

TruContact™
Powered by Neustar®



How to Optimize Your Outbound Calling Strategy

Overcoming barriers to improve customer engagement
and operational efficiencies

TransUnion® 

The key to effective outbound customer communications is through an omnichannel approach. But the phone remains a popular and vital tool.

According to a recent Forrester Consulting survey, respondents said their top three business goals are improving the customer experience, growing revenue and innovating products and services.¹

But, to achieve those objectives, enterprises are focusing on the following goals:



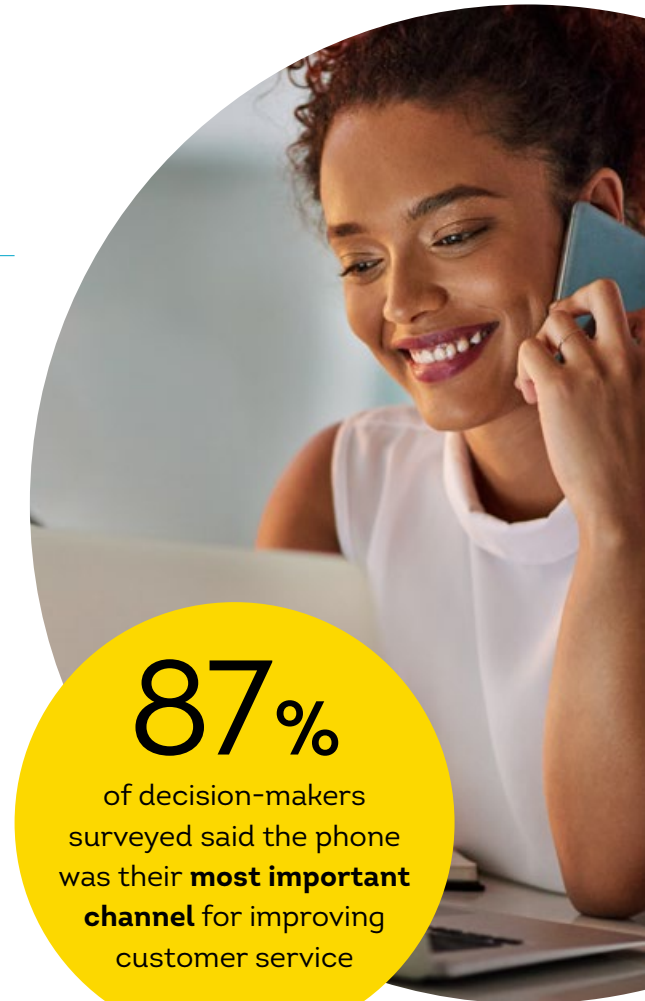
Outbound call experience



The customer service



Overall digital experience



87%

of decision-makers surveyed said the phone was their **most important channel** for improving customer service

¹ A commissioned study conducted by [Forrester Consulting](#) on behalf of Neustar, a TransUnion company, "An Optimized Customer Contact Strategy Combines Transparency and Intelligence: The State of Outbound Communications in 2022," October 2022.

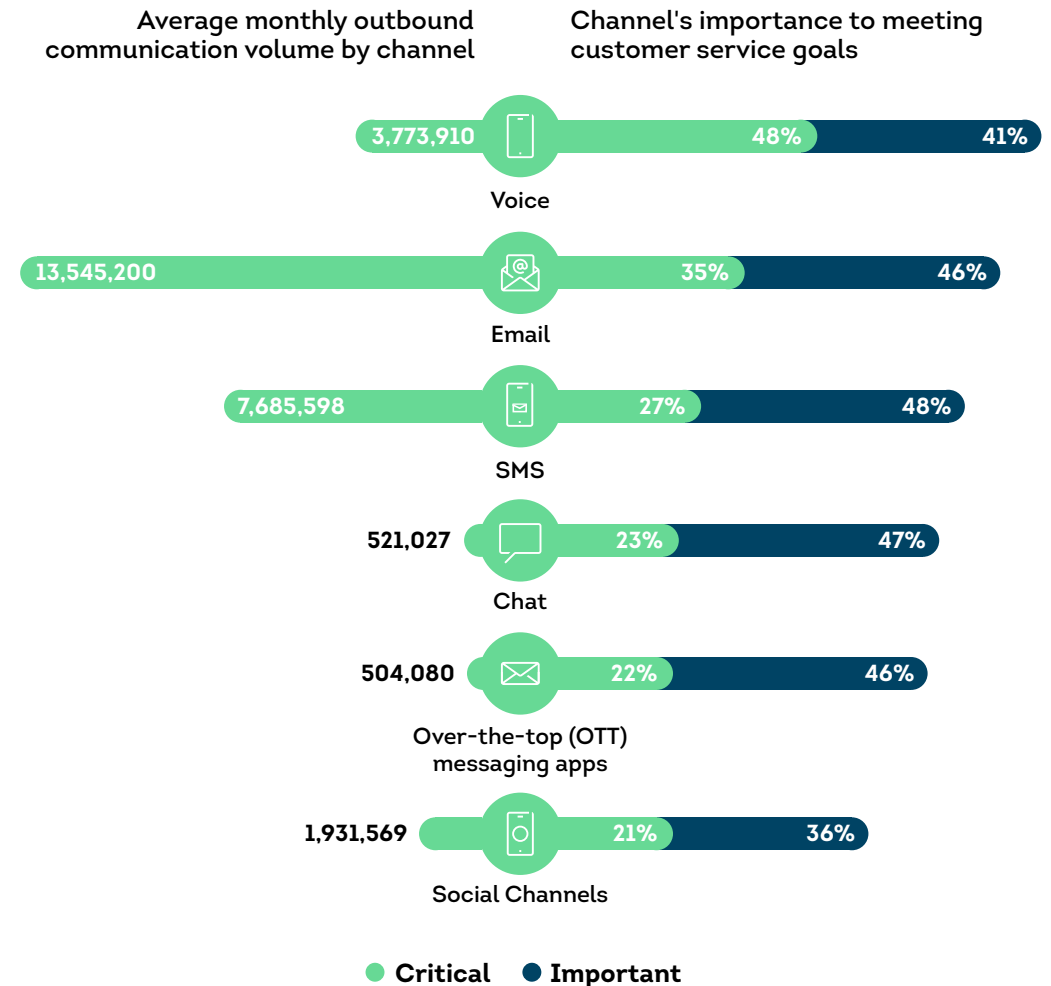
While email and SMS are the most used outbound communication channels, almost all survey respondents said the phone channel remains the most important. In fact, 87% of respondents surveyed said the phone was their most important channel for improving customer service.

However, today's consumers expect communications through the channels they prefer and often a combination of channels is most effective when it comes to connecting with your customers.

That means aligning call and digital channel strategies is more crucial than ever — and now a top five customer experience goal for respondents.

Voice remains key to meeting customer service goals

Base: 455 business and technology decision-makers responsible for outbound contact experience strategy and technology selection at US organizations



Source: A commissioned study conducted by Forrester Consulting on behalf of Neustar, a TransUnion company, July 2022

However, voice communications are impeded by many factors

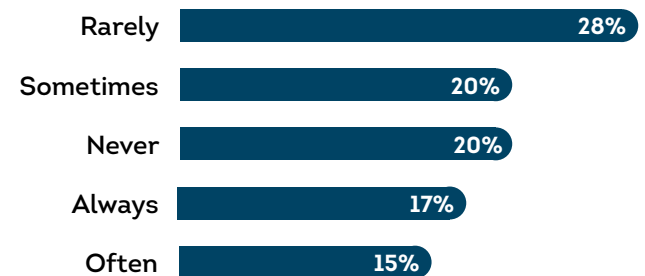
Those include customer mistrust of an “unknown caller,” incorrectly blocked or spam-labeled calls, the threat of fraud, inaccurate contact data, and misaligned channel strategies.

Only one in three respondents in the Forrester study said their digital and voice outbound channels are integrated. And message type more often dictates channel strategy than customer preferences. Messaging silos by product, brand and channel are a big challenge followed by relying on manual processes for multichannel outbound orchestration.

As a result, three in four respondents said their organizations had below what they considered a “good” right-party contact rate (RPC). The inability to connect with customers often leads to a loss of productivity coupled with an increase in operational costs and frustrated customers. Nevertheless, based on the survey, less than half of respondents have implemented customer contact solutions – even though they’ve been shown to increase answer rates and RPCs.

The lack of trust in the phone channel is backed by a recent TransUnion consumer study in which 73% of respondents said they’ve NOT answered a phone call due to safety/fraud concerns, and afterwards learned it was a legitimate number calling them. Furthermore, close to 50% of respondents said they rarely or never answer calls if they’re not certain who’s calling.

How often do you answer the phone if you are not certain who is calling, if at all?



Source: TransUnion TruContact™ Trusted Call Solutions, Powered by Neustar®, Consumer Survey, July 2023

Fortunately,
solutions are available for
enterprises that want to increase
phone communication
optimization and effectiveness.
In this playbook, we:



Present five ways
to improve phone
communications with
customers



Explain the positive impacts
effective phone communications
have on customer service
and company KPIs



Discuss today's
omnichannel approach and
the important role of phone
communications within it

Phone communication is more important than ever

Most enterprises understand there's no one-size-fits-all approach for communicating with customers. Given differences in ages and technical abilities, some prefer messaging, others like email, and still others want to communicate with a live person via phone.

The key is to implement an omnichannel approach that embraces all these options and enables customers to easily move between them. Amid this mix, the phone could be perceived as an old technology and last priority – but phone communication is still a critical component of an omnichannel approach.

As important as your communications are, they can be confined. It's important to investigate customer contact solutions that leverage phone behavior insights revealing when and at what number to reach customers, as well as branded calling so they know who's on the other end of the line.

“You can't conduct business if you can't contact customers. Nothing gets fixed, charged or collected if calls are tagged and blocked and you're not reaching them. Only 1 in in 10 calls get answered, and with collections, that number is even lower.”

Jonjie Sena, Vice President of Product Marketing at TransUnion



Receiving calls from an enterprise can be to the customer's advantage as well

According to the Forrester study, respondents believed using customer contact solutions can help ensure the following results:

Increased RPCs

It stands to reason customers are more likely to answer calls when they can clearly see who's calling. Improved visibility and intelligence on the best number to reach customers typically results in increased answer rates and RPCs.

Improved regulatory compliance

Limited insights into regulatory risks can lead to costly consequences for enterprises that break compliance rules when contacting customers. Those using a customer contact solution are more likely to mitigate compliance risks and avoid penalties.

Increased operational efficiency

Voice channel challenges can lead to increased resource demand as customer care centers are wasting time and dials by not connecting with their customers effectively and efficiently for issues that could be resolved by outbound calls. Customer contact solutions provide organizations the contact intelligence to develop a precision strategy for more productive outreach.

Improved customer experiences

Successful outbound calls serve to increase customer trust – something most companies strive for based on known customer needs. Trust leads to an improved customer experience, which increases customer loyalty. Contact center solutions help generate that trust and assist enterprises in demonstrating customer understanding.

Higher revenues

The results listed above generally lead to an additional, positive result: increased revenues. Customers who trust organizations are likely to maintain their loyalty to them when competitors come knocking. Additionally, when using customer contact solutions, enterprises can look forward to reduced costs and greater efficiency, resulting in a more profitable bottom line.

Five tips to improve phone communications with customers

TIP 1

Keep your CRM contact information constantly current

Incorporate a customer contact solution that relies on authoritative data sources and pushes consumer record changes to the database in real time. Such a solution enables utilities to keep CRM records fresh, robust and actionable. These insights enable you to develop better outbound dialing strategies, prioritizing the right numbers for maximum operational efficiency and revenue per dial. **TransUnion TruContact™ Phone Behavior Intelligence (PBI), Powered by Neustar®**, is a robust, intelligence-based service that helps organizations increase RPC rates (typically by an average of 25% – though results may vary) by knowing whom to contact, which number to use, and the best day and time to contact them. It then appends each contact record for more complete and actionable data.



TIP 2

Know better the when, and what number to use, to contact customers

To gain powerful insights that turbocharge outbound dialing strategies, you must understand the predictive phone behaviors of your customers. That means being equipped with information to better know which phone number each customer prefers to use and the time of day or week they're more likely to pick up. PBI enables enterprises to focus on the most contactable accounts by analyzing proxies on phone use and the various numbers within that account. It then scores those accounts according to their contactability. Using this solution, enterprises can also gain behavioral insights as to when consumers are most likely to answer their phones – both by time of day and day of week.

TIP 3

Better ensure your calls aren't blocked or mislabeled as spam

To help prevent these inadvertent call blocking and spam-mislabeling, ensure phone numbers used for outbound calling are included in an authoritative list of registered business numbers. As a verified business, you should also add phone numbers used for inbound calling only (that is, do not originate numbers) to authoritative blacklists. With **TruContact™ Caller Name Optimization (CNO), Powered by Neustar®**, enterprises designate verified business numbers for all their outbound calling through one centralized online portal. This process mitigates outbound calls being mislabeled, tagged as spam or blocked.

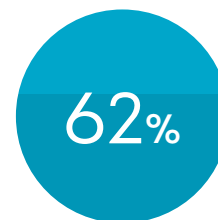
TIP 4

Tell customers who you are

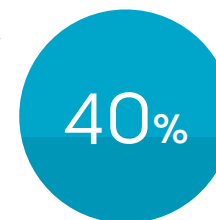
Ensure when you make an outbound call, your caller ID is accurate and consistent across telecom carriers. According to our recent study, 62% of consumers reported being more likely to answer a call if they can be certain who's calling. This can be achieved by maintaining phone lists and having a reliable caller ID program. This approach helps resolve the issue of customers not answering calls that don't show identification, show "unavailable" as the caller, show an incorrect caller name or worst of all, are identified as "SPAM likely." With **TruContact™ Branded Call Display (BCD), Powered by Neustar®**, enterprises can represent themselves more directly by displaying company branded information as part of the caller ID, including the company's full name, business location, logos, social media links and more. BCD also helps prevent scammers and spoofer from using these numbers fraudulently so customers can better trust calls.

We asked consumers what factors would impact whether or not they answer calls. Here's what they said:

What factors impact the likelihood of a respondent answering a call on their mobile phone?



Say they would be very likely to answer a call on their mobile phone when they are certain who is calling



Say they would be very likely to answer a call on their mobile phone when their phone identifies the caller with the name and/or logo

TIP 5

Tell customers why you're calling

Pair accurate identification with the reason for your call to improve key business metrics. When a consumer knows the reason for a call, they're more likely to engage, leading to positive outcomes like increased talk time, issue resolution and conversions. The telephone is still the channel of choice for consumers looking to communicate with enterprises. But, if fewer consumers are willing to pick up the phone because they don't know who's calling and why, that important conversation won't take place. With more robust consumer data, predictive phone behavior insights on when and on what numbers consumers prefer to use, and context-aware and consistent caller ID, contact centers are better able to deliver call experiences that improve contact rates and better align with customer expectations.



In today's omnichannel environment, the importance of phone communications can get lost amid the options of newer methods and technologies. Yet, the phone remains critical to enterprises' abilities to share information about important matters. Success in conveying such information should naturally lead to the attainment of critical company goals, such as improved customer experiences, operational efficiencies, enhanced brand reputation, and continued leadership in providing high-quality services.



Learn More

Learn more about our TruContact™ suite of Customer Contact Intelligence solutions, including **Phone Behavior Intelligence (PBI)**, and our **TruContact™ Trusted Call Solutions (TCS)**, including **Branded Call Display** and **Caller Name Optimization (CNO)** – all Powered by Neustar®.

transunion.com/trucontact



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