Contact Strategy

Contact Strategy is about configuring a set of rules for various modes. This set of rules decides the mode on which a contact is reached (usually based on the weight assigned to the mode), the time at which a contact is reached on a specific mode, the time when retries are dialed out on configured modes, and so on. This means you must have a Contact Strategy in place which tells the application what to do to reach an elusive. You could, at the first unsuccessful try, reduce the priority for this mode, and then instruct LCM Console through your Contact Strategy to either try the contact on the mode with the next higher priority, reschedule the contact to a later time on the same mode, branch the contact to a different mode, or even close the contact. In short, your Contact Strategy configuration largely contributes to the success or otherwise of a campaign. Before we set about describing how to configure a Contact Strategy on LCM Console, let us have a look at how contact strategies work.

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Contact Strategy Types

LCM supports three types of contact strategy.

- **Simple Strategy**—A simple strategy is, as the name suggests, simple. It is easily configurable and just moves on calling from one configured mode to another in a cycle. The cycle is repeated until the configured number of cycles are completed. It serves its limited purpose in certain types of campaigns that do not require any advanced contact handling methodology.
- **Advanced Strategy**—An advanced strategy is much more complicated. You can use multiple modes, retries, priorities, spread across multiple cycles, contact statuses, and more. You can also set dialing rules based on outcomes—telephony outcomes for modes and also business outcomes. This type of strategy leverages the maximum out of the application to dial out almost every uploaded contact.
- **Callback Strategy**—A callback strategy allows the agents to set callback requested by the customer and configure various aspects as to how callback calls are handled with respect to dialing, agents, retries, contact status, and so on.

Create a Contact Strategy

To create a Contact Strategy:

Step 1 Click **Contact Strategy** in the menu pane on the left to open the **Contact Strategy** page.

Step 2 In the grid displaying the available contact strategies, you can check out the modes for any contact strategy by clicking the **Modes**. All modes for the contact strategy are displayed.

Step 3 To add more modes to this contact strategy, if required, click the **Add Modes** button and follow instructions in **Modes**.

Step 4 Click **FAB** to add a new contact strategy.

Step 5 Complete three widgets to add a new contact strategy.

Widget 1—Contact Strategy Name

To complete the Contact Strategy Name widget:

Step 1 Enter a **Contact Strategy Name**.

Step 2 Enter a **Description**.

Step 3 Select a **Contact Strategy Type** from Simple, Advanced, or Callback.

Step 4 Turn the **Restrict Multiple Email** and **SMS** switch **ON** if you want to control sending of multiple Emails and text messages to the same contact. Turning this **ON** means the application sends only one Email or SMS to a contact for a specific campaign.

Step 5 Click **Next** to navigate to the **Select Mode** widget.

Widget 2—Select Mode

To complete the Select Mode widget:

Note
- Follow Steps 1 through 5 for **Simple** and **Callback** contact strategies.
- Start from Step 6 for **Advanced** contact strategy.

Step 1 Select a **Mode**. All modes created are available for selection.

Note If you do not have a mode that applies to this contact strategy, create a new Mode by clicking the **Add** button.

Step 2 Use the pop up time panel to select a **Time Range** for this contact strategy to be operational.

Step 3 Turn the **PEWC** switch **ON** to enable PEWC for this contact strategy.

PEWC(Prior Express Written Consent)—A compliance mandating telemarketers to obtain the prior express written consent of the called party for autodialed or prerecorded telemarketing calls to wireless numbers and prerecorded calls to residential landline.

Step 4 Click **Previous** to navigate to the previous screen at any time.

Step 5 Click **Next** to navigate to the **Telephony Outcomes** widget.

Note Start from Step 6 for **Advanced** contact strategy.

Step 6 Select a **Mode**. All modes created are available for selection.

Note If you do not have a mode that applies to this contact strategy, create a new Mode by clicking the **Add** button.

Step 7 Use the pop up time panel to select a **Time Range** for this contact strategy to be operational.

Step 8 Use the slider to configure the **Mode Retries** for this contact strategy.

Step 9 Turn the **PEWC** switch **ON** to enable PEWC for this contact strategy.

Step 10 Turn the **Transition Retry** switch **ON** to enable a **Transition Window** for this contact strategy.

Transition Window

Transition Window offers the ability to constrain or limit the number of attempts for each mode across a defined duration threshold. Situations may arise, due to some statutory regulations or requests, when contacts in a campaign be reached out for dialing only a specified number of times during a specified time period. This is addressed by the Transition Window feature.

- **Mode-level Transition Window**—The type of rule that says a mobile number must be attempted not more than 3 times within 7 days.
- **Contact-level Transition Window**—Set at campaign level, this limits the number of attempts over a period of time. For example, attempt note more than three times (across all the phone numbers) in a week.

Note The campaign-level transition windows is applied only within a campaign.

Step 11 Use the **Transition Attempts** slider to fix the number of attempts in a transition window for this contact strategy.

Step 12 Use the **Transition Duration (Days)** slider to set the number of days for the transition window.

Step 13 Next is the **Retain Mode Retries while switches to Callback** switch.

- In the **ON** position, the remaining retries for this mode is retained when the contact switches to a Callback Strategy.
- In the **OFF** position, the retries count is initialized to zero when the contact switches to a Callback Strategy.

Step 14 Click **Previous** to navigate to the previous screen at any time.

Step 15 Click **Next** to navigate to the **Telephony Outcomes** widget.

Widget 3—Telephony Outcomes

To complete configuring the contact strategy:

Step 1 The grid contains the **Outcomes** list. Configure your contact strategy for each outcome listed in the grid.

Step 2 All rows are loaded with default values. Click the row to configure to change to editable mode and make required changes.

Step 3 From the number panel, select the **Reschedule Time (D:H:M)** for the call to be rescheduled for this outcome.

Step 4 From the number panel, select the **Max Retries** for this outcome. This is applicable only for **Advanced** or **Callback** contact strategies.

Step 5 From the number panel, select a **Priority** for this outcome. The application delivers contacts to the dialer based on the priority.

Priority is the adjustment you want to make to this mode for this outcome. For a set of contacts selected and ready for delivery, those with higher priority are delivered first to the Dialer.

Step 6 From the number panel, select a **Lead Score** for this Outcome.

Lead Score helps in identifying the most prospective customer to be reached out from a campaign. This score is available as part of contact selection strategy and can be set at the time of upload or wrap up, while defining the business / telephony outcome.

Step 7 Select a **Branch Mode**, an alternate mode to reach the contact on if the primary mode does not work out. This is applicable only for **Advanced** or **Callback** contact strategies.

Step 8 Select the **Retain PCB** check box if the same agent has to service the customer in a callback. This is applicable only for **Callback** contact strategy.

Step 9 Select the **Close Contact** check box if you want to close the contact based on this outcome.

Step 10 Select the **Remove Mode** check box if you want to remove the Mode for a combination of this contact strategy and this outcome.

Step 11 Click the **Save and Add Another Mode** button to save the Contact Strategy configured thus far, and continue configuring Contact Strategy for another mode. Follow the above instructions to configure more modes.

Step 12 Click **Save** to complete creating and configuring a Contact Strategy.