

10 Ways Automated Calling Can Improve Both Customer Experience & the Bottom Line

Leverage the power of human-voice messaging to improve customer satisfaction, streamline workflows, and generate a clear ROI.



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Introduction

Automated calling can save organizations both time and money. It enables businesses to reach customers in a timely, affordable manner with brand-consistent messaging. And, at the highest level, it also enables:

- Versatility in message type
- Flexibility in processing of live responses
- Accessibility for those lacking literacy skills
- Demonstrated honesty from survey respondents.

Yet today, automated calling suffers from a stigma affecting both call recipients and the organizations that consider deploying them. That stigma can be summed up in one word: “**Robocall**.”

In 2017 alone¹, Americans received 30.5 billion automated “robocalls”—the bulk of which were unsolicited at best, and offensive at worst. And, recipients have become vocal about their distaste for these calls. Since 2009, complaints about robocalls have quintupled², reaching upwards of 375,000 per month in the U.S. alone.

Like any derogatory term, the word “robocall” carries a highly-negative connotation. The word is generally used to describe calls that are unwelcome, cold, and frequently deceptive. They violate one’s privacy because consent was never given to receive them, and they often come from companies with whom recipients have no previous relationship or history.

So, let’s first distinguish between an automated call and a “robocall.” Robocalls are to automated calling what Spam is to email marketing: **the misuse of a valuable communication medium in a way that is unwelcome to the recipient.**

How can organizations leverage this efficient and effective medium without alienating their customer bases? The answer lies simply in providing information that customers want, in a way that respects the listener’s preferences and encourages the recipient to engage.

At the end of this eBook, we’ll tell you a little more about **SPLICE Software** and how we achieve an average **93% listenership rate** by delivering automated calls that are:

- Highly personalized
- Emotionally- and informationally-relevant to the recipient
- On-brand for both the organization and the situation at-hand.

But before we get there, let’s look at ten ways that—regardless of solution provider—automated calling can be used to streamline the customer journey, boost operational efficiency, and grow your bottom line, year-over-year.

All automated communication requires some level of consent, which can be obtained from the customer through interactions that occur along the customer journey. Implied/express consent requirements vary by country and by state/province/jurisdiction, as well as by the nature of the business relationship. Please consult your legal counsel for more information on your intended use case(s).

Need help getting express consent? Ask about our Rapid Opt-In Capture and Confirmation (R.O.C.C.) program!

“Robocalls are to automated calling what Spam is to email marketing...”

#1: Sales Promotions

Effective sales promotions spur purchases from both new and established customers, change buying behaviors, move inventory, and grow sales even during a slump. Poorly executed sales promotions hurt both current and future growth, costing organizations time, depleting budgets, and potentially damaging your brand reputation¹.

Automated calling can be used in for the following points in the sales cycle, and can be the difference between an effective promotion and a flop:

- **Closing** - Offer prospects the option to be notified when a product goes on sale, an interest rate drops, or a special promotion goes into effect. Use automated calling to extend those offers to bring prospects back and to close the sale.
- **Up-selling** - Invite customers to join a VIP program to receive special offers or event invitations. Use automated calling to notify the customers when special pricing goes into effect on products they don't already have, increasing share of wallet.
- **Cross-selling** - Using the same VIP group strategy, invite customers to special in-store events to thank them for being customers; use RFM (recency, frequency, monetary) analysis to target the best prospects for additional sales.

Automated calling is a great way to stay top of mind with interested prospects and customers by providing a seamless ability to up-sell and/ or cross-sell existing:



Financial



- Special rate offers for CDs and Savings
- Rate drop alerts for Mortgage shoppers

Healthcare



- Special offers on elective/vanity procedures (Lasik, Botox®, laser hair removal, etc.)

Insurance



- Rate drop offers for online shoppers
- Cross-sales of new products to existing policyholders

Retail



- VIP event invitations
- Sweepstakes
- Friends & family events
- Special financing offers
- Birthday offers

Travel & Hospitality



- Last-minute travel offers
- Reduced rates on searched itineraries

#2: Workflow Management

Corporations commit time and money each year to streamline their business processes, and with good reason; improving workflows can greatly improve the value of a company¹, by:

- Reducing costs
- Improving customer experience
- Reducing risk
- Making the business easier to manage

Between consultants, time and motion studies, innovation programs, and initiatives like six sigma, billions of dollars are invested in process improvements to realize these goals each year. Results from these efforts may vary widely², but one thing is certain: no matter how efficiently you manage the internal operations, **managing your customers is much more challenging.**

There are points along most customer-facing processes when inputs to the system will be required from the customer. This may be anything from a proof-of-purchase for a warranty claim to a financial document for a loan application to labwork in preparation for a medical procedure.

When your processes stall awaiting customer input, it costs you time and money. But more importantly, if the customer isn't aware that he or she is the cause of the delay, your brand can suffer as well.

Postal mail can take days to arrive. While email delivery is faster, surveys show that only 23% of people have a single email address³. Outbound calls are more effective, but costly if made manually by an agent, processor, or other member of your team.

Automated calling allows you to quickly notify your customers about the need for their input in a way that is personalized, timely, and cost-effective.

Financial



- Documents for loan processing
- New account forms
- Late payments

Healthcare



- Pre-appointment forms
- Pre-procedure labwork

Insurance



- Photos of claim damage
- Proofs of purchase
- Police reports
- Late premiums

Retail



- Warranty forms
- Credit applications
- Layaway pickup
- Consent collection

Travel & Hospitality



- Redeemed travel vouchers
- Pre-travel documents



#3: Appointment Reminders

Consumers are busier than ever, so it makes sense that appointment no-show rates are high, regardless of appointment type. Appointments are often scheduled weeks—if not months—in advance. And, it doesn't help that people often maintain their schedules within several different platforms.

No-shows are typically caused by one of three factors¹:

- those who forgot they had an appointment
- those with conflicting last-minute work/personal obligations, and
- those who were unable to contact anyone at the appointment location to reschedule.

No-shows are more than just inconvenient; they create inefficiencies that impact all facets of an organization. Reducing no-shows—and the resulting strain on staff and budget resources—is an improvement target for organizations across industries. **Improved communication during the booking and rescheduling processes has proven to be the solution².** Automated calling allows your customers to confirm or to reschedule appointments easily and conveniently, at the touch of a button.

In addition to reminding customers of the date, time, and purpose of an appointment, some additional features that can be added to automated appointment reminder calls include:

- **Touch-Tone Confirmation** - Ask customers to press a button to confirm the appointment or to reschedule, dramatically reducing the likelihood of a no-show
- **Single-Number Hot Transfer** - Transfer customers to a live agent in a central call center if needing to reschedule
- **Data-Driven Hot Transfer** - Use data within your CRM to transfer customers directly to individual offices, agents, advisors, or adjusters if needing to reschedule.

Financial



- Financial reviews
- Loan applications
- Loan closings
- Mortgage appraisals

Healthcare



- Annual physicals
- Specialist consults
- Special testing
- Bloodwork
- Scheduled medical procedures

Insurance



- Agent consultations
- Coverage reviews
- Adjuster meetings

Retail



- Deliveries
- Consultations
- Repairs
- In-home design

Travel & Hospitality



- Check-in time
- Check-out time
- Departure reminders
- Vacation club informational meetings

#4: Special Events

Special events boost store traffic, increase sales, drive brand loyalty, and motivate staff. For retail brands, the results speak for themselves¹:

- Increased store attendance by 50–100%
- Increased day-of-event sales by 50–270%

So, why do businesses disregard events as a revenue-generating activity? Events require a lift from staff and management and distract from necessary day-to-day tasks. And if they fail, events waste money and time that could be allocated to valuable activities.

Event success can be assured when:

- Targeted customers are identified and invited
- Invitations are delivered at the right time
- Invitations are delivered via the right channel
- Events are promoted via reminder messaging

Automated calls maximize reach and deliver invitations within a defined, best-practice call window—ensuring customers are notified with enough time to attend. Call recipients have the option to connect with store locations to clarify event details with staff, if needed. Post-event calls can be delivered to attendees and include upcoming promotions as well as thank-you messaging.



Financial



- Branch openings
- Customer appreciation events
- Financial reviews

Healthcare



- Blood drives
- Wellness clinics
- Educational events

Insurance



- Customer appreciation events
- Post-CAT claims centers

Retail



- Grand openings
- VIP events
- Customer appreciation events

Travel & Hospitality



- Customer appreciation events

#5: Web Account Onboarding

When a customer creates a new account online, follow-up communication is crucial. Lacking the face-to-face relationship building that occurs in a more traditional opening, a strong communication program sets brand expectations and creates a tone of transparency and partnership. In fact, failure to acknowledge the start of the customer-brand relationship could mean losing a customer entirely¹.

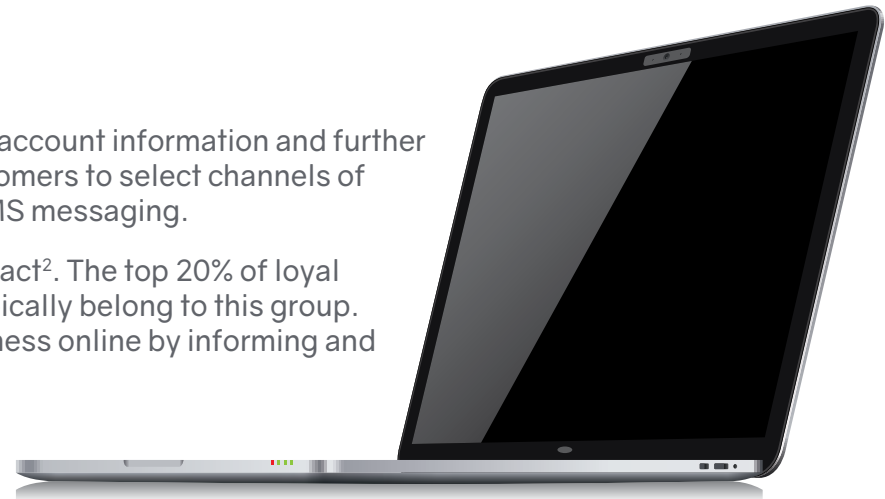
Web accounts are underused or abandoned when users are unsure or unable to:

- Access account documentation
- Change account preferences
- Monitor account history
- Make payments
- Connect with live support

In addition to welcoming new account holders, provide details on how to access account information and further help, including live support via touchtone, if needed. Automated calls allow customers to select channels of choice for future communications or even to opt into additional channels, like SMS messaging.

Keeping a customer costs less than winning a new one—up to five times less, in fact². The top 20% of loyal customers account for 80% of a company's revenue. Web account customers typically belong to this group. They have invested in a relationship with your brand! So, make it easy to do business online by informing and empowering them.

Your bottom line will thank you.



Financial



- Online account openings
- Online loan applications

Healthcare



- Online appointments
- New online pharmacy clients

Insurance



- Online policy purchases
- Online claim submissions
- Follow-up on abandoned quote applications

Retail



- Online purchases
- Online credit applications

Travel & Hospitality



- Online reservations
- Loyalty program registration

#6: Order Statuses

The order & delivery process is one of the most vulnerable stages in the customer journey. Due to third-party involvement, the potential for friction and negative outcomes is high—and often out of your brand's control.

Customer dissatisfaction & delinquency typically results from:

- Order fulfillment mistakes
- Delivery delays & errors
- Tracking inaccuracies

Consumers typically only contact customer service when order & delivery has gone awry. By then, the damage has already been done. Millennial consumers have higher expectations and lower tolerance for error¹. And unfortunately, millennials are more prone to broadcasting frustrations via social media and other online networks—potentially causing irreparable damage to your brand.

Preempt dissatisfaction with automated calls. Keep the customer up-to-date at each stage of the process—with the option to connect to their store or a centralized call center—until the order is successfully received. After the delivery is complete, follow-up with a satisfaction survey and gain insight into areas needing further improvement.

Things will go wrong! But proactively informing and preempting concerns can turn a potential complaint into a positive experience for all parties.



Financial



- Check delivery
- Loan paperwork

Healthcare



- Medications by mail

Insurance



- Insurance cards

Retail



- Order processing
- Delivery status

Travel & Hospitality



- Ticket delivery

#7: Application Updates

Expectation management is key to a positive customer experience. When customers apply for a product or service, start the conversation right away—acknowledge receipt of the request and set expectations going forward. Depending on application type, customers may feel vulnerable due to both the sensitive nature of the information shared and the importance of the product being sought. Uncertainty in those cases could even lead to losing the deal altogether; for example, if a client is applying for a mortgage to purchase a new home, any indication that the loan may not be approved could lead to a secondary application being submitted with another lender. Similarly, if a prospect is applying for a whole life insurance policy, that process can be involved—calling for medical exams and additional information—requiring informational updates to keep the applicant feeling secure.

Uncertainty can be greatly reduced when customers are kept informed through the following stages:

- **Application receipt** – setting expectations for timelines and next steps
- **Application on hold** – awaiting additional information or forms
- **Application in processing**
- **Application in underwriting**
- **Application approval**
- **Loan closing set/policy issued**

A bad purchase experience can set the tone for the entire relationship; for example, the primary frustration for millennials applying for financial services is that they find the purchase process unnecessarily confusing and frustrating¹. Automated calls ensure timely, personalized updates and free-up your team to focus on the application itself.

Alert customers to the application outcome as soon as it is determined and provide next steps; depending on the application type, this could include providing the expected premium or payment amount, or booking the closing immediately.

Financial



- Mortgages
- Home equity loans
- Consumer loans
- Credit cards

Healthcare



- Financing for elective procedures

Insurance



- Life insurance
- Health insurance
- P&C policies

Retail



- Credit applications

Travel & Hospitality



- Special financing

#8: Process Notifications

Interactions with insurance and financial institutions can be fraught with uncertainty for consumers, which is only aggravated by complex processes and industry jargon. Healthcare processes can be similarly frustrating, especially for those unfamiliar with evolving healthcare laws. Adding in the confusion that arises as requests move between departments and desks, is it any wonder that customers often feel lost in a sea of red tape?

Automated notifications delivered at specified points in a complex process to update the customer on progress or provide reasons for delay can help keep your customers at ease and eliminate inbound requests for information and updates.

Whether it's an auto accident claim, a refinance request, or an appeal for a denied healthcare claim, chances are the customer making the request is much less familiar with the process than you are. Keeping the requester informed throughout the process ensures he or she isn't left in limbo.

While those points may differ by industry, some points on the process journey worth considering include:

- When the process is initiated – setting expectations for timelines and next steps
- When something is needed to advance the process – see “Workflow Management” on page 4
- When an appointment has been scheduled – see “Appointment Reminders” on page 5
- When everything has been received and the process is moving into decision phase – setting expectations for how and when an answer will be communicated
- When a decision has been reached & process is complete
- Who is responsible or can be contacted at each step in the process



Financial



- Rate adjustments
- Balance transfers
- IRA rollovers

Healthcare



- Prior authorizations
- Appointment/procedure requirements (fasting, arrival window, etc.)

Insurance



- Insurance claims
- Policy reinstatement
- Policy addition

Retail



- Pre-orders
- Bespoke orders

Travel & Hospitality



- Currency orders
- Itinerary development

#9: Emergency Alerts

Emergencies happen. Pipes leak, utilities go offline, and extreme weather can hit unexpectedly. And, when they do, customers are generally understanding.

But that doesn't change the negative effect on overall satisfaction when a customer arrives at a place of business to find it unexpectedly closed.

Targeted & proactive automated calls can be quickly deployed to regular customers of a location or branch to notify them of these emergency closures and help them avoid a wasted trip, with information including:

- Location(s) affected
- Reason(s) for closure
- Anticipated reopening date/time
- Suggested alternative location(s)

For more severe emergencies, outbound notifications can be leveraged to warn customers of impending catastrophic (CAT) events in order to protect both the customer and the financial interests of the firm.

Messaging can include:

- Pre-CAT alerts
- Recommendations for preparation
- Reminders to follow evacuation orders
- Anticipated post-CAT processes
- Collection of alternative contact information, in case of displacement.



Financial



- Branch closures due to weather, facility issues, or robbery

Healthcare



- Alerts to patients with scheduled procedures in the event of weather or other emergencies

Insurance



- Pre-CAT alerts
- Post-CAT follow-up
- Announcement of post-CAT claims locations

Retail



- Alerts to shoppers with scheduled appointments/deliveries in the event of inclement weather

Travel & Hospitality



- Emergency cancellations
- Travel delays
- Rebooking calls

#10: Customer Satisfaction Surveys

Word-of-mouth plays a major role in buying behavior. When 83% of consumers make buying decisions based on word-of-mouth¹, it's essential to know how customers truly feel. Net Promoter Score, or NPS® surveys, are a go-to evaluator of customer and employee experience across industries. NPS surveys highlight brand detractors, passives, and promoters. While everyone wants to identify their brand promoters or “raving fans,” identifying brand detractors is just as valuable²—both groups are potential referral networks, for better or for worse. NPS scores provide awareness of loyalty-driving factors and points of friction—and improved stakeholder experience overall.

For consumers, a satisfaction survey must be convenient, or it will be ignored. When delivered via automated call, NPS surveys are convenient, fast, and flexible. Recipients can be provided the option to verbally complete the survey immediately, to receive a call back at a later time, or—for mobile phones—to receive a text message with a survey link to complete at their convenience.

Automated calls also reinforce the feeling of anonymity required for honest, transparent feedback—particularly important for surveys where confidentiality could impact results, such as with employee satisfaction surveys.

Aside from increased honesty and engagement, benefits for businesses include:

- **Maximized Call Reach** – Targeted calls can be delivered within a defined, best practice call window using customized caller ID.
- **Increased Insight into Delivery & Engagement** – Data and dashboards can make it easy to test, measure, and adjust.
- **Optimized Time & Cost Savings** – Limited manpower is required to execute surveys.

Some recommended interactions after which to survey your customers include:

Financial



- New account opening
- Branch visit
- Mortgage closing
- Investment appointment
- Online activity

Healthcare



- Doctor appointment
- Labwork/diagnostic testing
- Surgery/procedure
- Prescription pickup
- Billing/payments
- Appointment scheduling

Insurance



- Agent interaction
- Policy purchase
- Policy renewal
- Billing/payments
- Claims process
- Online activity

Retail



- Purchase
- Delivery
- Service/repair
- Return
- Online activity

Travel & Hospitality



- Reservations
- Hotel stay
- Cruise
- Flight/train ride
- Car rental
- Attraction attendance

About SPLICE Software

SPLICE Software creates automated messages with a human touch, delivered via your customers' channels of choice. Our personalized, human-voiced, automated calls get a 93% average listenership rate—meaning people actually want to hear them.

Our cloud-based Dialog Suite™ uses big- and small-data to help companies strengthen customer connections and improve their experience at the most critical points along the customer journey. It's all part of how SPLICE combines art & science to help you connect with customers in new ways.

Our clients include financial services firms, insurance companies, retailers, healthcare providers, and travel/hospitality firms in the United States, Canada, and western Europe.

Our **Data-Driven Dialogs**® enable you to send automated messages triggered from your systems to your customers via their channels of choice—including phone, SMS messaging, and email—based on both the individual's preferences and the particular point along the customer journey.

Our **Customer-Driven Dialogs**™ enable you to respond to requests for information initiated by your customers in real-time, whether it's a human-voiced response via a home assistant device like *Amazon Echo* or *Google Home*, or digitally through our 2-way conversational platform to messages received via text message, web chat, Facebook Messenger, or even WhatsApp.

We make it fun, safe, and easy for you to capture & manage customers' permissions and preferences—enabling you to personalize, test and measure like never before. With industry-leading customer engagement rates and proven organizational agility, we ensure a positive ROI and deliver easy implementation for the end-user.

To learn more, visit our website at splicesoftware.com, connect with us via [LinkedIn](#), or follow [@SPLICESoftware](#) on Twitter.

Hear the difference for yourself! Get a real-time test call by visiting:
<https://splice.cc/demo>

Combining Art & Science in Connecting You with Your Customer.

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