Alvaria Proactive Outreach™

Proactive and compliant outreach that makes an impression

Outbound customer engagement can feel transactional – but it shouldn’t. Alvaria Proactive Outreach helps customers see your best side through compliant, thoughtful, human connections. It brings your teams along for a journey where proactive outbound engagement is a strategic advantage and a way to show customers you’ve got their back. Together, we’re shaping a future where proactive customer engagement means removing obstacles so people can achieve their highest potential.

Key Differentiators

Thoughtful & Strategic List Management
Best-in-class proactive list management with simple set up and automation is a no-brainer for dialer administrators. Intuitive configurations and feature-rich options result in thoughtful outreach to customers.

Confident Compliant Outbound
Campaign management with built-in, compliance-ready tools means you can be certain you’re reaching out within industry regulations and guidelines. Reduce missed opportunities and screened calls by using powerful compliance tools to build a brand customers trust.

Data-Driven Proactive Outreach
The latest customer information enables you to drive data-driven outreach and avoid potentially unnecessary reach outs. Use context to determine the most valuable connection based on the most up-to-date data.

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.
Freedom of Choice Multichannel Options
Robust multichannel options ensure you’re meeting customers where they want to see you — not the other way around. Create valuable connections by providing information on the channels customers expect.

Culture of Connection
Your organization doesn’t fit into a checklist – you’re an enterprise. Alvaria delivers human connection and potential from the inside out, with a dedicated team that understands how to customize our solutions to your unique needs from smooth deployments to discovering ways we can drive even more value from your investment.

Key Components and Features

Thoughtful & Strategic List Management
Creating a thoughtful proactive outbound strategy can be challenging to set up. Let Alvaria Proactive Outreach™ 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 abandon 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
- 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 that can be set by disposition for each phone number such as a home phone number recall when busy for five minutes, while a work phone number is 30 minutes

Confident Compliant Outbound
Navigating multiple compliance and regulatory laws or acts is complicated – but it doesn’t have to be. Rest assured you’re avoiding costly fines and penalties with compliance-ready tools built right into your scalable, proactive outbound strategy. Clinch a more compliant, thoughtful outbound strategy with the latest and greatest features in Alvaria Proactive Outreach so you can spend less time worrying about costly fines and more time connecting with customers.

- DNC list management and dynamic list scrubbing, plus opt-out mechanisms and consent tracking that automatically updates global tables
- TCPA, CFPB, Ofcom, PCI DSS 3.2.1, DNC, STIR/SHAKEN, and more compliance-ready tools built right into your outreach strategy
- Convenient time to contact with the ability to define multiple time windows per day (also based on day of the week) by customer, account, or contact address (e.g. phone#)
- Attempts Tracker functionality limits attempts across one or more customer records as well as supports rules by contact address and simultaneous rules with different time periods (i.e., 60 minutes, or more month) from one minute to 35 days
- Message Tracker to continue contacting a customer or number even after reaching the defined limit of messages played for that customer or number during a defined period of time. This feature honors state specific controls and is supported with further scope rules by GeoCode, phone number type, and purpose for calling (i.e. collections, telemarketing, fraud, etc.)
- Time zone determination can be made by postal code, host system, or a combination of these to overcome number portability issues. For conflicts, the most restrictive calling window can be used or can be overridden by customer’s preferred time zone
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
- 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)
- 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 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
Freedom of Choice Multichannel Options

Provide and leverage the digital channels customers expect with Alvaria Proactive Outreach™. Meet customers where they expect to hear from you – on their preferred channels – to create better, more meaningful and thoughtful customer connections.

- Proactively send mobile and disposable apps to connect customers to rich, secure content, so they can receive alerts and get things done while on-the-go
- Follow up with customers even on social media messengers to enable easy payment processing — even through Facebook
- SMS/text for outbound customer engagement for those who don’t want to interact with a live agent or chatbot
- Encourage customers to utilize webchat by including questions that will proactively answer common FAQs about payments, account information, and more and ask if they’d like to opt-in to receive outbound messages via a phone call or SMS/text
- Transform your IVR into an outbound opt-in engine by asking customers if they’d like to receive proactive notifications and on what channel they prefer
- Offer email notifications as a channel to receive proactive notifications regarding important information your customer will want to know such as potentially fraudulent account activity, appointment reminders, and more

Key Benefits

- Provide your team with the tools to make proactive, outbound customer engagement a competitive advantage
- Leave a lasting impression on your customers by reaching out thoughtfully and with empathy
- Reduce your risk of costly compliance fines and penalties with compliance-ready tools built right into your outbound strategy
- Save countless administrative hours and ensure standardization across all your outbound strategies with automated and templatized features
- Increase right party connects by meeting customers on the channels they expect to hear from you

About Alvaria™ Alvaria helps organizations efficiently manage and connect compliantly with customers and prospects. Our open, innovative multi-platform is purpose built for two core competencies; a feature-rich, intuitive, and intelligent workforce engagement management platform, and a multichannel proactive compliant outreach platform. Alvaria, the product of the merger of world leaders - Aspect Software and Noble Systems - is proudly celebrating 50 years in business reshaping customer and employee experience. ALVARIA. Reshaping Customer Experience™. © Copyright 2023 Alvaria, Inc. All Rights Reserved. 9075US-C 9/23