Outbound customer engagement can seem complicated and complex—but it shouldn’t. While we don’t have a crystal ball, we do have the tools to help you predict your customer’s wants, needs, and desires before they come up. Alvaria enables you to proactively engage with your customers easily and effectively, planting the seeds of satisfaction long before any potential concern. Don’t let complicated software get in the way of doing outbound customer engagement right. Leverage the Alvaria Outbound List Management solution to do more than just address issues and start building a relationship that thrives on understanding, trust, and meaningful interactions.

Key Differentiators

**Thoughtful & Strategic List Management**
Best-in-class proactive list management that’s a breeze to set up and automate. Configuration that makes it a no-brainer for dialer administrators and results in thoughtful outreach to customers.

**Data-Driven & Scalable Proactive Outreach**
The latest customer information and advanced list penetration functionality enable you to provide data-driven outreach and avoid potentially unnecessary reach outs. Use context and rules built into your strategy to deliver a more positive customer connection at scale.

**Automated & Templatized Standardization**
Take the guesswork out of creating consistent outbound strategies with automated and templatized tools in Alvaria Proactive Outreach™. Create the standards ahead of time and automate them to be included for every outbound strategy, helping you spend less time on configuration and more time delivering a lasting impression on your customers.
Key Components and Features

Thoughtful & Strategic List Management
Creating a thoughtful proactive outbound strategy can be challenging to set up. Let Alvaria Outbound List & Campaign Management do the heavy lifting of streamlining the list management process. Leverage our easy-to-use list management tools to make configuration a breeze and enable you to focus on becoming that trusted partner for your customers.

- Multiple dialing modes such as preview, precision, predictive, automatic, and blast.
- Powerful preview dialing mode flags individual records based on certain dispositions like abandons and enables you to specify which phone number positions for a record can be dialed predictively (i.e., have the customer’s consent), while the remaining numbers in the dial sequence, not explicitly flagged as having consent, will be dialed in preview mode even if it is a part of a predictive calling strategy.
- Determine time zones for contacts by postal code, host system or a combination of both to overcome portability issues. Use the most restrictive calling window or override by the customer’s preferred time zone to avoid conflicts.
- Utilize a single large list with highest priority contacts being worked first across multiple systems, eliminating artificial list segmentation based on expected contact capacity for individual systems.
- Multiple lists can be worked based on a percentage distribution, enabling lists from multiple clients to be worked simultaneously by a single large agent pool.
- List management and distribution is separate from telephony, agents, and host systems, meaning customer identifying data doesn’t cross a border.
- Flexible, on-the-fly changes like stopping, starting, or changing the priority of individual lists are supported and won’t introduce artificial idle time for agents.
- Advanced recall logic on a list-by-list basis can be set by disposition for each phone number, such as a home phone number recall when busy for five minutes, while for a work phone number is 30 minutes.

Data-Driven & Scalable Outreach
Ensure you have the most up-to-date data to avoid unnecessary reach outs and build in advanced rules within your outbound strategy to create more positive customer connections. Take advantage of advanced counters for penetrating throttling and exclusions to build scalable proactive outreach strategies with data-driven tools plugged right in. Rest assured you’re reaching out thoughtfully with data-driven and advanced counter and exclusion functionality built into the core of your outbound strategies.

- Advanced counters such as the ability to restrict calling at the phone number field level vs. just at the account level, enabling you to continue to contact if multiple numbers have been added. If maximum attempts are reached on a specific phone number, dialing can still continue for the remaining numbers on the account.
- Counters can be used in automated scripts as “Wait Until” triggers, with automation based on SUM, Average, Minimum, Maximum, or a Count of the COUNTx values within a list as well as ratios of these values.
- Counters can track and exclude more than one number from the dialing sequence when an assigned threshold is met (e.g., borrower and co-borrower home numbers).
- Configure rules for records with zero attempts or messages using the Attempt Tracker and Message Tracker. Restrict even the first requested attempt/message against the matching criteria and leverage the additional criteria available within the Attempt and Message Tracker tools, such as geocodes, to further control exclusions.
- Evaluate multiple geocodes for the same record to ensure the most restrictive geo-based attempts are applied.
- Exclusions can be created manually from inbound results based on intra-day processing or imported into the system from external sources such as a lock box or front desk walk-ins (eliminating call for payment received, but not yet posted).
- Exclusions can be set for multiple days and have an expiration date (allow promised payment time to post).
Data-Driven & Scalable Outreach (continued)

- Exclusions for a specific customer can be applied to one or more lists.
- Intra-day exclusions can be system generated on a list-by-list basis for specified dispositions (account number, phone number, social security number, email).
- Detailed customer account information is available via screen pops.
- Utilize multi-level security that protects your sensitive customer data with user-defined and role-based access.

Automated & Templatized Standardization

Turn your proactive outbound strategy into a repeatable engine of excellence with automation and templates. Keep the competition guessing how you’ve created a streamlined outbound process that leads to lasting customer impressions time and time again.

- Automate any action in your outbound strategy, including the ability to start or stop a list (automation cannot define a list, however).
- Automated schedules based on calendar/time-based events and for recurring rules — such as every Monday at 8:00 am, every five minutes, or every first day of the month — to trigger an individual action, such as start a list or a script with multiple actions.
- Automation can occur for scripts that consolidate a series of actions that take place together or that are triggered by an event. For example, if at 11:00 am List A’s penetration is > 75% and List B’s penetration is < 25%, then lower List A’s priority so that List B receives more activity.
- Consolidate the availability of various business rules within list management, dialing style, counters, and more into templates for scalable use across multiple administrators.

Key Benefits

- Provide your team with the tools to make proactive, outbound customer engagement a competitive advantage.
- Leverage an easy-to-use list and campaign management solution so you can focus less on complicated software and more on connecting with customers before issues arise.
- Leave a lasting impression on your customers by reaching out thoughtfully and with empathy.
- Save countless administrative hours and ensure standardization across all your outbound strategies with automated and templatized features.