

– How To –

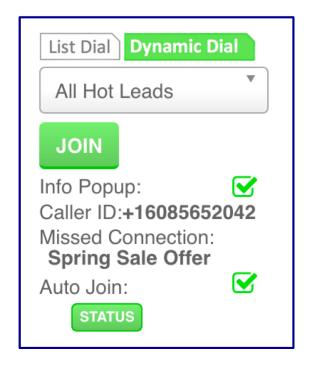
**Dynamic Dial**Session Owner



# Dynamic Dial

Fully autonomous dialer

- Simplicity for agents
- Full Control for managers



The Session Owner role is Key to dialing effectiveness



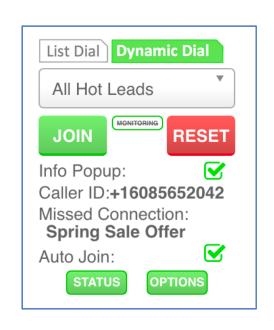
#### Topics: Session Owner

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



#### Session Owner - Role Overview

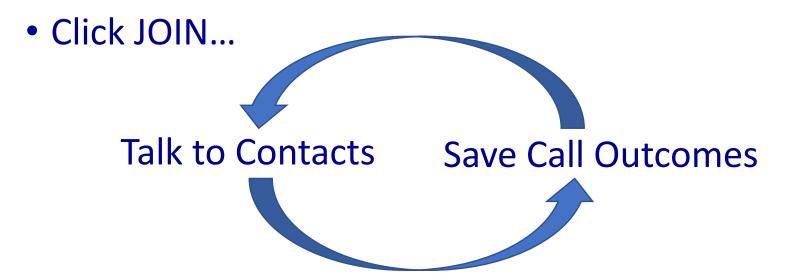
- Setup the Saved Search list in Infusionsoft
- Configure the Session options in turboDial
- Load the list & become the Session owner
- Assign agents to Join the Session
- Observe Session status
- Create dashboard reports





## Calling Agent - Role Overview

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





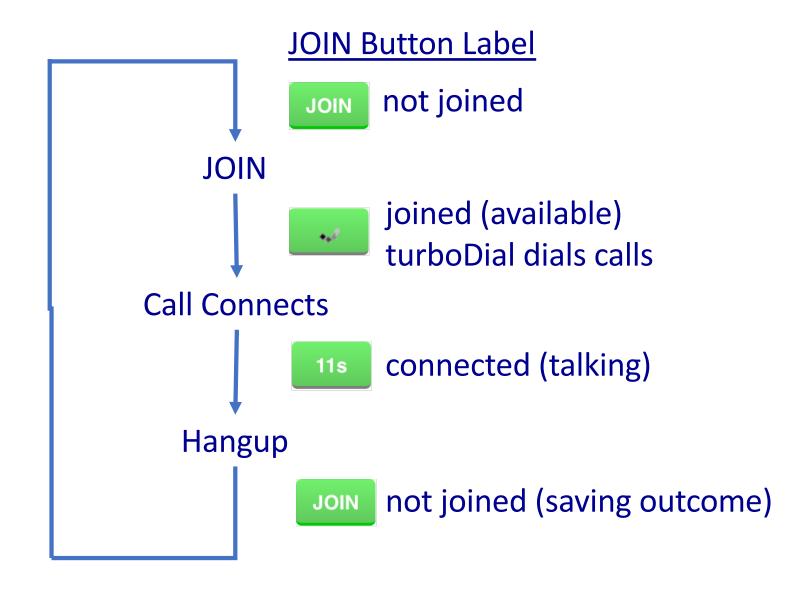
### **Key Concepts**

#### 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

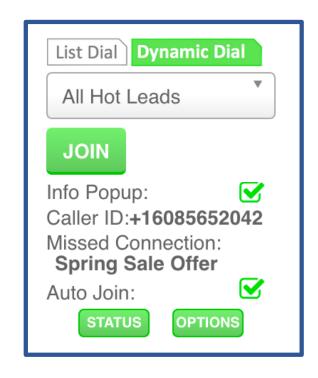




## The Agent Cycle

#### A Calling Agent has 3 possible states:

- Not joined (not available),
- Joined (available), or
- Connected to a call (talking)



- 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



### Dynamic Dial vs Power Dial

- Both have a simultaneous calls setting: 1-4 calls
- Power Dial
  - Dials the <u>1-4</u> 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 <u>1-4</u> 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 <u>1-4</u> 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 <u>usually</u> 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



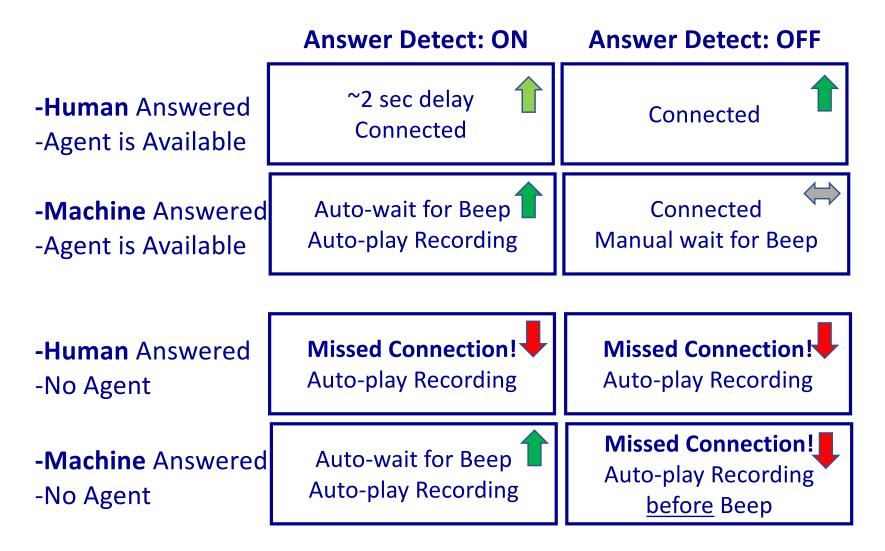
#### Differences with Answer Detect

#### **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**

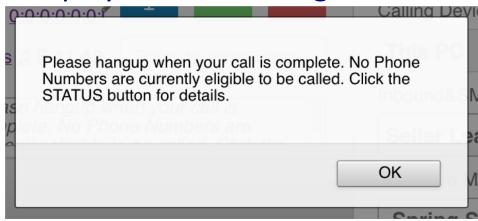


Answer Detect has some Advantage - Must consider the tradeoffs

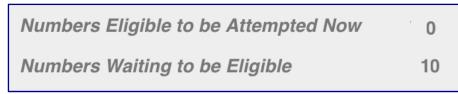


## No Currently Eligible Numbers

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



Check the details in the STATUS window



 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



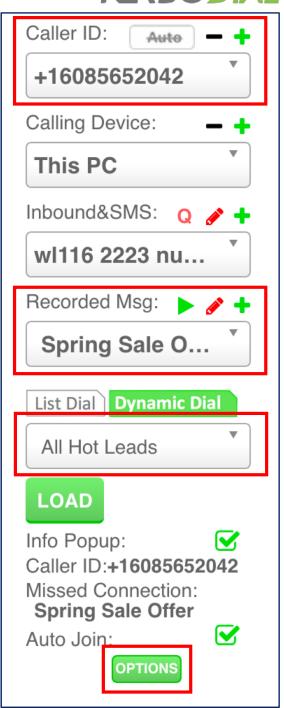
#### Pre-Setup

- 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.





- <u>Record Calls:</u> 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	<b>-</b>		
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			

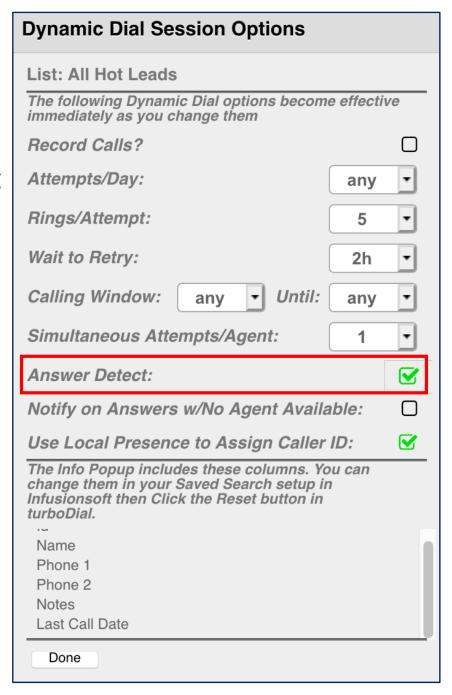


- Wait to Retry: Set the interval to wait before re-attempting a call to a contact who has not yet connected to an agent.
- <u>Calling Window:</u> Set the start time and end time for calls based on the timezone for the contact's area code. (North America only).
- Simultaneous Attempts per Agent:
   turboDial 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	e		
Record Calls?			
Attempts/Day: any	▼		
Rings/Attempt: 5	•		
Wait to Retry: 2h	T		
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			



- 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)





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

ANS Thu, 17 Jan 2019 11:17:57 -0600
Smitty Chandler (+16302538502) answered a Dynamic Dial call when no agent was available.
Click blue arrow to Claim & Call them now!

- 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** 

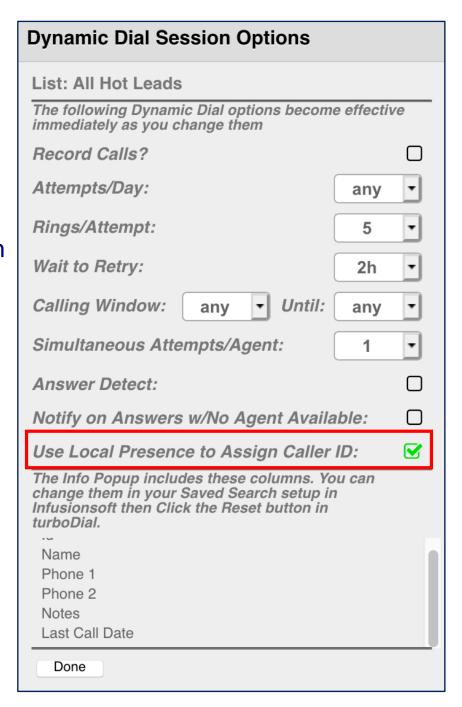
<b>Dynamic Dial Session Options</b>		
List: All Hot Leads		
The following Dynamic Dial options becom immediately as you change them	e effectiv	re
Record Calls?		
Attempts/Day:	any	•
Rings/Attempt:	5	•
Wait to Retry:	2h	•
Calling Window: any <b>▼</b> Until:	any	•
Simultaneous Attempts/Agent:	1	•
Answer Detect:		
Notify on Answers w/No Agent Availa	able:	<b>⋖</b>
Use Local Presence to Assign Caller	ID:	<b>∀</b>
The Info Popup includes these columns. You 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		



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 <a href="http://turboDial.biz">http://turboDial.biz</a> for more information on Local Presence





• 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.

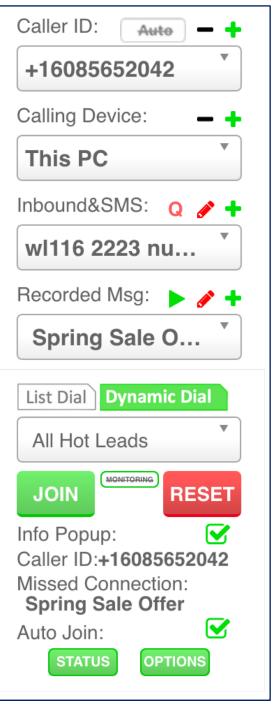
• Info Popups are described later.

Dynamic Dial Session Options			
List: All Hot Leads			
The following Dynamic Dial options become immediately as you change them	e effectiv	e	
Record Calls?			
Attempts/Day:	any	<b>-</b>	
Rings/Attempt:	5	▼	
Wait to Retry:	2h	<b>-</b>	
Calling Window: any ▼ Until:	any	<b>-</b>	
Simultaneous Attempts/Agent:	1	<b>T</b>	
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			



### Session Setup

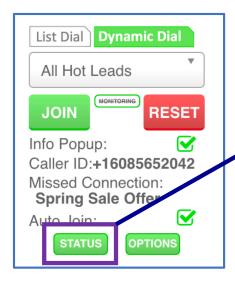
- Click the LOAD button
  - turboDial reads the list from Infusionsoft and builds its own copy
  - Subsequent changes in the Infusionsoft version of the list are NOT reflected in the turboDial copy
    - See "List Auto Sync" utility
- Wait for the Load to complete will take longer for large lists
- The LOAD button changes to JOIN
- The RESET and STATUS buttons appear
- The Session is ready for Calling Agents to JOIN
  - You are the Session owner





#### Session STATUS

 Useful data when a Session is underway



Dynamic Dial Session Status		
List: All Hot Leads		
Owner:	bill@web-le	ver.com
Loaded:	Fri, 18 Jan 2019 07:15:5	52 -0600
Total List Size		102
Total Attempts (incl Reattempts) 4		
Total Numbers Attempted		5
Answered & Connected to Agent 4		
Answered & No Agent Available 0		
Machine Answered (Answer Detect) 0		
Not Answered - Ring Timed Out		
Numbers Not	97	
Numbers Eligible to be Attempted Now		
Numbers Wait	ing to be Eligible	0



#### Session STATUS

This is the # of Phone Numbers which may be < or > # Contacts

"Numbers" means Phone Numbers.

These are the "Missed Connections"

Shows how much of the list remains untouched

turboDial won't dial unless this is > than 0 -

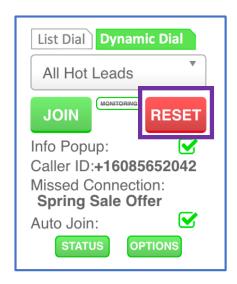
Attempts/Day, Wait to Retry, or Calling - Window options can cause some numbers to not be currently eligible

Dynamic Dial Session Status		
List: All Hot Leads		
Owner: bill@web-lever.com		
Loaded: Fri, 18 Jan 2019 07:15:52 -0600		
Total List Size		102
Total Attempts (incl Reattempts) 4		
Total Numbers Attempted 5		5
Answered & Connected to Agent 4		
Answered & No Agent Available 0		
Machine Answered (Answer Detect) 0		
Not Answered - Ring Timed Out 0		
Numbers Not Yet Attempted 97		
Numbers Eligible to be Attempted Now 98		
Numbers Waiting to be Eligible		



#### 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 <u>Abandon</u>, 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 Fri, 18 Jan 2019 07:15:52 -0600 Loaded: Total List Size 102 Total Attempts (incl Reattempts) Total Numbers Attempted Answered & Connected to Agent Answered & No Agent Available Machine Answered (Answer Detect) Not Answered - Ring Timed Out -11 Numbers Not Yet Attempted 97 Numbers Eligible to be Attempted Now 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:**

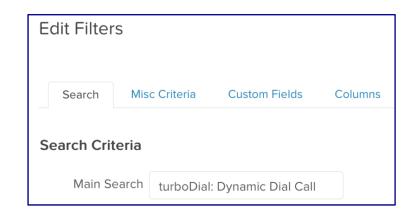
- turboDial: Dynamic Dial Attempt
  - The phone number was dialed but ringing timed out before an answer
- turboDial: Dynamic Dial Call
  - The phone number was dialed and the call was connected to an Agent
- turboDial: Dynamic Dial Call Recorded
  - · The phone number was dialed and the call was connected 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**

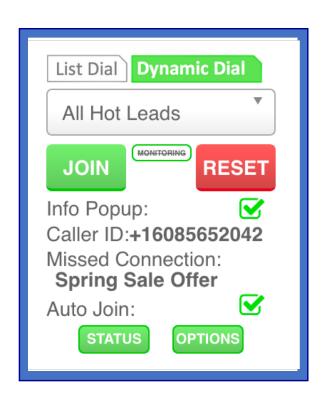
- Connected Calls
  - Task-Note Report
  - Main Search = turboDial: Dynamic Dial Call



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

Edit Filters			
Search	Misc Criteria	Custom Fields	Columns
Search Criteria			
Main Se	earch turboDial	: Dynamic Dial Miss	ed



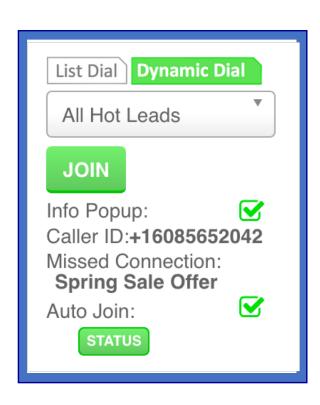


### **Dynamic Dial**

Autonomous Simplicity Control

Thanks for viewing Dynamic Dial: Session Owner





- How To -

Calling Agent steps **Dynamic Dial** 



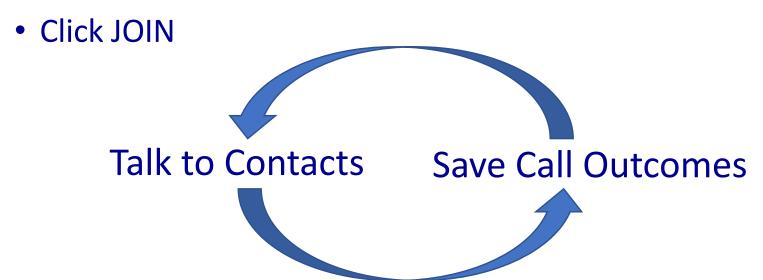
## Dynamic Dial for Calling Agents

- This video explains how to use Dynamic Dial to make calls in a Dialing Session
- Your manager will prepare the Dialing Session for you
- Use the guides available at <a href="http://support.turboDial.biz">http://support.turboDial.biz</a> if you need help with
  - Launching turboDial
  - Choosing your Calling Device
  - Making calls
  - Leaving voice mails
  - Saving Call Outcomes



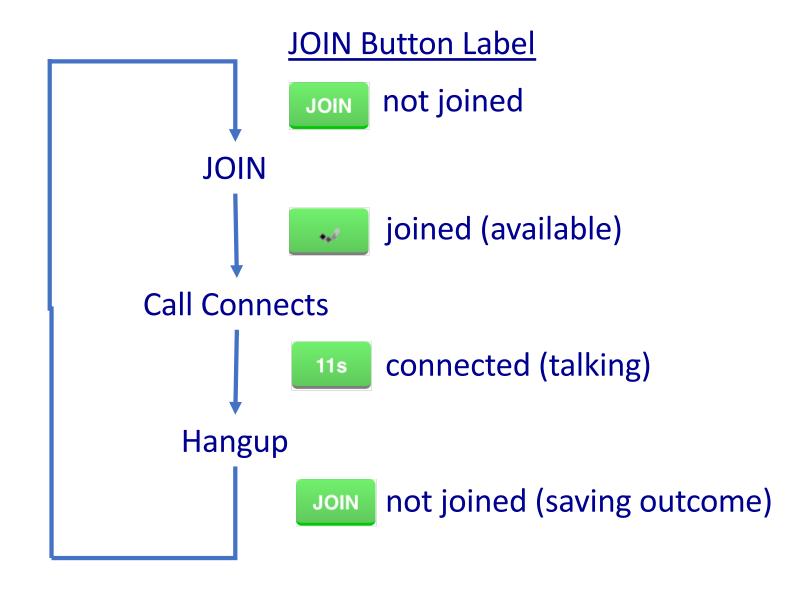
## Calling Agent – Basic Steps

- Your manager gives you the Session to join and...
  - Explains the Call Outcomes to use
  - Shows you the Recorded Message to use for leaving Voice Mail
- Choose your options for making calls
- Select the Session in turboDial





### The Agent Cycle

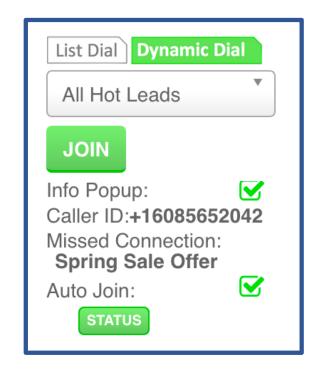




### The Agent Cycle

An agent has 3 possible states:

- Not joined (not available),
- Joined (available), or
- Connected to a call (not available)



- An agent becomes available by clicking JOIN
  - That causes turboDial to start dialing calls
- When a call is answered it is connected to an agent
- If no agent is available the call is connected to the "Missed Connection" recording



# Calling Agent Options

Choose the device you will use for calls.

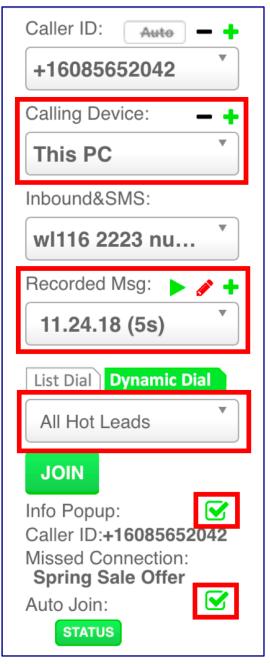
- 'This PC': you will use a headset with your computer.
- A phone number: turboDial will call you when you JOIN a session.

Optional: Choose the pre-recorded message to use with the MSG button for voice mail machines

Choose the list your manager wants you to dial

The Info Popup will display a window with Contact details when you are Connected to a call

Auto Join will automatically JOIN you back into the Session after you save a Call Outcome.





### JOIN

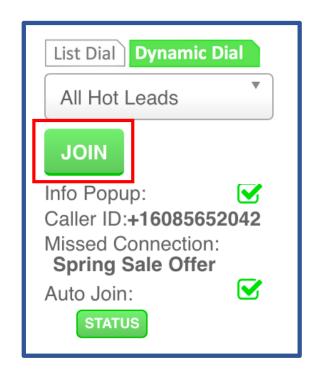
### When you are ready for calls...

Click the JOIN button

Button changes to rolling pattern



You hear "Waiting for a call"





### Connect

#### When you are Connected to a call...

 You see a sudden alert in turboDial with the name of the Contact from Infusionsoft

Will Jameson

- Start talking!
- You may or may not hear them saying "hello"
- JOIN button label changes to a call timer in seconds

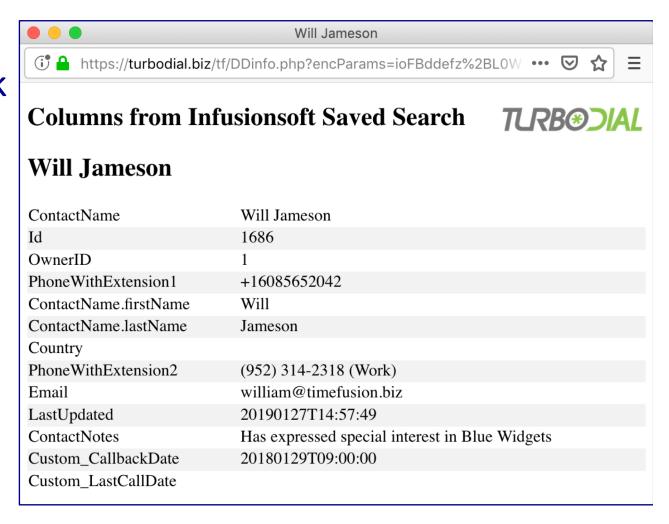




### Connect

#### When you are Connected to a call...

 An Info Popup window will look similar to this:

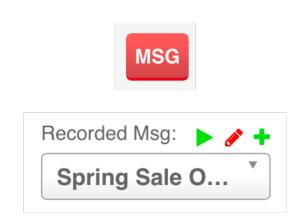




### Connect

#### When an answering machine has answered...

- You may press the MSG button:
  - Plays the selected recorded message on their machine
  - Hangs you up



- Save a Call Outcome
- Return to JOIN step



### Hangup

#### When a Conversation ends...

Hangup your end



Save a Call Outcome

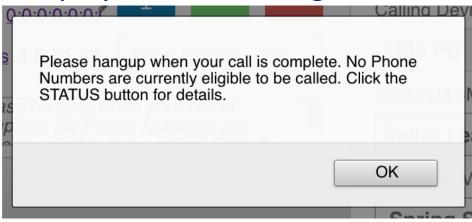
Return to JOIN step



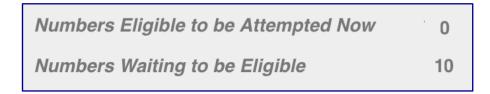


## No Eligible Numbers

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



Check the details in the STATUS window



 You should Hangup, then monitor the STATUS and JOIN again when there are Numbers eligible to be called





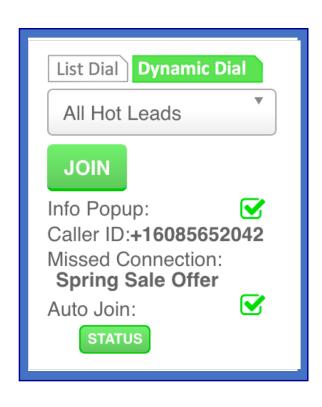
## Notify to Call Back

This Notification may popup in your turboDial panel



- When you see it...
  - If you are Joined and waiting for a call, Hangup
  - If you are on a call, wait until the call is done
  - Then click the blue arrow in the Notification
  - Click the "Call" button to call the contact directly





### **Dynamic Dial**

Autonomous Simplicity Control

Thanks for viewing Dynamic Dial: Calling Agent