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Leveraging ChaseData Corp's voice based call center software to maximize your company's ROI	Ahmed Macklai Dan Cleary Guillermo Sandoval Mike Sparanza Jordan Wittmeier	<ul style="list-style-type: none">- 2016 Voice channel forecast page 4- ChaseData is your unfair advantage page 6- Connect every call to the best agent page 8- Faster, easier voice integration (APIs, etc.) page 10- Our capabilities your advantages page 12- 3 Practical examples of application page 14

RE:THINKING VOICE IN TODAY'S MODERN CONTACT CENTER



A guide to modernizing + maximizing the voice channel in your contact center in order to achieve your company's critical sales and customer service goals.



INTRO

VOICE IS
THE BUSIEST
CHANNEL AT
58.7%

Source: February
2015 *Call Centre
Helper* survey

“... Or press zero and a
live agent will assist you
with this call.”

TECH HELP

Intelligent ACD
IVR/Outbound
API/Social Media

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How often have you wound up speaking with an operator after desperately navigating and IVR maze in a desperate search for an immediate resolution to your inquiry is required? If you are like the vast majority of consumers and moreover business people making critical purchase decisions or critical customer service inquiries - this option is executed more often than not. Voice remains the most popular channel for critical communications between the enterprise and clients. All this, despite the rise of other important communications channels such as e-mail, social media and the others such as Apps, etc.

The critical challenge to the 21st century enterprise (with respect to communication) is quite complex and namely: “to develop effective strategies to meet client requirements

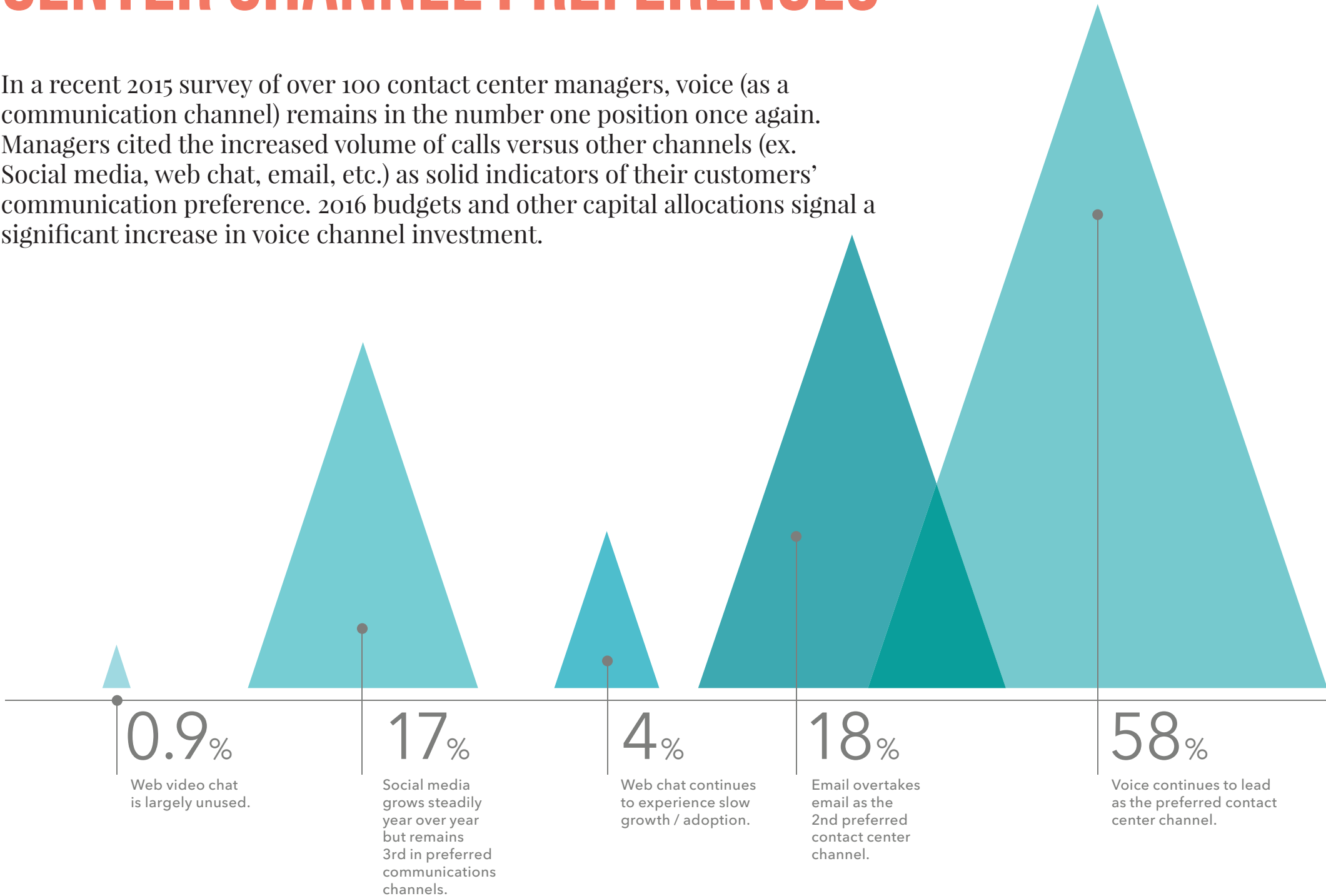
by leveraging technology to lower costs and increase overall client satisfaction.” Today’s sales and customer experience managers are bombarded with a myriad of alternative platforms with no clear method of evaluation prior to deployment. This paper is presented as a primer to creating a more effective 21st century call center.

“Nailed it! I’ve been using this system for about a year now and can say after a full years cycle the benefits of this dialing system far out weigh any others I have reviewed.”

— Ted Manikas, Supervisor at TJA

2016 VOICE VS. OTHER CONTACT CENTER CHANNEL PREFERENCES

In a recent 2015 survey of over 100 contact center managers, voice (as a communication channel) remains in the number one position once again. Managers cited the increased volume of calls versus other channels (ex. Social media, web chat, email, etc.) as solid indicators of their customers' communication preference. 2016 budgets and other capital allocations signal a significant increase in voice channel investment.



LEVERAGING THE POWER OF VOICE AS A CHANNEL IN YOUR CONTACT CENTER.

When creating a strategy of communicating with customers based on their expressed preferences, voice cannot be ignored. Likewise, emerging channels such as social media must also be addressed as part of a successful communication channel mix strategy.



STRATEGIC SUGGESTION

Clearly define the role of each channel based on a statistical analysis of client behavior, and adjust marketing and customer service messaging accordingly. According to Bain & Company, enterprises have allocated up to 40% of their contact center budget to social media, while social media is only likely to account for 17% of total contact center traffic in 2016.

PRACTICAL APPLICATION

Learn how a book publisher uses ChaseData's Small Business Edition to drive sales and reduce inbound call traffic during the peak Q4 holiday shopping season.

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OBSERVATIONS

THINK

- Incorporate multi-channel
- Optimize voice
- Net Promoter Scores (NPS)

ACTION ITEMS

DO

Test an existing 6 Month inbound/outbound blended Campaign using ChaseData's software then benchmark the results against previous performance to determined incremental ROI and NPS.

WE ARE YOUR UNFAIR ADVANTAGE

Our mission is you give your business an unfair advantage in the contact center and beyond. ChaseData creates powerful contact center software options with a 20 year track record of delivering unfair advantages to clients like you. We look forward to earning your business.



2 PROFESSIONAL

Experience the fastest, highest efficiency, lowest drop rate predictive dialing kernel available today.

This edition is custom made to maximize sales, lower payroll and decrease training time.

Starting at \$139/user (incl. Unlimited Minutes)



1 SMALL BUSINESS

Enterprise-class outbound dialing plus powerful inbound automatic call distribution (ACD) software perfectly suited for startups and small offices seeking aggressive growth.

Starting at \$89/user (incl. Unlimited Minutes)



3 ENTERPRISE

Meet your mission critical requirements day in and day out. This is a secure and infinitely scalable enterprise solution engineered for high volume contact centers with complex call segmentation and third party integration requirements.

Starting at \$169/user (incl. Unlimited Minutes)

2016 CONTACT CENTER

THREE HEAD-START ADVANTAGES



Leverage a major head-start with some unfair advantages for your contact center now. Here are three innovative features you can use on day-one of deploying any of our contact center software editions.



HOT LEAD INJECTION

Visitors requesting information from your website are automatically segmented as "HOT LEADS" and loaded in the priority outbound dialing queues of your most effective agents.

- Increase sales
- Increase appointment
- Create VIP access
- Segment by language



ZAPPIER® AUTOMATION

Extended the power of your contact center by integrating over 500 of the web's best Apps (most of which are FREE) to quickly add functionality in order to meet your business goals.

Popular Zappier® Apps

- Salesforce®
- Twitter®
- Oracle® Database
- Zendesk®



DEPLOY AT-HOME AGENTS

Reduce facilities costs, maximize scheduling flexibility and lower payroll by leveraging low cost geographically diverse agents. All while monitoring performance and calls from any location.

- Reduce facilities costs
- Maximize scheduling
- Keep your best agents on the job by eliminating childcare, transportation and other common barriers

Experience the advantages today- give us a call.

1.855.246.3921 TOLL-FREE

CONNECT EACH AND EVERY CALL TO THE BEST AGENT EACH AND EVERY TIME.



IDENTIFICATION

Leverage your company's existing data sources and quickly identify the caller based on instant look-up of the inbound caller ID data or self-identification using our built-in interactive voice response (IVR) technology. This delivers instant, relevant call history, and initiates the appropriate routing rules.

SEGMENTATION

Agile rules-based segmentation efficiently routes incoming and outbound calls based on the criteria you establish (e.g. language, customer lifetime value, open tickets, response to an outbound call, etc.).

ROUTING

Identify the best resource available to satisfy the prospect(s) needs. Calls can be routed to live agents, call queues or ChaseData's advanced IVR system assuring the fastest transaction and/or resolution.

COMPLETION

Once a call has been properly resolved, live agents are able to disposition the results of the call which in turn drives reporting and business intelligence processes. Post-call processes such as satisfaction surveys, etc. are also available further tracking and enhancing future contact center performance.

ChaseData's Intelligent Automatic Call Distribution (ACD) technology is the culmination of almost two decades of empowering contact centers to blend inbound and outbound calls. Proper allocation of agent resources, real-time/no-lag routing of calls and critical reporting work in harmony to deliver a truly powerful solution for your call center. We did not stop there, however. Calls are also segmented by campaign then routed to specific agents based on defined skill sets such as language, technical expertise, etc.

POWERFUL VOICE OPTIMIZATIONS



1. Adjust routing rules in real-time with zero interruption to contact center operations
2. Capture critical contact center reporting data regardless of the originating source (e.g. web, voice, IVR and other channels).
3. Align staffing with bursts in call traffic by using "on-call" remote agents, balancing call loads between multiple call centers and contract Business Process Outsourcing (BPO) operations in a snap.
4. Increase your contact center's Net Promoter Score (NPS) by eliminating low/no skill set agents from the transfer pool while providing qualified agents with the customer information required to achieve first call resolutions every time.

Easily connect and expand your contact center

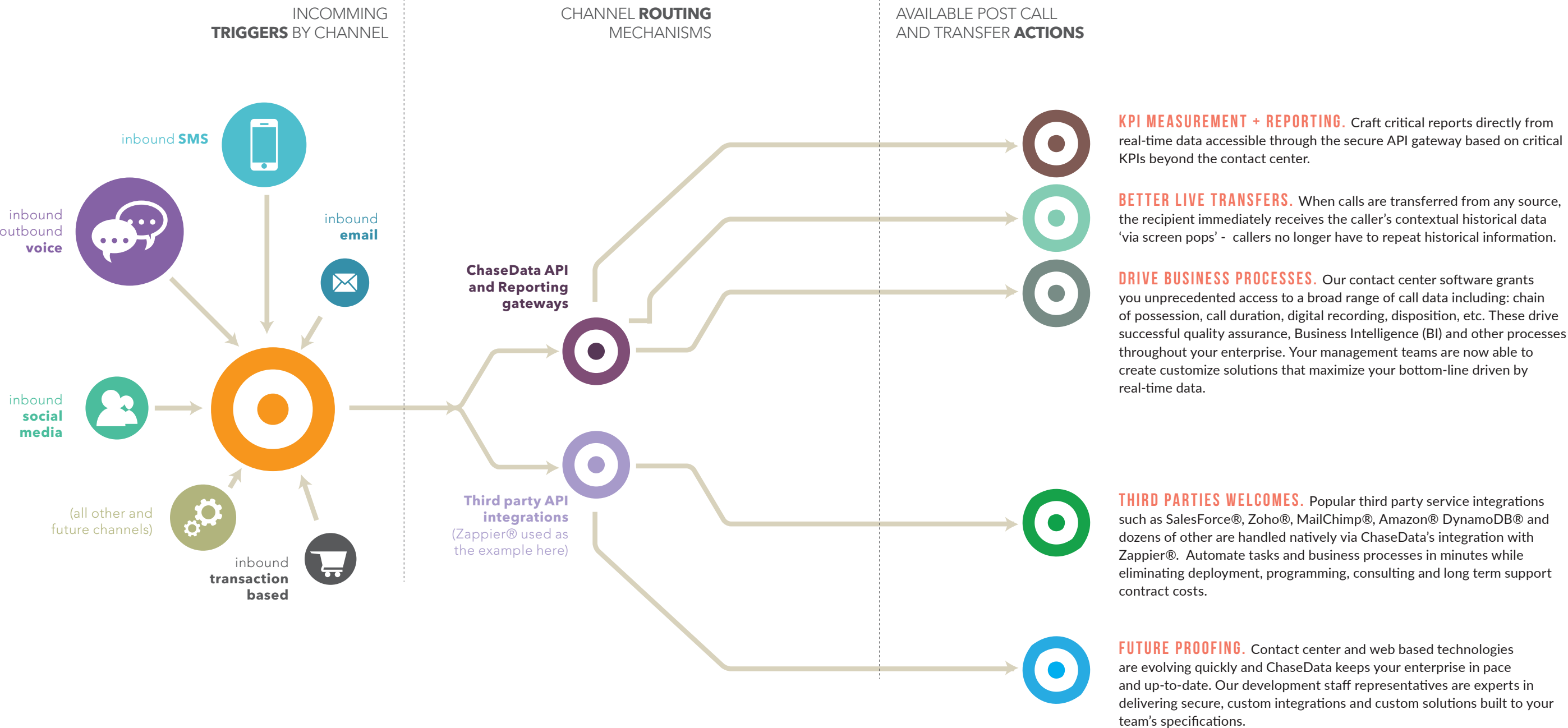
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FASTER + EASIER VOICE INTEGRATIONS USING THE NATIVE API & 3RD PARTY APPS.

Powerfully integrate voice into the web based world

011

Super-charge the voice channel with trigger based segmentation, automated call routing and native API + 3rd party architecture. Applications and features previously unimaginable are now achieved at virtually no additional cost and in record time. Now move web inquiries into outbound predictive dialing queues using our “hot-lead injection technology”, generate real-time contact center KPI reports and much more while immediately connecting the inbound or outbound call to the perfect agent each and every time. The net results are higher productivity, increased customer satisfaction and lower overall costs while consistently achieving your contact center’s business goals.



The tools to supercharge your contact center

012



OUR CAPABILITIES YOUR ADVANTAGES

Maximize the voice channel in your contact center as well as your central hub driving agility in implementing business processes. Supercharge reporting and quality assurance metrics, while easily integrating multi-channel communications.



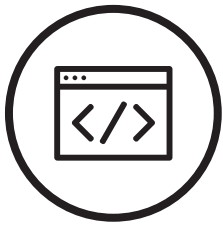
FAST AND EASY DEPLOYMENT

95% of our new customers are up and running within 24 hours of giving the green light to ChaseData Corp proceed with implementation. You supply the scripts, call data sources, and other fundamental information. Our team handles the set-up, pre-flighted and delivery of a system to configured to your exact requirements.



BASIC TRAINING IS A SNAP

Contact center management and agent training is remarkably easy because our software is intuitively designed by/for contact center users. Most new clients require 4 hours of basic training within the first 30 days of launch. Scheduling ongoing professional training is always quick a telephone call away.

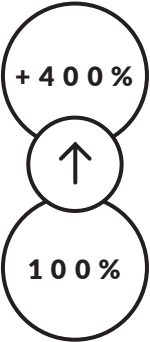


NO CODING REQUIRED

99.99% of the features you require are already built into ChaseData's software. No-Code integration of powerful third party applications such as Sales Force® are handled by our API or user friendly services such as Zappier®.

PREDICTIVE DIALING

Increase contact rates by over 400% with an exponential increase in agent productivity by decreasing wait time.



MANUAL DIALING



SMARTER FASTER

Our ACD algorithm detects agent success factors significantly faster than your managers could then instantly routes calls to top agents. This is ChaseData feature adds to your unfair advantage. You set the rules - we increase your success metrics.

CLIENT QUOTE



"Greatest dialer I have ever used! They have a great team and the software is very user friendly. The company and software are worth every penny!"

— Ryan Allen, President at Allen Marketing Group

GOALS

TECH IS BETTER

Applying automation technology instantly boosts contact center virtually every success metric. Adopting ChaseData's software also adds critical reporting + business process integration critical to your business success.



0% DOWNTIME + LOWER PAYROLL

Our software virtually eliminates agent downtime by empowering administrators to combine the distribution of inbound and outbound calls seamlessly. Your customers are always quickly connected to an agent (based on skill set, campaigns or BPO contract definition). When not receiving calls, agents may make outbound sales, support and customer service calls automatically - streamlining cost and boosting production.



THE TOOL FOR SUCCESS

Managing a contact center's ongoing success requires for clear objectives and the tools to achieve them. After all, training and the management methods you develop must not only work today but also well into the foreseeable future. When choosing a software solution for your company, consider these criteria during deliberations:

EASILY DEPLOYABLE SOFTWARE

ChaseData is the most advanced, cloud based contact center software on the market for over 20 years. Virtually 99% of our new clients are up and running with 48 hours.



THE ABILITY TO SWITCH GEARS

Campaigns, leads data sources and rules can be changed instantly with 0% contact center downtime by authorized managers.



FUTURE PROOF TECHNOLOGY

ChaseData's API, 3rd party integrations and 24/7 product evolution assures that our software will keep your company on the leading edge of contact center automation for years to come.



LEAD SEGMENTATION

Personalize campaigns and develop targeted messages to defined segments resulting in more successful sales and customer service operations.



WWW.BETTERCALLCENTERS.COM

SELLING BOOKS JUST BECAME A LOT EASIER.

KEY CHASEDATA CONTACT CENTER TECHNOLOGIES USED

- **UNLIMITED Digital call recording** feature is used to drive Quality Assurance policies and improvement.
- **Automatic Call Distribution** segments callers by reverse look up of inbound caller ID and drives segmentation by language, reader genre and segregates consumer vs. B2B inbound traffic.
- **Ad-Hoc Remote Agent** feature is used during peak book fair season in outreach efforts to the press, book reviewers and buyers.
- **Zappier® integration** drives post call and post sales processing using MailChimp®, SMS Factor (confirmation of shipments), Stripe®, and ShipStation®.

PRACTICAL APPLICATION: SMALL BUSINESS EDITION



An online bookseller uses ChaseData's contact center management software to increase customer satisfaction and drive significant incremental R.O.I.

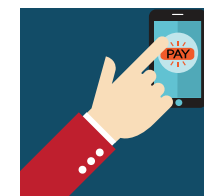
DELIVERING SALES AND SATISFACTION ONLINE

Predicting customer needs is a critical cornerstone of this online retailer's success and ChaseData software plays a critical role. Their baby boomer and Gen-X customer base demand customized care and agile response to inquiries via voice, e-mail and social media channels. Since integrating Zappier® and ChaseData's intelligent ACD technology their NPS (Net Promoter Score) outperformed historical NPS by 150 basis points.



ROUTING WEB TO CALL

Clients access live agent via the web instantly using "hot lead injection." (see page 7)



ABANDONED CARTS

Proactive outbound calls to abandoned cart customers in order to boost sales conversions.



PROJECT FOCUS

During the Q4 shopping season inbound customer service calls were reduced by over 60% by implementing a proactive "notify of shipment" strategy. Not only were tracking numbers supplied via e-mail, customers also received an automated courtesy call the day before projected delivery date and an SMS confirmation of delivery minutes after a package arrives.

A BOOT CAMP FOR INSURANCE SALES REPS.

KEY CHASEDATA CONTACT CENTER TECHNOLOGIES USED

- **Anywhere, Anytime Digital Sales Coaching** let's supervisors and closers deliver in-ear coaching, anonymous monitoring and "call take over" from their desk at the call center, or remotely using a mobile phone or Microsoft Surface tablet.
- **Agent Specific Inbound Routing** great closers receive "hot lead" call backs, initiated by his/her team of recruiters (cold callers). This effortlessly increases enrollment conversions.
- **Predictive Dialing** maximizes high volume outbound sales contact rates and optimize follow up calls critical to sales, enrollment and admissions success.

PRACTICAL APPLICATION: PROFESSIONAL EDITION

This sales academy specializes in converting "good sales performers" in various insurance markets into "remarkable sales professionals." ChaseData technology is a critical driver of enrollment into the academy, sales performance among students and the financial success of the organization.

DELIVERING SALES AND SATISFACTION ONLINE

Outbound predictive dialing coupled with affiliate and data mining efforts drive pro-active recruitment of new insurance sales agents motivated to take their sales to the next level. Complex campaign-based behavioral rules assure that calls, e-mail and other communications arrive at the point of "peak conversion." This significantly reduces prospect list and cold call agent fatigue while boosting paid enrollment.



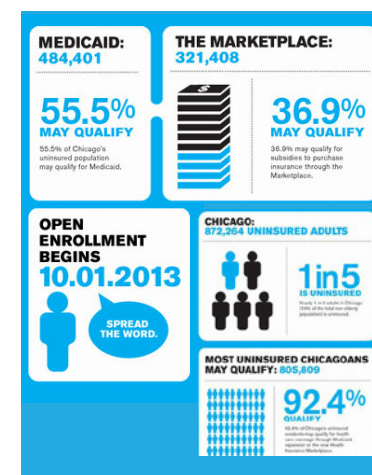
TIMING IS EVERYTHING

Predictive dialer based prospect call backs are timed to maximize conversions.



COMMISSION COLD CALLS

Closers maintain exclusive access to their callbacks resulting higher commission payouts.



PROJECT FOCUS

Contact center software enhanced Mastermind Groups shape the curriculum and focus of the academy by harnessing the experiences and innovations of industry professionals on a monthly basis. Meeting call action items are managed via subsequent conference calls, e-mail and group updates of the academy mastermind's wiki. Every process is driven by campaign data from ChaseData's software.



GREAT VACATIONS IS THEIR BUSINESS.

KEY CHASEDATA CONTACT CENTER TECHNOLOGIES USED

- Desktop IP phones are fully integrated in order to extend the call center's reach + powerful reporting capabilities throughout the enterprise. Now, client information is instantly transferred along with the call to every extension's workstation. Bye, bye outdated PBX hello caller/backoffice integration.
- Automatic Call Distribution uses inbound caller ID to drive real-time segmentation and routes calls to specific agents based on your rules (i.e. language preference, support ticket status, sales pipeline position, campaign participation, etc.) .

PRACTICAL APPLICATION: ENTERPRISE EDITION



This client is in the business of turning dreams into vacation realities for their nearly 200,000 vacation club members, who enjoy access to 60 resorts located in over 40 luxurious destinations throughout the United States.

DELIVERING SALES AND SATISFACTION ONLINE

Vacations make people happier and this client is an expert in delivering happiness to timeshare owners. Our Enterprise Edition software is central to attracting new owners and efficiently integrates into the company's suite of title, billing/collections and financial services for existing owners. Efficiency equals increased profitability which results in a happier enterprise all around.



REPLACE THE PBX SYSTEM

Transfer contact center calls + data to standard desktop IP phones throughout the company.



INTEGRATED B.I. SYSTEMS

Integrated call center data drives core business intelligence systems.



PROJECT FOCUS

Using ChaseData's Enterprise Edition software - IP phones as well as desktop software was deployed across the entire 4,5000 employee strong organization. Now calls are no longer simply transferred - contextually relevant customer/vendor/partner data is delivered simultaneously to the recipient's PC. The net results were significant increases in customer satisfaction and NPS.

GETTING STARTED IS FAST, EASY & PAINLESS.



REQUEST A FREE	EXPERIENCE A FREE	SET UP + DEPLOY + ENJOY
DEMO	TRIAL	Call us today and you are on the way to significantly boosting your company's profitability.
1.855.246.3921 TOLL-FREE	INFO@CHASEDATACORP.COM	





THE FEATURES THAT DRIVE SUCCESS.

These core features have organically evolved over the past 20 years of our experience in supporting our clients’ contact center needs. From single-click customized call dispositions to sub-campaign utilization reporting and beyond, our products and services all reflect the requests made by thousands of our clients and have subsequently become standard features. These features are unique to our contact center software and are a powerful addition to your contact center’s management arsenal.

	ENTERPRISE EDITION Perfect for large scale blended contact centers.	PROFESSIONAL EDITION Perfect for high volume outbound sales centers.	SMALL BUSINESS EDITION Perfect for low volume blended contact centers.
UNLIMITED NATIONWIDE MINUTES	●	●	●
UNLIMITED DIGITAL CALL RECORDING	●	●	●
AT-HOME AGENT + MULTIPLE LOCATION SUPPORT	●	●	●
LIVE CALL TRANSFER	●	●	●
INTEGRATION FEATURES			
SOAP based Salesforce® API	●		
Native API (Sugar® CRM, Zoho® and Oracle®)	●		
Zappier® (Over 500 integrations and growing)	●	●	●
OUTBOUND DIALING MODES			
Predictive dialing	●	●	
Progressive dialing	●	●	●
Agentless dialing	●	●	
Preview dialing	●	●	●
INBOUND TECHNOLOGIES			
Automatic Call Distribution	●	●	●
IVR	●	●	
OTHER FEATURES			
Dedicated telephone support	●	●	
Basic reporting package	●	●	●
Custom reporting package	●		
Raw data export included	●		
Online technical support	●	●	●

ADDRESS

8201 Peters Road
Suite. 1000
Plantation, FL 33324

ONLINE

Website
www.bettercallcenters.com
www.chasedatacorp.com

Social Media
twitter.com/callcenter0101
linkedin.com/company/chase-data-corp

ChaseData 