# Inbound Call Tracking with Intelligent Outbound Dialing

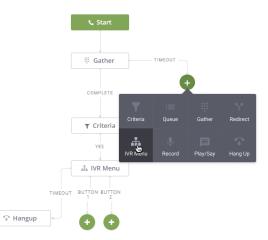
RingResponse meets the demanding requirements of inside salespeople, enabling them to move quickly from outbound dial campaigns to managing and transferring inbound calls. The performance of inbound calls are tracked from any marketing channel, improving call conversion and lead quality. RingResponse will ensure every call is prioritized, routed, and answered by a qualified salesperson. Outbound dialing with RingResponse will elevate your sales team enabling them to make more dials, have more meaningful conversations, and surpass their sales targets.

## **Inbound IVR Operational Features**

#### **Create Call Flows**

Call flow designer provides a visual map to create call trees which direct callers through queues, to various locations or teams based on criteria or call distribution rules.

The call flow features include: upload audio, text to speech, call forwarding, redirect, criteria, hang up, play/say, gather, and time constraints.



Available Number	rs			
Type: Local	• Search by:	Location • AZ	Q Search	🗙 Clear
NUMBER	AREA	INBOUND RATE	RECORDING RATE	
(520) 263-8096	Sierra Vista AZ	<b>\$0.100</b> /minute	\$0.20/minute	Buy
(520) 214-2830	Review Your F	Plan	×	Buy
(520) 365-0223	(520) 487-4483	San Manuel AZ	\$2.00/month \$0.0275/min	Buy
(520) 487-4483	Cancel		Confirm Subscription	Buy
(520) 389-5762	Cancel		commin subscription	Buy
(520) 214-7630	Tucson AZ	<b>\$0.100</b> /minute	\$0.20/minute	Buy

#### Add Funds and Purchase Numbers

With RingReponse, port your existing phone numbers or purchase new numbers right from the solution. You can pick local or long distance numbers in the United States and Canada.

#### **Create Queues**

Queues include salespeople, locations, or customer support agents. Within each queue, an inbound call Routes to the next available agent or the entire queue group.

Queue Features: hold time, hold music, announce callers queue position, and offer a call back based on queue hold time.

QUEUE		×	
Queue Name			
Call Strategy	<ul> <li>Round Robin</li> <li>Shotgun</li> </ul>	Maximum Length	20
Call Settings	Record Calls	Hold Music	Jingle Bells 🔹
	Offer Callback	Max Hold Time	Hold Forever 👻
		Per User Timeout	None 👻
Maximum Length	20	Phones and Users	
Hold Music	Jingle Bells	Select an existing list	of users (phones) 👻
		Manage lists of users (	phones)

#### Text to Speech

RingResponse can convert typed text to speech from the call flow editor. The text to speech feature eliminates the need to pre-record voice options for keypress prompts throughout the call flow.

Upload	Audio
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Add a pre-recorded introduction message that plays for a caller helping to keep them on the call until greeted by a live salesperson or customer service associate.

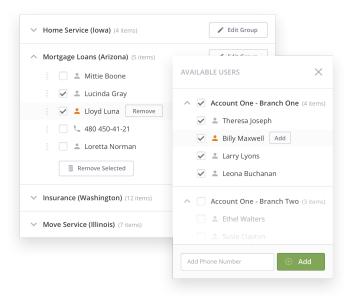
Text to Speech		Upload File
Voice Type	Man Voice -	
	Add Variable	-
Message	Spelling	variable text var 2 ×
Initial Delay	1 sec	•
Repeat	Don't Re	peat 🔹
Reset All Settings		

Text to Speed	h	Upload File
Playing «10-27-2017»		00:19/00:48
Initial Delay	1 sec	•
Repeat	Don't Rep	eat 🗸
1 Reupload	File	Another from Library

## **Administrative Features**

#### Enable and Disable Users

Supervisors can edit call flows and add and remove users from a queue. There is also the ability to restrict supervisors from these functions.



Preview Recorded calls and playback with no storage limits.

Additional Informa	Additional Information			🖌 Show	v Recorded Only
Appointments	History	Call History			= -
	eduled Appoi			01:25	Details
	<ul> <li>Outbound: No Response - Callback</li> <li>11:20 PM, 01/19/2017 - initiated by Agent Two</li> </ul>			00:13/00:57	Details

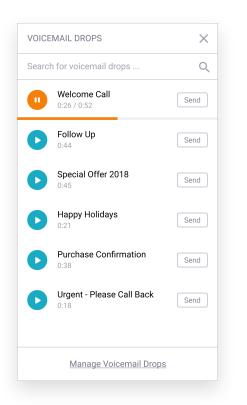
Call Details	5			×
Summary	Lifecycle			
Caller #:	420-2525216	Recipient #:	434-4343434	
Туре:	Inbound	Channel:	Website Phone	
Initiated:	07:19 AM, 10/14/2016	Lead Source:	Facebook ←	
Duration:	2m 13s	Campaign:	Summer 2017	
Agent:	Joe Doe	Call Flow:	Default	
DISPOSITION				
Subject:	No Response - Callback			
	d: Scheduled Appointment M, 10/14/2016 - answered by Joe Doe		0	00:13/00:57

View Marketing Analytics for Marketing Channel, Lead Source, and Campaign origin.

## **User Features**

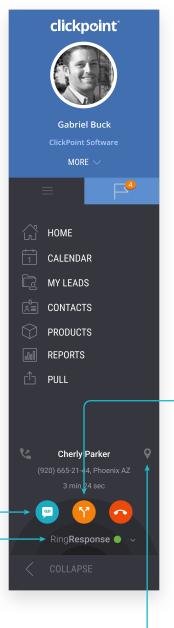
#### **Pre-Recorded Voice Mail**

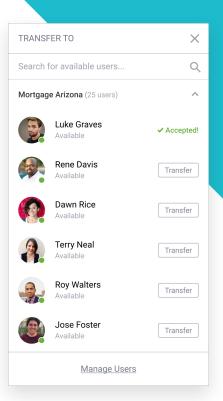
As salespeople are making outbound calls, they have an option for leaving a pre-recorded message once they get an answering machine. The feature makes dialing more efficient as salespeople can quickly move to the next lead without wasting time on messages.



#### Available / Unavailable

Users can make themselves unavailable to avoid receiving calls and notifications for a new call if they are busy.





#### **Call Transfer**

Users can transfer a live call to other team members inside of a queue or outside of queue if configured properly. View available agents, salespeople, and queues in real-time improving transfer rates.

#### Local Presence

Local presence enables salespeople to dial leads using a bank of local area codes. Local presence improves call connection rates by up to 400%.

#### **Pull Next Lead**

Provide the salesperson with the next best lead based on a variety of preset criteria. RingResponse will then screen pop the lead information along with a sales script, notes, history, and other vital information to assist the salesperson with the call.

clickpoint	Your number (602) 555-0123 Q Local Present	e - active		O Appointments: 12 O Calls: 32 O Sales: 9
Gabriel Buck ClickPoint Software	CONTACT INFORMATION Name Cherly Parker Phone (602) 555-0171 Email <u>cherly, parker@example.cc</u> Company AGM Group	LOCATION Location Phoenix, AZ - <u>85254</u> Timezone MST Local Time 10:00 am (Apr 23, Mon Weather 🖄 81°	MARKETING Source Facebook Channel Purchase Form Campaign <u>Winter Deals</u> Record Type Insurance	SYSTEM Created 28 Apr, 2017 - 12.23am Status Nurturing - 70% Assigned To Gabe Buck Dist. Strategy Mortgage
	Fields (8/21) Search a Field	Notes (12) Emails (	5) History (123)	Set Disposition and initiate a call to a next lead
С НОМЕ	GENERAL - (8/9)		~	Script Progress
CALENDAR	First Name Cherly Phone	Last Name Parker Email	Company AGM Group State	Hi <b>Jeff Watford</b> , this is <b>John Hopkins</b> from <b>Phoenix Mortgage</b> . I'm calling because we have some exciting new programs available
	(602) 555-0171 City	cherly.parker@example.com	Arizona	that could save you thousands on your mortgage. Do you have time for a 10-minute chat with to see how we can help save you
亡 PULL	Phoenix	85254		money?
	FINANCIAL - (0/6) Loan Amount 50.000	Interest Rate	Loan Length	
	Annual Income	Credit Score Good	Loan Purpose	
Cherly Parker O (602) 555-0171, Phoenix AZ	INSURANCE - (0/6) Building Type	Floor Area	Address	
3 min 24 sec	House		Autress	
Ring <b>Response</b> • ~	Year	Coverage 150.000	Monthly Payment	Yes No
< COLLAPSE				



✓ Yes

#### **Dynamic Sales Script**

Help junior salespeople quickly understand your sales process and enable them to make more calls with confidence.

Power Dial

dial the prospect.

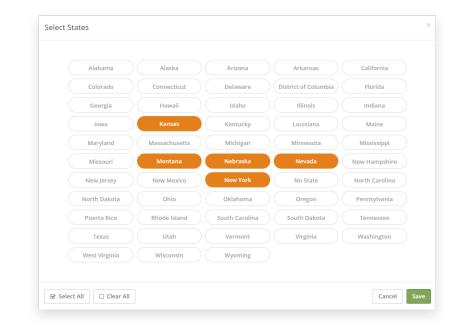
Salespeople can select a list of prospects to dial sequentially, and RingResponse will efficiently move to the next call and

alling (602) 432-6997	
	Emails Appointments Calls Sales
	☎ 0         ☎ 0         ☎ 0         ☎ 0           osition 1         Position 1         Position 1         Position 1
Lead Options	Contact Information Sales Information
🕼 Notes (1) 🔻	First Name
🖾 Email 👻	Robert
🗲 Other Actions 👻	Last Name
	Buck
	Phone
	(602) 432-6997
	Email
	gbuck33@live.com
	Address
	SADS E Dall Dd Cuita 140

#### MARKETING C., FIRST NAM., LAST NAME . TEXT... CALL... EMAIL. COM. □ ● 🖉 + + 🔤 🕻 📮 Inbound Call (870) 464-2520 0 <u>0</u> 🗝 0 (928) 223-9368 1.00 0 0 - • + + <u>-</u> L <del>-</del> (480) 645-2778 0 🕂 0 Brown Smith (602) 432-6987 0.00 0 🗋 👁 💉 🗲 🔤 🐛 💷 Third Party Smith (602) 432-699 Joe Ricky 🗆 👁 🖉 + + + - - - - - - - - - - - Inbound Call (602) 432-5997 Taver 🖉 👁 🖉 + + + - - - - - - - - My Website Robert Alvarez (602) 432-6997 0 ● / + + = ↓ □ Inbound Call Brad Buckne (602) 422-9889 (928) 779-0311 HATLE □ ● ✓ <l Westor (928) 779-0311 (602) 132-6997 Battle 0 +0 9 🗆 👁 🖉 + 🖌 + 🔤 - 📞 📮 Lead Sources 9 (602) 422-6997 0.00 Sally Barnes (928) 783-2979 0 +0 0 Lopez 🗌 👁 🖋 + 🗸 🔤 🖕 📮 My Website (602) 132-6997 2 🕪 0 Jennifer Blackston 🗋 👁 🖉 🕈 🖉 🐷 🐛 🗖 🕇 Lead List Christopher (602) 432-6293 4 ⊕ 0 0 9 Jennifer (602) 753-4441 Johnson Jim □ ● 🖉 + + = 🔤 L 🗐 Inbound Call Chris (602) 432-3333 <u>4</u> ⊕ 0 Smith 🗋 👁 🖉 + + + - - - - - My Website (602) 432-6997 9 +0 2 Gabe Buck 49

#### Click-to-Dial

Select any prospect in the ClickPoint Lead Manager and call with one click.



#### **State Restrictions**

Ensure your team makes calls to states in compliance with state calling hours.

## **Call Distribution**

#### Shotgun

Notification of a new call delivers in real-time to team members in a queue. The first salesperson to answer the call will connect with the prospect.

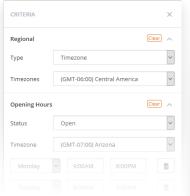
#### **Round Robin**

A method of call routing that will look for available users in a queue and attempt to deliver calls sequentially.

#### **Call Forwarding & Redirect**

Call forwarding allows external call forwarding in the case where queues or team members are not immediately available.

REDIRECT	×	
Target Flow   Select     Show Timeout Action	FORWARD	×
	Phone Number (520) 487 Show Timeout Action	-4483



Timezone		iMT-07:00) Ariz	ona	
Monday	$\sim$	9:00AM	6:00PM	Î
Tuesday	~	8:00AM	5:00AM	Û
		🕂 Add Ran	ge	
By Variable			(	Clear 🔨
Presence Mortgage Amount				
Presence	М	ortgage Amou	nt	~

### Criteria

Criteria selections are useful for routing calls when users select keypress options. Other criteria options include: area code, state, and information gather by utilizing reverse 411 to determine the origin of the caller.

## Texting

Template		
Group		Owner
Message Templ	ate Examples 👻	Joel Reynolds 🔹
Message		
Hello, {FirstNam	e}.	
To stop receivin	g message please reply with – {cmd:STOF	?END,UNSUBSCRIBE}
29 characters left		
KEYWORD LOOKU	JP	
UNSUBSCRIBE	Add the lead to the "Do Not Text" list	Insert
STOP	Add the lead to the "Do Not Text" list	Insert
CAR	Set Email Nurture Strategy - Car Insurance	(Arizona - Initial)
HOME	Set Email Nurture Strategy - Home Insuran	ce (Arizona - Initial)
Add Keyword		
Last updated Apr 23,	2017 by Gabe Buck	Cancel Save Template

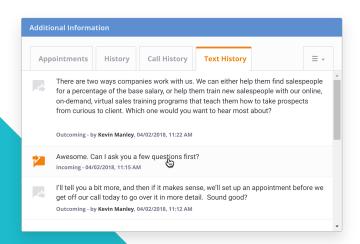
#### **Text Message Library**

Create text messages to be used by any team member with opt-out and compliance features. Send consent request before new messages are delivered and include opt-out on every text.

Send N	lessage Template ×
Group	Message Template Examples -
,	ou for your purchase. We have received ment for item #13201. Best Ways Shop.
the Paint	kids happy this summer with free entry to ball Centre throughout the whole of Call us back to book a date: 555-4545-777.
Gottingh	avourite books at your reach! am Bookstore is now mobile. Best deals is only, hurry up: m.bookstore.com.
23 Newir 10:00am	Bank reminds you of your appointment at ngton Way on Monday, 13th of August at . Your account manager is Timothy , phone 0748379393.
Canc	Send



Manually deliver text messages or set a text message to be delivered as part of a lead nurture strategy.



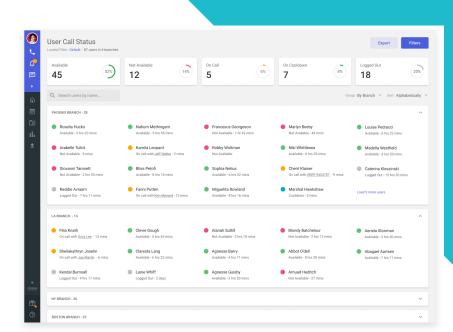
#### View Text Conversations

Track texting conversations as well as customer responses and view statistics in reporting.

## **Call Reports**

There are many out of the box reports that help administrators understand how lead sources or salespeople are performing. Call reports provide insights into local and toll-free numbers used in marketing campaigns.

Track performance by the salesperson and by the numbers used in marketing campaigns. Track transferred calls, abandoned calls, call response time, and results from both inbound and outbound calls.



## Integration

#### Nextiva

Nextiva is a Cloud Communication and business phone service provider. RingResponse is integrated so that outbound and inbound calls sync with the Nextiva application.

#### **REST API**

RingResponse features a self-documenting REST API found here: <u>REST API</u>. The REST API makes it easy to make changes to lead and call data, as well as access data for third-party applications.

## About ClickPoint Software

ClickPoint Software is committed to improving the lives of salespeople and their managers by creating sales software that enables sales teams to generate more revenue for themselves. ClickPoint is actively transforming sales organizations through the implementation of their products; ClickPoint Lead Manager, RingResponse, and LeadExec Lead Distribution. Not just a software company, ClickPoint employees embody a shared commitment to the success of every customer by providing Amazing support. From its headquarters in Scottsdale, Arizona ClickPoint has been empowering companies both large and small to dial more leads, sell faster and more efficiently, which leads to more revenue and commission.