Automated Dialing - What will it do for you?

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Introduction

Automated dialing has been an increasingly integral part of many market research organizations over the last 10 years. While being adopted as a means of improving interviewer productivity, an unexpected by-product has been quality improvement by taking some of the tedium out of the interviewers job and insuring a consistent application of dialing technique. This paper will address the economic and quality issues surrounding the use of automated dialing – showing the benefits to social research**.**

Methods of Dialing

The different terms used for automated dialing can be very confusing. Terms frequently employed are: auto, power, predictive, adaptive, super, progressive, preview, etc. There are three fundamental methods of automated or machine-based dialing:

- **Auto** - telephone number is dialed by a dumb modem
- **Power** - dialer can detect and disposition certain dialing results such as non-working numbers
- **Predictive** - dials more than one number per interviewer using sophisticated statistical algorithms and number knowledge base to deliver a live respondent more quickly

Auto Dialer

- Dials one telephone number under interviewer control via modem or black box
- Accurate dialing of telephone number
- Dials number much more quickly than manual dialing
- Approximate productivity gains of 3 to 5%
- No abandonment of calls
- No intelligent sensing of dialing result
- No ability to dial "ahead" of the interviewer

Power Dialer

- Dials one telephone number per interviewer - can be under interviewer control or paced by the programmer
- Builds on all auto-dialer features
- Can automatically detect fax/modem, ring no-answer, non-working, busy signal. Programmatically exchanges messages with CATI system to disposition old number and retrieve new number for dialing
- Conservative productivity gains of 24-50%
- Less tangible benefits of improved working environment
- No abandonment of calls
- No ability to dial "ahead" of the interviewer

Performance Gains - Power

- 1000 23-minute; 94% incidence; Completes per Hour 19% higher
- 950 23-minute; 6.5% incidence; CPH 53% higher
- 2000 10-minute; 95% incidence; CPH 68% higher
- Qualify and transfer to IVR; CPH 100% higher
- Analysis of 1,700,000 dialings: 31 seconds to connect Vs. 56 seconds manually; 43% Reduction
- Large company yields overall 24% increase
- 22 minute; 8% incidence; CPH 96% higher

Predictive Dialer

- Dials telephone numbers in a ratio greater than 1:1
- Builds on all power dialer features
- Uses sophisticated statistical algorithms to calculate quantity of telephone numbers to dial
- Allows adjustment of call abandonment percentage
- Conservative productivity gains of 25% over power dialing
- Can contribute to respondent abuse via call abandonment

Performance Gains – Predictive

- Side-by-side comparisons show 25-50% improvement over power dialing with less than 5% abandonment
- With higher abandonment rates- claims run to 300%

What else can Autodialing do for you?

Can replace need for PBX – saving considerable money

System building blocks provide add-on capabilities

- Remote Audio Monitoring
- Digital voice capture / playback of open ends
- Whole interview recording – an incredible tool for insuring quality
- Support distributed interviewing
- Integrated IVR (Interactive Voice Response)
- Administrative Features
- Automated inbound/outbound switching - Call blending

Interviewer & Productivity Management

- Enforces standardized call rules
- Eliminates dialing errors
- Faster dialing means greater throughput
- Dialing modes can be assigned on a study by study and/or station basis
- Real-time graphic and tabular reporting of interviewer productivity
- Full silent monitoring capabilities

Facilities Management

- Real-time and historical production reporting, by interviewer, study, shift, site, client, and date
- Scheduling module provides information on number of interviewers and supervisors, and those briefed
- Local and remote monitoring capabilities
- Real-time analyses and reporting of trouble on telephone lines

How Dialers Interface with CATI

- For example, the MSG system is a 20 slot, industrial strength Intel-PC with special telephony hardware by Dialogic
- E1, T1, ISDN, or CO lines plug into boards inserted into backplane
- Lines from interviewing stations are punched onto demarc block and cross connected to lines going to station boards
- Dialer is connected to CATI server via serial connection or ethernet using TCP/IP
- CATI system manages sample file

What is Heard by the Interviewer?

Power Mode:

- Some systems can be set to pass call progress tones to the interviewer or just the respondent voice on connects.
- The interviewer will usually hear 'ello'
- The call will sound like a normal call to the respondent

Predictive Mode:

- No call progress tones can be heard
- The interviewer will usually hear some part of the 'hello'
- The call should sound like a normal call to the respondent unless the call is abandoned

Research Vs. Telemarketing

- Research has a limited sample frame. The TM supply is comparatively unlimited.
- A primary goal of research is a high response rate
- Researchers cannot afford respondent abuse - on a project OR industry basis
- Predictive dialing works best with more people, researchers often have 5 to 10 people working on a given project

What is Research doing Different

- We know more about a given telephone number than anyone in the country
- We pay attention to call history
- We will predict the probability of connection rather than predict when an "agent" will be finished
- We are offering predictive dialing with "near zero" abandonment
- Predicting probability of connection works with just a few interviewers
- We can dial numbers in fractional ratios, e.g. 1:1.7 rather than 1:2 or 1:3 like some telemarketing systems which forces high abandonment rates
- Traditional predictive is an optional setting
- We have the flexibility to do it many ways: power, probability of connection, traditional predictive

Beyond Productivity – The Improved Environment

- Improves interviewer retention
- Makes their job easier
- Provides a discipline that isn't innate
- *Improved Job Satisfaction*
- Gives the supervisor time to do things other than push for productivity
- *Improving Project Quality*

Social Research is Different

- It's often heard that social research is different – especially when it comes to length of interview – therefore negating the impact of autodialing. Analysis of dialings shows that 70% of interviews are completed on the first dialing. This allows social research to benefit from the gains of automated dialing.

- Social research call rules often call for double and triple the number of dialings done by market and survey research. This actually gives the advantage to social research of being able to make use of automated dialing. The more dialing of telephone numbers you do, the more productive it can be.

Are Dialers Expensive?

- They are one of the few things in this industry that can demonstrate a return on investment in under a year
- Are you having trouble finding interviewers?
- Would you like to improve project quality?
- You don't need a large phone room realize the productivity gains.