contact Management and Maximization

Just as it is key to have an efficient method for tracking and evaluating leads, it is also vital to maximize how you utilize those leads in order to connect with as many potential customers as possible. This is a key area in which leading call center software providers differ from one another, as many require manual contact management while others have management strategies built into their interface to happen automatically. Some of these strategies, which may or may not be built into your call center software, include:

- **Caller ID Methodology:** The phone number that shows up when your lead's phone rings can have a significant impact on whether or not you are able to make contact. There are a number of ways caller ID can be manipulated to maximize connections and sales. Local Touch can display a local number on the customer's caller ID that will ring back to your main number. Trusted Caller ID allows you to register the phone numbers associated with your company to a certified business entity, which means that phone companies won't label those numbers as spam or fraud on the customer's caller ID. You can rotate the caller ID by attempt, so that the customer won't see the same number pop up multiple times and will be less likely to block you. You could also assign one caller ID to a batch of leads, such as a batch from one particular state, so that they all receive calls from the same number.

- **Dialing Strategies:** Determining the exact right dialing strategy is crucial to maximizing leads, and there are a number of factors that should be considered. You can adjust the time between dial attempts, the time of day or the day of the week that the lead is contacted. You can set a maximum number of dial attempts per day or a maximum number of lifetime attempts. If a lead reaches its maximum number of lifetime attempts, you can set an amount of time to rest it before recycling it for more attempts. You can categorize leads based on the frequency of attempts or how long its been since the last attempt.

- **Agent Routing:** Depending on whether your software is capable of evaluating and grading your agents, you can route the best leads to your best or more senior agents and/or your lower performing leads to more junior or less experienced agents.

- **Multiple Touch Points:** Sometimes calling leads and hoping they answer the phone in that moment is not enough and it is necessary to rotate the methods you use to make contact. Assuming you have permission from the customer to contact them in different ways, you can rotate from calls to live or prerecorded voicemails, emails and text messages to encourage the customer to call you back.

Call Scripting

An intuitive and easy-to-use scripting interface not only makes it easier for the agent to do his or her job confidently, consistently and effectively, but it will also help ensure the success of every call. With scripting, you can prompt the agents to ask the right questions and provide all the key selling points on every call, ensure they capture all the required data in the proper format and build in different paths depending on the flow of the call. Some of the features a call center system might utilize to meet these goals and optimize scripting include:

- **Pre-Filled Forms**: A system that pre-fills forms with the basic information of each potential customer before they even pick up the phone takes care of the first necessary step on a call, allowing the agent to move to the next phase of the call faster.

- **Minimal Typing**: Instead of typing out the customer's responses to questions, the option to select responses from a drop-down menu or check them off a list also allows the agent to quickly move the call forward.

- **Rebuttals and Frequently Asked Questions**: To minimize the time it would take for an agent to think about or look up the answer to a common question or a response to pushback, rebuttals can be added to any or all pages of the script. To use, the agent could simply click on the rebuttal that the customer has given and a suggested response would be provided.

- **Supervisor Chat and Transfer**: For questions that the agent does not already have the answer to, a chat box on the script screen allows him or her to send a brief message to the supervisor to get the answer quickly before the customer loses interest. If a customer requests to speak to a supervisor, the transfer can be completed with the simple click of a button.

- **Tabs**: Similar to the way a web browser is used, tabs within the scripting interface allow agents to keep any windows open that contain information that might be pertinent or come in handy on a call. This way, they can easily jump back and forth between a web page and the script with negligible lag time.

Interactive Voice Response

Inbound call centers require a system to efficiently direct incoming calls to the agent who can best assist them. That system is known as interactive voice response (or IVR), and depending on your call center software, it can be customized to your exact needs and specifications, linking stops and routing options in the order you choose. Some of those options for routing include:

- **To An Agent**: If it is during work hours and a customer is calling with a query that can be easily addressed, that call can be routed to an agent. Clients can customize this routing order in a variety of ways, setting the system to route calls based on agent availability, the time of day or the day of the week. If only certain agents respond to certain types of calls, the IVR can be set to determine the nature of the call before routing it to the agent who can best respond to it.

- **To A Queue**: For companies in which all agents are equipped to handle all queries, a queue can be built into the IVR. Once callers arrive at this stage, they will be held until an agent becomes available who can address their needs.

- **To A Third Party:** In some cases, not all queries can be addressed by the call center agents. If this situation arises, the IVR can directly transfer callers to a third party, saving the caller the time and the hassle of getting in touch with that person or company themselves and making the call center appear more helpful and more willing to take that extra step to assist customers.

- **To Voicemail:** During off hours or on days when the call center might be short-staffed, the IVR could have the option to send callers to a voicemail box from any stage in their call, where they can leave their query to be addressed at a later date.

Reporting

Reporting is essential for you to know not only how your leads are faring but also how effective your agents are at creating connections and making sales. Your call center software should have a robust reporting mechanism that allows you to analyze what is going on in your call center on a daily basis and develop calling strategies accordingly. Reports can be created, analyzed and utilized in real time or saved, downloaded and/or emailed to be reviewed when needed. Some of the topics and processes on which reporting might be necessary include:

- **Dial Attempts:** Answer rate per attempt, conversions per attempt, attempt frequency, best calling days and times and other data surrounding dials can be pulled together and analyzed in order to help maximize your return per dial.

- **Call Details:** Moving beyond dial attempts, other details of calls such as wait times and total call times can be gathered, analyzed and utilized to help improve call outcomes.

- **Lead Sources:** There are many different sources from which leads can come. Likewise, the quality of the leads can vary widely depending on their source. Reporting can allow you to determine lead quality and identify any trends that are tied to lead sources and then create individual strategies based on the source. It can also help you calculate your return on investment for leads from different sources in order to quantify the value of each source.

- **Agent and Team Performance:** The productivity and performance of agents and teams are based on a number of factors, but reports that collect and quantify these factors can help you evaluate your agents, identify strengths and weaknesses and pinpoint process bottlenecks.

- **Sales Trends:** Perhaps the most important indicator of overall call center performance, sales numbers offer a quantifiable measure of the performance of every other indicator combined. Being able to see your sales by product and by time period will help you identify any seasonal trends or changes that may be required to your marketing or advertising strategies.

- **Payments:** Sales are important, but making sure payments come through for those sales is also key. Your call center software should be able to track and report on incoming payments.

Quality Assurance

A successful call center business must be able to ensure efficient, quality calls every single time a customer is on the phone. But this can be difficult to measure and maintain for large campaigns, especially when agents may not all be in one place. The solution: Features that allow managers and supervisors to immediately evaluate calls in both a qualitative and quantitative manner. Since a supervisor cannot listen in on every call as it happens, all calls should be recorded and kept on the server for evaluation and for reference. But when supervisors can be present, some call center systems offer different ways in which the supervisor can participate in the call. He or she may be able to listen to the call without speaking to the agent or customer, communicate with the agent without the customer hearing, or speak to both the agent and the customer at the same time.

Besides listening in live, one of the most effective QA methods is to evaluate and grade calls after the fact. To do so, many call center software packages will offer scorecards that can be utilized to evaluate calls and the agents completing them. Some of the features that scorecards might have include:

- **Customizable Templates:** The call center system may have the capacity to create and save unlimited unique scorecards. Once created, questions can be organized by section and the order of the sections and questions can be easily adjusted if needed. The questions themselves may also be completely customizable and easy to edit. When creating the scorecard, you could also designate whether a question is required or not.

- **Multiple Grading Options:** As questions are created and added to the scorecard, you will need to choose a grading option for each. These grading options may include Pass or Fail or number scales like 0 to 3, 0 to 5, or 0 to 10. Then depending on the scale utilized and the number of questions, you can set a passing score for the call being examined.

- **Integration of Scorecards and Call Recordings:** If you want to listen to the recording of a call and grade it using a scorecard, you may be able to do so without toggling between windows or pausing frequently to input answers. Some scorecards will even tally the call's scores as you select them and give the option to make notes on individual questions or on the call as a whole.

- **Individually Organized Reports:** Once a scorecard is completed and submitted, it can be filed under the individual agent along with any other scorecards that agent has collected for fast and easy review.

Industry Regulations and Compliance

It's no secret that there are numerous regulations and restrictions on the call center and telemarketing industries. They are also constantly changing, which makes it difficult to keep up with the rules—so you should be able to rely on your call center software's built-in compliance mechanisms to ensure that your company is always aligned with the industry regulations. In this section, you'll find information on some of the key regulations and the steps your dialing system can take to maintain compliance.

STIR/SHAKEN and the TRACED Act

Since 2014, the Federal Communications Commission (FCC) has been encouraging the telecommunications industry to find a way to stop robocalls—calls that use a digital autodialer to deliver a pre-recorded message—and call number spoofing, in which robocalls change the number that the call is coming from so it appears that a neighbor, friend, or official agency is calling. And the industry has responded with a technology protocol called STIR (Secure Telephony Identity Revisited) and SHAKEN (Secure Handling of Asserted information using toKENs). The key to STIR/SHAKEN is digital certificates. Every telephone service provider must obtain a digital certificate from a trusted certificate authority; the STIR technology ensures that a calling number is accurate and has not been spoofed. This process has many steps, all of which occur between the time a call is placed and the time the receiving phone begins to ring, during which the call goes through multiple layers of verification to determine whether or not the number has been spoofed. Both the originating phone service provider and the terminating service provider take steps to authenticate the call's origins, with the terminating provider checking the call's digital certificate against the public certificate repository. For calls that originate directly from cell phones or landlines as opposed to from the internet, the SHAKEN protocol is employed. This offers guidelines for how to deal with calls that have incorrect or missing identity information.

While the STIR/SHAKEN protocol is not new, its relevance has been renewed with the passing and approval of the TRACED Act, which was signed into law on December 31, 2019 and approved by the FCC on March 31, 2020. The law required adoption of the STIR/SHAKEN framework by carriers on a "reasonable timeline", and on March 31 the FCC announced that large carriers must implement the system by June 30, 2021 and small, regional carriers must do so by June 30, 2022. As far as what this means for companies that utilize call centers: It's a good thing. STIR/SHAKEN will help crack down on the scammers and robocallers that could be hurting your call center's business, all while restoring the public's faith in the industry.

3% Abandonment Rate Rule

For predictive dialers, the Federal Trade Commission (FTC) has something called the 3% abandonment rate rule, which says that in a 30-day period only 3% of outbound calls can be abandoned. What does abandoned mean? If someone picks up a call and all the agents on the team are busy with other calls, there will be no one on the line to assist, effectively abandoning that potential customer and losing out on the opportunity to make a sale at that moment and likely in the future.

The easiest way to follow this rule is with call center software that remembers when an abandonment occurs and adjusts the speed at which it dials to lower the likelihood of it happening again. It will constantly collect data on the rate at which calls are initiated and the number of calls being picked up in order to maximize the number of connections and sales made. A low abandonment rate also builds customer trust, increasing the likelihood that they will pick up a call in the future.

The Blacklist Alliance

Any company that uses a call center as part of their business model inadvertently opens themselves up to predatory litigation under the Telephone Consumer Protection Act, or TCPA, with every call or text sent. Unfortunately, there are people whose primary goal is to run scams and schemes that will allow them to sue call center clients under the TCPA, which can earn them profits while financially crippling companies. And not only does this exist, but business is booming: Since 2010, TCPA lawsuits against call centers using automated dialing systems have increased a whopping 1,273%. An easy way to mitigate this risk is to use a call center platform that is fully integrated with The Blacklist Alliance.

The goal of The Blacklist Alliance is to minimize the impact and expense of these lawsuits. Through the use of various tools, techniques and technologies, The Blacklist Alliance has built a comprehensive list of the professional plaintiffs, class action lawyers and regulatory enforcement agencies that are looking to sue call centers under the TCPA. One of these is the Litigation Firewall, which automatically blocks calls to and from phone numbers associated with known TCPA litigators. The Blacklist Alliance also offers data services that help ensure call center compliance with TCPA regulations, plus 24/7 monitoring of court filings that provide immediate notification if a lawsuit is filed.

Day, Time and Holiday Restrictions

There are many restrictions on when you are allowed to call customers and many different governing bodies that set these restrictions. There are state-mandated requirements on the hours of the day you are allowed to call during the week and on weekends, federal restrictions based on time zones and holiday restrictions that vary by state. Breaking any of these rules—and each customer on your list, depending on their location, may come with different rules—can subject you to potential fines. But choosing a dialing software that will manage these regulations for you makes following them a cinch. Look for one that allows you to set dialing rules based on the customer's area code, address or both so it will only call that customer at times that are compliant with every rule.

Do Not Call and Litigator Scrubbing Management

As you obtain leads and reach out to customers, you will inevitably run into people who need to be placed on a Do Not Call (DNC) list or who appear on litigator lists. The simplest way to manage DNCs is with a call center software that offers multiple ways to place customers on a DNC list and manage that list. Some of those strategies might include:

- **Uploads:** If you receive a DNC list from an outside source, you can upload that list onto your platform to integrate into the existing lists and customer information.

- **Instant Add:** For customers who you connect with and who request to be added to a DNC list, there is an option in the scripting to immediately place that caller on a DNC list.

- **Customer Opt-out:** If an outbound call is abandoned or a customer calls back and there is no agent to answer the phone, the customer has the option to place themselves on a DNC list and to be scrubbed out of all future calling on that campaign.

- **Platform Integration:** The dialing software can be integrated with outside DNC scrubbing platforms and litigator lists that will update the data in your system accordingly.

Call History and Recordings

In case your company is ever questioned or charged on grounds of non-compliance, your call center system should maintain a detailed history of calls and storage for years' worth of call recordings (providing that permission to record is obtained on each call). You should be able to easily search for and retrieve calls based on the phone number and then see the full call history associated with that number. And if you're storing all this information, you should be using tools like Trusted Form and Jornaya to ensure proof of consent and get a detailed look at your customers' experience. Searching call history by number can also allow you to see how frequently the same numbers are being dialed and adjust that frequency as needed.

Scripting Compliance by State

Different states have different requirements for how agents must proceed through calls. These requirements (which include things like two party consent to record, statutes that require the agent to end the call when the customer indicates that they aren't interested and turning off the recording when confidential information like credit card or social security data is being shared) should be built into your system and your scripting accordingly. These are not things that your agents should be required to remember and double check before every call; the call scripting should reflect them automatically.

Questions to Ask Before Choosing a Dialer

Now that you have a better idea of all the features you can get from your dialing software and which ones you may or may not need for your business, there are four key final questions to ask that will play a role in your decision-making process.

Question 1: Is your business growing?

Perhaps your business has existed for a while and you don't foresee your team growing or your needs changing in the near future. But if you do anticipate growth, this is a key factor to consider when choosing a call center system. Some software solutions may offer different levels of service or a different breadth of features depending on the size of the business, with different price points attached to each. But if you want your business to succeed and grow, you're not just thinking about the tools you need now, but also those you'll need down the line. And when you are growing and thriving, the last thing you'll want to do is take the time to relearn how to use your software. The solution: Call center software that offers all its features to every customer, regardless of the number of agents or the size of the campaign. That way, everything you need is in place from the start and you can take the time to learn the system inside and out before your business takes off.

Question 2: Where are your reps based?

Whether your reps work out of an office, from home, or switch off between the two is an important factor to think about. As evidenced by the worldwide upheaval caused by COVID-19, software that can travel with you and allows your agents to work from anywhere is more important than ever. If you are going to need this flexibility, you'll want to hone your search to only cloud-based systems. If your team is based only in an office, then you may place more consideration on premise-based.

Question 3: Do you need to integrate old software into your new system?

If your business is brand new and you are choosing a dialing system and starting from scratch, this may not be an issue for you. But if you have an existing business and will need to integrate existing programs into your new system, the ease with which that can be done should be a concern. Some things to look for when it comes to integration: An easy-to-use centralized access point from which you can access all the applications used to run your business, the ability to communicate directly with a wide breadth of web applications, and the ability to insert webhooks into call scripts. And in addition to CRMs (customer relationship management systems), you might need to ensure that you can integrate order processing systems, payroll systems, and time tracking into your new software as well.

Question 4: Do you have an IT department?

This is a pretty simple one: If your company has an IT department, you don't need to take into account how much technological savvy is required to run your call center. But if you don't, you'll want to make sure you choose software that is user-friendly and doesn't require any advanced knowledge of information technology to troubleshoot and use.

Are You Ready?

Many cloud-based call center solutions offer free demos of their software so you can get a feel for the system, interface, and features available before paying a cent. So what are you waiting for? You have all the information. Get started today!