



improve it 360
an EverCommerce Solution

Evaluate Campaign

Re-Calls & Adjust Settings

Evaluate Campaign Re-calls



The biggest mistake most Call Centers make is not knowing their agents **Calling Capacity** and creating more Re-Calls than the agents can reasonably handle in one day.



Campaign Results by Campaign: Shows which Campaigns are being called and provides the total Disposition count for each Campaign. This report can be used to determine how many Calls your team can reasonably make in a Day, or a Week's time. (Be a conscientious manager, know if your team is **clicking but not calling!**)



Re-Calls by Campaign- used to identify how many Re-Calls are scheduled within your Campaigns.

How do we know if we have too many Recalls?

Campaign Results Report

Re-Calls by Campaign Report, re-grouped by Scheduled Recall date/time

<input type="checkbox"/>	Scheduled Re-Call Time: 11/29/2023 (15 records)
<input type="checkbox"/>	Scheduled Re-Call Time: 11/28/2023 (15 records)
<input type="checkbox"/>	Scheduled Re-Call Time: 11/27/2023 (117 records)
<input type="checkbox"/>	Scheduled Re-Call Time: 11/24/2023 (25 records)
<input type="checkbox"/>	Scheduled Re-Call Time: 11/23/2023 (5 records)
<input type="checkbox"/>	Scheduled Re-Call Time: 11/22/2023 (36 records)
<input type="checkbox"/>	Scheduled Re-Call Time: 11/21/2023 (12 records)
<input type="checkbox"/>	Scheduled Re-Call Time: 11/20/2023 (117 records)

These two (2) Reports will tell you if you have more re-calls scheduled than what your team can reasonably handle.

53 Dials per Day

Action Reason					Grand Total
ointment	Released	External completion	Return Call Later	No callable phone numbers	
5	0	4	3	0	25
0	0	1	0	0	1
1	0	0	0	1	6
0	0	0	3	0	6
0	2	2	3	0	15
6	2	7	9	1	53

How to Adjust Campaign Re-call Settings

Ensure your team can get through all the Re-calls each day!

Re-Call Duration - Busy Signal days hours mins

Re-Call Duration - No Answer days hours mins

Re-Call Duration - Left Message days hours mins

Re-Call Duration - Return Call Later days hours mins

Hiring more Call Center agents?

Increase the Campaign's **Re-call frequency** to call more often, completing the re-calls sooner!

Not Hiring additional Staff?

Decrease the Campaign's **Call Limit Setting**, ensuring the Lead is released so you call the freshest inquiries.

Auto-Release

Auto-Release Call Limit



Clean the Campaign Members List often

Look for old Re-calls and Mark as Completed

There should only be **FUTURE Re-calls** at the end of each Business Day!

2. Resolve pending Re-Calls

Total pending Re-Calls: 52

View by Re-Call reason: Return Call Later

Mark as completed Move to another campaign...

<input type="checkbox"/>	Campaign Member	Calls ↓	Re-Call Set At	Re-Call Set By	Scheduled Re-Call Time	Re-Call Assigned To
<input checked="" type="checkbox"/>	Canavan, Patrick	1 [Details]	8/27/2018 1:38 PM	Kyle Cann	1/7/2019 2:36 PM	Kyle Cann
<input checked="" type="checkbox"/>	Aldana, Mildred	1 [Details]	9/4/2018 1:02 PM	Kyle Cann	4/8/2019 2:00 PM	Kyle Cann
<input checked="" type="checkbox"/>	Randolph, Edward	1 [Details]	10/2/2018 11:54 AM	Kyle Cann	11/6/2018 12:52 PM	Kyle Cann
<input type="checkbox"/>	Kothapa, Vinod	1 [Details]	4/10/2023 2:58 PM	Joseph Guerridos	12/3/2023 4:58 PM	
<input checked="" type="checkbox"/>	Anthony Rosa	1 [Details]	7/31/2018 2:13 PM	Kyle Cann	1/6/2019 3:11 PM	Kyle Cann
<input checked="" type="checkbox"/>	Anthony Rosa	1 [Details]	7/31/2018 2:13 PM	Kyle Cann	12/3/2018 3:12 PM	Kyle Cann
<input checked="" type="checkbox"/>	Anthony Rosa	2 [Details]	8/3/2018 12:25 PM	Roxanne Acevedo	12/3/2018 8:25 AM	Roxanne Acevedo
<input checked="" type="checkbox"/>	Anthony Rosa & Erica	2 [Details]	8/2/2018 9:55 AM	Kyle Cann	3/5/2019 10:53 AM	Kyle Cann
<input type="checkbox"/>	Moorman, Victoria	2 [Details]	1/2/2019 12:21 PM	Robin Smith	7/2/2019 1:21 PM	Robin Smith
<input checked="" type="checkbox"/>	Anthony Rosa	2 [Details]	8/1/2018 12:35 PM	Anthony Ruiz	2/4/2019 8:00 AM	Anthony Ruiz
<input checked="" type="checkbox"/>	Ryan, Dennis	2 [Details]	11/2/2018 10:21 AM	Robin Smith	11/2/2019 11:21 AM	Robin Smith
<input type="checkbox"/>	Raphael, Carmel*	2 [Details]	11/6/2023 3:53 PM	Joseph Guerridos	11/27/2023 5:53 PM	
<input type="checkbox"/>	Oliva, Fernando*	3 [Details]	11/21/2023 4:26 PM	Joseph Guerridos	11/22/2023 6:26 PM	

1-27 of 27

Look for incorrect Call disposition use

Know when to use **Remarket** versus **Return Call Later**

Re-Train your Telemarketers on the most appropriate disposition to use every time!

Campaign Name: Fresh 0-5 (36 records)

<u>WILTCHER, DUSTIN</u>	<u>WILTCHER, DUSTIN_0</u>	<u>Isabel, Isabel</u>	Return Call Later	4/11/2024	10:12 AM
<u>Partridge, Kevin</u>	<u>Partridge, Kevin_0</u>	<u>Isabel, Isabel</u>	Return Call Later	4/27/2024	11:04 AM
<u>Kaur, Kiran</u>	<u>Kaur, Kiran_0</u>	<u>Christina, Johnson</u>	Return Call Later	11/11/2023	9:08 AM
<u>Bryant, Robbie</u>	<u>Bryant, Robbie_0</u>	<u>Christina, Johnson</u>	Return Call Later	11/15/2023	10:59 AM
<u>sample, Deon</u>	<u>sample, Deon_0</u>	<u>Christina, Johnson</u>	Return Call Later	1/3/2024	12:13 PM
<u>Weatherspoon, Ursula</u>	<u>Weatherspoon, Ursula_0</u>	<u>Isabel, Isabel</u>	Return Call Later	12/1/2026	7:02 AM
<u>Miller, Catina</u>	<u>Miller, Catina_0</u>	<u>Isabel, Isabel</u>	Return Call Later	12/14/2026	1:39 PM
<u>McMullan, Ethan</u>	<u>McMullan, Ethan_0</u>	<u>Isabel, Isabel</u>	Return Call Later	6/14/2024	1:43 PM
<u>Elliott, Donnie</u>	<u>Elliott, Donnie_0</u>	<u>Isabel, Isabel</u>	Return Call Later	12/14/2025	1:49 PM

In a Fresh Leads 0-3 Day Campaign, no re-calls should be scheduled more than 5 days out, otherwise use the **Remarket** button instead.

This is relative to the timeframe of the Campaign. If it were a 1-15 Day Campaign, you can schedule a **Return Call Later** up to 15 days out.

Disposition

Complete

New Appointment

Remarket

Not Qualified

Wrong Number

TCPA

Re-Call

No Answer

Left Message

Busy Signal

Return Call Later

Call Me in 3 months

I'm in Nebraska, where are you?

Call All Numbers on file first

Take Me Off Your List

Call me Tuesday at 5pm

Overuse of **Return Call Later** can result in too many Scheduled Re-calls.

How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:
<https://support.improveit360.com/>
3. Or Email Us: support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

