WEBINAR
Best Practices for Call Originators in a World of Robocalls and Phone Scams

Wednesday, March 18, 2020 | 2-3 pm ET
Call scams have reached epidemic levels.

It destroys customer trust, erodes your brand, and exposes you to penalties & liabilities.

There is an opportunity to protect yourself AND your customers.
Call centers efficiency plunging due to inbound and outbound fraud

Spoofing erodes brand and risks potential liability

Calls to consumers incorrectly blocked or mislabeled

Epidemic of robocalls & call fraud mean consumers no longer answer their phones
REGULATORS & LEGISLATORS: STOP ROBOCALLS NOW

June 6, 2019
FCC allows blocking of **illegal AND unwanted** robocalls (without opt-in)

Aug 22, 2019
All State AG’s + 12 leading operators adopt Anti-Robocall Principles

May 23, 2019
Senate votes 97-1 to approve TRACED Act

Nov 15, 2019
House & Senate compromise bill

Dec 04, 2019
House passes 417-3

Dec 19, 2019
Senate passes unanimously

Dec 30, 2019
Enacted: Pallone-Thune TRACED Act

July 24, 2019
House votes 239-3 to pass Stopping Bad Robocalls Act

TRACED ACT
- **BLOCK** unwanted calls and texts
- **VERIFY** calls with STIR/SHAKEN
- **FINE** violators up to $10K per call
CHALLENGES FOR CALL ORIGINATORS

1. Calls you **WANT** ARE NOT getting through

2. Calls you **DON’T WANT** ARE reaching customers
POLL QUESTION

What is your BIGGEST CHALLENGE in calling your customers?

1. Inaccurate Customer Contact Details
2. Call Agent Scheduling / Staffing
3. Caller ID Quality
4. Incorrect Spam/Fraud Labeling
5. Call Blocking
6. Call Spoofing
7. None
NOW

Improve Contact Efficiency

Manage calling brand; Mitigate call blocking & spam labeling

NEXT

Enable Trusted Communications

Authenticate calls to protect calls to/from your customers

LATER

Improve Customer Engagement

Transform the phone call experience with identity & context
NOW
MITIGATE CALL BLOCKING & SPAM LABELING
Are my CRM records complete, accurate, and up-to-date? | Customer Record Enhancement
---|---
What’s the best number and time-of-day to reach this person? | Phone Behavior Intelligence
How do I avoid my calls being blocked or spam-mislabeled? | Caller Name Optimization
How do I improve odds of calls being answered? | Branded Call Display
Is this number at risk for TCPA violations? | Contact Compliance Risk
How do I reduce fraud risk without additional friction? | Outbound Risk
INDUSTRY RESPONSE #1: ROBOCALL ANALYTICS

CONCERN: calls already mislabeled; now can be blocked.

VIEW: network blocking is permissible; ➔ Impacts nearly all devices, 4x increase
CALLER NAME OPTIMIZATION: MANAGE YOUR CALLING BRAND

FEATURES

CALLER NAME MANAGEMENT
- Standardize caller name, or customize by extension for Toll-Free and local phone numbers

SPAM TAG MITIGATION
- Register verified business numbers to mitigate incorrect call blocking and spam-labeling
- Neustar publishes to all leading carriers & apps

DO-NOT-ORIGINATE (DNO)
- Blacklist inbound-only numbers as Do-Not-Originate to prevent spoofing

REPORTING
- Monitoring and alerts regarding your brand’s reputation

BRAND PROTECT
- Protect call brand with monitoring alerts if others attempt to register their numbers with your name
ENTERPRISE CASE STUDY: COLLECTIONS

Improvement #1: Nuestar corrects caller ID naming

Improvement #2: Nuestar registers phones

Call Answer Rates

Incorrect Call ID
Spam tags displayed

+33%
ENTERPRISE CASE STUDY: DATA SURVEYS

Profile
• Data collections & surveys
• >50M calls / year

Optimize Caller Name
• Poor coverage
• What to show?
• Test & Measure

Challenge
• More time + calls to reach right survey responders

Register #s
• Mitigate incorrect blocking & labeling

Yield Rate
+23%

Complete Rate
+12%

Landline Call Costs
-29%

Wireless Call Costs
-14%
NEXT

AUTHENTICATE CALLS WITH STIR/SHAKEN
INDUSTRY RESPONSE #2: CALL AUTHENTICATION

**STIR**: Secure Telephony Identity Revisited

**SHAKEN**: Secure Handling of Asserted information using toKENs

**STIR / SHAKEN** are the technology standards which define to digitally sign phone calls to prevent spoofing.

- Neustar is co-author of STIR, a contributor to the SHAKEN framework, and hosts the industry testbed for STIR/SHAKEN implementations.
CALL AUTHENTICATION EXAMPLE

STIR/SHAKEN Authentication Service

STIR/SHAKEN Verification Service

SIP Header w/Verification Status

Attestation/Trust Indicator=“A, B or C”
SHAKEN is a carrier solution.

Enterprises cannot sign their calls. They worry their calls will be blocked or tagged as spam.

Enterprises want to self-attest or have carriers sign on their behalf.

Enterprises want device distribution to maximize reach.
WHICH ENTERPRISES GET HIGHEST LEVEL OF ATTESTATION?

 Enterprises that let carriers manage their numbers, with numbers from and connectivity to a single carrier, will likely get an “A” attestation.

There are gaps/questions for enterprises with **common scenarios**:

- Enterprises with legacy TDM telecom infrastructure
- Enterprises who receive SIP trunks from carriers and manage their own numbers
- Enterprises that receive number blocks from multiple carriers, and use Least Cost Routing (LCR) for outbound traffic
- Enterprises that use “legitimate spoofing” to provide alternate callback numbers
- Enterprises that make outbound calls from toll-free (8XX) numbers
- Enterprises that outsource to call center providers

There is growing consensus that carriers will only trust “A” attestations. Most complex cases above will likely receive attestation of “B” or “C”.
CERTIFIED CALLER: SIGN YOUR OUTBOUND CALLS

FEATURES

ENTERPRISE NETWORK INTEGRATION
- Integrate STIR/SHAKEN to authenticate outbound and verify inbound calls, even if underlying operator does not support STIR/SHAKEN

CARRIER NETWORK INTEGRATION
- Commercial, fully-compliant STIR/SHAKEN implementation

CERTIFICATE DELEGATION (PILOT)
- Neustar defining certificate delegation mechanism with carriers & enterprises
ENTERPRISE INTEGRATION: Business → Customer Mobile

Trusted Call Solutions
- Caller ID (CNAM)
- Policy & Identity Portal
- Certified Caller (STIR/SHAKEN)
- Robocall Mitigation

Call Session Registry

Subscriber DB

Enterprise Integration

Corporate Network

Carrier Network(s)

Mobile App SDK

STIR / SHAKEN Attestation A, B, C

Mobile App

Consumer (Terminating)
What stage of PLANNING for call authentication technologies are you?

1. Complete / Near Complete
2. In Progress
3. Planning
4. Haven’t Started
5. No Plans
LATER

TRANSFORM THE CALL EXPERIENCE
THE CALL EXPERIENCE DOESN’T MEASURE UP

Digital user experience is amazing

But call experience is poor
BRANDED CALL DISPLAY: ENHANCE THE MOBILE CALL EXPERIENCE

FEATURES

PERSONALIZED
- Enhance caller identity with a customized brand display for an differentiated and enriched mobile call experience
- Add a targeted message to deliver a personalized branded experience

CONTEXTUAL
- Give customers a reason to answer and to engage in the conversation
- Display call authentication / verification result

RICH ENHANCED CONTENT
- Leverage the mobile screen with logos, images and e-business cards for a rich multimedia display
- Provide expanded name information, business location, title, department
BRANDED CALL DISPLAY: CARRIER PILOT

Collaborative Pilot

Pilot with 12 enterprises, with carrier and mobile app partners for end-to-end integration

Integrated platforms to register and manage enterprise branding (logos, phone numbers, etc.)

Branded calling for enhanced call experience

Compelling results in improved engagement

1. Incoming Call Screen
2. Post-Call Notification
3. Call History Log
## BCD CASE STUDY: SURVEY ENTERPRISE

<table>
<thead>
<tr>
<th>Industry:</th>
<th>Market Research / Survey / Data Collection</th>
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| Product/Services | • Political polls  
| | • Health research  
| | • Government program research |
| Branded Call Display Pilot activity | • Participating in Branded pilot during 2nd half of 2019  
| | • Approximately 1 million calls per year across campaign survey  
| | • Initial pilot results across a sample of 15K Branded calls  
| | • Branded display includes Survey Name, Survey Logo and Called Intent reason. Post call content includes Business Type and Business Website. |

### Branded Call Display Results

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<tr>
<th>KPI</th>
<th>Sample</th>
<th>Rate</th>
<th>Control:Test Lift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Answer Rate</td>
<td>Control</td>
<td>18.2%</td>
<td>56% ↑</td>
</tr>
<tr>
<td></td>
<td>Branded Test</td>
<td>28.48%</td>
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POLLING QUESTION

What is the MOST IMPORTANT driver to your organization for implementing call authentication?

1. Regulatory Compliance
2. Risk & Security
3. Customer Retention / Care
4. Customer Growth / Experience
WRAP UP
**EVOLUTION: TRUSTED CALL SOLUTIONS FOR ENTERPRISE**

- **Caller Name Optimization**: Manage how name & brand appears on calls, and protect against blocking / mislabeling.
- **Certified Caller**: Digitally sign outbound calls to assure customers, and battle unwanted inbound robocalls.
- **Branded Call Display**: Personalize mobile screen for contextual and branded customer call experience.
HERE’S WHAT OUR CUSTOMERS SAY

NEUSTAR CUSTOMER STATISTIC
75% of surveyed organizations agree that Neustar has enhanced how their brand displays.  
Source: TechValidate survey of 20 users of Neustar
Published Jan 10, 2020 TID: 827-401-D08

NEUSTAR CUSTOMER STATISTIC
89% of surveyed organizations agree that Neustar has reduced or eliminated incorrect call blocking or tagging.  
Source: TechValidate survey of 19 users of Neustar
Published Jan 10, 2020 TID: 840-801-F04

NEUSTAR CUSTOMER STATISTIC
100% of surveyed organizations agree that Neustar has increased consistency and accuracy of caller ID on their outbound calls.  
Source: TechValidate survey of 19 users of Neustar
Published Jan 10, 2020 TID: 840-801-F04

NEUSTAR CUSTOMER SATISFACTION RATING
A Director Call Center Operations at a large enterprise financial services company would be very likely to recommend Neustar for this reason:

“Neustar has always been a leader in communications – Having the experience working with the telecoms is a big benefit.”
Source: Director Call Center Operations, Large Enterprise Financial Services Company
Published Jan 10, 2020 TID: 893-701-E76

NEUSTAR CUSTOMER TESTIMONIAL
“Neustar Caller Name Optimization product has improved our brand identity and enabled us to stay in touch with Blacklisting ongoing to correct the issue observed.”
— SVP/VP Operations, Medium Enterprise Banking Company
Source: SVP/VP Operations, Medium Enterprise Banking Company
Published Jan 10, 2020 TID: 893-701-E76

NEUSTAR CUSTOMER TESTIMONIAL
“Fixed many inaccurate SPAM definitions and made it easy for us to update our caller id across carriers. The flexibility and ease of making additional changes is one of the driving factors to selecting Neustar.”
— Director Call Center Operations, Large Enterprise Financial Services Company
Source: Director Call Center Operations, Large Enterprise Financial Services Company
Published Jan 10, 2020 TID: 480-901-DE3

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Thank You

www.callerid.neustar