



List Dial

Dynamic Dial

All Hot Leads

JOIN

MONITORING

RESET

Info Popup: ☒

Caller ID:+16085652042

Missed Connection:  
**Spring Sale Offer**

Auto Join: ☒

STATUS

OPTIONS

– How To –  
**Dynamic Dial**  
Session Owner

# Dynamic Dial

Fully autonomous dialer

- Simplicity for agents
- Full Control for managers

List Dial

Dynamic Dial

All Hot Leads

JOIN

Info Popup:

Caller ID: +16085652042

Missed Connection:

Spring Sale Offer

Auto Join:

STATUS

The Session Owner role is Key to dialing effectiveness

# Topics: Session Owner

- Roles Overview
- Key Concepts
- Session Setup
- Options in Detail
- Session Status
- FCC Regulations
- Dynamic Dial Reports

# Session Owner - Role Overview

- Setup the Saved Search list in Infusionsoft
- Configure the Session options in turboDial
- Load the list & become the Session owner
- Assign agents to Join the Session
- Observe Session status
- Create dashboard reports

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RESET

Info Popup: ☒

Caller ID:+16085652042

Missed Connection: **Spring Sale Offer**

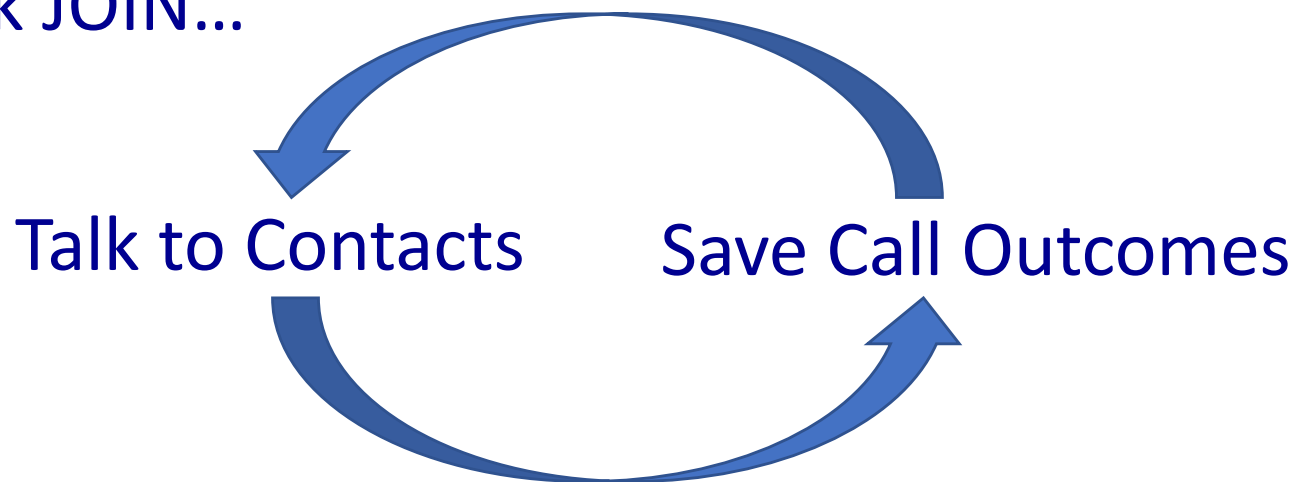
Auto Join: ☒

STATUS

OPTIONS

# Calling Agent - Role Overview

- Accept Session dialing assignment from manager
- Choose personal options for making calls
- Select the Session in turboDial
- Click JOIN...

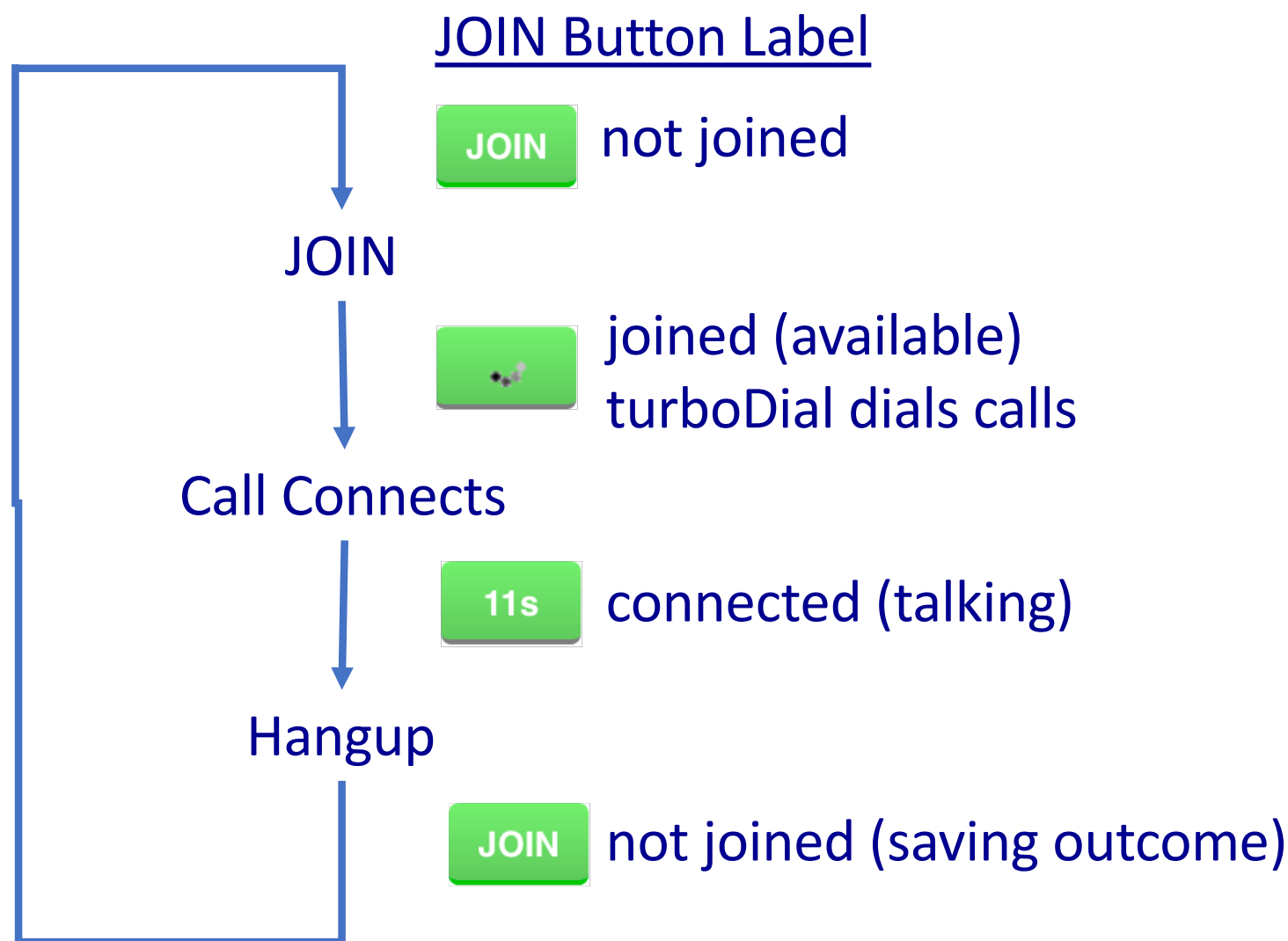


# Key Concepts

## Topics in this section

- The Agent Cycle
- Dynamic Dial vs Power Dial
- Missed Connections
- Answer Detect Option
- Answer Detect & Missed Connections
- No Currently Eligible Numbers

# The Agent Cycle



# The Agent Cycle

A Calling Agent has 3 possible states:



- Not joined (not available),



- Joined (available), or



- Connected to a call (talking)

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JOIN

Info Popup:

Caller ID:+16085652042

Missed Connection:

Spring Sale Offer

Auto Join:

STATUS

OPTIONS

- When agents are available -> turboDial dials calls
  - If a call times-out/no-answer turboDial hangs it up and dials another contact
- If a call is answered it is connected to the longest waiting agent\*
  - If no agent is available the call is a **Missed Connection**

\*depending on Answer Detect option

# Dynamic Dial vs Power Dial

- Both have a simultaneous calls setting: 1-4 calls
- Power Dial
  - Dials the 1-4 calls for 1 agent then stops dialing
  - First answer is connected to the agent
  - Remaining calls are dropped
    - If answered -> dead air, no recording
- Dynamic Dial
  - Maintains 1-4 calls actively ringing for each available agent
  - Any answer is connected to an agent, if possible
    - If no agent -> recording
  - Calls are dropped only when ringing times out
    - More calls are dialed to replace dropped calls, to maintain 1-4 actively ringing for each available agent

# Missed Connection

Call is Answered, but no agent is available

- Play a recording instead
- Increment the **Missed Connection** count for the Session

Q: How can there be a case where no agent is available?

A: turboDial can dial 1-4 calls per available agent...

- If you choose 2, 3 or 4:
  - Multiple calls are dialed simultaneously
  - If a call answers and is connected to the only available agent, then...
  - If another call is answered there is no agent available.
    - That call is a **Missed Connection**
- If you choose 1: no Missed Connections will occur

# Answer Detect Option

- Special Twilio technology
  - Adds \$0.0075 to each call (3/4 cent)
- Determines if Human or Machine has answered
- >80% accurate

# Differences with Answer Detect

## Answer Detect: ON









- A ~2 second delay is inserted after the call is answered
- Twilio uses that delay to detect Human vs Machine
- Human answer – connected to an Agent
  - Human usually accepts the delay and waits for your agent to begin talking
- Machine answer – turboDial handles the call
  - turboDial waits for the “beep” then plays your Missed Connection recording
  - Note, this is not considered a **Missed Connection**, but the same recording is played

# Differences with Answer Detect

## Answer Detect: OFF

- No detection is performed when the call is answered
- Your agents are connected to both Humans and Machines
  - That means agents are less available to connect to calls, possibly leading to more **Missed Connections**
- Human answer – connected to an Agent
  - Human hears your agent begin talking right away
- Machine answer – connected to an Agent
  - Your agent will detect the Machine, wait for the beep then play a pre-recorded message of their choice.

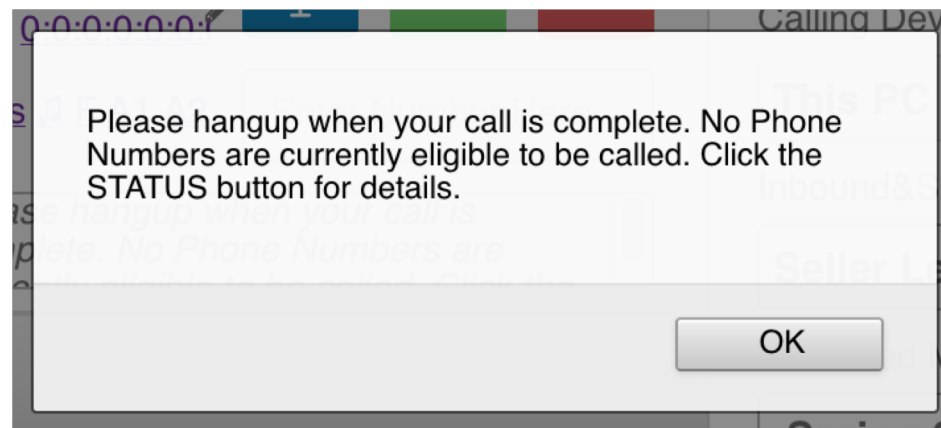
# Answer Detect & Missed Connections

	Answer Detect: ON	Answer Detect: OFF
- <b>Human</b> Answered -Agent is Available	~2 sec delay Connected 	Connected 
- <b>Machine</b> Answered -Agent is Available	Auto-wait for Beep  Auto-play Recording	Connected  Manual wait for Beep
- <b>Human</b> Answered -No Agent	<b>Missed Connection!</b>  Auto-play Recording	<b>Missed Connection!</b>  Auto-play Recording
- <b>Machine</b> Answered -No Agent	Auto-wait for Beep  Auto-play Recording	<b>Missed Connection!</b>  Auto-play Recording <u>before</u> Beep

Answer Detect has some Advantage - Must consider the tradeoffs

# No Currently Eligible Numbers

- When there are no phone numbers eligible to be dialed turboDial will display this alert to Agents:



- Check the details in the STATUS window

<i>Numbers Eligible to be Attempted Now</i>	0
<i>Numbers Waiting to be Eligible</i>	10

- Contacts who have not yet been Connected to a call will become eligible after some time has passed, based on your chosen options

# Session Setup

- Goal: Configure the session to achieve a good pace of connections to your Calling Agents while also respecting your prospects.
- Prospects feel disrespected when they perceive you are intentionally...
  - Ringing their phone repetitively
  - Terminating calls before they can answer
  - Connecting them to a machine rather than a person

# Pre-Setup

- Create your Saved Search in Infusionsoft
- Decide which numbers to dial : Phone1, Phone2, Phone3
  - Include those phone fields as columns in the saved search
- Decide what Contact information should be displayed in the Info Popup
  - Include those contact fields as columns in the saved search
- Create the Recorded Message(s)
  - Message for Missed Connections and Answer Detect playback
  - Message Agents should playback for voice mail machines
- Determine what Call Outcomes your Agents will use
- Create the Call Outcome automation in Infusionsoft

# Session Setup

- Relaunch turboDial
- Choose the Caller ID for the Session
- Choose the Recorded Message to use for Missed Connections
- Choose the Saved Search List
- Click the “Options” button
  - The options config window opens
  - The initial settings are the recommended values. Change them as needed.

Caller ID:

Auto

-

+

+16085652042

▼

Calling Device:

-

+

This PC

▼

Inbound&SMS:

Q

+

wl116 2223 nu...

▼

Recorded Msg:

+

Spring Sale O...

▼

List Dial

Dynamic Dial

All Hot Leads

▼

LOAD

Info Popup:

✓

Caller ID:+16085652042

Missed Connection:

Spring Sale Offer

Auto Join:

✓

OPTIONS

# Configure Options

- **Record Calls:** Select this box if you want calls to be recorded.
- **Attempts/Day:** Set the maximum number of dial attempts per day for each contact.
- **Rings/Attempt:** Number of rings (approx) to wait for an answer before ending the attempt and trying the next contact.  
A lower setting will minimize answering machine answers, and higher will reach more answering machines.

## Dynamic Dial Session Options

List: All Hot Leads

*The following Dynamic Dial options become effective immediately as you change them*

Record Calls?

☐

Attempts/Day:

any

Rings/Attempt:

5

Wait to Retry:

2h

Calling Window:

any

Until:

any

Simultaneous Attempts/Agent:

1

Answer Detect:

☐

Notify on Answers w/No Agent Available:

☐

Use Local Presence to Assign Caller ID:

☒

*The Info Popup includes these columns. You can change them in your Saved Search setup in Infusionsoft then Click the Reset button in turboDial.*

~

Name

Phone 1

Phone 2

Notes

Last Call Date

Done

# Configure Options

- **Wait to Retry:** Set the interval to wait before re-attempting a call to a contact who has not yet connected to an agent.
- **Calling Window:** Set the start time and end time for calls based on the timezone for the contact's area code. (North America only).
- **Simultaneous Attempts per Agent:** turboDial can maintain 1-4 calls ringing per each available agent. Choose 1 or 2 to minimize **Missed Connections**. Choose 3-4 to minimize the time an Agent waits for a call.

### Dynamic Dial Session Options

List: All Hot Leads

*The following Dynamic Dial options become effective immediately as you change them*

Record Calls? ☐

Attempts/Day:

Rings/Attempt:

Wait to Retry:

Calling Window:  Until:

Simultaneous Attempts/Agent:

Answer Detect: ☐

Notify on Answers w/No Agent Available: ☐

Use Local Presence to Assign Caller ID: ☒

*The Info Popup includes these columns. You can change them in your Saved Search setup in Infusionsoft then Click the Reset button in turboDial.*

~

Name

Phone 1

Phone 2

Notes

Last Call Date

Done

# Configure Options

- **Answer Detect:** Select this box to detect answering machines and play a recorded message to them rather than connecting the call to an agent.
  - turboDial tries to connect agents only to calls answered by humans.
  - Adds about 2 seconds of delay after answer until an agent is connected.
- turboDial may force Answer Detect to be enabled if too many **Missed Connections** (more info follows)

## Dynamic Dial Session Options

List: All Hot Leads

*The following Dynamic Dial options become effective immediately as you change them*

Record Calls? ☐

Attempts/Day:

Rings/Attempt:

Wait to Retry:

Calling Window:  Until:

Simultaneous Attempts/Agent:

**Answer Detect:** ☒

Notify on Answers w/No Agent Available: ☐

Use Local Presence to Assign Caller ID: ☒

*The Info Popup includes these columns. You can change them in your Saved Search setup in Infusionsoft then Click the Reset button in turboDial.*

~

Name

Phone 1

Phone 2

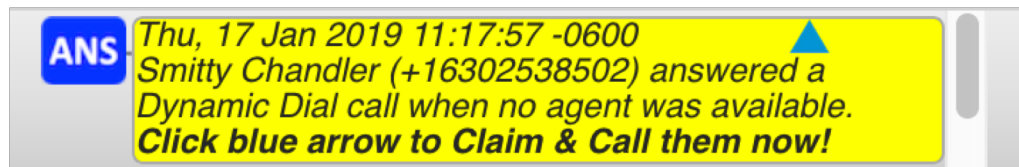
Notes

Last Call Date

Done

# Configure Options

- **Notify on Answers w/No Agent...:**  
When enabled, a **Missed Connection** will cause a screen pop alert to be displayed in the turboDial panel.



- All Agents who have ever joined this Session will receive the alert.
- Click the blue arrow to “claim” it and hide it from other Agents.
- The claiming Agent should call the prospect directly.
- This prospect will NOT be attempted again by turboDial in this session

**Also called: Missed Connection Alert**

## Dynamic Dial Session Options

List: All Hot Leads

*The following Dynamic Dial options become effective immediately as you change them*

Record Calls? ☐

Attempts/Day:

Rings/Attempt:

Wait to Retry:

Calling Window:  Until:

Simultaneous Attempts/Agent:

Answer Detect: ☐

**Notify on Answers w/No Agent Available: ☒**

Use Local Presence to Assign Caller ID: ☒

*The Info Popup includes these columns. You can change them in your Saved Search setup in Infusionsoft then Click the Reset button in turboDial.*

~

Name

Phone 1

Phone 2

Notes

Last Call Date

Done

# Configure Options

- **Use Local Presence to Assign Caller ID:**  
This option is only displayed if the Local Presence feature is available in your account.  
When enabled, for each call your chosen Caller ID will be replaced with one that matches the number dialed, if available.
- See <http://turboDial.biz> for more information on Local Presence

Dynamic Dial Session Options

List: All Hot Leads

The following Dynamic Dial options become effective immediately as you change them

Record Calls?
☐

Attempts/Day:

any

Rings/Attempt:

5

Wait to Retry:

2h

Calling Window:

any

Until:

any

Simultaneous Attempts/Agent:

1

Answer Detect:
☐

Notify on Answers w/No Agent Available:
☐

Use Local Presence to Assign Caller ID:
☒

The Info Popup includes these columns. You can change them in your Saved Search setup in Infusionsoft then Click the Reset button in turboDial.

Name
Phone 1
Phone 2
Notes
Last Call Date

Done

# Configure Options

- **Info Popup Columns:**  
The current columns you have specified in your Saved Search settings in Infusionsoft are displayed here. These cannot be changed in turboDial.
- Info Popups are described later.

Dynamic Dial Session Options

List: All Hot Leads

The following Dynamic Dial options become effective immediately as you change them

Record Calls?
☐

Attempts/Day:

any

Rings/Attempt:

5

Wait to Retry:

2h

Calling Window:

any

Until:

any

Simultaneous Attempts/Agent:

1

Answer Detect:
☐

Notify on Answers w/No Agent Available:
☐

Use Local Presence to Assign Caller ID:
☒

The Info Popup includes these columns. You can change them in your Saved Search setup in Infusionsoft then Click the Reset button in turboDial.

~

Name
Phone 1
Phone 2
Notes
Last Call Date

Done

**TURBODIAL**

- Caller ID:

Auto

-

+

+16085652042

▼

Calling Device:

-

+

This PC

▼

Inbound&SMS:

Q

+

wl116 2223 nu...

▼

Recorded Msg:

+

Spring Sale O...

▼
- List Dial

Dynamic Dial
- All Hot Leads

▼
- JOIN

MONITORING

RESET
- Info Popup:
- Caller ID:+16085652042
- Missed Connection:

Spring Sale Offer
- Auto Join:
- STATUS

OPTIONS

# Session STATUS

- Useful data when a Session is underway

List Dial

Dynamic Dial

All Hot Leads

JOIN

MONITORING

RESET

Info Popup: ☒

Caller ID: +16085652042

Missed Connection: ☒

Spring Sale Offer

Auto Join: ☒

STATUS

OPTIONS

## Dynamic Dial Session Status

List: All Hot Leads

Owner: bill@web-lever.com

Loaded: Wed, 13 Mar 2019 09:29:27 -0500

Total count of Contacts 91

Total count of Ph.Numbers 102

Call Attempts (incl Reattempts) 4

Ph.Numbers Attempted 5

Answered & Connected to Agent 4

Answered & No Agent Available 0

Machine Answered (Answer Detect) 0

Not Answered - Ring Timed Out 0

Ph.Numbers Not Yet Attempted 97

Ph.Numbers Eligible to be Attempted Now 98

Ph.Numbers Waiting to be Eligible 0

# Session STATUS

The number of Unique Contacts in the list

“Ph.Numbers” means Phone Numbers  
May be more than 1 per Contact

These are the “Missed Connections”

Portion of the list that remains untouched

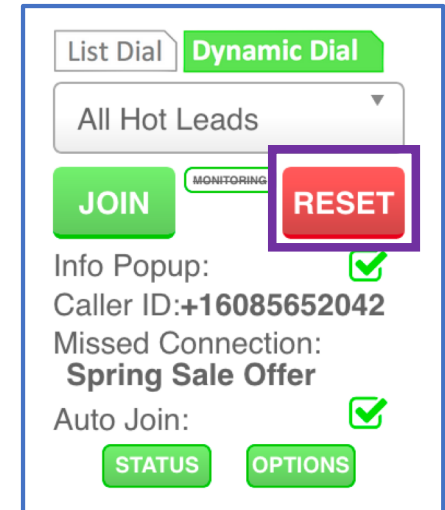
turboDial won't dial unless this is > than 0

Attempts/Day, Wait to Retry, or Calling  
Window options can cause some  
numbers to not be currently eligible

Dynamic Dial Session Status	
List: All Hot Leads	
Owner:	bill@web-lever.com
Loaded:	Wed, 13 Mar 2019 09:29:27 -0500
Total count of Contacts	91
Total count of Ph.Numbers	102
Call Attempts (incl Reattempts)	4
Ph.Numbers Attempted	5
Answered & Connected to Agent	4
Answered & No Agent Available	0
Machine Answered (Answer Detect)	0
Not Answered - Ring Timed Out	0
Ph.Numbers Not Yet Attempted	97
Ph.Numbers Eligible to be Attempted Now	98
Ph.Numbers Waiting to be Eligible	0

# Session RESET

- A RESET will end the Session:
  - Cancel all dialing activity in the Session
  - Delete the copy of the list saved in turboDial
- After a RESET, all that remains from the Session are...
  - The Call Note Records turboDial created
  - The Call Outcomes and typed notes your agents saved
  - The Automation your Call Outcomes triggered
- Use RESET when:
  - You want to stop dialing to the List, or
  - You need a fresh copy of a List from Infusionsoft
    - RESET then LOAD the List again



# FCC Requirements (2003 TCPA)

“A telemarketer may Abandon, during a 30-day period, no more than three percent of calls answered by a person and must deliver a prerecorded identification message when abandoning a call.”

- Dynamic Dial **Missed Connection** is counted as an Abandon
  - If a machine answered: FCC does not considered it an Abandon

# Abandoned Call Compliance

## What you should do:

- Call a list of leads who have opted-in to something you've offered. Don't call purchased lists.
- Use a **Missed Connection** recording that identifies you
- Set your "Rings/Attempt" to a higher number, 6+
- Set your "Simultaneous Attempts/Agent" to 1
  - Or, if >1 then use "Answer Detect"

# Abandoned Call Compliance

## What turboDial does:

After 10 Missed Connections:

- “Answer Detect” is Enabled (override)

If > 3% Missed Connections ongoing:

- “Simultaneous Attempts/Agent” is reduced (override)

turboDial will override your options to keep you in compliance

- Click the STATUS window to view overrides

### Dynamic Dial Session Status

List: All Hot Leads

Owner: bill@web-lever.com

Loaded: Wed, 13 Mar 2019 09:29:27 -0500

Total count of Contacts 91

Total count of Ph.Numbers 102

Call Attempts (incl Reattempts) 4

Ph.Numbers Attempted 5

Answered & Connected to Agent 4

Answered & No Agent Available 0

Machine Answered (Answer Detect) 0

Not Answered - Ring Timed Out 0

Ph.Numbers Not Yet Attempted 97

Ph.Numbers Eligible to be Attempted Now 98

Ph.Numbers Waiting to be Eligible 0

**Override: Answer Detect is Enabled**

**Override: Simultaneous Attempts/Agent: 1**

# Important Notes

- turboDial will not traverse your List in order
  - turboDial looks for eligible Numbers based on the criteria specified in your Options
  - The order may seem random
- Special List Type: "My Tasks Due"
  - Every Calling Agent dialing to a "My Tasks Due" session will be dialing a unique list of their own assigned Tasks
  - It is not possible to share a "My Tasks Due" session
  - The Calling Agent will always be the Session Owner
- If Global Option: *Restrict views to owned records?* is enabled:
  - The Session will be Loaded with only Contacts who are owned by the Session Owner
  - The Session Owner is the only Agent allowed to JOIN the Session

# Important Notes

- List Auto-Sync
  - Use the List Auto-Sync utility from turboDial to add/remove contacts in turboDial's copy of the list without requiring the list be RESET and LOADED from Infusionsoft.
    - <http://support.turbodial.biz/?s=List+Auto-Sync>
- Local Presence
  - Use the Local Presence add-on to improve your answer rates and help avoid being caught in carrier spam call filters.
    - <http://support.turbodial.biz/?s=local+presence>
- Call Newest First: use 'Date Created' column
  - If you add the 'Date Created' column to your Saved Search then Dynamic Dial will look for the most recently created record when choosing numbers to dial.
  - Records created on the same day have the same priority.
    - A record created today will be dialed before a record created yesterday. But a record created this afternoon may not be dialed before a record created this morning.

# Dynamic Dial Note Records

## Call Note Record Titles:

- turboDial: Dynamic Dial Attempt
  - The phone number was dialed but ringing timed out before an answer
- turboDial: Dynamic Dial Call
  - The phone number was dialed and the call was connected to an Agent
- turboDial: Dynamic Dial Call – Recorded
  - The phone number was dialed and the call was connected to an Agent and recorded
- turboDial: Dynamic Dial Call - Left Message (<name of recording>)
  - The phone number was dialed and the call was connected to an Agent
  - The Agent triggered a Recorded message to be played
- turboDial: Dynamic Dial Machine Answer
  - “Answer Detect” is enabled. The phone number was dialed and the call was answered and Twilio decided it was a Machine. turboDial played the Missed Connection recording.
- turboDial: Dynamic Dial Missed Connection
  - The phone number was dialed and the call was answered but no agent was available – **Missed Connection**. turboDial played the Missed Connection recording.
- turboDial: Dynamic Dial Attempt - Number Failed (<number>)
  - Twilio reported the call as Failed, most often due to a bad number

# Dynamic Dial Reports in Infusionsoft

## Example Reports

- Connected Calls
  - Task-Note Report
  - Main Search = turboDial: Dynamic Dial Call
  
- Missed Connections
  - Task-Note Report
  - Main Search = turboDial: Dynamic Dial Missed

Edit Filters

Search
Misc Criteria
Custom Fields
Columns

Search Criteria

Main Search
turboDial: Dynamic Dial Call

Edit Filters

Search
Misc Criteria
Custom Fields
Columns

Search Criteria

Main Search
turboDial: Dynamic Dial Missed

A screenshot of the 'Dynamic Dial' interface. At the top, there are two tabs: 'List Dial' and 'Dynamic Dial', with 'Dynamic Dial' being the active tab. Below the tabs is a dropdown menu currently showing 'All Hot Leads'. Under the dropdown are three buttons: a green 'JOIN' button, a small green 'MONITORING' button, and a red 'RESET' button. Below these buttons, the text 'Info Popup:' is followed by a green checkmark. Below that, 'Caller ID:+16085652042' is displayed. Then, 'Missed Connection:' is followed by the text 'Spring Sale Offer'. Below this, 'Auto Join:' is followed by a green checkmark. At the bottom of the interface are two green buttons: 'STATUS' and 'OPTIONS'.

## Dynamic Dial

Autonomous  
Simplicity  
Control

*Thanks for viewing Dynamic Dial: Session Owner*