Creating Proactive Customer Journeys

Purvi Bajaj
Solutions Engineer

Session ID: BRKCCT-2559

Cisco Webex App

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Use Cisco Webex App to chat
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How

1. Find this session in the Cisco Live Mobile App
2. Click “Join the Discussion”
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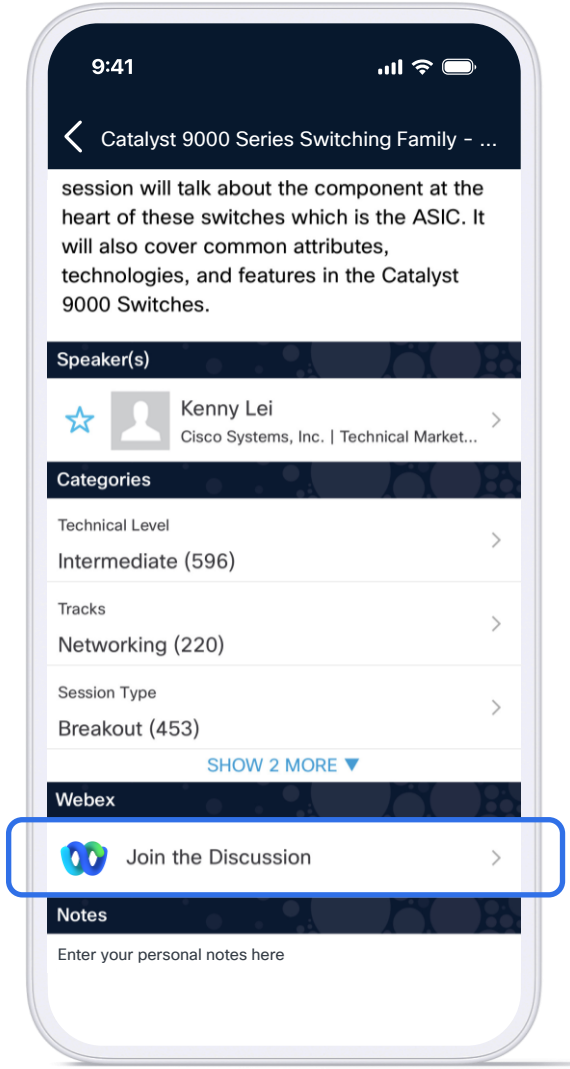
Webex spaces will be moderated by the speaker until 14 November 2025.



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Agenda

01 Use Cases

02 Best Practices

03 Let’s use our voice!

04 Or Maybe Chat

05 I love Questions!!

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Outbound campaigns

“Redefining proactive engagement”

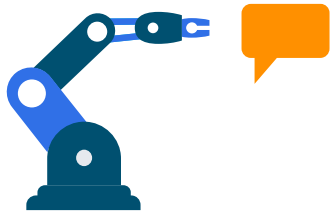
Customer engagement

Improving the **Customer Experience** (CX) through proactive omnichannel engagement solutions that align with business objectives and value customer privacy

Employee engagement

Augmenting **employee satisfaction and productivity** by streamlining Communication Enabled Business Process (CEBP) adoption within an enterprise

Machine engagement



Enabling autonomous business processes for **optimizing the cost-of-service delivery** and improving CX through robotic process automation and proactive engagement with minimal human intervention

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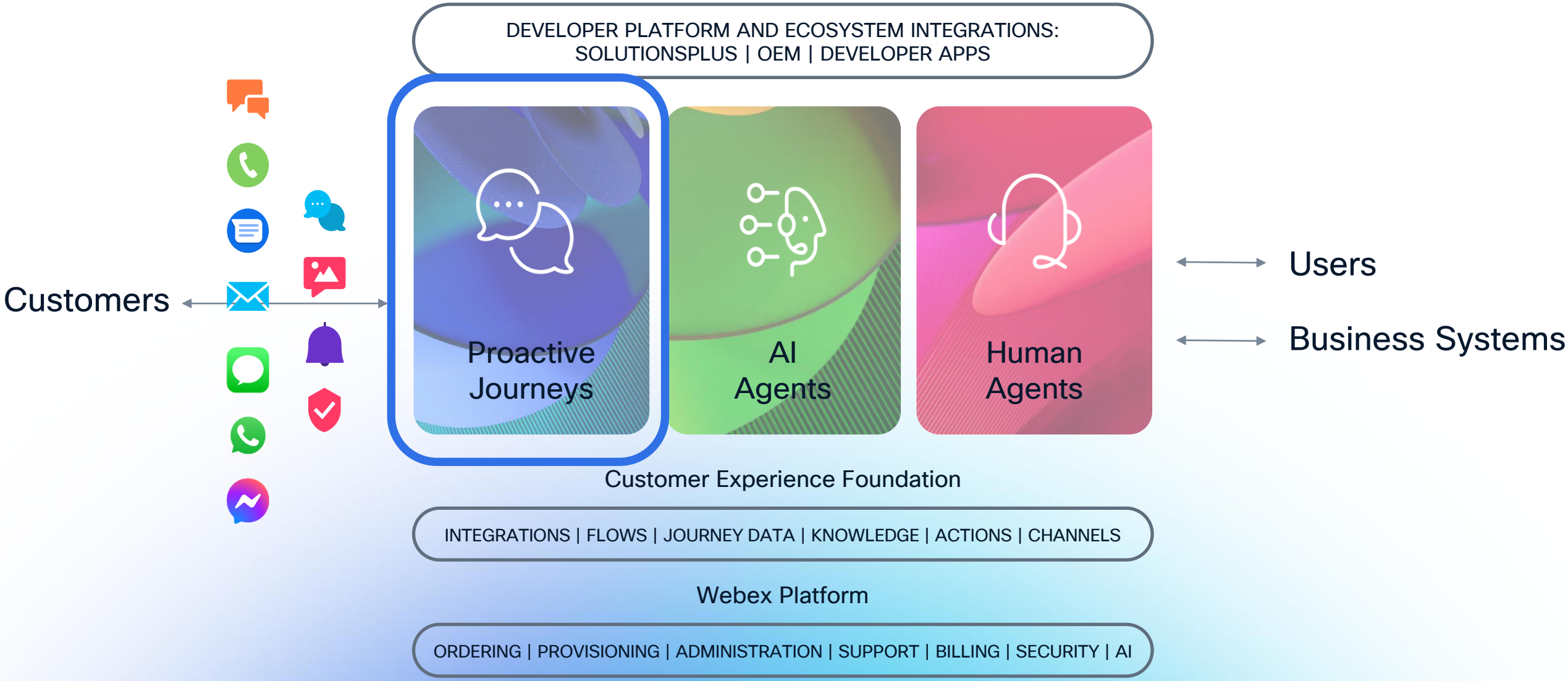
Webex Customer Experience



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Outbound customer engagement
Industry challenges

- Lead prioritization in real time and business goal alignment
- Nonintrusive customer proactive engagement
- Cost of service delivery vs. user experience – need for robotic process automation and communication-enabled business proces
- Resource optimization and agent productivity improvements
- Adherence to the growing federal and regional compliance regime

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Use Cases

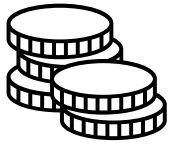
Reasons for Outbound

Sales Calls for customer Acquisition

Proactive Customer Service

Debt Collection

Contract renewals



Cross Sell & Up Sell

Customer Satisfaction Survey

Security Alerts

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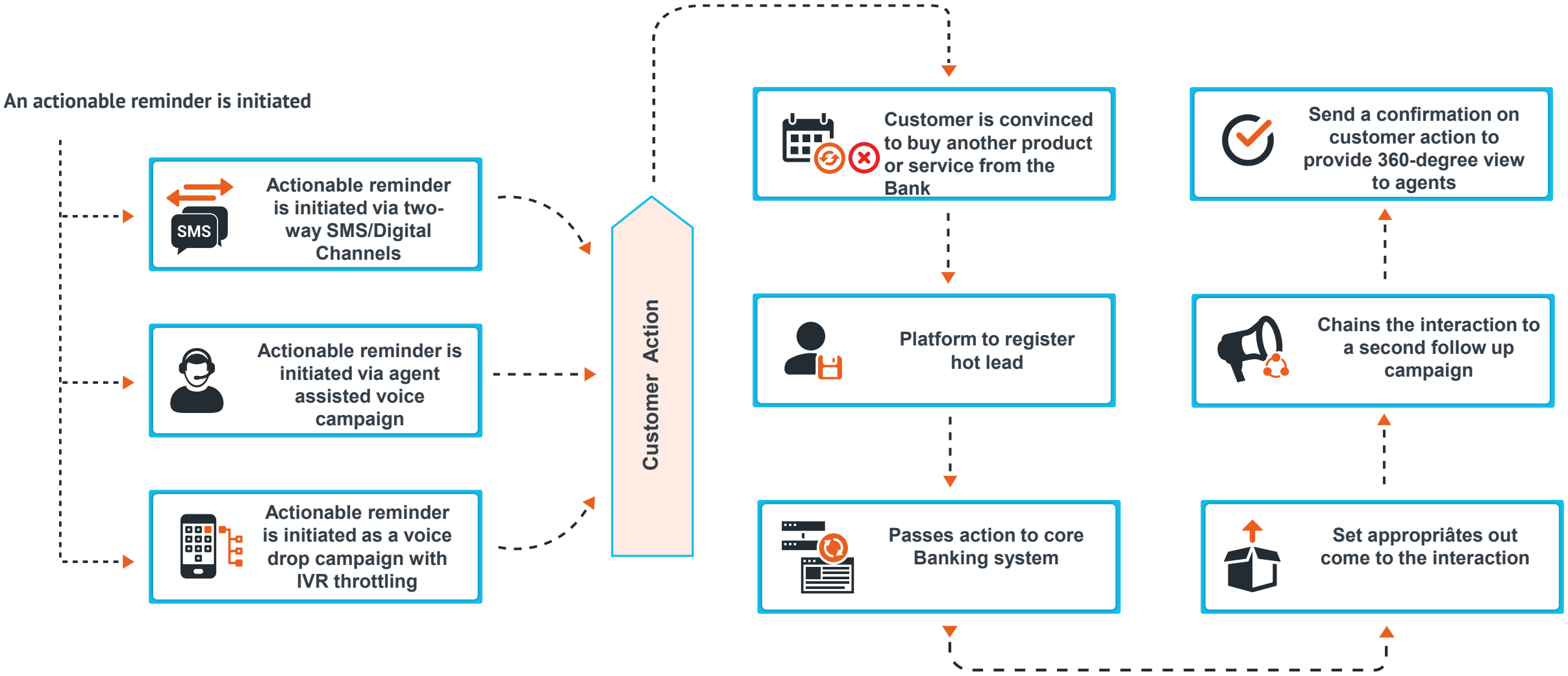
Actionable Reminder



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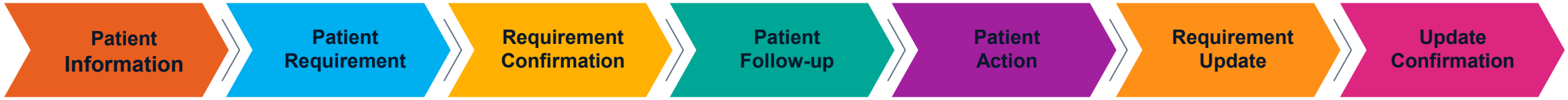
Patient life cycle



	Patient Information	Patient Requirement	Requirement Confirmation	Patient Follow-up	Patient Action	Requirement Update	Update Confirmation
Key Steps	Patient interacts with the agent	Requirement is known	Patient receives confirmation	Requirement follow-up	Patient can alter requirement	Requirement is updated	Confirmation is sent
Activities	• New / Existing patient • Fetch patient info • Create new patient record • Add patient demographic information	• New Appointment • Re-schedule Appointment • Cancel Appointment • Referral booking • Triage line	• Confirmation sent to patient • Patient is linked to a follow-up campaign	Static Reminder / actionable reminder is sent via • SMS Channel • Voice drop campaign • Email • Agent Assisted	Via actionable reminder patient can; • Reschedule Appointment • Cancel Appointment • Make referral booking	• Requirement is updated on Epic CRM • Patient chained to appropriate follow-up campaign	• Confirmation is sent to patients based on the new requirement change
Cisco Action	• Cisco Journey Data Services APIs to update customer information & Preferences	• Send SMS/ Email/ WhatsApp based on Event Trigger using Webhooks	• Update dispositions in Campaign • Decide next action in workflow	Campaign created in CM • SMS Channel • Voice drop campaign • Email • Agent Assisted	Trigger event in the backend system based on response using Webhooks	• Requirement is updated on Epic CRM using APIs • Next campaign triggered in CM	• Confirmation is sent to patients on SMS, Email, WhatsApp or Voice

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Use Case – For Collections

Collection Manager pulls Delinquent Accounts and bucket them (30, 60, 90 days)

Feed data to the collections campaign

Platform executes SMS/Email/ voice drop reminder campaigns for non – delinquent cases
And executes a 2-way SMS or agent based campaigns for delinquent cases.

Leveraging AI / Predictive models to identify Best time and right person contacts.

Platform executes predictive voice drop campaigns with self-pay options

Platform captures customer promises / information in core banking system

Platform chains the record to a collection follow-up campaign as per promise time / agent creates a personal call back request..

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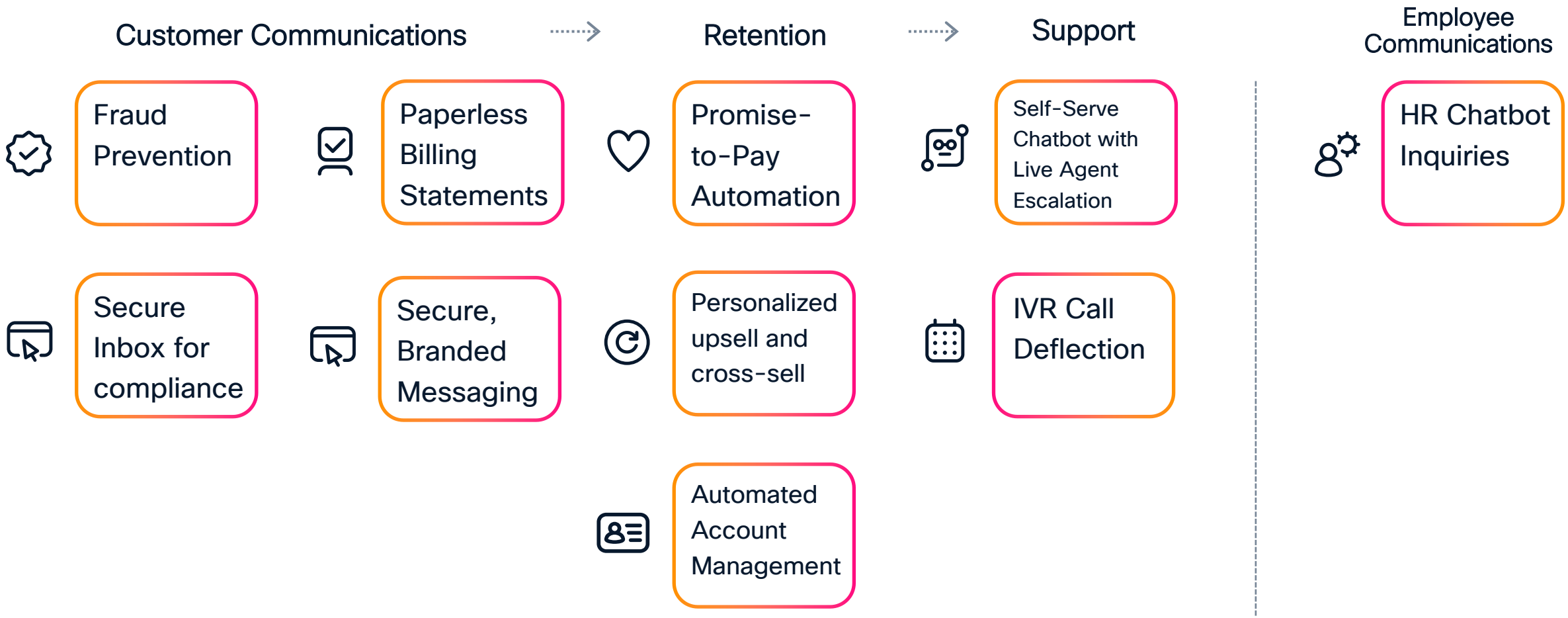
Use cases across Customer Life Cycle



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Use Cases

Call Deflection

Appointment Management

Payment Reminders & Collections

Utilities

- Meter Readings
- Engineer Visits
- Virtual Appointments
- Billing Statements
- Connect Home Alerts

Travel

- Virtual Concierge
- Service Upsell
- Travel Disruptions
- Personalised Marketing
- Conversational Sales
- Luggage Alerts

Retail

- Conversational Marketing
- Abandoned Baskets
- Order Inquiries
- Delivery Notifications
- Personalised Marketing
- Click and Collect Alerts

Finance

- Fraud Mitigation
- Paperless Statements
- Payment Confirmation
- Balance Alerts
- Suspicious Transactions
- Credit Card Increase

Education

- Emergency alerts
- Tour scheduling
- Tuition alerts & payments
- Student services engagement
- Recruitment & alumni campaigns

Public Sector

- Healthcare Comms
- Police: Non-emergency
- Tax Payments
- Housing – Rent collections
- Vaccinations
- Virtual Healthcare Appointments

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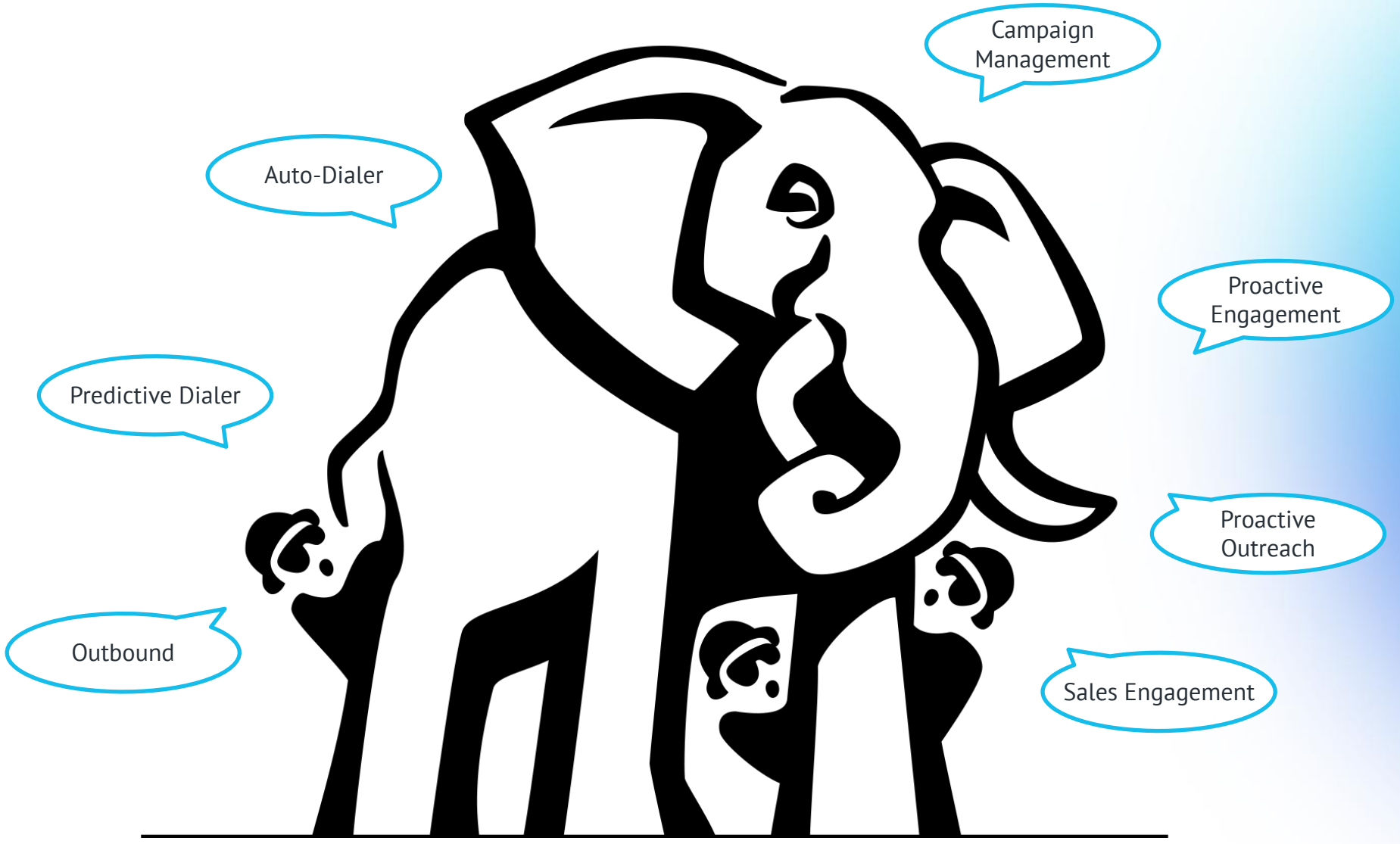
Let’s Converse about Conversing!

Outbound Jargon



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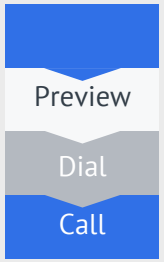
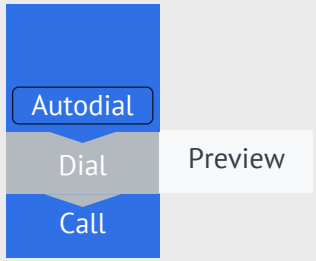
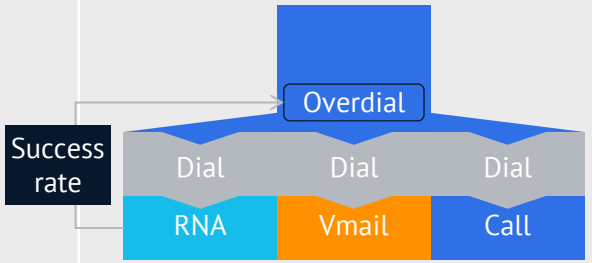
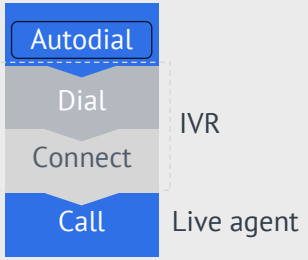
Dialing modes

	Preview dialing	Progressive dialing	Predictive dialing	Agent-less
Dial by	Agent	Machine	Machine	Machine
Overdial	No	Opt.	Yes (Calculated by Algorithm)	No
Preview	Before dialing	While dialing	No (Delivered along with customer call transfer)	No
				
Productivity	Good	Better	Best	Better
Compliance	n/r	Required	Required	Required

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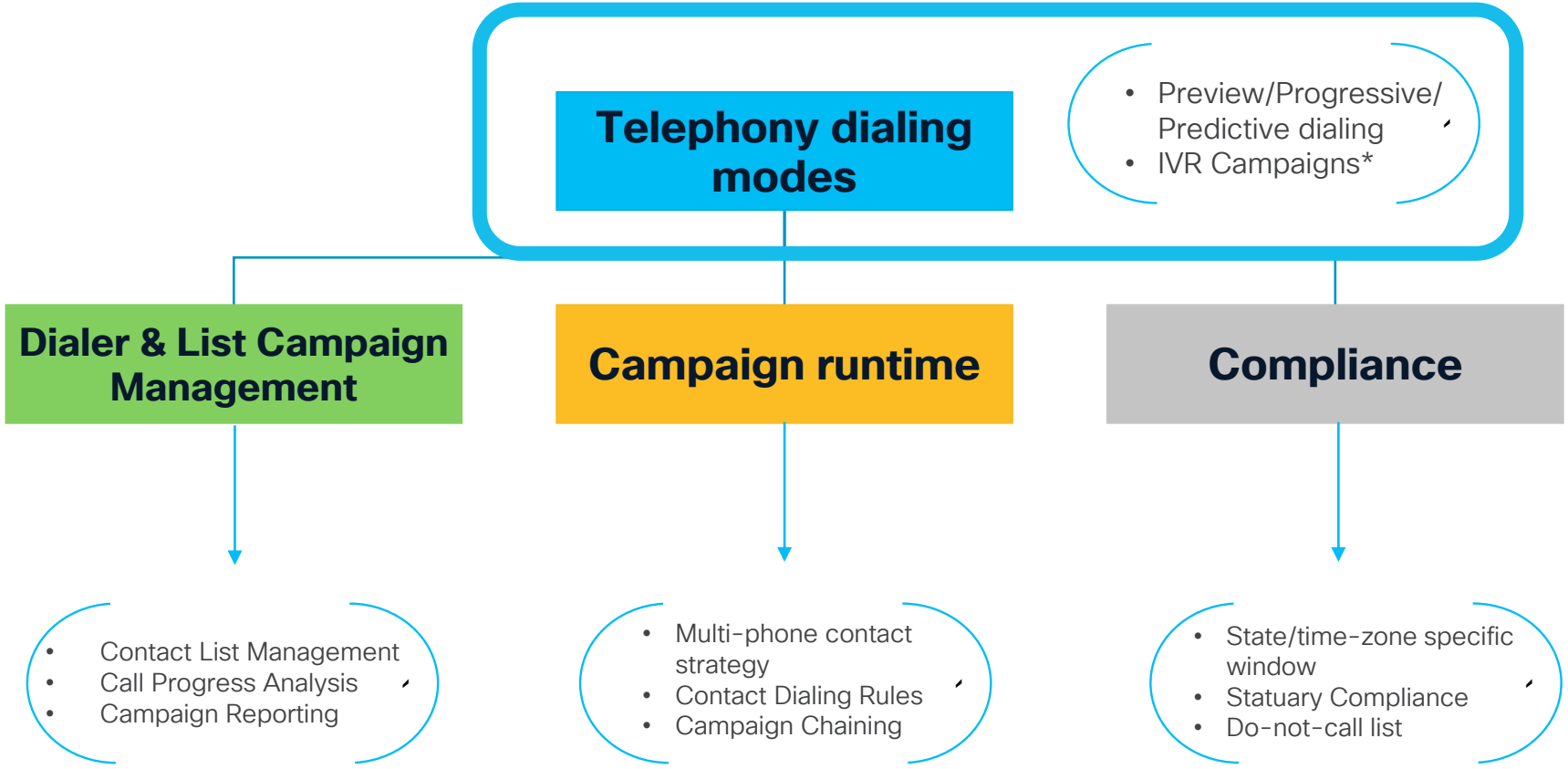
Outbound Campaign Features

Outbound campaign starts with a Contact list, and Webex Contact Center Outbound Campaign Management support the following:



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Best Practices

Best Practices

Dial smarter, not harder – preview for precision, predictive for performance.

Modes of dialling

Personalize & contextualize

Because you're **not 'User123'** – you're *you*, and we get that.

Because good timing isn't luck, it's **strategy with style.**

Relevant & Right time

Right Channel

We don't shout in emails or whisper in alerts – just **smart channel sense.**

No imposters allowed – we keep it real with verified digits and legit flows

Secure and Authentic

How do you want to Report

Reports that know their audience – because **relevance is the real ROI.**

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Optimize outbound campaigns

Unify and personalize contact strategy across multiple customer contact points

Automate business process enablement by integrating with back-office processes

Implement statutory **compliance**, including **do-not-call** and state/time zone-specific calling window

Improve customer communication effectiveness with list prioritization and segmentation and business rules-driven targeted campaigns

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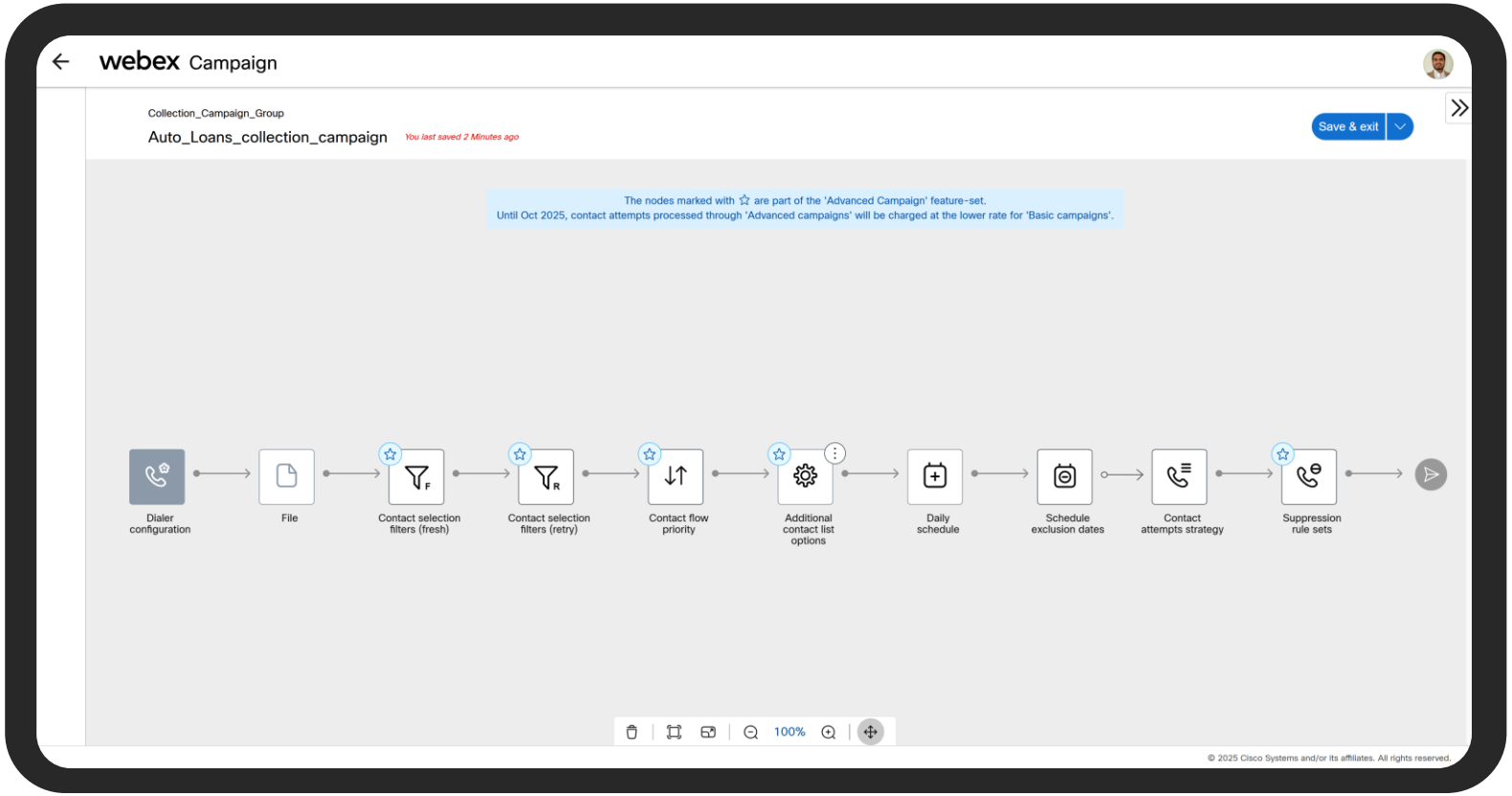
Campaign Management

New add-on

Webex Campaign Management for Webex Contact Center

Administrations and supervisors can now effortlessly configure, manage, and optimize outbound voice campaigns



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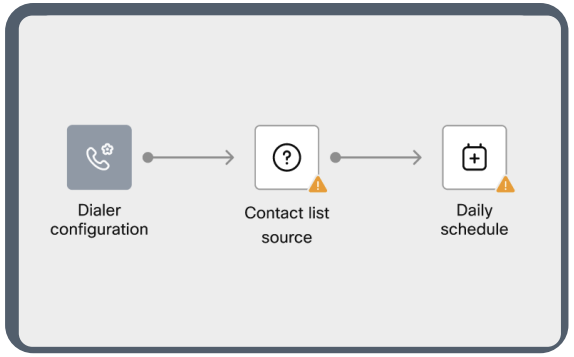
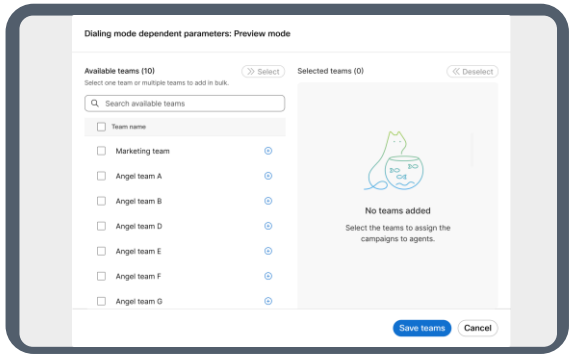
Rapidly build scalable, compliant outbound voice campaigns



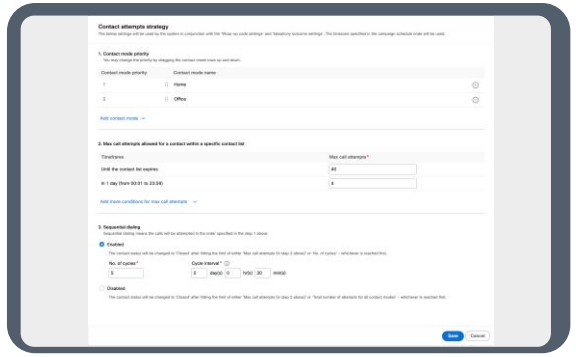
Build campaigns on a single canvas

Build



Save time with easy configuration

Configure



Define campaign rules and attempt strategies

Strategize

Leverage multiple dialling modes

Deploy

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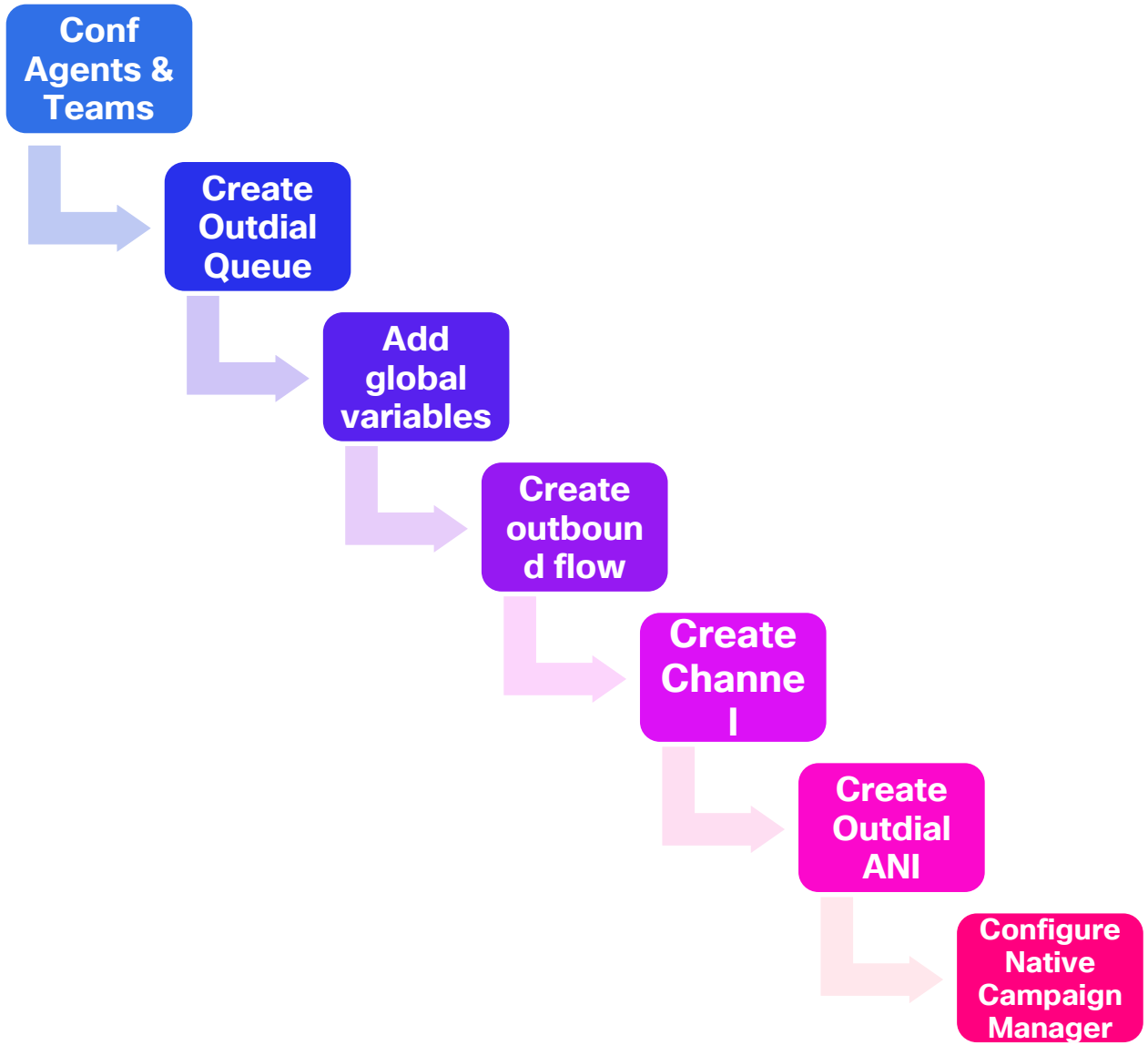
Step 1: Configure the Campaign



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Step 2.1: Configure Outbound Campaign Manager

Typical Steps

- Select campaign dialling mode
- Configure CPA parameters
- Configure dialling-mode specific parameters

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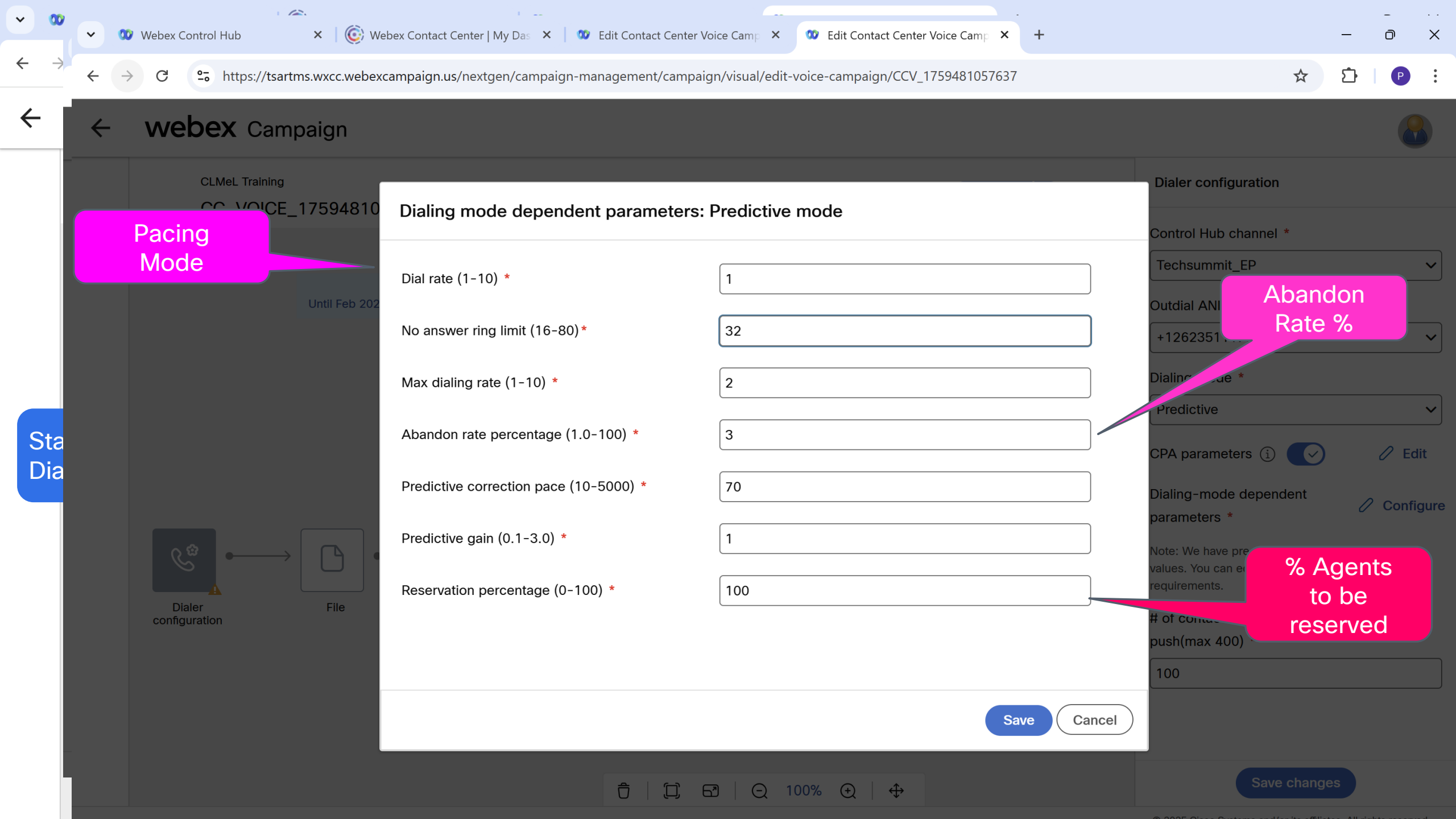
Webex Control Hub
Webex Contact Center | My Das
Edit Contact Center Voice Camp
Edit Contact Center Voice Camp
https://tsartms.wxcc.webexcampaign.us/nextgen/campaign-management/campaign/visual/edit-voice-campaign/CCV_1759481057637
webex Campaign
CLMeL Training
Pacing Mode
Dialing mode dependent parameters: Predictive mode
Dial rate (1-10) *
1
No answer ring limit (16-80) *
32
Max dialing rate (1-10) *
2
Abandon rate percentage (1.0-100) *
3
Predictive correction pace (10-5000) *
70
Predictive gain (0.1-3.0) *
1
Reservation percentage (0-100) *
100
Save
Cancel
Abandon Rate %
% Agents to be reserved
Dialer configuration
Control Hub channel *
Techsummit_EP
Predictive
CPA parameters
Edit
Dialing-mode dependent parameters *
Configure
Dialer configuration
File
100%
Save changes

Step 2.2: Configure Outbound Campaign Manager

Typical Steps

- Select campaign dialling mode
- Configure CPA parameters
- Configure dialling-mode specific parameters

- Select manual file upload or automated SFTP
- Select field mapping
- Contact list automated expiry

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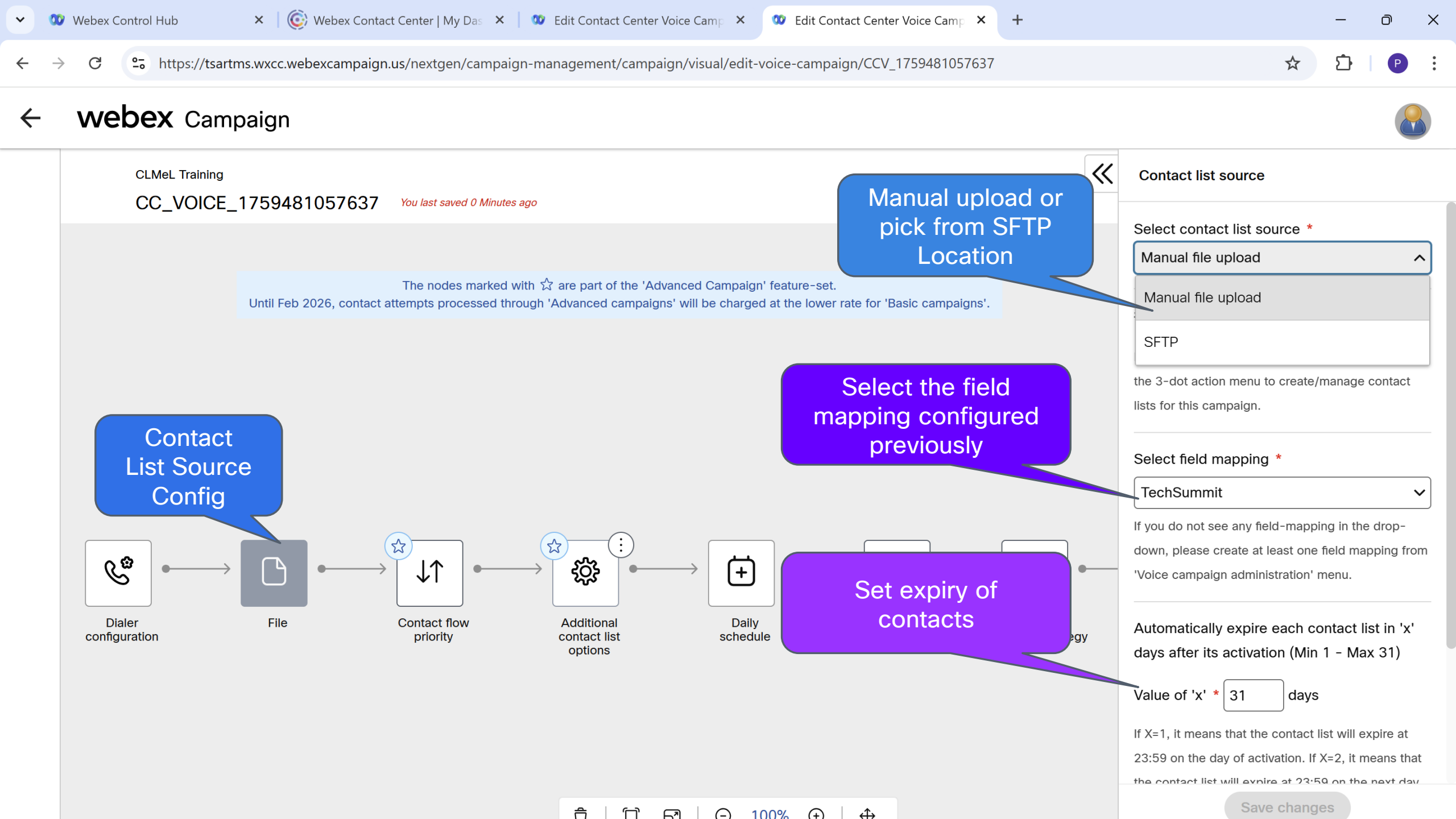
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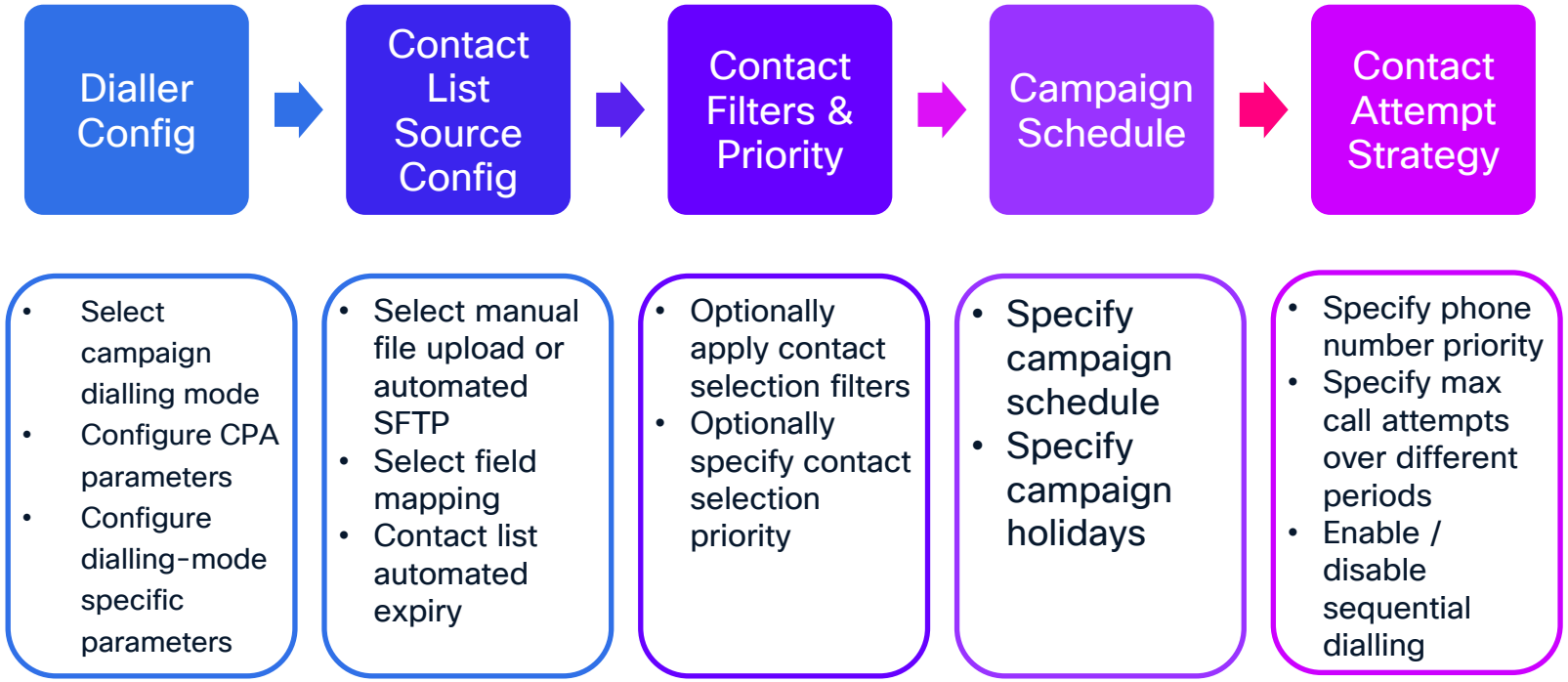
Edit Contact Center Voice Camp
Edit Contact Center Voice Camp
https://tsartms.wxcc.webexcampaign.us/nextgen/campaign-management/campaign/visual/edit-voice-campaign/CCV_1759481057637
webex Campaign
CLMeL Training
CC_VOICE_1759481057637
You last saved 0 Minutes ago
The nodes marked with ☆ are part of the 'Advanced Campaign' feature-set.
Until Feb 2026, contact attempts processed through 'Advanced campaigns' will be charged at the lower rate for 'Basic campaigns'.
Manual upload or pick from SFTP Location
Contact List Source Config
Select the field mapping configured previously
Set expiry of contacts
Dialer configuration
File
Contact flow priority
Additional contact list options
Daily schedule
100%
Contact list source
Select contact list source *
Manual file upload
Manual file upload
SFTP
the 3-dot action menu to create/manage contact lists for this campaign.
Select field mapping *
TechSummit
If you do not see any field-mapping in the drop-down, please create at least one field mapping from 'Voice campaign administration' menu.
Automatically expire each contact list in 'x' days after its activation (Min 1 - Max 31)
Value of 'x' * 31 days
If X=1, it means that the contact list will expire at 23:59 on the day of activation. If X=2, it means that
Save changes

Step 2.3: Configure Outbound Campaign Manager

Typical Steps



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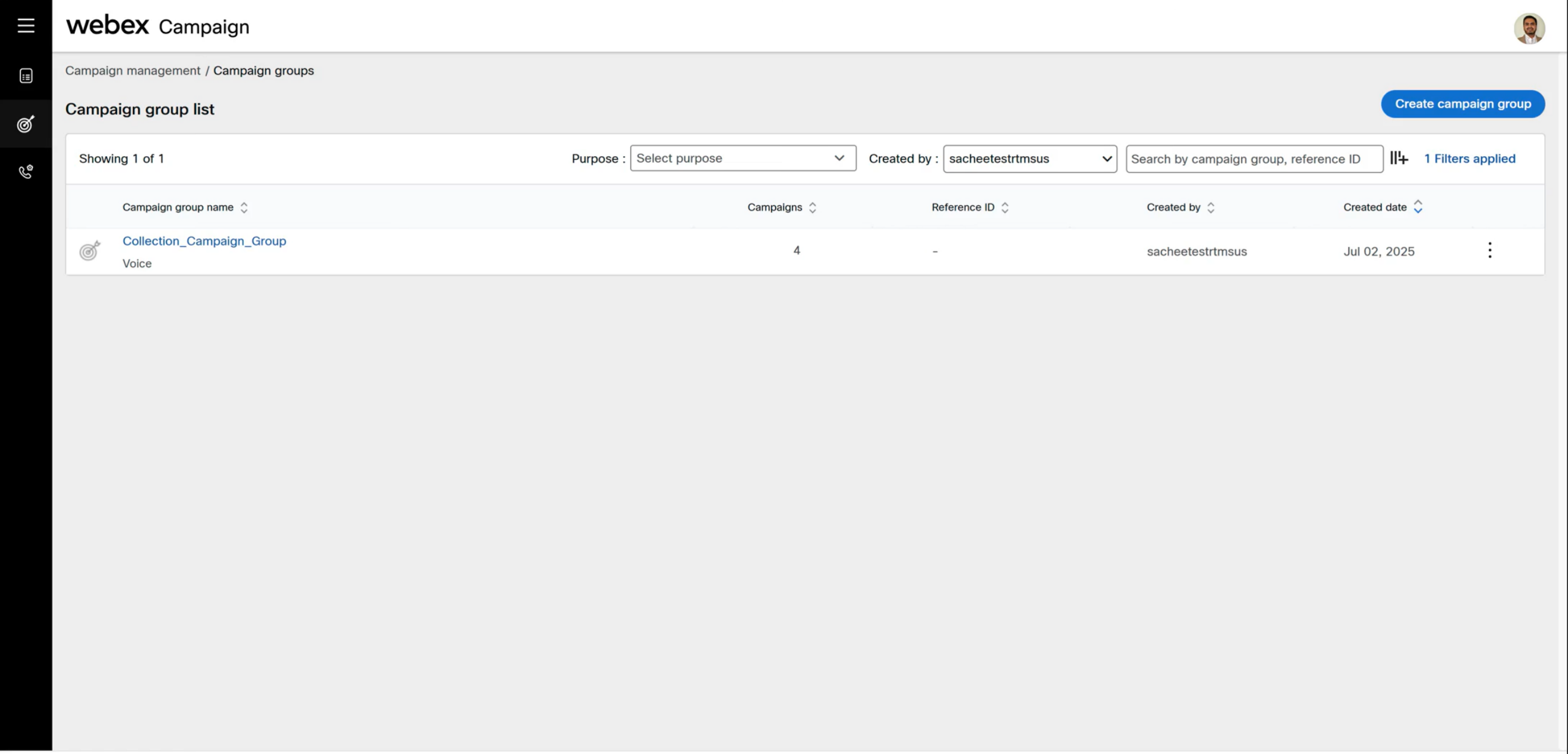

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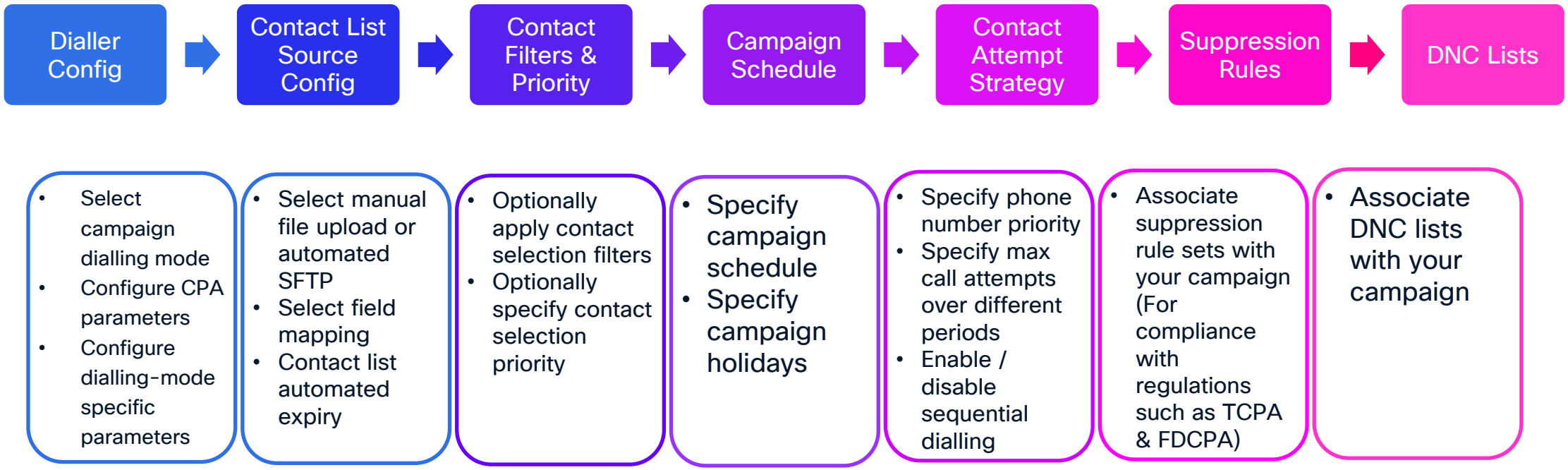
Step 2.4: Configure Outbound Campaign Manager

Typical Steps



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webex Campaign

Collection_Campaign_Group

Auto_Loans_collection_campaign *You last saved 0 Minutes ago*

Save & exit

The nodes marked with ☆ are part of the 'Advanced Campaign' feature-set.
Until Oct 2025, contact attempts processed through 'Advanced campaigns' will be charged at the lower rate for 'Basic campaigns'.

100%

Suppression rule sets

Suppression rules not required

Suppression rule sets *

2 Selected

Note: Maximim of 10 suppression rule sets are allowed per campaign.

Bank_XYZ_Corporate_Suppression_Ruleset_2

Federal_FDCPA_Suppression_Ruleset_1

1. Federal_FDCPA_RegulationF_Rule_1_timing_window
2. Federal_FDCPA_RegulationF_Rule_2_Contact_attempt_frequency
3. Federal_FDCPA_RegulationF_Rule_3_telephone_conversation_frequency
4. Timing_bet_10_to_20_hrs

Save changes

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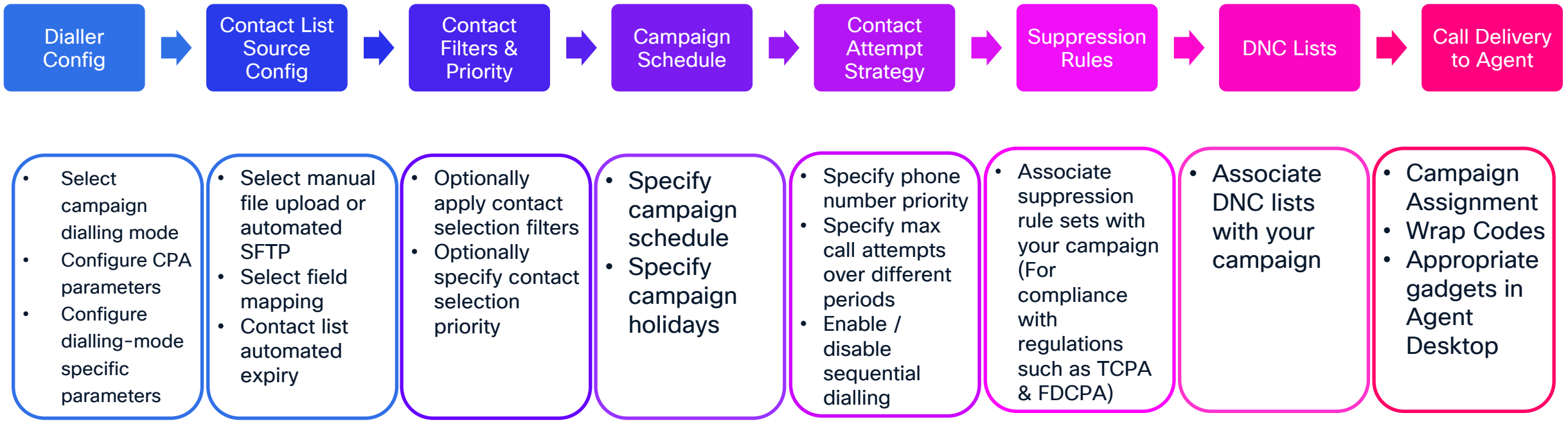
Step 2.5: Configure Outbound Campaign Manager

Typical Steps



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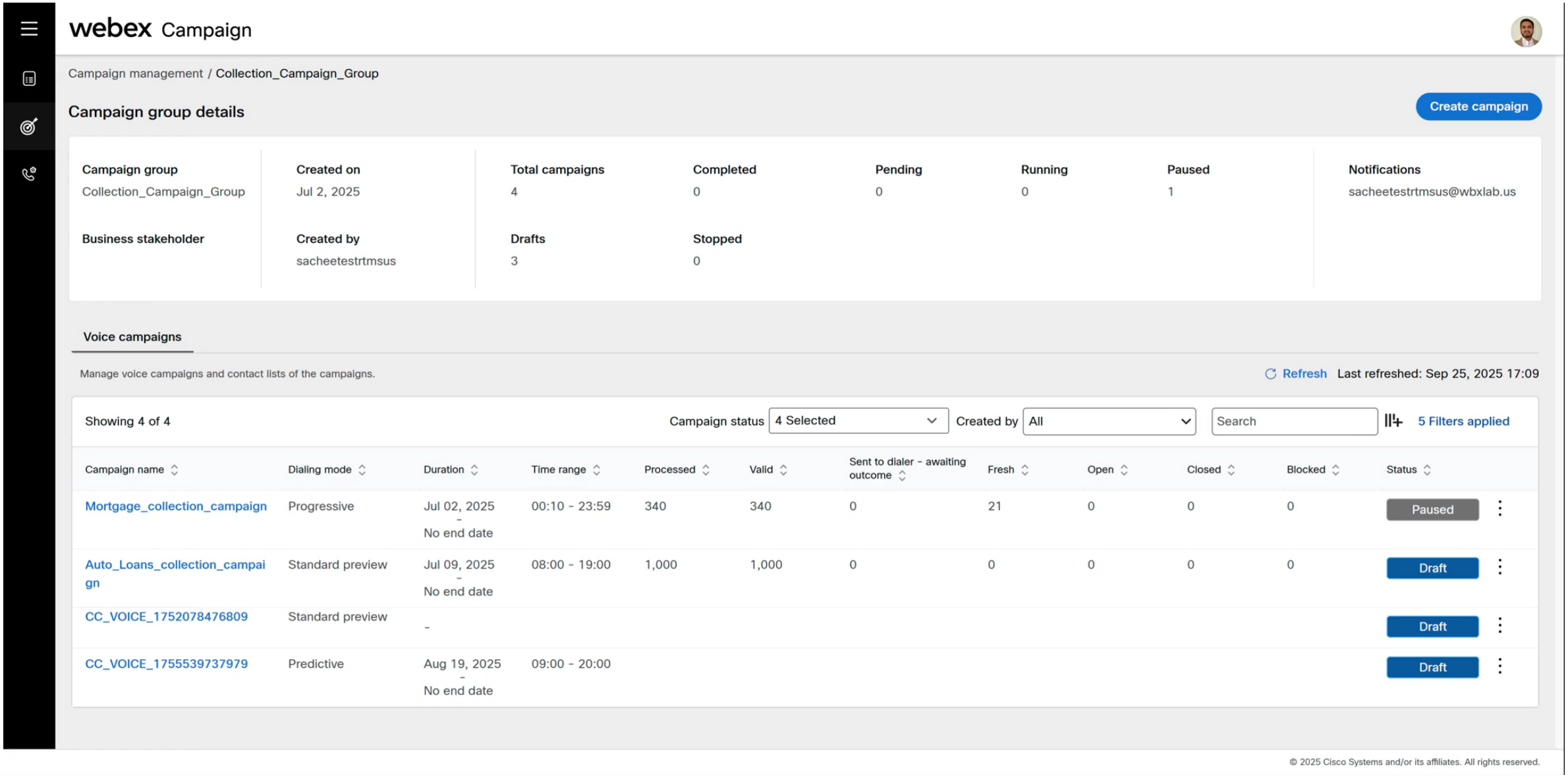

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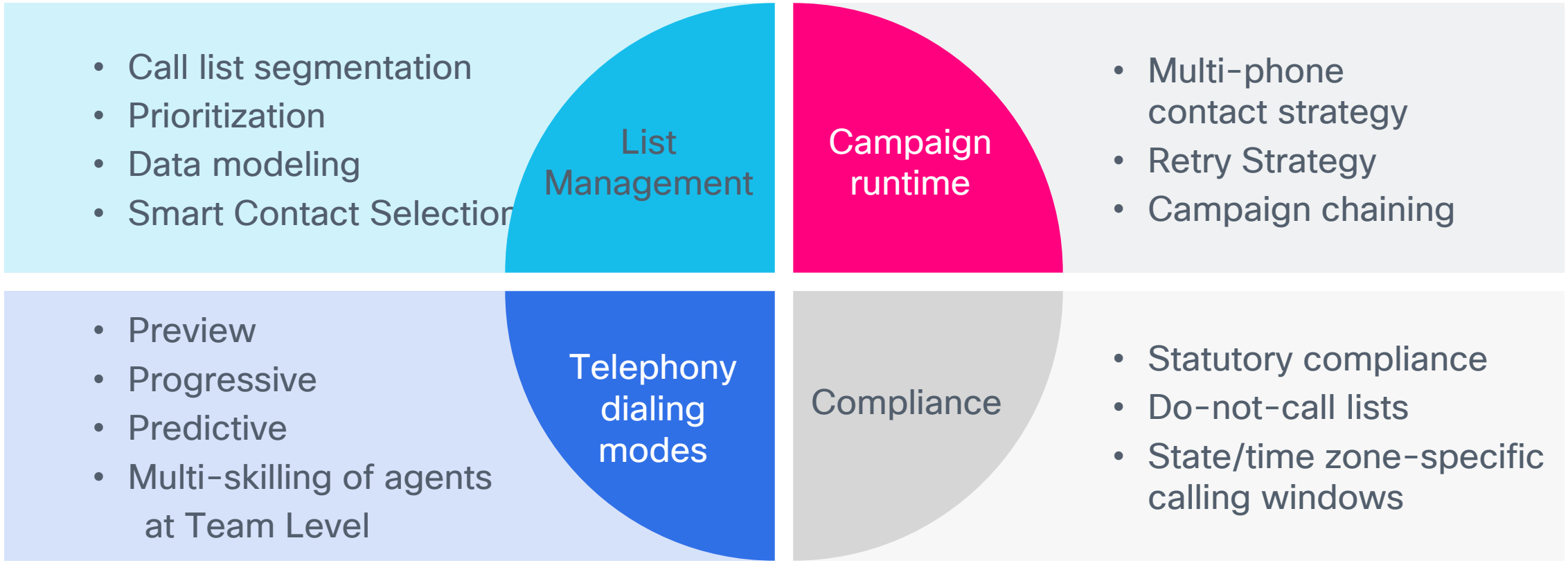
Cisco Outbound Campaign Suite



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Proactive outreach from businesses is something we all experience

Your appointment is coming up!

12:27

Alert: Suspicious activity on your account!

Routine maintenance, service may be affected

Your flight is departing, head to the Gate.

12:27

Enjoy 20% off your next purchase !

Your policy is up for renewal in next 60 days.

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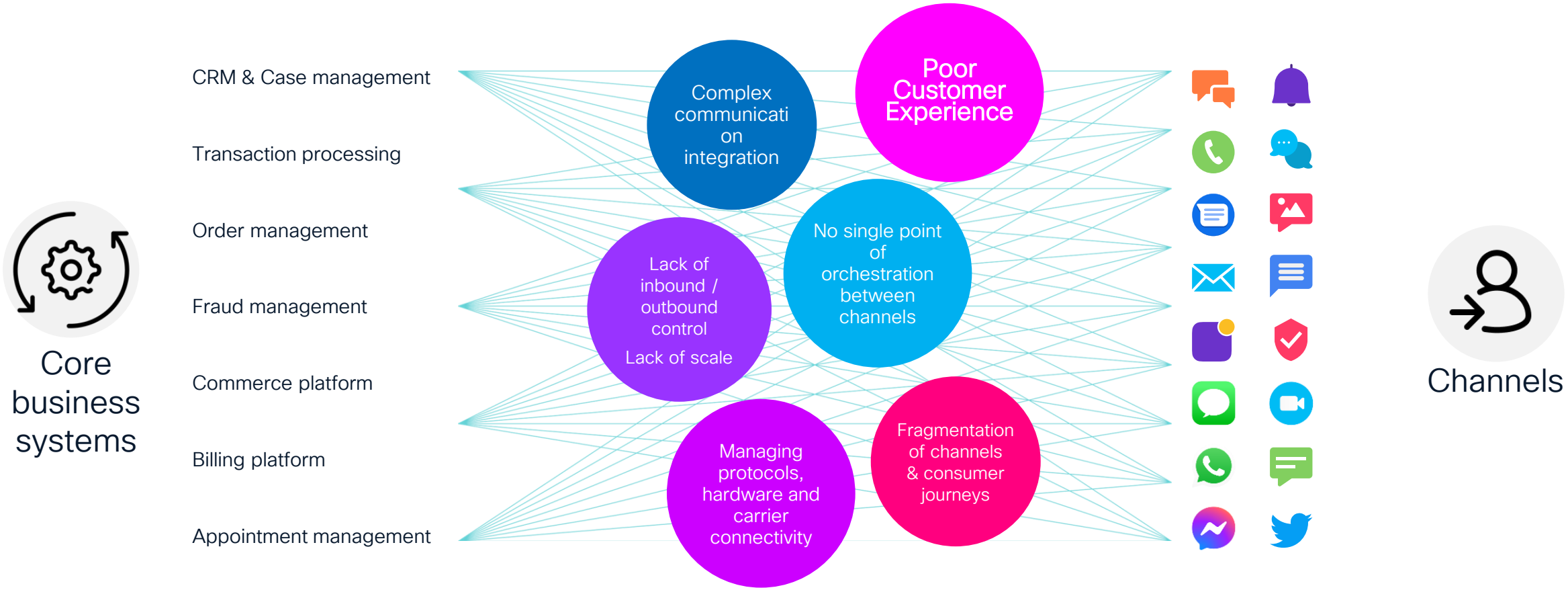
Managing customer interactions is increasingly complex for enterprises



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We make it simple!

Core business systems

CRM & Case management

Transaction processing

Order management

Fraud management

Commerce platform

Billing platform

Appointment management

Channels

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75% of consumers are frustrated when they can’t respond directly to a brand’s message

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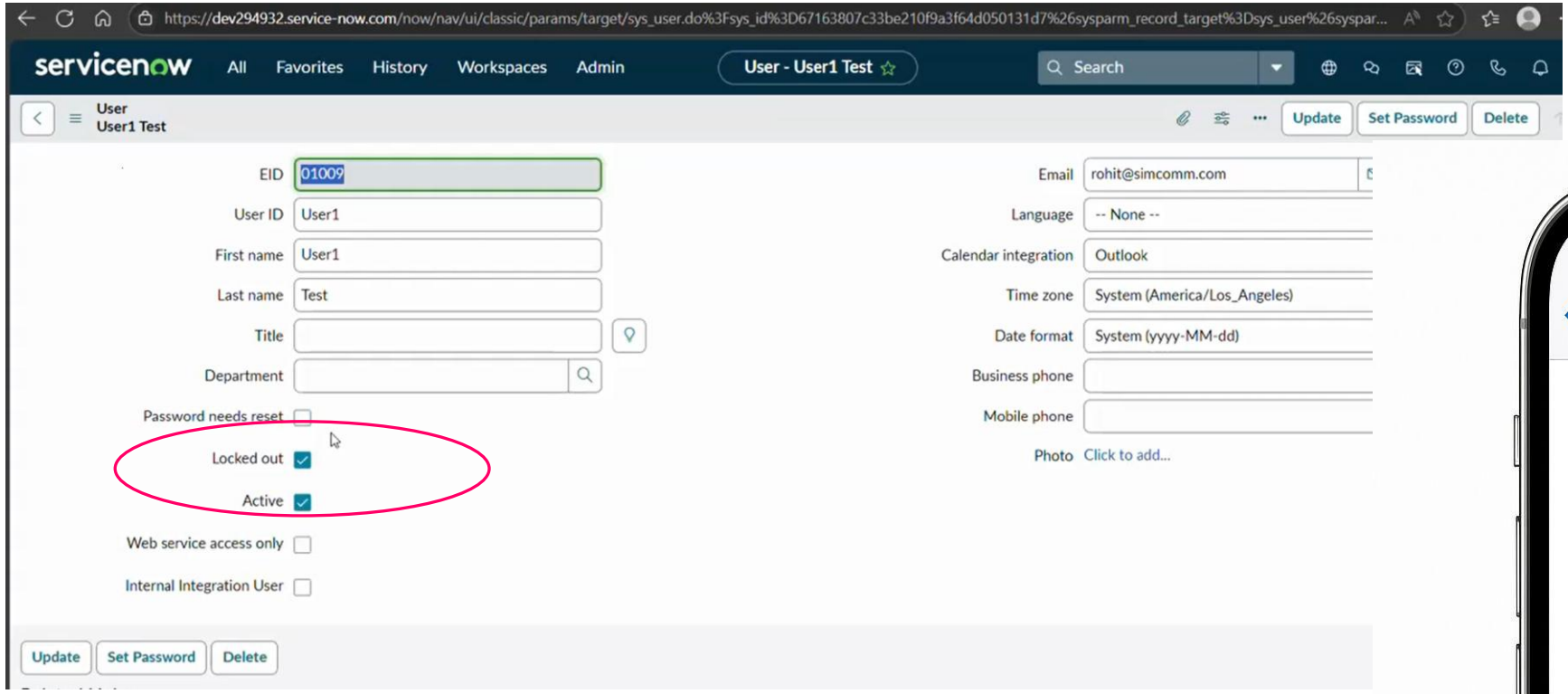

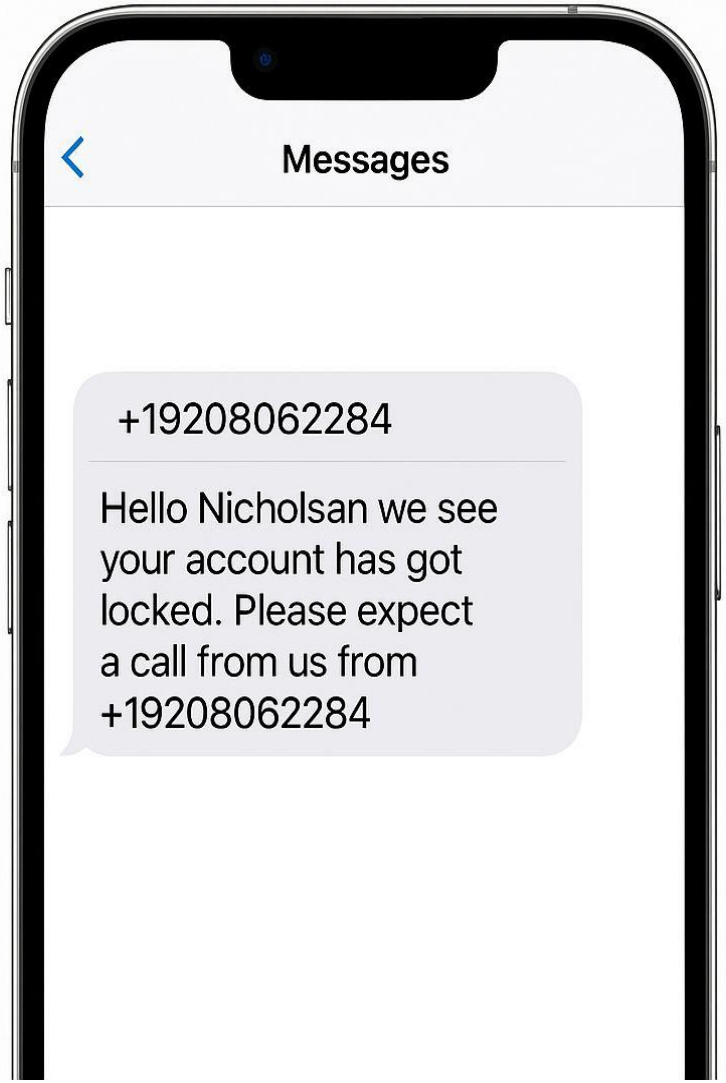

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Digital Identity API's

Network Identity

Identifies if the network of the mobile number

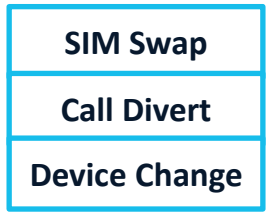
SIM Swap

Returns the date and timestamp of the last SIM Swap for a mobile number, to help identify fraudulent activity. A recent SIM Change may signal an account takeover.

Call Divert

Verifies whether an outbound call to a customer's mobile number has been forwarded or not. It may have been diverted to a fraudster's mobile number.

Account Takeover



Also known as Enhanced SIM Swap.

Not only does ATP return SIM Swap and Call Divert information, but it also returns a date and timestamp when the device last changed for a mobile number. Another fraud indicator.

KYC match

Know Your Customer: When onboarding new customers, check if the data submitted (mobile number, name, address, DOB) matches the verified data in MNO's database.

Number Verify

Confirms if the customer's known mobile number matches the one seen in either the mobile web or App session. This proves 'possession', instead of an OTP via SMS which is susceptible to social engineering.

NOTE: Not all API's are cross network, the representative list above are all available on EE

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Digital Identity API's

Age Eligibility

Age Eligibility

A check against our database that provides a true/false response to confirm if a customer is over a configurable age.
E.g. 21 years' old.

Number Recycle

Number Recycle

Determine if a mobile number has been recycled, and if so, the timestamp that the mobile number was last deactivated. A deactivated mobile number will go through a recycle process to be cleansed and will be re-allocated to a new End User.

IMEI Lookup

IMEI Lookup

Provides the device ID (IMEI) associated with the mobile number. Does that IMEI belong to the latest iPhone or a burner phone?

Home Network

Home Network

Provides a true or false response as to whether the specified mobile number is on their Homer Network at the time of the API call, or if the device is roaming

Tenure (testing)

Tenure

Submit a date along with a mobile number and get a True/False response as to whether the MNO has known that customer for that amount of time. E.g. 90 days

Scam Signals (build)

Scam Signals

This could help identify customers who are being socially engineered, confirming IF a customer is on an active call, the direction of the call (inbound or outbound) and if the call duration has exceeded a configurable timespan.

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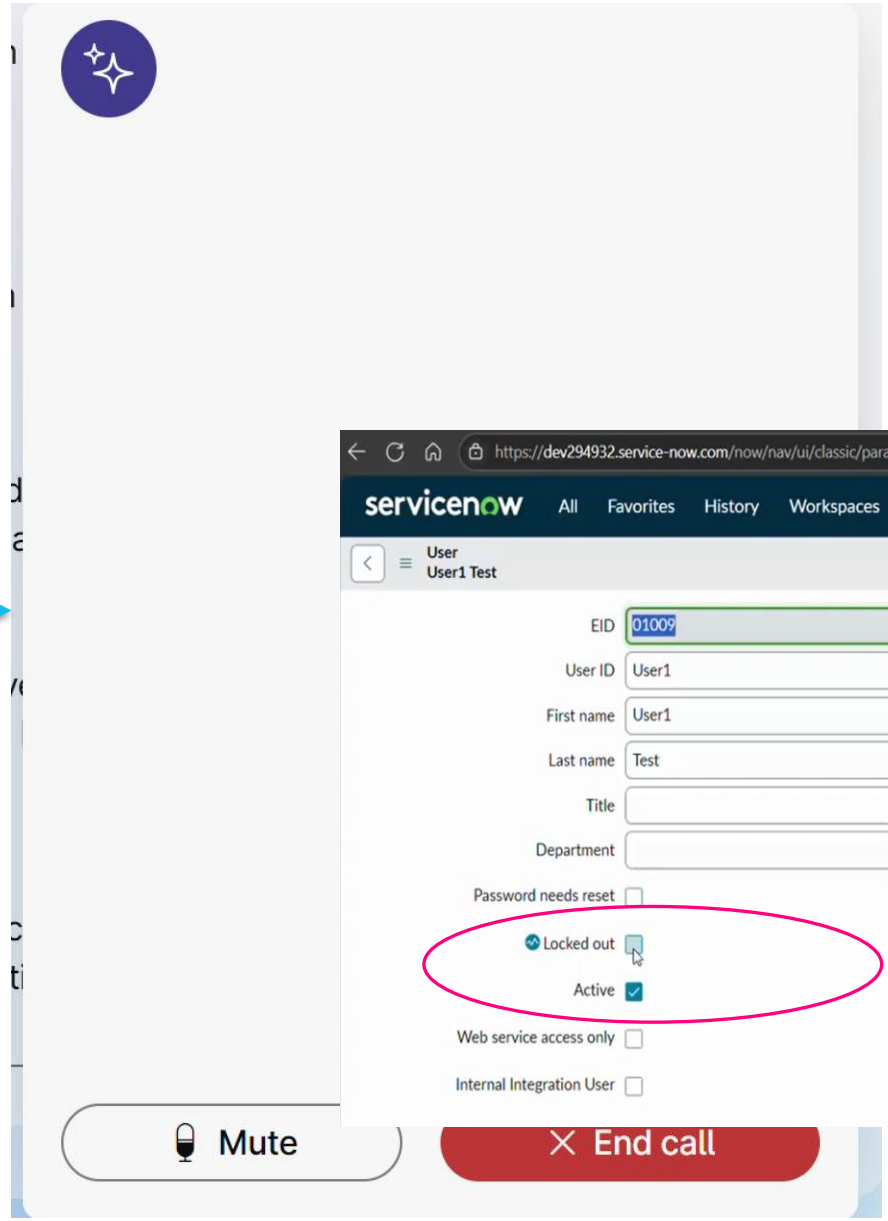
At Home Location

Yes



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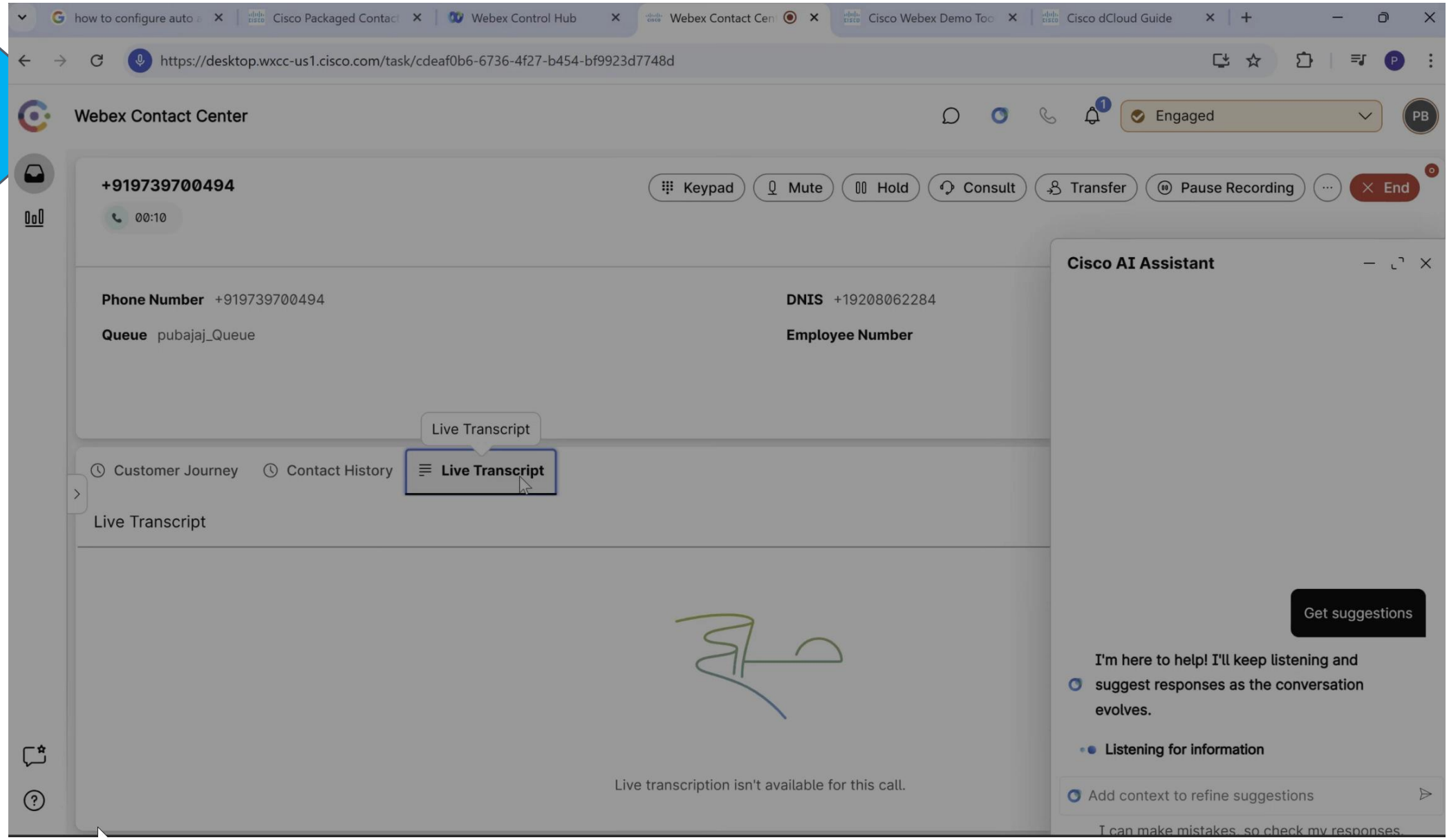
At Home Location

NO



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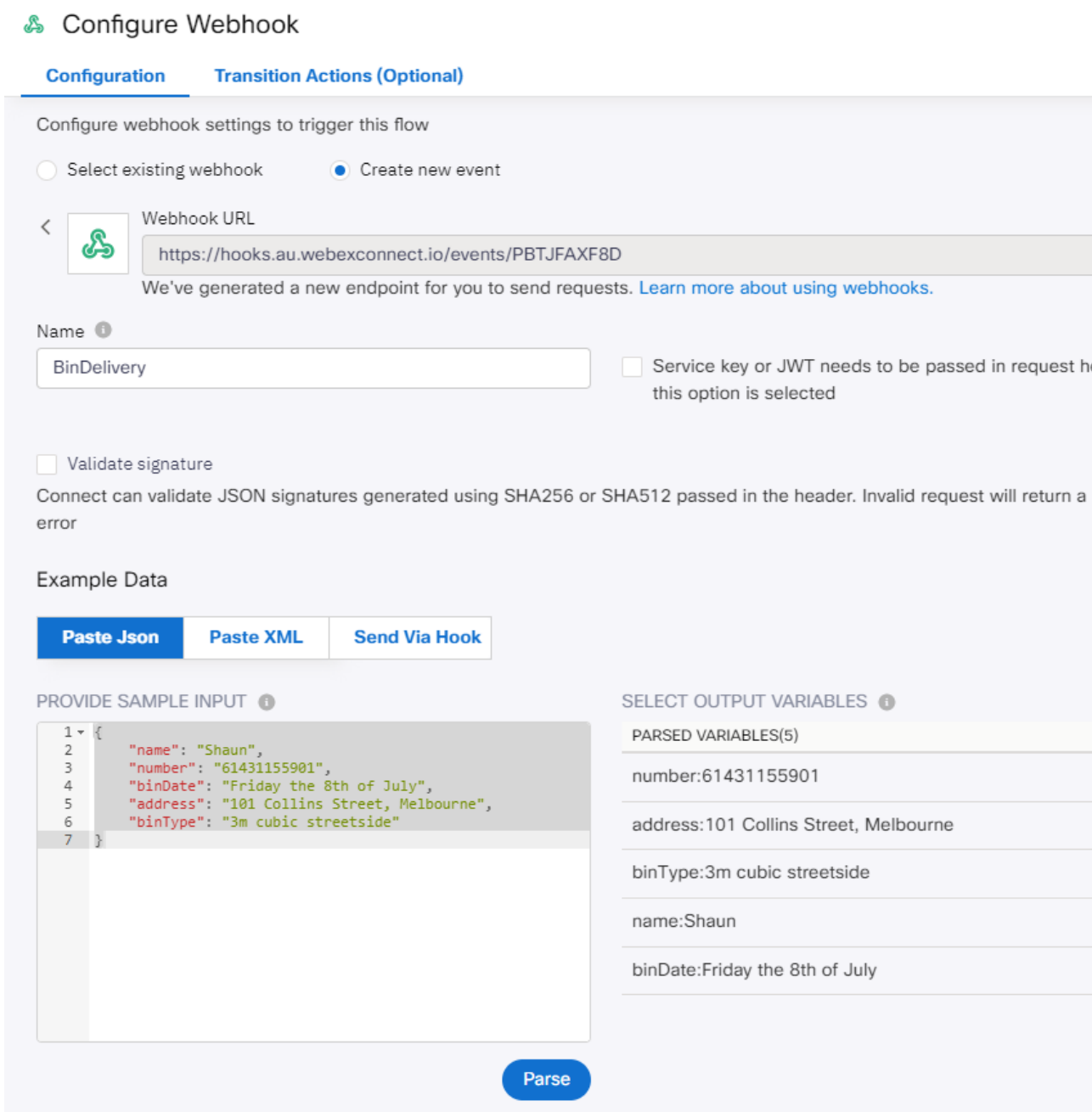
Webhook triggered workflow

Provides ability to define API endpoint

Opens options for Workflow definitions

Also provides endpoint for 3rd party business systems



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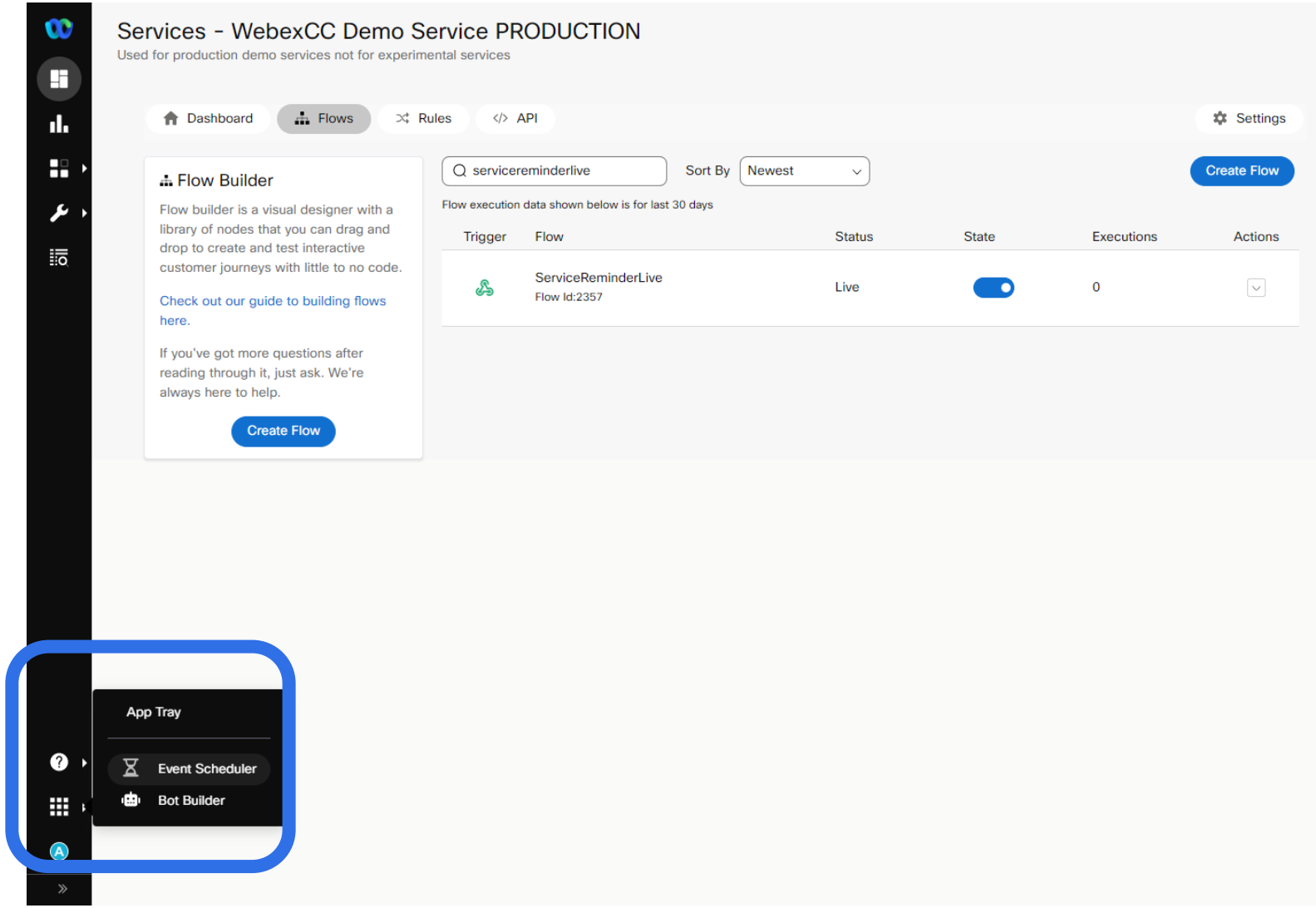
Event Scheduler

- Allows scheduled execution of a flow.
- Flow data can be fed by CSV or via S3 bucket.



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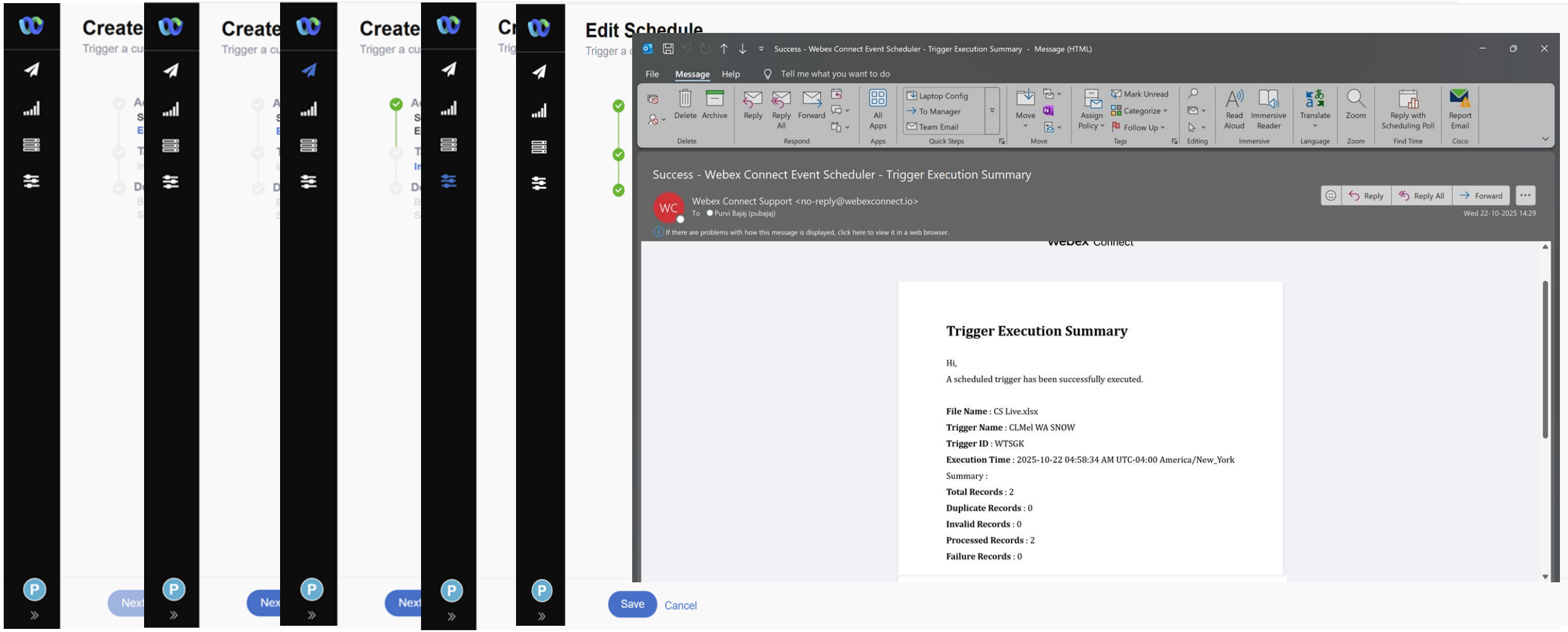
Flow of Events!



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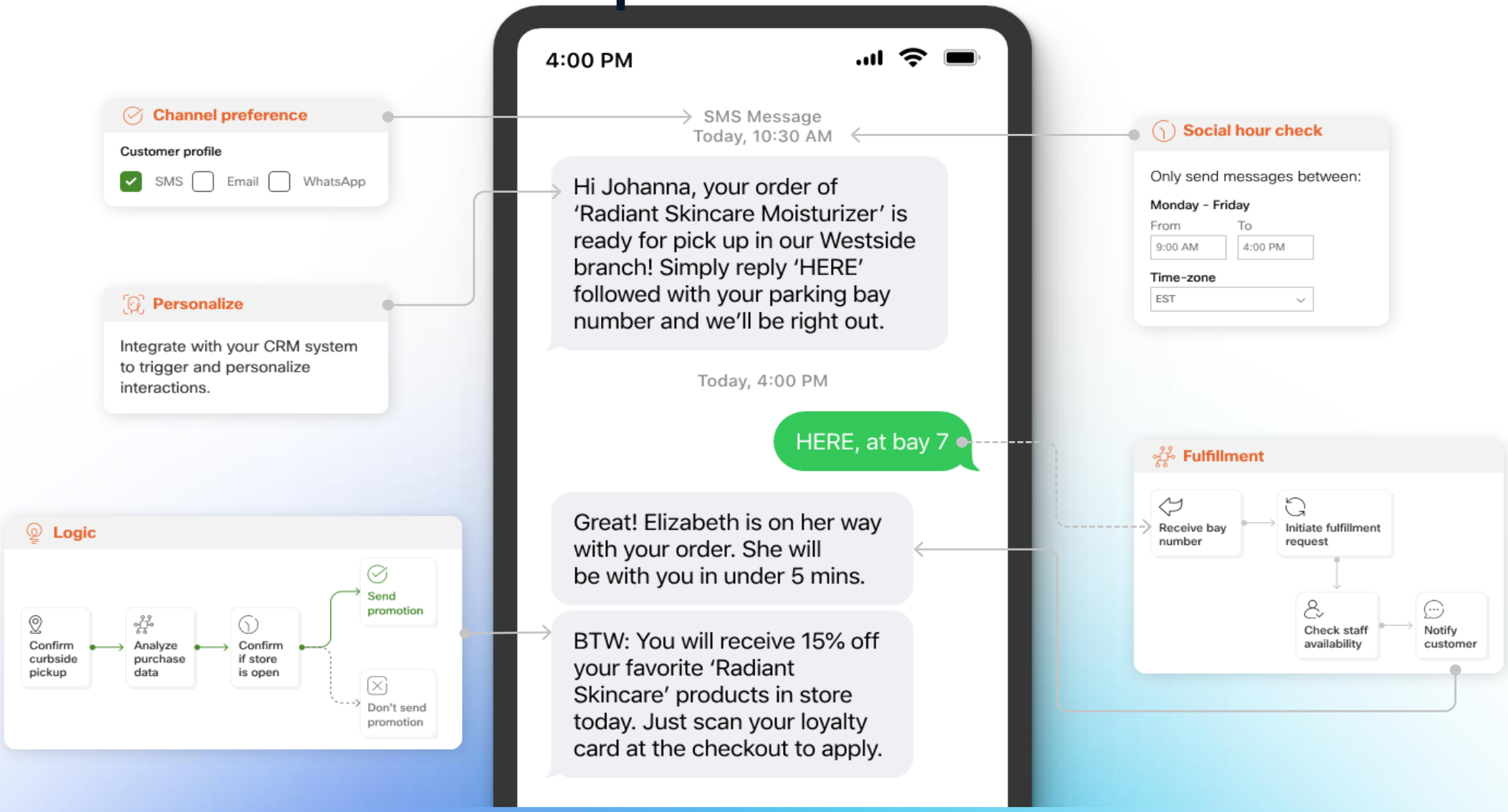
Proactive Journeys – Anticipatory Experiences



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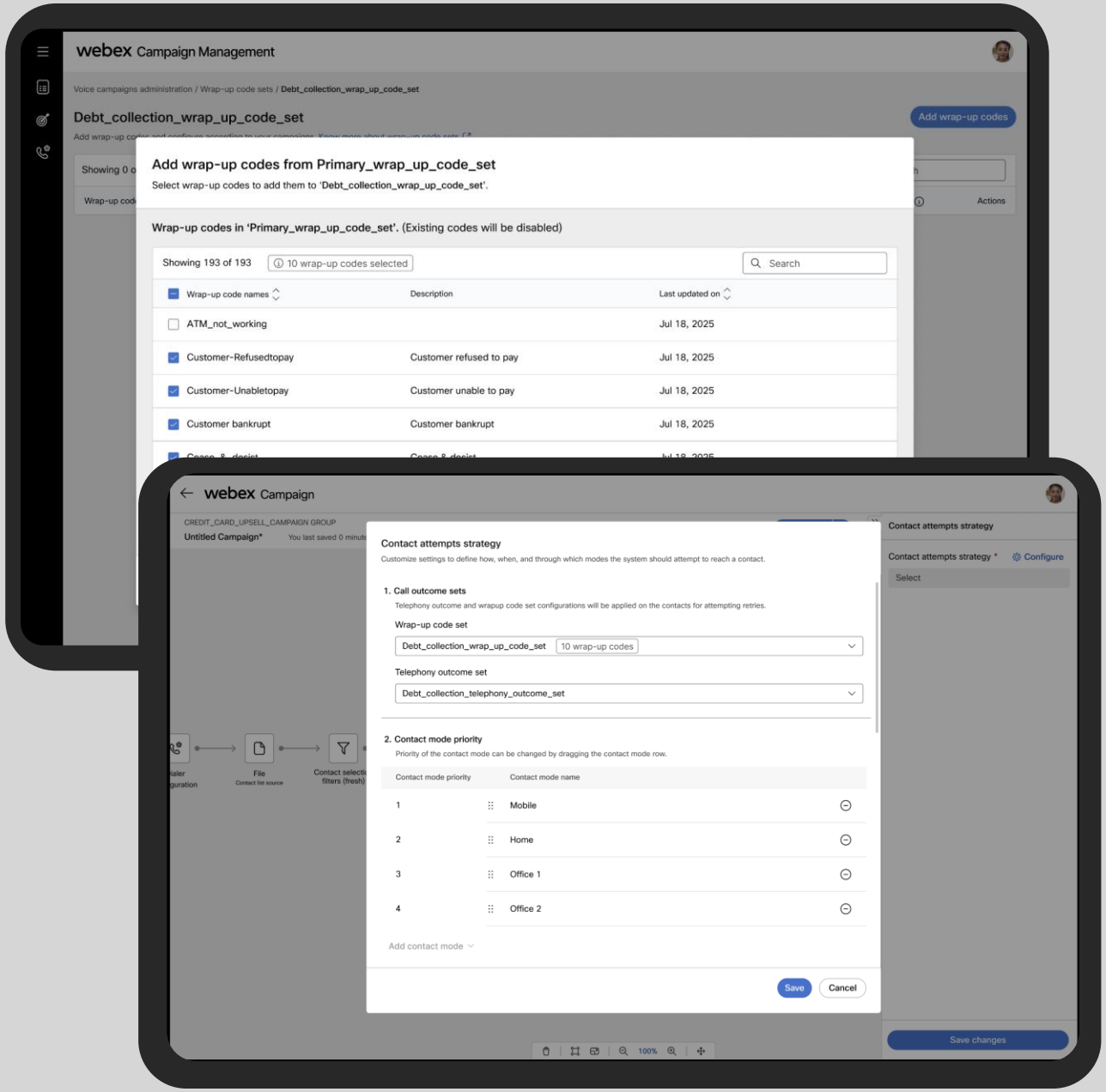
Roadmap

Roadmap:

Campaign specific wrap up codes and telephony outcomes

Configure different retry behavior for different use cases for the same wrap-up code and same telephony outcome



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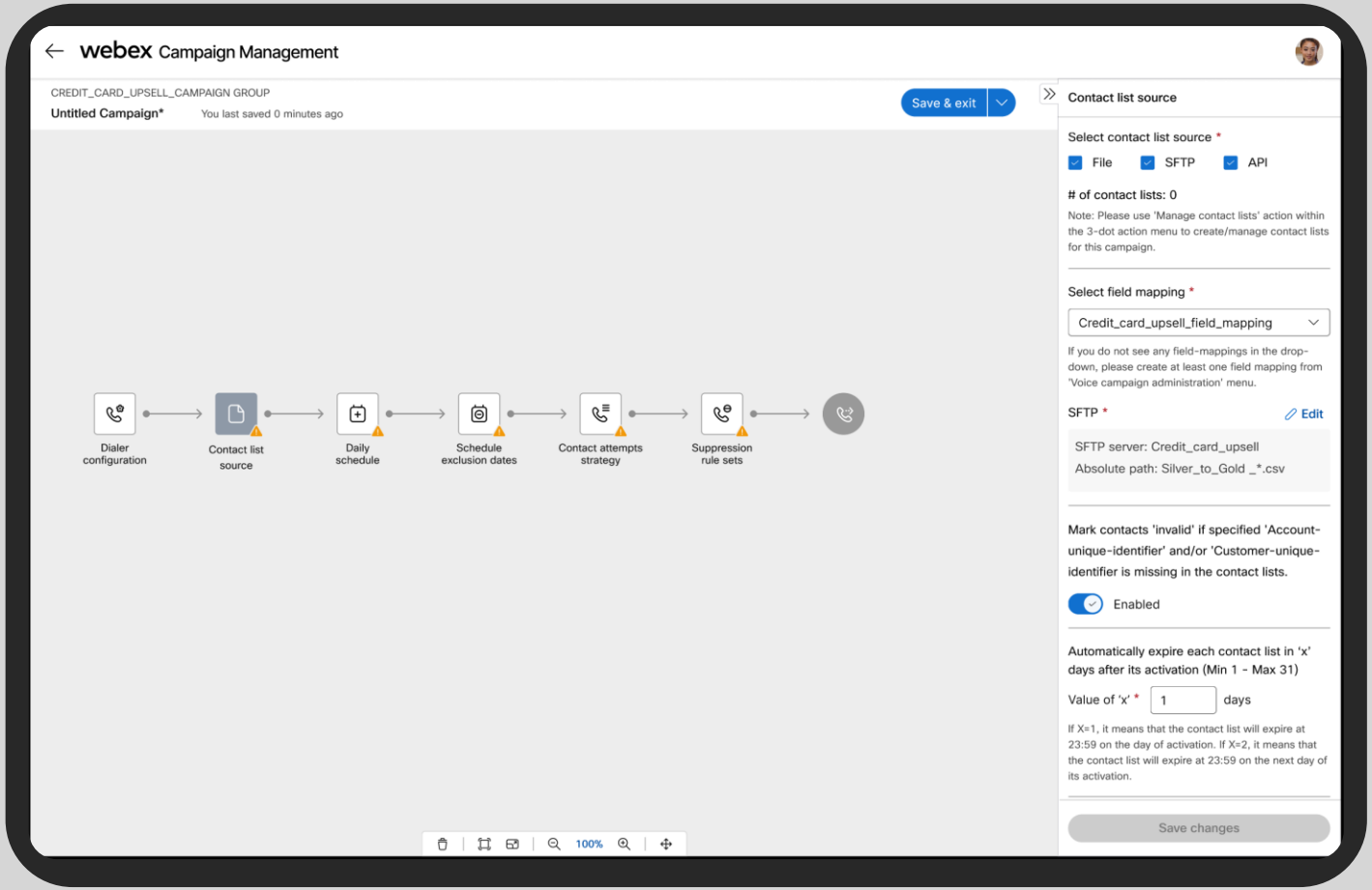
Roadmap:

APIs for managing contact lists

You can fully automate contact list creation, contact creation, and contact status updates.



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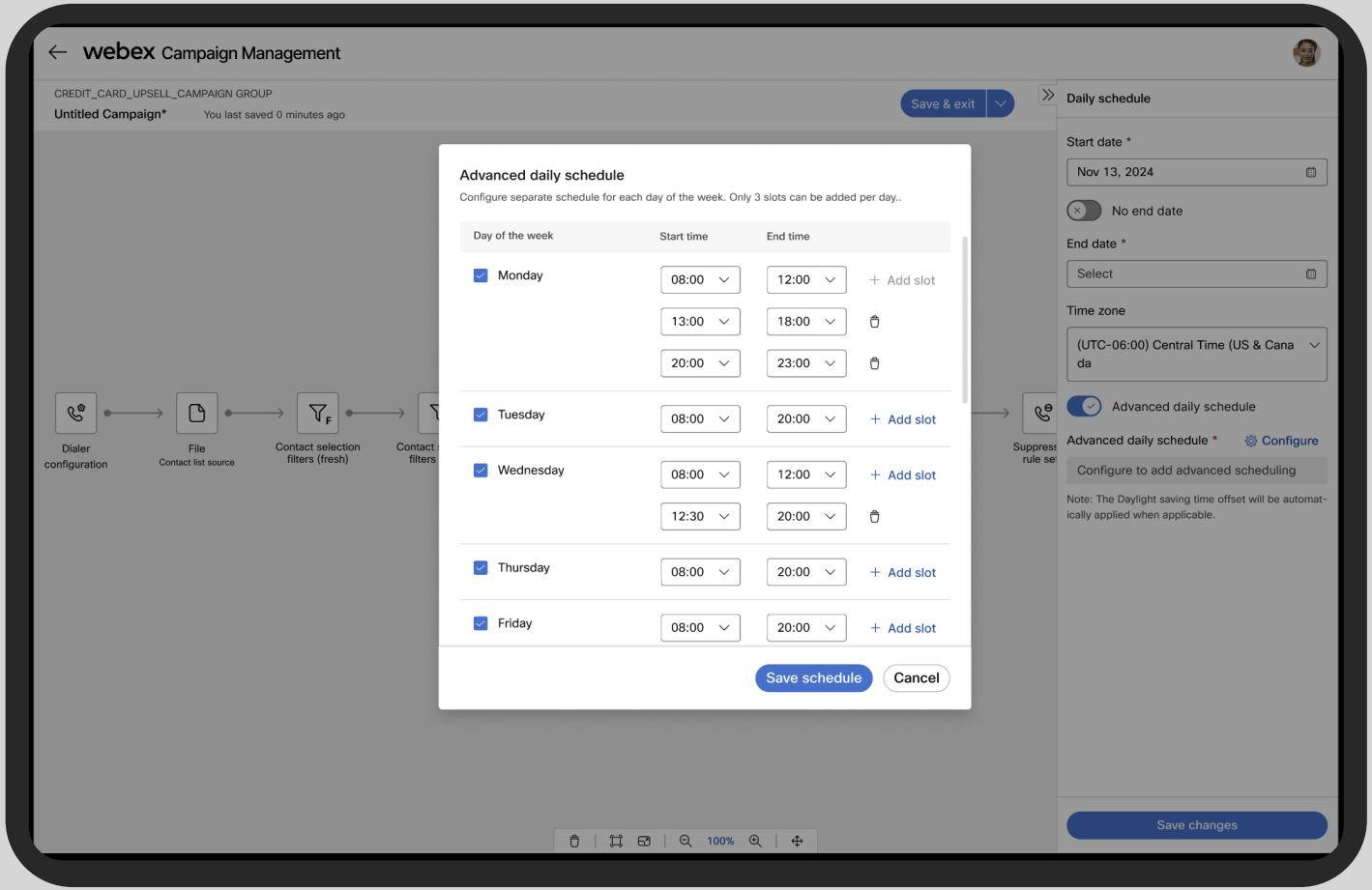
Roadmap:

Advanced scheduling options

- Configure different start/end times and time windows per day.
- Allow multiple shifts within the same day.
- Support unique weekly schedules per campaign.



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I know Kung Fu!

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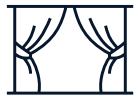

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Thank you

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