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# Best Practices in Customer Callback Strategy Design and Implementation

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The pursuit of customer loyalty is the central focus of most organizations. Your customers are increasingly less tolerant of service that does not meet their expectations, more vocal in expressing dissatisfaction through social media, and more fickle in their relationships with your company. Earning customer loyalty today has never been more challenging, which means your organization can't leave any aspect of the customer experience to chance. Implementing a customer callback strategy is one more tool to consider adding to your customer service toolbox. Thinking about implementing customer callbacks? We've put together this playbook to help you ensure you're in alignment with customer callback best practices.

### ***What is a callback?***

A callback is a feature that provides queued customers with the option to receive a callback as opposed to waiting in queue or opting to abandon their call before it's answered.

### ***How does the Interactive Intelligence solution handle callbacks?***

Interactive provides two options for handling customer callbacks:

- **Option 1: In queue callbacks** allow the customer the option to register their desire to receive callback prior to disconnecting, maintain their place in queue, and receive a callback when an agent becomes available. This method simply initiates the callback to the number provided by the customer when an agent with the required skills becomes available to handle the call. Callback requests retain place in queue, priority and/or skill assignment associated with the original interaction regardless if the caller selects the same number or to enter a different number for the callback.
- **Option 2: Scheduled callbacks** provide the customer with the option to select a timeframe in which they would prefer to receive a callback. Scheduled callbacks can be configured in the IVR or can utilize Interaction Dialer for more specific requirements, including agent-owned callbacks. Once the scheduled callback is queued, the system dials the call at the designated time. Scheduled callbacks require additional customizations and applications. The callback scheduler custom application is needed if a caller or a website user wants a callback at a specific time.

### ***Can contact centers offer both in queue and scheduled callback options to the customer? How would that be handled?***

A Customer may be offered both an in queue and a scheduled callback during the same queued interaction. In queue callbacks would be offered first to the customers' based on the assumption that they called the contact center when it was most convenient for them. Scheduled callbacks may be offered as a secondary option if the customer does not opt for the in queue callback, providing an additional option that may appeal to the customer.

*Note: If a contact center uses Interaction Dialer, there is no Service Level reporting, only reporting on attempted outcomes for each call. Unless you are using Interaction Dialer for other outbound dialing functions, leveraging customizations in the IVR and the Callback Scheduler application is all that is required. The contact center can opt to use Dialer for scheduled callbacks if they are also using Dialer for other agent and agentless outbound campaign functionality.*

### ***Can the contact center confirm the return call phone number or request alternate callback numbers from customers for either in queue or scheduled callbacks?***

We recommend asking the customer to confirm the return call phone number for callbacks. This increases the probability of a successful callback if the number from which the customer is calling (ANI) is not a direct number. For example, if the customer is calling from their workplace, the ANI might be the number tied to the switchboard and not directly routed to the customer. If a customer can enter a direct number, the callback will be made to the customer's direct number. What are some potential scripting options?

- **For in queue callbacks, typical scripting is:** "We apologize for your wait. Your current wait time is X. You may hold for the next available agent or we can call you back. You won't lose your place in line and will receive a callback at the number of your choosing. Would you us to call you back at (play current number back to customer)? If yes, press 1. If you would like to enter another telephone number, press 2 and enter the phone number where it is best to reach you."
- **For scheduled callbacks, typical scripting is:** "Thank you for calling. If you would like us to call you back when it's convenient for you, enter the telephone number you'd like us to use to contact you and select the time when you would like to receive a call."

How would you approach combining in queue and scheduled callbacks? If you'd like to offer both in queue and scheduled callbacks, the best approach is to offer the in queue callback first. For example, "Thank you for calling. The current wait time is X. Please hold for the next available agent, or you may choose to have an agent call you back without losing your place in line. If you would like to receive a callback, press 1. You will be prompted to enter your callback number." Should the customer choose to remain in queue instead of selecting an in queue callback, the contact center may consider adding an option for a scheduled callback when the maximum average wait time for the queue is exceeded.

### ***Are callbacks a good thing? What is the impact on customer experience?***

A well-executed callback strategy can be an effective part of the overall customer experience strategy. Callbacks provide a tactical situational value proposition to reduce abandons and manage peak volume times without sacrificing focus on the customer experience.

Callbacks benefit the contact center by:

- Reducing customer abandon rates.
- Reducing agent idle time.
- Reducing handle time since the agent may be able to identify the caller's information and reason for call prior to the callback.
- Saving telecommunication services costs.

Callbacks are best used during peaks that the contact center can't anticipate or staff for, or short-lived situations. While every customer's first preference is for their call to be answered quickly, customers are generally appreciative of the option to receive a callback under extenuating circumstances. From a customer experience perspective, continually being presented with a callback option every time the contact center is contacted defeats the use of callbacks as a service-enhancing feature. The best practice is to plan and staff to answer customers' calls by having the right number of properly trained and skilled people, in the right place, at the right time. Callbacks should not be viewed as a substitute for effective workforce management. Long-term planning, forecasting, scheduling and real time management are fundamental to a well-managed, highly functioning contact center and will be vital to supporting an effective callback strategy.

A potential drawback in the use of callbacks can be the transaction handling efficiency. It's a flawed assumption to view increasing the use of callbacks as a guaranteed path to higher levels of efficiency. Because the callback is not occurring at the time the customer found it convenient to contact an organization, the callback attempt may only be that – a missed attempt at reaching the customer that may start an inefficient round of return calls. Also, the inability to reach an agent by phone could result in the customer attempting to resolve their issue through multiple channels (e.g., first phone, then chat, then e-mail). Without the ability to identify that the same request was received in multiple channels, the possibility exists for duplicate requests and rework to occur (along with unnecessary agent expense). It is not unusual for 5 minute calls to morph into 30 minutes or more of workload if the callback strategy is not well designed and executed.

### ***When should in queue callbacks be offered?***

In order to make your callback program most successful, you should first inform your customer of the longest average wait time. For example, if you know that your customers longest average wait time is likely to abandon at 60 seconds, you may want to offer a callback within 30-40 seconds, to coincide with their tolerance for waiting. This will improve the customer experience and positively impact the center's abandonment rate. It's also important to note that callbacks should be offered as an option. They should never be forced upon a customer.

### ***When should schedule callbacks be offered? How often should number be called back?***

As a general rule, scheduled callbacks should be attempted three times with a 5 minute window between attempts. Scheduled callbacks are most successful and will support service level targets most effectively, when the callbacks are assigned to a workgroup, rather than to individual agents.

### ***What options exist for dispositioning and re-queuing callbacks?***

If a customer does not answer the callback on the first attempt, the agent may “snooze” the callback. This resets the callback for another attempt. If the subsequent callback is not successful, the agent dispositions the call with a wrap code, or reason for call, and a second disposition to mark the call failed if the customer is not reached or completed if the customer is reached. In both cases, this removes the call from the callback queue.

### ***What are some practical applications for the use of callbacks?***

These are examples of situations in which the use of the callback feature would be appropriate:

- Airline reservation centers when extreme weather disrupts passenger travel plans.
- Utilities during unanticipated widespread power outages.
- Small, specialized contact centers or business units that are less able to absorb volume surges.
- Financial services when stock market prices make sudden and dramatic swings.
- Auto industry when major recall notices are publicly announced.
- Natural disasters affecting all business in the impacted region.
- New product release or marketing campaign that drives call volume beyond forecasted levels.

### ***Should we pilot the callback program before rolling it out?***

Yes. An initial pilot should be configured with the following parameters:

1. Define a one-week test period for a single queue and workgroup leveraging in queue callback.
2. Determine a short window of operational hours to offer pilot callbacks (e.g., 11am - 1pm).
3. Promote the callback service to customers through email, web and IVR messaging.
4. Configure the wait time in queue message based on less than the average abandon time.
5. Provide an option for play back of ANI and an option for the customer to enter an alternate callback number.
6. Review calls offered, answered, abandon rate and customer feedback to determine effectiveness.

### ***How should the success of a callback program be measured?***

Callbacks offered, answered, abandons and flow outs are all valid metrics for determining whether callbacks are successful. Other potential metrics include contact rate, cost per contact, and customer satisfaction. Contact rate reporting is a custom report and is not part of the Interactive Intelligence's standard reports. Callback contact rates should correlate to customer retention rates, sales and revenue targets to determine the long-term value of the program to the contact center and the enterprise.

Callbacks may lessen the impact of high call volume periods on daily service level. The overall impact depends on how customers respond to callback offers and how many decide to opt in rather than remain in queue. From a customer experience standpoint, customer satisfaction surveys should be used to gauge customers' interest in and satisfaction with the callback feature.

### ***How is service level tracked for callbacks?***

Service level is affected when a call or a callback is waiting in queue. If a caller waits in queue and then selects to leave a callback, the call flows out (overflows) of the queue and an associated callback enters the queue. The initial *Inbound Call Wait* time does not impact ASA or service level because the initial call was never answered. The inbound call counts towards the number of flowouts logged in the system. Service level is impacted by the number of callback retries of a callback, and the agent's indication of the callback being a success or failure.

**Scenario 1:** If the caller is offered a callback in the IVR, then the system wouldn't track the service level of the inbound call as it not presented to the queue.

**Scenario 2:** If the caller is offered a callback while waiting in queue, the call is sent back to the IVR, disconnected, and a callback is then generated. The inbound call is tabulated as a call offered and flowout, with the inbound callback tabulated as both offered and answered. Each inbound call would be counted twice: once for the inbound call and once for the callback.

- The inbound call would count as offered to queue and then overflow (flow out). The service level would not be affected by this inbound call because it was never answered.
- When the callback enters the queue, it would be counted as an offered and eventually answered. Time to answer for the callback would start once it enters the queue.

### ***Does Interactive Intelligence provide standard reporting for callbacks?***

Most of Interactive's standard, out-of-the-box reports have the option use media type as a report parameter. Callbacks are considered a media type like inbound calls, emails or chats. Reports like the User Availability Reports, which do not display call data, do not have media types.

We recommend establishing separate workgroups for callbacks to allow for cleaner real time statistics and queue management. Reporting is different between a call and a callback. Real-time statistics such as, “Interactions Waiting”, “Longest Interaction Waiting”, “Service Level”, “Wait Time”, are combined if both calls and callbacks occur within the same workgroup queue. If the contact center agent is constantly re-trying the call, then handle time will be different than a live call.

Currently there isn’t a standard report to indicate success rates for callback attempts. Agents may indicate whether the callback was a success, failure, or retry the call, which may be reported on in a custom report.

**Examples of Current Reporting for Callbacks:**

Queue Detail Report																								
Date Time Range:		1/1/2014 12:00:00 AM - 8/11/2014 11:59:59 PM (This Year)																						
Media Type:		Callback																						
Group Order:		Queue, Media Type																						
Target Service Level Calculation:		Target answered/Total answered																						
Workgroup:		Customer Satisfaction																						
INBOUND												INBOUND SERVICE LEVELS												
OFF	#	-- ANS -- %	-- ABD -- #	%	ASA	%ANS SVC LVL	AVG TALK	AVG HOLD	AVG ACW	AVG HAND	Flow Out	# HOLD	ANS 300	ANS 600	ANS 900	ANS 1800	ANS 3600	ABN 300	ABN 600	ABN 900	ABN 1800	ABN 3600		
Customer Satisfaction	84383	84384	100%	0	0%	0.01	100%	0:18	0:00	0:10	0:28	0	0	84374	9	1	0	0	0	0	0	0	0	0
Callback	84383	84384	100%	0	0%	0.01	100%	0:18	0:00	0:10	0:28	0	0	84374	9	1	0	0	0	0	0	0	0	0

User Productivity Summary																			
Date:		1/1/2014 12:00:00 AM - 8/11/2014 11:59:59 PM (This Year)																	
Media Type:		Callback																	
User List:		MP Demo, MP Agent, Noemi Amoroso, Gino Andre, Mathew Aulin, Jenifer Carpenter, John Carr, Melissa Clark, Serena Colvard, Amy Cooper, Ben Crouch, Milagros Dillio, Sofia Fell, Annette Fournier, Julio Friedland, Ted Frison, Ruth Garner, Madeline Gilbert, Lance Guan, Sean Hadden, Fernando Hartzler, Julianne Havel, Linda Herr, Chris Herr, Jessie Hinchey, Cody Hollars, Lance Hursey, Lela Jensen, Russ Johnson, Kathy Johnson, Roxie Kamel, Hillary Kehrer, Sharron Kensey, Neil Kindell, Jason Lee, Christian Leedy, Amy Lenoach, Rian Logan, Allan Lucus, Mark Malin, Ted Malin, Jamie Mang, Hope Martin, Gregg Massey, Jay Miles, Sheila Miller, Nicholas Miller, Travis Moran, Becky Oliver, Zachary Perrott, Ethan Peterson, Dale Pierce, Cheryl Poole, Grace Ray, Bryan Rodriguez, Muriel Sanders, Lisa Schwartz, Steven Simms, Julie Smith, Karl Stoneking, Bob Tomatoes, Johnny Watkinson, John Watkinson, Lisa Weed, Andy West, Lonnie Wesner, Kenya Wolken, Morgan Young, William Young, Linda Zollar																	
Summaries Per User																			
User	Offered	Answered #	%	Abandoned #	%	Flow Outs #	%	Talk Time Duration	Average	Hold Time Duration	Average	ACW Time Duration	Average	Handle Time Duration	Average				
Grand Total	14	8	57.14%	0	0.00%	6	42.86%	00:30:10	00:03:46	00:00:15	00:00:02	00:01:15	00:00:09	00:31:40	00:03:58				
Site : 1																			
John Watkinson	1	0	0.00%	0	0.00%	1	100.00%	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00				
Rian Logan	4	1	25.00%	0	0.00%	3	75.00%	00:00:42	00:00:42	00:00:00	00:00:00	00:00:10	00:00:10	00:00:52	00:00:52				
Russ Johnson	9	7	77.78%	0	0.00%	2	22.22%	00:29:28	00:04:13	00:00:15	00:00:02	00:01:05	00:00:09	00:30:48	00:04:24				



### ***Report Descriptions and Metric Definitions:***

**Queue Detail Report:** The Queue Detail report shows the number of callers that opted for a callback including workgroup queue statistics such as:

- Offered – Defined as the number of callers who opted for a callback.
- Answered – The number of callbacks that were answered by an agent.
- Abandon – Callbacks will never abandon.
- Flowout – The number of callbacks that waiting in the workgroup queue but were somehow routed out of that workgroup queue before being answered. This would include “Grabbed Callbacks” and as well as callbacks that overflow due to a preset timeout.
- ASA – The average speed of answer from the time the caller opted for a callback to the time the callback was answered by an agent. *By default this does not include time it takes the agent to actually place the outbound call.* Note: Retried Callbacks or “Snoozed Callbacks” do not effect time in queue.
- Average Talk – The average connected time to a callback (Including but not limited to the time on Outbound calls).
- Average Hold – Time average hold time on a callback.
- Average ACW – The average time an agent was in follow up after a callback was disconnected.
- Average Handle Time – The complete handle time on a callback, including talk, hold, and after call work.
- Service Levels – The number of callbacks that were answered in your specified Service Levels. Time to answer is defined as: “the time the caller opted for a callback to the time the callback was answered by the agent.” *By default this does not include the time it takes the agent to actually place the outbound call.*

Note: Retried Callbacks or “Snoozed Callbacks” do not effect time in queue.

**User Productivity Summary Report:** The User Productivity Summary Report shows the number of callbacks that were offered to an agent including statistics such as:

- Offered – Defined as the number of callbacks that were offered to an agents’ station.
- Answered – The number of callbacks that were answered by an agent.
- Abandon – Callbacks will never abandon.
- Flowout – The number of callbacks that alerted an agents’ station but were not picked up in that time. Otherwise known as Agent Not Answering (ANA).
- Average Talk Time – The average connected time to a callback (Including but not limited to the time on Outbound calls).
- Average Hold Time – Time average hold time on a callback.
- Average After Call Work – The average time an agent was in follow up after a callback was disconnected.
- Average Handle – The complete handle time on a callback, including talk, hold, and after call work.

### ***What is the impact of a successful callback program on agent head count?***

The impact of your callback program on agent head count is dependent on the business and customer behavior, and will vary based on:

- When the callback feature is offered.
- Staffing levels to forecast.
- Acceptance of the feature by customers.

It is conceivable that staffing levels could increase, decrease, or stay the same after implementing a callback program. The result depends on the strategy of your center when deploying the callback feature.

### ***What do we recommend?***

The Interactive Intelligence Contact Center Consulting team recommends cautious and prudent use of the callback feature and proactively offering customers estimated wait times while they wait in queue. Keep in mind that the use of in-queue callbacks will reduce the number of callers who abandon, since we can assume a percentage will choose a callback rather than disconnecting. At first glance, this would seem to be a benefit; however, the result of keeping more callers in queue (both waiting callers and callback callers) is that **all** callers will experience a longer delay than if the callback callers had abandoned the queue. A consideration with estimated wait times is to use ranges for the expected wait announcements, as the expected delay can go down (or up) based on workgroup size, average handle time, long calls, customers who opt for scheduled callbacks at a later time, and other factors.

## **In summary**

### ***Are callbacks a good thing?***

Callbacks are a valid, tactical, short-term solution to reduce the abandon rates and provide another service option to customers. Callbacks should be leveraged only during challenging service level time periods that typically coincide with the need to deploy additional queue management strategies to maintain an acceptable customer experience delivery. Never forget that customers' first preference is for their call is answered quickly when they choose to make that call. When used as a routine contact center tactic, callbacks can mask a bigger and more serious staffing problem.

### ***How are callbacks best applied?***

Callbacks should be offered at an interval that is less than your average abandon time so the contact center can improve abandon rates and enhance the customer experience at the same time.

### ***What is the best use of callbacks?***

Callbacks are best used as an option for customers during unanticipated, unplanned situations where there is insufficient staff to handle the workload. Customer Interaction Center looks at the queue before offering callback. If there are already greater than X number of calls in queue or the average wait time is greater than X seconds, present the caller with the option to leave a callback number. In this scenario, the system was designed to offer the caller a second menu in queue after holding X seconds to stay in queue or request a callback.

### ***What contact center challenges may callbacks address?***

Callbacks may lessen the impact of high call volume periods to daily service level and customer accessibility. The overall impact depends on how customers respond to callback offers and the number that decide to opt in to the feature rather than wait in queue.

### ***What are the staffing impacts?***

The impact of callbacks on staffing are dependent on the business and customer and may vary based on when the callback feature is offered, staffing levels to forecast, and acceptance of the callback feature by the customer.

## The Author



**Todd Marthaler** is a 20 year veteran of the contact center field and a Contact Center Consultant with Interactive Intelligence. Before joining Interactive, Todd was a Business Analyst and Client Services Manager for a top Interactive Intelligence Partner. Todd has managed several multi-channel and multi-site contact center operations with Fortune 500 Companies in the retail, hospitality, utility, and service verticals. Todd has a passion and focus to positioning the companies he services to deliver the ultimate customer experience. He has expertise in IVR and Call Flow Design, Workforce Management Implementation, Workflow Optimization, Operations Management, Quality Assurance and Voice of the Customer programs.