



Telemarketing guide





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Introduction

Relevant and personalised

Telemarketing, when done well, can be a brilliantly successful, profitable and mutually beneficial channel of communication and sales between you and your customer.

It gives you an invaluable opportunity to communicate a highly relevant and personalised offer to your customer or supporter in a timely, sensitive manner.

One-to-one phone marketing allows you to build a closer relationship with your customer in a very personal, relevant manner – complete with instant interaction and resolution – to give them a new offer that they appreciate or help them get more value from a product or service that they are already using.

Your best practice goals

Best practice is about much, much more than mere compliance. Instead, following these guidelines will add tangible value to both your organisation, looking to prosper, and your customer, looking to benefit.

As with all one-to-one marketing, your main goal must always be to do the right thing for your customer – to *put your customer first*.

Only by doing this will you enjoy the fullest rewards of telemarketing – and continue to enjoy the freedom to engage with your customer by telephone in the future.

Getting it right

The sign of a great telemarketing call is that your customer would not describe it as telemarketing – but would instead describe it as a great service call!

Following these guidelines will most certainly help you to achieve this goal.



Business practice



Compliance

Regulation, compliance and standards

There are many regulations and standards affecting contact centres. They can be split into four strands:

- Legislative requirements
- Data Protection Act 2018
- Privacy and Electronic Communications Regulations 2003
- Telecommunications (Lawful Business Practice) Interception of Communications Regulations 2000

Regulatory organisations

Compliance with your legal obligations is adjudicated and enforced by several authorities:

Ofcom

Ofcom is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services.

www.ofcom.org.uk/

The Information Commissioner's Office (ICO)

The ICO responds to any complaints or concerns regarding data protection and privacy issues.

ico.org.uk/

The Financial Conduct Authority (FCA)

The FCA regulates the financial services industry in the UK, with the aim to protect consumers, ensure the industry remains stable and promote healthy competition between financial services providers.

www.fca.org.uk/

The penalties for non-compliance include fines, sanctions, public censure and reputational damage.

For more information on penalties – including examples of organisations that have been sanctioned – visit the ICO:

ico.org.uk

Industry codes

Although these are not law, contact centres are expected or required to comply with industry codes and standards, certainly if they are members of industry organisations.

Telemarketing is subject to code requirements from the following industry bodies:

The DMA Code

DMA members must comply with the provisions of the DM Code.

Non-members are strongly advised to comply with the Code as it is a useful summary of the legal and best practice requirements for one-to-one marketers.

The Code is adjudicated by the Direct Marketing Commission (DMC).

The CAP Code

The British Code of Advertising, Sales Promotion and Direct Marketing (CAP Code), which is enforced by the



Advertising Standards Authority (ASA).

PhonepayPlus

Regarding premium rate services and charging. Mobile marketers must comply with the Code of Practice and Guidelines issued by PhonepayPlus.

Industry bodies monitor compliance with their codes of practice and can impose sanctions if they are not met.

Best practice guidelines and kitemarks such as those contained in this document aim to raise standards and retain customer confidence in the medium. They aim to ensure the long-term sustainability of our industry.

- **Comply with relevant standards**

Contact centres need to decide the standards with which they will comply (in addition to those that are a legal requirement) and put in place quality assurance processes that verify they are being met.

- **Obtain verification**

Regulatory requirements and industry standards usually require verification to those bodies responsible for them. A level of transparency is necessary to comply.

- **Encourage internal transparency**

It is also worth considering transparency internally for management and agents. This will drive standards as objectives are set and improvements are considered by all involved.

Taking payments over the phone

- **Comply with PCI**

If you accept credit card payments, you must comply with the Payment Card Industry (PCI) Security Council standards.

- **Approach payment compliance as a business benefit**

Compliance with data security standards can bring major benefits to your organisation – while failure to comply can have serious and long-term negative consequences.

Major benefits:

- Compliance with the PCI DSS means your systems are secure, and customers can trust you with their sensitive payment card information
- Compliance improves your reputation with acquirers and payment brands -- the partners you need in order to do business
- Compliance is an ongoing process, not a one-time event. It helps prevent security breaches and theft of payment card data – now and in the future

Negative consequences:

- Just one incident can severely damage your reputation and your ability to conduct business effectively, far into the future
- Account data breaches can lead to catastrophic loss of sales, relationships and standing in your community – and can depress share price if yours is a public company
- Lawsuits, Insurance claims, cancelled accounts, payment card issuer fines and government fines

- **Client is responsible for ensuring compliance**

If you have outsourced your telesales function, legal responsibility still falls on you, not your supplier, to ensure that payments are being handled in a compliant way.



Verification

Include a verification process to monitor your compliance alongside evolving regulation and standards.

- **Assign internal responsibility**

Appoint an employee to manage this process and 'own' regulation, compliance and standards verification for your organisation.

The employee appointed to fulfil this task will need to liaise with outside regulatory bodies.

- **Appoint compliance officer**

Appoint a compliance officer and communicate their responsibilities across your organisation.

Your compliance officer should be an expert in this area and be able to advise your organisation on its future development as well as the regulation, compliance and standards to which your contact centre must adhere.

- **Demonstrate compliance**

Use your verification process to monitor and improve the processes that are necessary for compliance.

Keep relevant records to demonstrate compliance.

- **Create campaign quality assurance**

Ensure that all relevant personnel understand these verification processes.

Create quality assurance procedures and measures to ensure compliance at the start of each campaign.

- **Keep records**

Keep verification records including:

- Agent and team objectives
- Dialler compliance reports
- Copy of agent script for campaign
- Agent training manual for campaign
- Campaign results
- Campaign execution rules – including dialling times, retry counts, abandoned call message handling and so on
- 'Do not call' (DNC) list management processes
- Data management process
- Details of other front office and back office processes
- Complaints and resolutions

Verifiers

- **Use a verifier**

Consider using a verifier for certain processes.

The purpose of a verifier is to check data, a call or a transaction on an individual basis to ensure it is correct.

This is a double-checked approach that you should adopt for sensitive sales and regulated products such as financial services.

This approach minimises product cancellations, poor agent selling techniques and incorrect data.



Quality assurance

Quality assurance underlies all sections of your best practice. It is the responsibility of every campaign owner and contact centre to consider and deliver quality to their customers.

Without quality assurance, it is likely that the outbound telemarketing and teleservice industry will fall into disrepute – making it no longer effective as a business practice and possibly attracting direct government regulation.

This section highlights quality assurance best practice that you should implement. There are also other suggestions that will enhance quality and will become practical in the future.

Quality assurance tools

There are a number of technological tools that provide an aid to quality assurance.

Some of these, such as call recording, are fundamental to quality assurance. Others, like speech analytics, are ones you should understand for the future.

Call recording and quality monitoring

Effective monitoring and occasional recording are commonplace with all types of calling activity.

- **Set clear monitoring objectives**

There are four basic reasons why you and, if relevant, your outsource CCT would want to listen to recorded calls:

- Improve performance – for example, testing and optimising scripts
- Ensure quality control standards and compliance
- Training of both new and existing staff
- Crime detection

- **Be compliant**

Call recording is a requirement of a number of regulatory bodies and is legally allowed – but you must meet the requirements of The Telecommunications (Lawful Business Practice) Interception of Communications Regulations 2000.

- **Tell customers and staff when calls are being recorded**

Although it is not a legal requirement to inform customers that calls are recorded, it is certainly best practice to do so.

It is, however, a legal requirement to make reasonable efforts to inform all your staff that calls are being recorded. It is certainly best practice to ensure all staff are aware that calls they make may be recorded.

This includes telemarketing staff at your company, as well as at your outsource CCT.

This is a requirement of The Telecommunications (Lawful Business Practice) (Interception of Communications) Regulations 2000.

- **Store recordings**

Ensure that recordings are securely stored with accurate, detailed information – and can be easily accessed and examined in any customer disputes.

- **Monitor constructively**

Use quality monitoring positively – with supervisors proactively assessing a sample of calls against your criteria and looking for constructive ways to help the campaign (or individual agents) get better results.

- **Use screen capture**

Use screen capture to complement call recording. Replay both at the same time to gain a full view of your agent's process and check that data capture is consistently high.



- **Define specific training for each agent**

Use the findings to target specific training for each of your agents. Ensure that you quickly spot and address any quality issues.

- **Recording of payment details**

There has been some confusion about the storage of cardholder information in call recording systems.

The DMA has produced a document outlining some of the requirements of the PCI DSS in relation to the storage of cardholder information in call recording systems and some potential solutions for CCT operators.

You can download this specific guidance here:

www.dma.org.uk/uploads/PCI%20Guidance%20Notes_542ec328e8176.pdf

Reporting and business intelligence

Technology can provide reporting on a wide range of measures. Some of these are fundamental to verification by regulatory authorities. For example, under Ofcom regulations the operations of any predictive dialler must be captured and stored.

- **Monitor against campaign measures**

Assess calls against your campaign measures, such as conversion rate or customer satisfaction indexes, as part of a balanced scorecard to improve quality.

- **Monitor for potential problems**

A number of quality monitoring solutions can spot other potential problems in calls, including:

- Long silences in calls
- Where the agent and customer talk over each other
- High levels of stress in a voice

Speech analytics

Speech analytics is a very new technology but it will become commonplace in the future and will profoundly affect the way contact centres assess performance. It allows the identification of key words, phrases and stress patterns.

Speech analytics automatically maps call information into language patterns that are based on dozens of indicators such as customer satisfaction, agent politeness, acoustic stress, and call tempo.

- **Identify call issues**

Use speech analytics to uncover patterns that are quite unexpected, alerting you to issues that you would not be able to discover otherwise.

- **Combine with call data**

Combine speech patterns with call data to reveal in-depth information and allow you to make further analysis.

'Pull' calls individually and inspect them for quality.

- **Monitor for swear-words**

Monitor for inappropriate language, including swear-words or other offensive terms.

- **Investigate benefits and issues**

Investigate and assess all factors around how your specific organisation can benefit from speech analytics, including:

- Management of the technology
- Use of alerts and trends
- Feeding back results
- Using results to improve quality
- Legality and regularity compliance



Complaints procedure

Complaint-handling objectives

A complaint is any expression of dissatisfaction – whether oral or written and whether justified or not.

Good complaint handling is critical to the success of your relationship with your customer.

It will cost you much more to replace a dissatisfied customer than to retain an existing customer – so make every effort to ensure that you have effective organisational structures in place to handle complaints.

- **Put your customer first and value your reputation**

Design your complaints management process to:

- Foster a positive relationship with your customer – especially when they are starting from a point of dissatisfaction
- Minimise any risk or cause for anxiety for your customer
- Minimise any reputational damage by acting quickly, sensitively, constructively and decisively
- Bolster your brand reputation through excellent customer service
- Turn a negative experience into a positive brand story

- **Ensure a robust clear framework that provides:**

- Transparent, visible procedures
- Easy and free access – including removing all barriers and offering free phone numbers
- Effective and easy complaint recording methods
- Fair and respectful treatment of all customers
- Consistent processes for determining outcomes
- Clear timeframes and deadlines for resolving the majority of complaints
- Clear processing of complex complaints
- Full information and expectation management for your customer throughout the process

Complaints policy

Your complaints policy should cover the following issues:

- **Obligation to have a written complaints policy**

As a requirement of the *DMA Telemarketing Manifesto*, any contact centre that undertakes outbound calling activity – whether outsourced or in-house – is required to have a written complaints policy.

- **Obligation to deal with complaints**

Your company has a duty to improve your customer's experience of an outbound telemarketing call by fully understanding the root cause of any dissatisfaction.

- **Identify systematic issues**

As a company, you are required to manage and analyse complaints stemming from outbound calling and must:

- Identify systemic issues
- Remedy them



- Make root-cause analysis of the reasons for the complaint
- Change processes and procedures to minimise customer dissatisfaction
- **Train complaint-handling staff**
Make sure your complaint-handling staff are knowledgeable, trained, respectful and supported by specialist supervisors so that they are able to have empathetic and productive conversations with your complainant.
- **Turn complaints into an opportunity**
Well-trained staff will help your customer feel confident that their complaint has been respected and that they are valued by your organisation – in fact, a well-handled complaint can actually improve customer loyalty.
- **Use complaints to gain valuable insight**
Although unwelcome on the surface, complaints can give you hugely valuable insights into how you can continuously improve your customer's experience and remain competitive.

Complaints process

- **Be professional**
 - Listen to your customer and acknowledge their complaint
 - Respond quickly, honestly and appropriately to issues they raise
- **Collect required information**
Your organisation is required to have its own written complaints procedure.
As a minimum you should collect the following information:
 - Date of complaint
 - Reason for complaint
 - Outcome
 - If complaint was escalated
 - Tracking back to agent/campaign
 - If complaint was handled within service level agreement (SLA)
 - Date complaint settled
- **Categorise complaint**
You should categorise each complaint as either:
 - A complaint that can be answered and resolved immediately on the call by your agent
 - A complaint that requires further investigation
- **Provide information to complainant**
If a complaint cannot be immediately resolved, you must provide your complainant with the following information:
 - Acknowledgement of receipt of their complaint
 - Details of your organisation's complaints procedure
 - Named contact within your organisation to handle their complaint
 - Telephone number for this contact
 - Your organisation's business hours
 - A timeline of your investigation process, to inform your customer's expectations
 - Details of when you expect your investigation to be completed



- **Notify when complaint cannot be settled within seven days**

If your customer's complaint cannot be settled within a seven-day period, contact them with:

- Notice by telephone, letter or email to advise the reason for your delay
- An updated timeline in which you expect to conclude the matter

- **Explain escalation policy**

In the event of your customer remaining dissatisfied, explain your organisation's escalation procedure courteously and guide them through it.

Complaints reporting

- **Document full complaint procedure**

Provide your agent with clear, documented information on when, how and to whom to escalate a complaint – together with a clear expectation on how long a complaint will take to resolve.

- **Log all complaint communications**

As a minimum, log all complaints and conversations so that all communications are tracked and followed up in accordance with your procedures.

Show your agent where complaints are stored and what information is required for analysis purposes.

- **Keep agents informed**

It is essential to regularly update your call-handling teams about any existing complaints.

- **Align process with policies**

Align your escalation process with your organisation's complaints policy.

- **Manage customer expectations**

Make sure your agent is able to help manage your customer's expectations by providing a timeline at the point at which they make their complaint.

- **Create dedicated handling for group complaints**

Set up a dedicated complaints line, using live operators, in circumstances where a large number of customers may complain.

Ensure that your operators can classify the nature of each complaint and, if they are unable to resolve it themselves, are able to connect your customer to the most relevant person or department.

Ensure that someone from the appropriate department is always available to take the call.

Complaints analysis

- **Identify long-term trends**

Spot trends and implement improvements by building up complaints records over time, including:

- Reasons for complaints
- How complaints are managed
- How many complaints are resolved at point of call

- **React quickly to problems**

Identify trends within your complaints in order to tackle underlying issues.

For instance, you may find that a particular data batch caused more complaints than others and can change your data strategy and stop buying data with this customer profile.



- **Turn findings into training**

Turn findings into vital training to help your supervisors have constructive conversations with your frontline agents and, in turn, enable your agents to offer a better customer experience.

Give your supervisors the time to support your agents through call monitoring and regular competency testing.

Complaint-handling training

You must train your entire customer-facing staff to be able to handle complaints appropriately and positively.

- **Key areas for training**

As a minimum, this training should include:

- Complaint identification
- Complaints recording – accuracy of this recording
- Complaints resolution – handling difficult customers
- Regular organisation briefings and updates
- Understanding TPS and/or CTPS and their requirements
- Overcoming 'the right to call' – explaining to your customer where you got their data from
- Complaints procedure
- Complaint recording
- Escalation process

- **Train all customer-facing staff**

Before having conversations with customers, ALL your front-line staff should attend training on complaint resolution to help them recognise dissatisfaction and be able to resolve the complaint through polite and respectful dialogue.

- **Provide empathy training**

Empathy should be a key part of your staff training programme. If your agent does not understand or convey the right attitude or tone, there is a real danger that your customer's dissatisfaction will not be recognised and will be escalated.

- **Train staff to recognise a complaint**

Make sure your agent has the knowledge and the confidence not only to recognise a complaint, but also to acknowledge this in a proactive manner.

A complaint can often be effectively ignored as your agent continues with their own commercial objective – brushing the complaint off instead of appropriately acknowledging and responding to your customer's concern.

An appropriate response to the complaint can often allow both your agent and your customer to relax and move on through the call.

- **Prepare helpful scripts**

Equip your customer-facing staff with precise, pre-prepared scripts or factual responses to help answer your customer's anxieties and diffuse any potentially heated conversations.

- **Background/knowledge training**

Give your agents the following knowledge to help them handle complaints confidently and appropriately:

- **Educate about TPS and CTPS**

Ensure your agent understands how the TPS and CTPS work – and how to respond appropriately if your customer has registered for either service, including asking appropriate questions such as "May I ask when you signed up for this service?".



- **Provide original data source**
If warm calling, make sure your agent is able to explain to your customer where their data was obtained from – for example, during a previous enquiry.
- **Full project briefing**
Make sure that your agent can explain to your customer why they are being called. This will help reassure your customer, clarify that the call is relevant to them and make them more likely to listen to what your agent has to say.
- **Teach the DMA Telemarketing Manifesto**
Ensure your agent knows, understands and abides by the DMA Telemarketing Manifesto so that they can serve your customer correctly and effectively.

Difficult customers

- **Define unacceptable customer conduct**
Create a written policy to define inappropriate behaviour from your customers – covering complaints, offensive or aggressive behaviour and discrimination, such as sexist or racist remarks.
- **Train agents to handle difficult customers**
Make sure your agents understand clearly what is and what is not acceptable behaviour from a customer and how to handle such situations.

Inclusivity and vulnerable consumers

- **Have written 'vulnerable consumers' policy**
You must have a written procedure, included in your training manual, to offer your staff guidance when dealing with vulnerable consumers, including:
 - Older people
 - People who speak English as a second language
 - Children and young people
 - People with mental illness
 - People with learning disabilities
 - People with physical disabilities
 - People with alcohol or drug use problems
- **Develop inclusion objectives**
Develop measurable, customer-centric objectives to enable effective communication with all groups of customers. Train your agents to respond to all customer types.
- **Strategise handling of different communication needs**
Make provision to ensure an easy flow of two-way information for as many of your customers as possible.
Develop a sensitive communication strategy, capable of engaging with disadvantaged groups via sensitive and responsive telephone discussion in an appropriate way.
For example:
 - Avoid the temptation to just speak louder in reaction to someone who does not speak English well
 - Instead, avoid using metaphors or phrases that might confuse, such as 'second to none'
 - Speak at a steady pace using standard, non-embellished, clearly-enunciated language



- **Have responsible policies in place**

Accept that we all have a responsibility to protect the interests of the vulnerable and consider additional safeguarding steps, such as a longer cooling-off period, or a policy of confirming every transaction by post.

- **Offer no-quibble refunds**

Offer no-quibble refunds or cancellation to any customer believed to be vulnerable.

- **Be extra vigilant for customers with mental illness**

With consumers suffering mental illness, such as Alzheimer's disease, it is not always possible to detect or respond to vulnerabilities, particularly towards comprehension.

Consumers may suffer with episodes of confusion and may therefore agree to something they do not want or need.

Train your agents to recognise any signs that a customer may be vulnerable and to react appropriately.

- **Make appropriate allowances for the hearing-impaired**

Sometimes your customers will be using certain sensory assistance services – for example, if they have impaired hearing.

These will impact on your call but can easily be accommodated by varying your speed and tone of speech.

You must make Type Talk or similar transcription facilities available prior to beginning a campaign if your agents might regularly contact the hearing-impaired.

- **Record vulnerable consumers' needs**

Annotate your records to flag up vulnerable consumers and their particular requirements.

Ensure your agent is aware of any known special requirements and has taken appropriate action before the call.

Corporate and social responsibility

Setting standards

- **Set policies in place**

Ensure that you have clear, publicly available policies to cover relevant areas of your corporate and social responsibilities.

These should serve as an important promise between your company and the world in which you operate – including your staff, surrounding community, customers, partners and physical environment.

- **Pursue accreditation**

Strongly consider working towards the industry standard accreditations for relevant areas – for example, ISO 27001 for information security.

These accreditations will benefit your company by providing a clear, best practice framework for your processes, by helping you to become more efficient and optimised and by earning you credibility in your marketplace. They can also be an essential requirement demanded by your potential clients or suppliers.

- **Define non-financial standards**

Consider the impact of your campaign in non-financial terms:

- How is it affecting your customers and prospects who do not convert?
- Is it socially responsible, for example, to inconvenience 49 people with an inappropriate phone call in order to make a single sale?
- Identify a reasonable and socially responsible conversion rate for your campaign



- **End an under-performing campaign**

At the start of your campaign, set a minimum daily conversion rate.

Stop your campaign if you fall below the threshold.

Environment

Whilst telemarketing has a relatively low environmental impact compared with other activities, there are still important issues that all responsible marketers and CCTs should consider.

Question your outsource supplier on the following:

- **Health and safety**

Provision of a supportive, health and safety-compliant working environment for all employees, including:

- Ergonomic seating, desks, telephony and computer equipment to ensure a comfortable and compliant workplace
- Appropriate management infrastructure and a supportive, coaching culture – with regular feedback, mentoring, development and support for agents and the absence of workplace bullying
- Adequate access to toilet, break and rest facilities
- Promotion of good work/life balance culture – such as flexible work patterns
- Opportunities for further training, education, growth and development for employee career development

- **Minimising impact upon the environment**

- Efficient electricity consumption and waste – such as 'lights off' initiatives, minimal use of photocopiers and efficient server storage solutions
- Waste management – including reduce, re-use, recycle strategies
- Print reduction and stationery management
- Travel reduction and use of virtual technologies, such as telephone and video conferences, where possible
- Car pooling and public transport usage incentives

- **Minimising negative impact of calling activities within the wider marketplace**

- Adopting responsible and compliant dialler strategies to avoid causing unnecessary distress and confusion, especially via silent calling
- Adhering to DMA guidelines for dealing with vulnerable customers – again to avoid unnecessary distress and confusion
- Avoidance of hard sell, cold call and mis-selling techniques
- Full disclosure relating to call recording
- Full adherence and compliance with 1998 Data Protection Act relating to use of personal customer data
- Ensuring access to appropriate resource to handle customer complaints efficiently



Workplace inclusivity

As with any workplace, CCTs need to ensure they promote inclusive workplace values and provide equal opportunity to all employees regardless of differences such as age, ethnic background, gender, religion or sexual orientation.

An inclusive workplace has been recognised in law as one where the human rights principles of fairness, respect, equality, dignity and autonomy are promoted and are part of the organisation's everyday goals and behaviour.

- **Check CCT's approach to inclusivity**

To ensure an inclusive workplace, simple efforts can be made by your CCT to remove and prevent physical and behavioural barriers, such as:

- Making job advertisements and applications accessible for people with vision disabilities
- Ensuring fair recruitment and selection processes for all applicants
- Ensuring fair promotion opportunities for all staff, based purely on merit
- Ensuring the workplace is accessible, usable, pleasant and compliant with occupational health and safety regulations for persons with disabilities – such as including ramps, lift access and braille signs
- Educating staff on multicultural sensitivity, including cultural differences
- Providing facilities for people to practice their religion during work hours, as appropriate

From a legislative perspective there are some very simple Equality and Human Rights Commission Guidelines in place to enable all employers to sense check if they are compliant, as follows:

- There is a welcoming workplace culture where everyone is treated with respect and dignity and everyone feels valued
- Policies are in place concerning equality and human rights, working conditions, dignity at work, employee welfare and fair recruitment and procurement practices
- Members of staff at all levels are aware of the inclusive values of the organisation and are actively consulted and involved in policy development
- The workforce is representative of the local community or customers – or if not, under-represented groups are encouraged to apply
- All employees are encouraged to develop and progress and any barriers faced by specific groups are identified and action taken to address them
- Unnecessary hierarchies and occupational segregation, where groups of employees are congregated into certain areas, are discouraged
- The organisation is aware of any potential tensions within the workplace and takes action to anticipate and address them
- Inclusive strategies are fully supported and promoted by senior staff



Human resources

This section outlines the importance of agents or frontline staff to the future health of your business and the telemarketing industry.

The following areas are covered to enable you to understand your minimum obligations to your staff in order to meet best practice:

- **Recruitment**
- **Training**
- **Contracts**
- **Remuneration**

Key principles

- **Think long-term**
The number of agent places in the UK has risen significantly over recent years. As our industry continues to expand, evidence suggests that a career in the contact centre industry is no longer seen as a stepping stone between alternative careers but for many agents is a career in its own right.
- **Provide a positive work environment that encourages growth**
It is more important than ever to make sure that the training and environment you provide for your team is positive and constructive in the long-term as well as the short-term.
With further growth forecast well into the next decade, it is important for you to create a positive vision of your business, our industry and the different contact centre careers available to talented individuals.
- **Present roles honestly and fairly**
When recruiting for outbound telemarketing positions, consider the way in which you present different roles to best reflect the actual work that your recruits will undertake.

Roles

For the purposes of this best practice document, the following roles are considered in scope (the list is not exhaustive):

- Telemarketing executive
- Telemarketer
- Telesales executive
- Telephone sales canvasser
- Customer relationship telephone adviser
- Outbound customer adviser
- Outbound sales agent

Recruitment

- **Recruit with honesty**
In order to attract and retain the best people, your recruitment process should be fair, open and honest about the nature of the role throughout – from initial advertising through to recruitment days or interviews and job offer.



- **Check latest legal requirements**

Ensure that your recruitment policy complies with current employment and immigration law.

- **Include telephone interview**

It usually makes sense to include a telephone interview, as a clear and professional telephone manner will be integral to the success of any candidate in an outbound telemarketing role.

- **Use one process**

By their very nature, telemarketing campaigns can often be tactical and therefore you may also be recruiting people on a temporary basis on occasion. You should attempt to follow the same recruitment methodology whether for a permanent or temporary role.

- **Use reputable agencies**

In the event that you are employing temporary staff, there are many reputable recruitment agencies from which to draw agents.

- **Check full references**

Agents will have access to your customer's personal data and will be working in a privileged position, effectively entering a customer's home every time they conduct a telemarketing conversation.

Your organisation's reputation (and that of your client, if you provide outsourced facilities) is in their hands.

In order to ensure compliance with security of customer data, always obtain and check your recruit's full references.

Contracts

- **Include full job specification**

The contract of employment should include a full job specification that clearly states:

- Job role
- Place of work
- Hours of work
- Holiday entitlement
- Sickness entitlement, if applicable
- Disciplinary and grievance procedure
- Remuneration, including financial and non-financial benefits

- **Review annually**

Review this annually as part of your agent's annual performance review to ensure it continues to accurately reflect the activities they are required to undertake on your behalf.

- **Clearly explain incentives**

Providing full, clear information and explanation of any incentive structure, if this is an integral part of the job you are offering.

- **Agency staff contracts**

For agents working via a recruitment agency, your agent's contract of employment is with the agency itself.



Remuneration

A proper remuneration structure provides your best opportunity to encourage the right sort of behaviour among staff working on outbound telemarketing campaigns.

- **Pay a sufficient basic rate**
Pay a basic rate of pay, whether a salary or hourly rate, that allows individuals to focus on the best interests of each and every customer they contact in the course of their work.
- **Comply with minimum wage**
Ensure that rate of pay complies with the current national minimum wage. We recommend that you should guarantee your agents a pay rate of no less than the minimum wage, irrespective of their employment status or the number of sales that they make.
- **Enforce minimum wage from agencies**
We further advise that it is best practice for you to contractually enforce a basic pay rate of no less than minimum wage on the agencies you use – and actively supervise their third-party sales agents.
- **Make incentives achievable**
Set incentives to achievable levels and reflect the ability to convert.
- **Incentivise good behaviour**
Set team goals and individual rewards to minimise poor behaviour and maximise positive outcomes.
- **Incentivise QUALITY of customer interaction**
Think about exactly what you are incentivising. Reward the QUALITY of customer interaction rather than focusing exclusively on the outcome (sale). Encouraging your agents to focus on quality is a key factor in allowing the natural conversion rate for a campaign to rise.
- **DO NOT pressure conversions**
Forced conversions can often lead to cancellations and or complaints which, in turn, take business time and effort to resolve.
- **Align motivations for all staff**
Ensure that your payments structure incentivised all members of the team, and all levels of management structure, towards the same behaviours and objectives.
- **Monitor against incentivising bad practice**
Observe the outcomes of your commission structure to ensure that is not deliberately or inadvertently encouraging bad practice.
- **Things to avoid when remunerating sales staff:**
 - Commission-only deals between agencies and clients
 - A high proportion of your telemarketer's remuneration paid in the form of commission
 - Low levels of accountability
- **Further resources**
Further resources:

[Chartered Institute of Personnel and Development \(CIPD\) \(member access only\)](#)



Training

Telemarketing relies on great telemarketers

The performance of your telemarketing is inextricably linked to the skill of your agent making the call.

- **Offer continual training**

Identify and address ongoing training and development needs within your telemarketing or contact centre environments to ensure best practice and best results.

Not only will your commitment to training activities produce immediate higher business effectiveness, it will also encourage a high-performance culture that will help to grow your business in the long term.

- **Nurture staff performance as a key competitive advantage**

A culture of lasting high performance and efficiency is the keystone of top organisations.

Nurture a community of engaged agents, with a clear idea of how they are performing and where they are going, to gain a pivotal differentiator between your organisation and your competitors.

Your ultimate goal is to create a culture where your staff can improve, give their best and deliver your business sustainable high performance.

- **Use training to create a successful culture**

Build organisational values, hard work ethic, clear reward and a customer care ethos into the framework of your training.

Well-structured training will also enable you to raise the profile of your company, your agent's role and telemarketing generally – shaping the future of your business and our industry.

- **Deliver creative training programmes / introduce innovative telemarketing practices**

Creative training programmes will help stir thought and get agents thinking, responding, contributing, and releasing creative potential with each call made.

- **Invest in training to improve profitability**

Practitioners who embrace and promote training, whether accredited or not, will invariably cash in on tangible bottom line rewards.

Well-trained teams naturally tend to achieve better results, leading to greater efficiencies, higher quality standards and an uplift in financial returns.

- **Provide meaningful shared vision**

Delivering a clear vision and strategy that benefit ALL levels of your organisation to provide your staff with motivational shared objectives.

- **Reward employee training**

Getting staff to connect with your business and buy into the idea of high performance can be tricky.

Provide real rewards for successful training and recognise employees who perform highly or make a particularly valuable contribution to your training or culture.

Ensure that you are incentivising positive, quality-focused behaviour rather than poor practice or goals that might compromise customer experience.



Accredited training schemes

- **Offer accredited training**

Offer training that is linked to some form of accreditation.

This can offer faster payback on your investment as your staff are better incentivised to learn when extra qualifications are at stake, leading to obvious performance benefits to your organisation.

- **Recognise that accredited training attracts good staff**

Equally, accredited learning can help you attract and retain the best staff.

Offer your staff the opportunity for practical work-based learning to both raise their competency levels and help them in their career path.

- **Accredited qualifications emphasise measurable improvement**

Accredited learning programmes are fundamentally different to training because they place far more emphasis on the individual learner and the measurable change in their performance as a result.

- **Measure key competencies**

These programmes communicate with learners by breaking key competencies or skill sets down so they are measured and scored by certain written and shared standards.

For example, a task such as 'opening a call' might be scored on a scale of 1-5, with 1 being lowest and 5 highest:

1. **Below expectation** – Agent did not properly announce the call, failed to check they had the correct person, spoke unclearly, provided inaccurate information.
5. **Exceeded expectation** – Agent used customer's first and last name, communicated call objective well, immediately generated interest and went on to progress the call.

Feedback and continued development are features of this method of learning.

- **Accredited training improves business performance**

Accredited learning programmes in the workplace help place stronger focus on business performance, enabling higher levels of employee engagement and better business results.

- **Offer ongoing training**

The best training programmes are those that never stop happening and are linked to daily activities like your company intranet, call logging systems, morning meetings, individual feedback and so on.

- **Accredited schemes available**

There are several kinds of accredited learning programmes available.

These are usually work-based and can take the form of practical assignments, workplace assessments, coursework, college courses or apprenticeships, depending on the type of qualification and the awarding body.

National Vocational Qualifications (NVQs)

NVQs are recognised competency-based qualifications acknowledging proficiency in a particular occupation or task.

An NVQ is roughly equivalent to a GCSE so are ideal for those who wish to extend their qualifications.

They are based and evidenced on workplace activities, not coursework or exams.

NVQs are not necessarily dedicated to learning new skills but are typically focused on raising and recognising competence in an existing role.



BTEC

BTEC is one of a small number of exam boards that offer a standalone qualification.

A BTEC, like an NVQ, is an occupational qualification, but comparable to an A Level.

BTECs are designed to help learners progress in their career, learning new skills and increasing their competence in new tasks aimed towards a certain job.

Other awarding bodies or exam boards that offer similar qualifications include OCR and AQA.

Corporate training programmes

Some organisations run their own custom training scheme, developed in line with the specific needs of the business.

These programmes may not have a recognised qualification but are valuable in that they are ongoing and will have a regular systematic framework. These are based on key competencies required for specific jobs and are linked to individual learning plans tailored to each individual. They break down performance to sets of competencies and set clear measurement objectives for each.

Supervision and support of agents

Campaign training

Once you have recruited the staff required for your telemarketing needs, it is paramount that you offer a structured training programme relevant to the needs of your individual recruit – not just the specifics of the product or service you are promoting.

Your training programme should provide your telemarketer with a good understanding of:

- **The product**
The fullest details of the product or service being promoted – and where these sit in the market place.
- **The organisations involved**
The position of the promoted organisation in its market place.
- **Their role**
Their own role in the sales process alongside other promotional materials and marketing.
- **Telemarketing good practice**
How to get the best out of a telephone call with a prospect or customer in the right manner.

Typical training programme:

Hard skills

- Product knowledge, including any terms and conditions
- Objectives of project or campaign
- Demographics of customers/prospects
- Briefing on previous/current promotions, including telemarketing
- Escalations
- Industry guidelines, including data protection and the TPS and CTPS



Soft skills

- Listening techniques
- Call structure
- Strategies for dealing with different customer types
- Handling complaints
- Updating customer records

Key training goals

- **Empower your staff**
The key is to empower your front-line staff to understand and respond to any query from a prospect or customer, including how to handle a complaint.
This in turn should reassure customers and help to positively change the perception of our industry as a whole.
- **Scale training to task**
The level of training you need to undertake will be proportionate to the amount of information appropriate to the product or service being promoted.
- **Consider staff knowledge levels**
Consider the telemarketing experience – including both good and bad habits – of the labour pool from which you recruit.
- **Take advantage of qualification schemes**
There are a number of schemes to consider for the development of your staff at all levels, such as:
 - **Train to Gain** – basic literacy and maths programme funded by the BIS
 - **NVQs** – Institute of Customer Service
- **Give staff portable skills**
Both the above provide portable qualifications that your member of staff can take with them as their career progresses.
- **Promote industry reputation**
Best practice dictates that you safeguard the future of our industry by providing the highest level and quality of training that your organisation's resources will allow.

Ongoing competency

- **Appoint supervisors**
Support each of your agents with a supervisor who listens to their calls regularly.
- **Comply with regulation**
Ensure supervision is done in compliance with the requirements of the Regulation of Investigatory Powers (Lawful Business Practice) Regulations 2000.
- **Gather feedback**
Make sure that your supervisor monitors how customer dissatisfaction is being recognised during calls and that calls are managed effectively, in line with your processes and procedures, and recorded appropriately.
- **Offer praise where praise is due**
Do not forget to praise your agents when they have done a good job!



Note for agents

This document is a summary of what is reasonable for you to expect from an employer who is asking you to undertake telemarketing activities.

As a member of the industry you are within your rights to challenge practices that fall short of the standards being set in this document.

The emphasis is on doing what is right by the customer in order that we may retain the freedom to make contact with customers by telephone in the future.



Campaign creation



Campaign strategy

Effective outbound calling

Without doubt, outbound calling is critical to the lifeblood of many organisations. Relevant, timely and tailored communications are very often welcomed by customers and businesses alike.

Outbound calling when done well is of true value to customers and continues to deliver results for some of the world's best known and most trusted brands.

Range of outbound activities

The range of outbound activities includes:

- **Telephone Account Management (TAM)**
Used for customer liaison, building rapport, enquiry management, taking orders, vacant territory coverage, new product launches and point of sale and promotional support to outlets and distributors.
- **Customer Satisfaction Index (CSI)**
Seeking feedback from the customer for ways to improve overall service and product offering.
- **Inside Sales Representatives (ISR)**
To promote awareness of products and promotions.
- **Lead generation and profiling**
Profiling across sectors to compliment SIC coding and identify when, why and to whom a particular product or service is relevant.
- **Appointment setting**
For example, to set up test drives, business meetings, medical appointments or car servicing.
- **Follow-up calls and customer care**
To ensure case management resolution and that customer complaints or enquiries have been dealt with to a satisfactory standard.
- **Research**
To gain qualitative or quantitative results – for example, to gain industry insights or customer feedback or to conduct a political poll.
- **Customer relationship management (CRM) and sales**
For sales and acquisition activities, cross-selling and up-selling, customer or client relationship building, reactivation of lapsed customers and retention of existing ones.

Key principles

- **Put your customer first**
 - Place your customer at the heart of your calling process
 - Respect their rights and requests – particularly their right to say NO
 - Experience your processes and practices from the perspective of your customer
 - Take time to understand how your service comes across and resolve any practices you would find inappropriate
- **Be honest and fair**
 - Make clear, honest and open two-way communication central to all practices and processes



- **Foster excellent communication**

- Share information as appropriate to enable excellent communication
- Be consistent, clear, easily understood, relevant and up-to-date in all communication – whether spoken, written or electronic

- **Encourage conversation over conversion**

- Be careful when setting timeframes for outbound calling
Encouraging shorter talk times may well be counter-productive – but on the other hand, your customers should not feel 'hostage' on the phone either
Find a careful balance and build some element of flexibility into your agents' efficiency targets

- **Deliver what you promise**

- Do not overpromise at any stage: whether through over-ambitious goal-setting or through the commitments your agents make to customers
- Only deliver what can be achieved realistically and in a fair, positive manner for both agents and customers

Campaign objectives

Questions to consider:

- What do you want to achieve from your campaign?
- How will your campaign benefit your customer?
- Are your objectives measurable?
- Are your objectives achievable?
- How, in detail, is your telemarketing agent going to help achieve the objectives?
- Is there a secondary objective to your agent's call?
- How many dials and decision-making contacts (DMCs) will be required?
- What conversion rates are achievable?
- What quality objectives should you establish, in addition to the financials?
- What valuable customer insight can you collect during the call?
- How will this insight be used to help improve your customer's experience in future campaigns?

Goal-setting

- **Ensure clear, achievable KPIs**

Agree clear, realistic KPIs on a bespoke basis to support your objectives for each activity taking place.

Exact performance outputs will be driven by a range of internal and external factors. For example, a longer script (perhaps incorporating a requirement for legal compliance at end of conversations) or a more complex proposition will naturally demand a longer call time to ensure a high-quality conversation.

Make sure you have fairly considered the specifics of your project when setting KPIs.

- **Understand context of your campaign**

Telemarketing never happens in isolation and you should always take into account the other internal and external factors that might be affecting your results.



Campaign creation



Take these into account when setting your campaign goals to ensure that they are realistic, achievable and fair.

For example:

- **Internal factors influencing performance**

- Scripting and call guides
- Agent performance
- Hit rate – successful connection to decision maker contacts (DMCs)
- Incentives
- Motivation
- Management
- Product knowledge
- Skills training

- **External factors influencing performance**

- Availability of DMCs
- Presence of gatekeepers
- DMC profile and seniority
- Age, completeness and accuracy of data
- Size of call file
- Telephone number availability
- Calling window
- Your offer or proposition
- Competitor activity
- Other concurrent promotional or advertising activity
- Environmental context, such as the weather or economic climate

- **Understand emerging challenges in outbound telemarketing**

The world of outbound calling faces new challenges every day.

Make sure that you and your CCT are knowledgeable and prepared for these challenges, such as:

- **Increasingly stringent EU legislation**

Follow the DMA's latest information and advice about these inevitable changes to how you must approach and handle data.

The likelihood is for the EU to move to a wholly opt-in approach to one-to-one marketing with much stricter regulation on whom you can call and in what circumstances – if at all, in certain European markets.

For up-to-the-minute developments, discussion, information and advice on this key issue, see:

dma.org.uk/product/data-protection-toolkit

- **Increased mobility and fluidity of workforces**

Your customer base is increasingly being employed on a virtual basis and as part of 'project teams' rather than in fixed department hierarchies.

Particularly when calling B2B, you will need to become more adept at identifying key decision makers and at asking them for their permission and mobile number in order to reach out to them by phone.



Campaign creation



- **The impact of the internet and power of social media**

Your customers are increasingly able and keen to self-educate about your company's product, brand and ethics. They will investigate you, your reputation and your competitors' offerings before making a purchasing decision – often looking to peer groups, online forums and reviews as well as more formal information.

This has already made your role as a telemarketer more nuanced and complex.

For example, even a major outbound telemarketing campaign can be compromised by a few negative reviews left online by previous unhappy customers.

Or your competitor may have just launched a rival promotion that is easy to find online – in which case, your telemarketing activity may end up just provoking your customer to buy at a time when your competitor has launched a better deal.

Make sure that you are fully aware of this wider context surrounding your proposition and that this is continually and openly fed back into your telemarketing approach and taken into account – with your agents informed about this context and trained and prepared to work within it.

- **See opportunities, not obstacles**

Far from undermining your outbound calling, such changes simply challenge you to ensure your one-to-one marketing is always relevant, timely and tailored.

Key tips

By way of summary, some final key tips for deploying outbound calling to its best effect include:

- **Data quality is key**

You cannot make a successful call to the right customer with the right message if your data is wrong. The more accurate, complete and recent the better your telemarketing results will be.

- **Undertake pre-call research wherever possible**

Undertake research to ensure that your strategy, proposition and approach are relevant to each customer profile.

- **Concentrate on the essentials**

Think carefully about 'necessary' versus 'nice-to-have' data – too long a call can turn your customer off, as can poor call flow routing.

- **Be timely**

Identify optimal calling windows to maximize contact rates.

- **Be organised**

Ensure effective data management and scheduling of call-backs. Use dialler technology if necessary.

- **Be relevant and genuine**

Have a genuine and compelling reason for calling. Make sure your offer is relevant, timely and tailored.

- **Use the right agents to represent your brand**

Use agents with the right skill set, knowledge base and rapport-building competencies to undertake calling on your behalf.

- **Use key measures to maintain purpose and quality**

Establish key SLAs and KPIs upfront to clearly communicate what success looks like to your outbound team. Measure performance against these metrics openly as a constructive approach to optimising and quality-checking your campaign.

- **Provide thorough training and support to agents**

Manage, coach, motivate and incentivise your agents sensitively and attentively to help them achieve your desired outputs.



Campaign creation



- **Use supporting technology**

Leverage call management software and other technology to ensure quality, efficiency and high-quality customer experience.

- **Record and monitor calls for compliance and quality**

Ensure calls are digitally recorded where legislation dictates – for example, when signing up new customers to Paperless Direct Debit.

- **Ensure compliance**

Ensure calls processing payment are undertaken in line with PCI regulations and that all regulations and industry standards are adhered to or exceeded at all times.

Brand value

As with any channel, your telemarketing campaign is a vital part of your whole brand development and reputation.

Give careful thought to how you can complement and advance your brand or campaign goals through your customer's experience of your contact centre.

- **Create a positive customer experience**

Identify the most impactful communication that ensures your prospect or customer remembers your call for positive reasons.

- **Integrate messaging with other marketing**

Strategise your telemarketing communication to integrate with any other advertising that may be taking place for the same product or service.

- **Support brand development**

Ensure that the messaging, tone and specific details of your telemarketing campaign supports and enhances other channel communications and brand development.

For example:

- Script language and phrasing that fits with the brand being promoted
- Select agents whose personality is most appropriate to the brand's persona
- Pitch your approach to suit for the product you're promoting

- **Brief agents on other marketing activity**

Thoroughly brief your agents on all other marketing activity for the same product or service so that they can deliver a more effective and informed offer to your customer.

- **Add extra customer benefit**

A good quality call will mitigate the inconvenience to those you don't convert, so look for a benefit to make your call beyond your primary sales objective.

For example, offer a customer services tag to the end of your call, such as: "Okay, I understand that you are happy with your existing car insurer at the moment, but while you are on the line is there anything I can help you with? Would you like to check the balance on your account?"

- **Avoid high pressure telemarketing**

High pressure, aggressive campaigns can lead to high staff attrition rates and distress customers who feel they are being treated in a robotic manner, not as individuals.

- **Stop campaign below acceptable conversion rate**

You must monitor the conversion rate and pause your campaign if your minimum conversion rate is not being met.



Campaign planning

To maximise your chance of a successful telemarketing campaign, carefully plan your campaign before calling starts.

- **Use planning to drive good service**
Good planning will ensure you support your staff and provide a valuable service to prospects and customers alike – whether you are carrying the work out in-house or outsourcing it.
- **Pinpoint your customer**
Undertake research to fully profile and understand your potential customers and their needs. Define the ideal profile of your customer, enabling you to approach them effectively.
Calling the wrong people simply demoralises contact centre agents, upsets customers, is extremely inefficient and will damage your brand image.
- **Pinpoint data by quality, not quantity**
Select a quality database of customers who have a high propensity to buy, matched against your ideal customer profile – do not just select high volumes of data.
- **Apply previous learnings**
Apply any learnings from previous campaigns or industry research.
- **Match agents to the task**
Whenever possible, select telemarketing agents who have a genuine interest in the product they will be promoting.
This will enhance customer confidence and promotes a genuine conversation rather than a scripted dialogue.

Brief your front-line staff

- **Brief agents thoroughly**
Provide your staff with as much information as possible so that they can have well-informed, meaningful conversations with customers – which will reflect in positive conversions and higher customer satisfaction.
- **Learn from agents' feedback**
Get feedback from your agents. They will have extremely valuable and highly relevant first-hand information to contribute to the success of your campaign and organisation.



Call and after-call process

The four key components of your call should be:

1. **Disclosure**
2. **Call structure**
3. **Summary**
4. **Post-call process**

1. Disclosure

- **Use real agent names**
Ensure your agent uses their real name to introduce themselves and the purpose of your call.
- **Provide client with list of agents**
If activity is being outsourced, the client should be provided with a regularly updated list of agents' names.
- **Disclose key information**
Your call opening should contain the following information briefly but clearly:
 1. Who you are
 2. Where you are calling from
 3. The reason for your call
 4. You should ask "Is this a convenient time to speak?" – and perhaps add that the call will take just X minutes and be sure it takes no longer
 5. Complete any relevant security checks quickly where appropriate

2. Structure

- **Have a clear call structure**
Have a clear structure for your call that is designed to draw your customer into a dialogue quickly. Once your customer is talking they become 'involved' in your call and is less likely to hang up.
- **Establish relevance**
Aim to establish early on whether there is a 'need' or 'relevance' to your customer for your particular product or service. In other words, are you likely to convert your call to a sale, and is it relevant for your call to continue?
- **Use question technique**
Typically, you might use some kind of question technique, for example: "We'd be keen to know if you currently subscribe to X."
- **Follow call blueprint**
A good call structure will usually resemble the following blueprint:
 1. Question
 2. Establish a 'need' or 'desire' that you can meet with your particular product or service
 3. Explain in greater depth how your product or service will meet your customer's need



4. Deal with your customer's questions or resistance WITHOUT pushing or embellishment
5. Discuss any additional up-sell or cross-sell opportunities ONLY if appropriate
6. Close your call with a suitable conclusion – summarise what you have discussed or agreed

- **End unsuccessful calls professionally**

If your customer has no apparent need or desire for your product or service, you MUST conclude your call professionally and politely.

- **Build brand 'mind share'**

Respect that even where no sale is made, a good customer experience will spread a positive perception of the brand you are promoting (i.e. 'mind share') and will eventually encourage more customers and long-term market share.

3. Summary

- **Ending your call**

This is the process for the appropriate ending of your call.

This part of your call is vital to ensure that your customer is clear about the outcome of your call and to ensure there has been no misunderstanding about what will happen next.

- **Summarise your agreement**

Concisely summarise what your call has achieved. It should include the following things:

1. Synopsis, for example: "Okay Mr X, so you would like to..."
2. Explain whom your customer's data will be passed to, and what action they will take
3. Ask your customer if they are happy to receive email, phone or mail contact in future
4. Thank your customer sincerely for their time and end the call

4. Post-call process

- **Fulfil your commitments**

You must complete any commitments or promises made during a call within the timescale agreed with your customer.

- **Brief agents on after-call process**

It is essential that your agents are well-briefed and do not promise things that cannot be delivered upon.



Data

Data and direct marketing are inextricably linked. Put simply, you can have no contact of any kind without using your customer's correct personal information.

Data quality must, therefore, be your priority at every level. But it is most critical for you regard to the legal imperatives and from the perspective of achieving optimum ROI.

Further information

- **General data guidance**
For full general guidance on data issues in one-to-one marketing, see the DMA *Data guide* and the DMA GDPR resources including the Consent and Legitimate Interests guide
- **Client-supplier data guidance**
For specific guidance on the data responsibilities and relationship between clients and suppliers, see the *Outsource CCT* section of this guide.

Sourcing data

Cold data

- **'Warm' versus 'cold' data**
Data is often referred to as being:
 - **'Warm'** – when contact of some sort has been established by the brand on whose behalf your call is being made
 - OR
 - **'Cold'** – when there has been no previous contact with the brand
- **Expect to need cold data**
While intuition suggests that warm data is preferable to cold data, the reality is that your campaign will probably require cold data at some stage.
- **Cold data can be effective**
Cold data can be as effective as warm data, when selected intelligently and appropriately.
- **Source cold data**
If you are looking to contact people who are not already your customers, there are many sources of data available.

Data ownership

The following conditions are typical, but always check the precise terms of your own list rental agreement for variations.

- **One-off data usage**
In most cases, data acquired for direct marketing purposes is purchased as list rental for one-off use.
The 'use' is generally defined as being a live, answered call with the correct customer.
Once the customer has declined to participate further as the call unfolds, their number is deemed to have been used and may not be called again.
- **Call-back permitted**
The customer may request to be called back at a more convenient time, in which case a further call may be permissible.



- **Limit number of attempts**

Setting a limit on the number of times a number should be called where there is no answer or answer-machine disposition.

- **Positive response**

A positive response, and one which entitles you to have ownership of that record, will depend on the terms of your list rental agreement.

This could be where your customer has shown sufficient interest in your product or service to indicate that they have taken preliminary steps towards the conclusion of a contract, i.e. purchasing such product or service.

This would NOT normally include you simply claiming the consent of the customer to be re-contacted at a later date, unless otherwise agreed by your data supplier.

- **Client-supplier data ownership**

See the *Outsource CCT* section of this guide for further information on data ownership and responsibilities between a client and their CCT supplier.

Data owners

Telemarketers with knowledge and experience of the data market may choose to approach data owners directly.

List brokers

Those who are unfamiliar with the data market are at no disadvantage. There are many list broking experts who will advise, guide and acquire data on your behalf and at no additional cost.

- **Use DMA member brokers**

To ensure a high level of both legal compliance and efficacy of the data, you should only use data owners or data brokers who are members of the DMA.

- **Do thorough due diligence**

Whenever you buy or rent data, you are responsible for its compliance – so always ensure you conduct full due diligence on any data you source.

See the *Buying, selling and renting data* section of the *DMA Data guide* and the DMA GDPR resources including the Consent and Legitimate Interests guide for full details.

Origin

- **Check how data was collected**

With the increase in TPS and CTPS registrations in recent years, third-party data with telephone numbers is scarce. It is, therefore, incumbent upon you, as the telemarketer, to question the source of your data and the method by which it was collected and verified.

It is also worth considering under what circumstance the data was acquired, even if the data was collected in accordance with UK data protection legislation (i.e. offering an opt-out).

- **Check recency of data**

Accuracy is also absolutely critical when considering choice of data.

You must ensure that data is accurate and up to date in order to ensure compliance with the DPA.

Best practice requires that you check on the provenance of the data and recency of the contact in order to ensure you reach your intended customer.



Handling data

Legal compliance

- **Use data legally**
As well as gaining the assurance that the source data has been collected in accordance with the DPA and the PECR, it is imperative that you use the data with the same adherence to relevant legislation.
- **Screen cold data against TPS and/or CTPS and check accuracy**
Screening cold data against TPS and/or CTPS is a legal requirement.
It is also a legal requirement to ensure that data is accurate and up to date under the DPA.
- **Screen against other suppression files**
Screen files against proprietary suppression files, where appropriate (i.e. mortality, gone-aways and home-mover files), as well as internal suppression files.
- **Maintain DNC list**
As a legal requirement, you must maintain and consistently update in-house do-not-call (DNC) lists and ensure that this information is always shared between any retained agencies and/or outsourced call centres.
Often call lists are collated from a number of sources, and it is important to remember that these must always be run against your in-house DNC list.
Your in-house DNC list must always be updated to include any 'do-not-call' requests made to the agency or call centre(s).
- **Make data source available**
Track the data chain as far back as possible so that you can correctly provide the source of the data if your customer asks.
This is essential, even if it proves a challenge in the event of different sources of data being used for the same campaign.
- **Honour suppression requests promptly**
Act upon suppression or subject access requests from customers promptly – and certainly within a maximum of 40 days of the written subject access request.
- **Only use freshly-screened data**
Before you can use data for telemarketing purposes, you must have updated or refreshed it (at the very least by screening against suppression files) within the previous six months; and screened it against the TPS and/or CTPS no more than 28 days prior to use (see below).

Telephone Preference Service (TPS)

- **Screen before supplying**
Data purchased through a DMA member third-party supplier must have been screened against the TPS no more than 28 days prior to supply.
- **Screen before use**
You must ensure that data has been screened against the TPS no more than 28 days prior to unsolicited calls being made.
- **Legitimate market research exception**



The only exemption to this is for data which is to be used for legitimate market research.

- **Opted-in data exemption**

Your proprietary lists (i.e. lists of customers with whom you have an established relationship) may be used without cleaning against the TPS, providing your customer has supplied their number directly to you (i.e. you have not sourced it) and you have gained their opt-in permission to use their number for direct marketing purposes.

TPS Assured

- **Accreditation of TPS compliance**

TPS Assured is an annual audit and certification service that assesses whether your organisation complies with PECR, Ofcom guidance and TPS Assured's guidance on outbound telemarketing best practice.

If you're a UK-based organisation that uses outbound telemarketing to contact UK customers, you can apply for TPS Assured certification.

- **TPS Assured helps your business**

Achieving TPS Assured accreditation helps your business with three key benefits:

- **Stay on the right side of the law**

TPS Assured brings all the rules governing telemarketing together in one place to make it easier for you to comply and follow best practice.

You'll also receive expert advice, guidance and immediate updates about any changes to the laws, rules or regulations that could affect the telemarketing industry.

- **Gain competitive advantage**

Use the TPS Assured logo on your website and corporate literature to differentiate your business from those who have not achieved accreditation.

Accreditation also gives customers confidence that you have been independently assessed.

- **Protect your reputation**

Avoid the bad publicity and reputational damage of unwittingly breaking the law – as well as the hefty fines that come with it.

The ICO and Ofcom have issued non-compliant telemarketers with millions of pounds of fines over recent years – and will crack down heavily on any rogue practitioners.

- **Find out more and apply for accreditation**

For more information and to apply for TPS Assured accreditation, visit:

tpsassured.co.uk

Corporate Telephone Preference Service (CTPS)

- **Corporate telemarketing opt-out**

The CTPS is like the TPS but allows corporates to opt-out of receiving telemarketing calls to specific numbers.

CTPS includes limited companies and public limited companies in England Wales, Northern Ireland and Scotland and partnerships in Scotland, as well as government departments and other similar organisations.

www.tpsonline.org.uk

- **Renewed annually**

The registration has to be in writing and renewed every year.

- **Confirmed in writing**

The CTPS will also send out a confirmatory notice in writing of registration.



- **Screen against CTPS and TPS**

If you are carrying out B2B marketing then you need to screen against both the TPS file in respect of sole traders and partnerships and against the CTPS for limited and publicly limited companies.

Suppression files/'do-not-call' lists

- **Offer opt-out**

When undertaking warm calling, if your customer wishes to have their number added to your in-house suppression file, you should give them the opportunity to identify that they do not wish to receive calls on any telephone number associated with their account.

- **Honour DNC across multiple numbers**

Customers often have multiple devices and numbers and organisations tend to attempt to capture as many numbers as possible for a customer. Your management of suppression files must take this into account.

Scenarios where your customer is called on one number, requests to be added to a do-not-call list, and is then called on another number clearly brings DNC lists into disrepute with customers.

- **Unsubscribe at individual's level**

Where possible, use account-oriented do-not-call lists so that you can still contact other customers in the same household.

Security

- **Be diligent with data**

Take appropriate technical and organisational measures to protect the security of personal data, particularly when holding and transferring your customers' personal data.

- **Password-protect data**

All files should be password-protected.

- **Strictly control access**

No one should have access to your data unless they are directly involved in the process of preparation or use of the data.

- **Appoint data compliance officer**

Appoint a person or persons to be aware of and responsible for your organisation's DPA and PECR compliance relating to the security of personal data handled as part of your telemarketing activities.

- **Use DataSeal**

DataSeal is the industry standard for security of data handling and covers the transfer of data between two parties.

DataSeal is administered by the DMA. For full information and to apply for accreditation, visit:

dma.org.uk/content/dataseal

Using data

Selection and targeting

- **Targeting is critical**

Optimum targeting is an absolute imperative.

It is pointless to contact consumers who are inappropriate for the product or service that you are promoting – it will increase your costs, lower your conversion rate and is likely to antagonise some people.



- **Use detailed data**

In order to maximise your targeting, use data with as much depth and detail as is possible.

There are many databases available that can provide not just socio-demographics, but also purchasing habits and intentions, hobbies and interests and even household income.

- **Prioritise quality over quantity**

Do not compromise detail in favour of volume.

- **Test data first**

Always validate and test each data selection against your campaign objectives prior to roll-out.

- **Over-contacting customers**

When purchasing data for similar campaigns from the same list source, request the exclusion of data previously supplied in the last 12 months.

This will minimise the risk of customer antipathy towards your brand from perceived over-contacting.

- **Use specific business data lists**

There are many databases that will allow you to focus business-to-business telemarketing very specifically and with excellent understanding of your prospect's situation and purchasing ability.

For example, you can and should look to understand factors such as:

- Basic business profile
- Financial history
- Size
- Sector
- Geographic location
- Ownership
- Subsidiary relationships
- Purchase history
- Equipment and set-up
- Services used
- Specific contact details and responsibilities

Data volume

- **Assess required data volume**

Give special attention to the volume of data you will be using for your campaign. Factors that will influence this include:

- Number of agents you will be using
- Length of time that your campaign will run
- Number of contacts per hour – time of day may influence this

- **Weigh up fine-tuning of data versus volume**

Note that a greater emphasis on fine-tune targeting will reduce volume of data.

While it is imperative to ensure that your campaign is aimed at consumers most likely to respond positively, this consideration needs to be balanced with your overall campaign requirements.

You may want to adjust your requirements to take into account a lower volume of higher-quality data.



Campaign creation



- **Plan good dialler usage**

Do not underestimate the importance of good dialler planning and management – it is imperative that you constantly monitor turnover of your data.

Data that has been churned time and time again will not deliver your desired results.

Testing, analysis and refinement

- **Segment and test data**

Segmentation of your data into test cells prior to calling and subsequent detailed analysis of results will reap dividends for your future campaigns.

The analysis of non-sales dispositions can optimise your targeting for future campaigns.

- **Gather additional information**

Ask customers to volunteer additional key information (subject to compliance with the DPA) such as date of birth, presence of children or key events.

This will help you to match products to suit your customer during the course of the call, whilst post-campaign analysis will also help shape appropriate targeting for future campaigns.

- **Continually improve scripts**

Refine agents' scripts as your campaign unfolds. Take the opportunity to learn about and improve your campaign by adapting and testing scripts to suit different datasets.



Campaign delivery



Quality management

Your first priority when delivering your campaign must always be your customer's experience – it will not matter how efficient or sophisticated your processes are if you merely put your customer off your brand once you reach them.

Even strong sales results and ROI can mask problems with your delivery process – such as high-pressure selling or poor data usage.

Use conversion rates and customer satisfaction as your key indicators of the impression you are making on your customer base – and respond quickly to counter any negative performance.

Conversion rates

- **Define acceptable conversion rate**
Define the minimum conversion rate acceptable for your campaign, based on both profitability and the likely customer impact or annoyance factor.
- **Stop campaign below acceptable conversion rate**
You must monitor the conversion rate and pause your campaign if your minimum conversion rate is not being met.
- **Define for different segments**
Consider conversion rates in the context of specific data sets.
- **Define for different data sources**
Rates will differ between warm and cold calling and between different data lists selected.

Customer satisfaction

Customer satisfaction is a measurement of how pleased customers are with a particular product or service.

Satisfied customers are likely to make repeat purchases and often refer others.

Customer satisfaction and customer acceptance of industry telemarketing practice are vital for the sustainability of our industry.

It can also give you a view of your customer base purchase intentions and loyalty and should be considered a key performance indicator for any business within a competitive market place.

Great customer satisfaction can be the difference between growing your business or losing your business.

- **Maintain and improve satisfaction**
Ensure this is at least maintained at a minimum level and improved over time.
- **Note differences between audiences**
Customer satisfaction may naturally be different for different customer segments, applications and campaigns.
- **Assess each campaign**
Two techniques for assessment are noted below, but you should investigate others to identify and adopt the most appropriate techniques to monitor your campaign.
- **Make satisfaction a KPI for outsource customer service**
Measure customer satisfaction as a KPI to assess your partnership with an outsourced customer service supplier.



Measuring customer satisfaction

- **Define appropriate test**

There are many ways to measure customer satisfaction. Use a method that most accurately tests your customer's true experience and measures satisfaction in a realistic and actionable way.

For example:

- Mystery shopping
- Impartial external companies, such as Which?, JD Power and so on
- Engaged external companies to complete surveys
- Various touch points in your own company
- Via your website
- Via email
- Unsolicited feedback
- Post-call IVR

- **Build into your campaign form the start**

It is critical to have the right measures built into your campaign as a KPI that reflects the big picture impact of your activity on your customer base.

Pre-campaign testing and benchmarks

- **Test all campaigns**

Test all campaigns against a set of measures and benchmarks.

- **Do not be misled by profitability**

Your campaign assessment should not just be a question of campaign profitability – your campaign could be profitable in the immediate term but still not deliver quality or long-term benefit.

For example, a conversion rate below a certain level will show that a high number of your customers do not find your offer or service relevant. In cases such as these, modify or withdraw your campaign to avoid negative consequences – such as damage to brand reputation – even if your campaign is profitable.

- **Assess against best practice**

At the outset, campaign testing should also include testing against the content of this best practice guide to ensure compliance with the highest industry standards.

Post-call surveys

- **Conduct post-call surveys**

Conduct post-call surveys to ensure that your customer satisfaction does not fall below acceptable standards.

- **Identify the right survey technique**

Post-call surveys can be in several different forms, including:

- **End-of-call**
Ask your customer to complete a survey at the end of a call
- **Follow-up call**
Make a later call to a sample of customers
- **Survey**
Survey via another medium, such as post

- **Benchmark customer satisfaction**

Establish customer service benchmarks over a period of time to ensure that you maintain quality.



Call scheduling

Key considerations

- **Ensure sufficient agents**
If you use a dialler, ensure that you always have an available agent to pick up a connected call.
- **Provide appropriate training**
Ensure that you have sufficient time to fully train agents to work on your campaign before any work starts.
- **Schedule call times sensitively**
Schedule call times to allow the best chance to reach your target audience.
Calling customers at inappropriate times may cause resentment and render your future calling ineffective.
- **Honour customer preferences**
Clearly, it always makes sense to note your customer's calling preferences, where these are forthcoming.
- **Be sensitive to B2B customers' particular needs**
Busy decision-makers' are hard to reach and their time is precious. Make sure you have effective diary management for call backs – if you promise a call back at a certain time and day ensure that you do it!
- **Work around topical events**
Take topical events into account, such as national emergencies (storms or flooding, for example), when deciding whether to start or continue any outbound calling activity. Limit activity to unaffected parts of the country.

Reasonable hours

- **Respect reasonable hours**
Do not make sales, marketing or service calls during hours that are unreasonable to your customer.
- **Research demographic preferences**
Recognise that what is regarded as reasonable can vary in different locations and in different types of households or businesses.
- **Avoid Sundays and holidays**
While it is not illegal, many consumers consider it unreasonable to be called on a Sunday or on a national or religious holiday.
- **Reasonable hours**
Generally, reasonable calling hours are:

Monday to Friday:	8am to 9pm
Saturdays:	9am to 9pm

B2B call scheduling

- **Identify appropriate working hours**
The majority of B2B dialling will of course take place during normal working hours – Monday to Friday, 9am to 5pm.
But also bear in mind your target market and allow for preferences. For example, it may be easier, more appropriate and more welcomed to contact certain decision makers before 9am and others only available in the evenings.
Build this flexibility into your campaign.



- **Consider any unique sector timings**

Be mindful of sector specific calling times – for example, calling a cafe at lunchtime is unlikely to be effective, whilst you might struggle to get a good response from accountants at tax return time of year.

- **Always seek feedback**

Be obsessive with customer/prospect feedback PLUS the quantitative feedback that your Management Information should give you.

Study what works and design your campaign to suit your prospects availability as well as your campaign content.

Ring time

- **Define acceptable ring time**

Consider the length of time you allow calls to ring before being terminated due to no answer

- **Measure from customer's perspective**

Measure ring time from the point that the call starts to ring on your customer's phone, not from the point at which your call is launched.

This is particularly important when calling mobile phones where the delay between dial and ringing can be more than a couple of seconds.

Where the point at which the call starts ringing on the recipient's phone cannot be determined, a reasonable extension to the ringing time should be introduced to allow for this unknown.

- **Ring time factors**

The factors that a contact centre must consider when setting the ring time include:

- **Minimum ring time allowed** – under Ofcom regulations.
- **Customer demographics** – for example, elderly customers may need more time to get to the phone.
- **Your team size and answer success rate** – both of which may limit the impact of a higher ring time.

- **Manage agents' time effectively**

A higher ring time can increase your agent wait time between calls.

In high wait-time situations where you are using predictive dialling, your agents may become distracted between calls if they have no visual or audible indication of ongoing dialling activity

- **Answerphones**

Some telephone networks provide answerphone and voicemail capabilities that cut in after a standard delay – for example, BT 1571 answers after 20 seconds.

- **Set dialler functionality**

Understand any dialler functionality that mitigates longer ring time

For example, call cancelling over Ofcom minimum ring time, where calls are automatically terminated if leaving the call ringing would result in an abandoned call.

- **Test ring time factors**

Test with a higher ring time and plot answer count versus ring time for calls answered by customers and by answer phones to identify the appropriate ring time for your campaign.

Strike a balance between:

- Ringing too long
- Hitting a high proportion of answer machines
- Inconvenience to the customer caused by stopping too early



- **Provide ring time measurement mechanism**

In preview dialling mode, if your dialler does not automatically hang up calls, provide your agent with a mechanism to measure the ring time to ensure that Ofcom regulations are met.

Call retrying

Retry handling

- **Spread retries**

Use retry strategies that spread dialling attempts between morning, afternoon, evening and weekends.

Where possible, use dialler retry rules to avoid retrying numbers at the same time each day.

- **Reset after live calls**

Reset your retry count to an individual number or customer account following a call that is answered by the customer.

- **Equip agent with all information**

If you use predictive or progressive dialling, make sure your agents can see:

- The name of your customer and the reason for your call within one second
- The reason for your call only needs to be shown if the purpose of your calls varies within your campaign
- All relevant facts within two seconds

- **Prepare agents for each warm calling**

When warm calling, it is very important that your agent has all relevant facts to hand concerning your customer's account.

Your customer will expect your agent to know why they are calling and to be fully conversant with all relevant account details.

- **Take time to understand inbound calls**

When customers call inbound, they appreciate that the agent may need a little time to familiarise himself or herself with the customer's account, its status and so on.

Nuisance calls

- **Frequent retries can be a nuisance**

Frequent retries can cause a high level of nuisance to customers.

Even when your customer's experience of talking to your agent is perceived as good, a high level of retries will be seen by many customers as harassment.

- **Missed calls can be nuisance**

Nuisance will occur primarily when you dial mobiles or landlines with call history display functionality.

- **Calls are not typically anonymous**

If you use predictive dialling, you must present a caller line identification (CLI), so unsuccessful dial attempts are not anonymous.

- **Be wary of brand damage**

When cold calling, you may consider the nuisance to be low enough to not adversely affect your brand. But be cautious in this regard, particularly when warm calling active customers.



- **Avoid causing unnecessary worry**

In the worst scenarios, there is the possibility that you could cause your customer high anxiety.

For example, your customer might be left fearing that there is a major problem if they find a series of missed calls from your organisation, but on attempting to call back only reach an automated message stating that your contact centre is closed but had been attempting to call concerning their account.

- **Nuisance call rules of thumb**

The following recommendations are an initial 'rule of thumb' – but you need to be aware of, and have a clear policy regarding, retry management:

- **Limit the three redials per day**

When your outbound call attempt finds no answer, or an answerphone, limit to three dial attempts per day for any individual customer

- **Minimum redial intervals**

The following minimum redial intervals are recommended:

Busy	10 minutes
Number unobtainable	120 minutes
No answer	120 minutes
Answerphone	120 minutes

- **Leaving messages**

In some situations, especially in a B2B environment, it may be appropriate or common practice to leave a message on an automated answering system.

If you leave a message, take this into account and give your customer a reasonable amount of time to respond before calling them again.

Call-backs

- **Brief campaign timings to agents**

Brief your agents about the times during which your campaign will be undertaken.

Ensure your agent knows not to (or cannot) arrange call-backs with your customer for any time when the call-back cannot be performed.

- **Redialling missed call-backs**

If your call-back is not successful at the date and time requested, attempt same day redials.

If these are still unsuccessful, redial your customer at the original call-back time on the following day.

Switching call-backs to a different number

- **Switching call-backs to a landline**

With the increase in outbound dialling to mobile phones, make sure your agent knows how to handle the scenario of a customer wishing to talk on a landline rather than the mobile number originally dialled.

- **Call-backs on a different number**

Where your dialler equipment does not directly handle immediate call-backs, make sure your agents understand the process used to redial customers if your customer wishes to discuss the matter on a different number to the one originally dialled.



Call abandonment

Abandoned call handling

- **Redial abandoned calls immediately**

Where your dialler allows it, redial customers who receive an abandoned call as soon as possible, ideally within 10 minutes, using manual, preview or progressive dialling.

- **Flag abandoned calls to agents**

When a call presented to your agent has previously been abandoned, ensure that your agent is alerted to this either visually or audibly.

Abandoned call information message

There are three important telephone numbers involved in your management of a predictive dialler campaign:

1. The CLI transmitted on your call
 2. The number relayed during your information message which is played in the event that your call is abandoned
 3. If your customer calls your CLI number, you might then play a message providing a dedicated number they can call if they wish to be placed on your in-house suppression file
- **Use consistent call-back number**
Give the same number in your voicemail message as is disclosed in the message played to your customer on a 1471 call-back. This gives your customer a second opportunity to hear your number.
 - **Using a different number to your CLI number**
Your call-back and suppression numbers need not be the same as your outbound CLI number as this can present technical problems if you are not able to issue multiple CLIs.
 - **Use campaign-appropriate information messages**
Your messages do not have to be the same for each call in your campaign. As long as your messages are appropriate for your customer, you may include accounts for different companies and brands in a single campaign.
 - **Document all messages**
For auditing purposes, keep documentation of your CLI information messages and any other messages for each campaign.
 - **Sample messages**
Suggested message structure and content:

Information message:

"Hello, you were called on behalf of [organisation/brand] by our representative to discuss [specific offer/reason for call]. Please accept our apologies for inconveniencing you but our system has failed to connect you to one of our advisers. We hope this call has not caused you any anxiety. If you prefer not to receive any further calls on our behalf, please call us on 08xx xxx xxxx. Thank you."

Message heard when returning a call to the transmitted CLI:

"Hello. You are not being charged for this call. You were called on behalf of [organisation/client name] to discuss [specific offer/reason for call]. We are sorry to have missed you and apologise for any inconvenience or anxiety our call may have caused. We will try to contact you again in the near future. If you prefer not to receive any further calls on our behalf, please call us on 08xx xxx xxxx. Thank you."



- **Clearly identify your organisation or client organisation**

Your information message must clearly identify the organisation on whose behalf your call is being made.

Where a plc is a group of branded divisions, use the brand name to the customer, rather than the overall group name.

This Ofcom requirement is particularly important for warm calls and the financial services sector where a customer will have a relationship with a brand rather than a plc.

Technology and testing

All contact centres are reliant on technology to perform their task.

This includes a whole range of different technologies including:

- Predictive diallers
 - Computer networks
 - Databases
 - Voice or voice over internet protocol (VoIP) networks
 - The public switched telephone network (PSTN)
- **Test regularly**
Test and monitor your end-to-end infrastructure and the applications that rest on it.
Refer this duty to your IT department.

Dialler operations

This section covers all types of dialling. The abandoned call and answer machine detect (AMD) sections are, however, only relevant to predictive dialling.

Customer experience does not relate to how a call was initiated if it is not abandoned.

This section also covers different mechanisms to control over-dialling, such as explicit over-dial rates or agent-trunk ratios.

Diallers and dialler usage

The section covers a number of different scenarios:

Manual

Number dialled by hand, even if data selection is by a system.

Preview

Agent has to indicate that it is okay to initiate dial.

Timed preview

Agent has a pre-determined time period to review call details before call is made.

Progressive

Call will be dialled when previous one is completed, but only one per agent.

Predictive

More calls are made than there are agents, to eliminate agent wait time.

Other technologies

Such as power dialling and auto-dialling.



Predictive dialling

- **Provide CLI number**

It is important to note that the DMA Code and Ofcom regulations differ in that the Code requires you to transmit a CLI for ALL calls you make, whereas Ofcom regulations only apply to your use of predictive dialling equipment.

Productivity factors

Predictive dialling provides varying levels of productivity gain over progressive dialling, depending on these main characteristics:

1. Pacing

The quality of the predictive dialler's pacing engine or algorithm.

2. Live connection rate

The live connection rate of the campaign – i.e. the proportion of calls the dialler makes that are answered.

3. Call cycle

The average duration of the call cycle once connected – this is the time spent talking, plus any wrap-up time after the caller has disconnected.

In general, shorter call cycle durations and lower connect rates reduce the effectiveness of progressive dialling and there is, therefore, a greater productivity dividend for predictive dialling.

4. Size of team

The size of your team plays a crucial part. In order for your predictive dialler to be effective, you need a certain number of agents on your campaign in order to improve productivity without generating unnecessary abandoned calls.

- **Calculate required team size**

What constitutes this minimum team size will depend on your pacing, live connection rate and average call duration – and each dialler will behave differently under different circumstances.

- **Understand your chosen dialler**

It is important to understand how your chosen dialler works with low team sizes and that you use that information to plan your campaign. This is important because:

- **Be careful using diallers with small teams**

Many predictive diallers will generate high numbers of abandoned calls when the team size is too small.

- **Larger teams increase dialler productivity**

Productivity is increased with larger team sizes and, if it can be done within the operational priorities of the contact centre, it is better to run with larger teams.

- **Use maximum number of agents**

Wherever possible, maximise the number of agents assigned to your campaign.

Predictive dialling systems are usually more efficient and accurate when you have a large number of agents on a single campaign.

Use this to minimise your abandonment rate.

5. Dialling B2B customers

In a B2B environment, specific factors affect whether your predictive dialling is likely to be effective:

- **Gatekeepers**

Unless you are phoning very small businesses, your connection rates are likely to be very high.

However, where DDI numbers are not being used the person answering your call is likely to be a receptionist or switchboard operator acting as a gatekeeper.



Your agents are therefore likely to spend less time waiting for calls but more time trying to get past this gatekeeper to reach your real customer.

- **Automated Attendant systems**

Many businesses use Automated Attendant systems.

Using AMD on these calls is generally ineffective because they will be detected as an automated answer and screened out.

If your call is connected to your agent then they can respond, with tones or voice as required, to get to your intended customer.

Preventing abandoned calls

Some diallers will automatically understand if you have enough agents under the given calling conditions to start predictive dialling.

However, most will not. If this is the case, you will need to ensure that when you have a small number of agents working, your campaign is limited to prevent the dialler generating abandoned calls.

- **Reduce abandoned calls by:**

- Reducing your dialler's abandoned call target
- Limiting the number of trunks your campaign is configured to use
- Setting your campaign to be run in progressive, rather than predictive mode

Predictive dialler rules of thumb

If you are unsure how your particular dialler performs, consider the following rules of thumb for a typical dialler that cannot compensate for small team sizes itself:

- **Use minimum 12 agents**

Experience has shown that 12 agents is the minimum team size to efficiently manage predictive dialling within an acceptable 3% abandoned call cap.

- **Reduce nuisance rate for smallest teams**

A dialler can operate with 10 agents provided the nuisance rate is reduced to 2% – otherwise, there is a significant risk of poor dialler performance in the latter half of the shift due to the dialler compensating for higher dropped calls at the start of the shift.

- **Use preview/progressive dialling for smaller teams**

Experience has shown that less than 10 agents should be managed on preview/progressive dialling.

Dropped calls represent a higher percentage because of the small team size, meaning the dialler becomes inefficient in performance and use of data.

- **Switch diallers to recover nuisance rate**

Switching from predictive to preview/progressive dialling during a shift should not cause a dialler to treat the call list as two separate lists and is therefore a method of recovering a nuisance rate over the working window – but it is important to ensure that this applies to your dialler.

- **Seek specialist advice**

If in doubt, consult your dialler vendor for specialist advice on this complex issue.



Dialler ring time

- **15 seconds of ring time**
Allow 15 seconds of ring time before aborting the call to give your customer sufficient time to answer.
- **Optimise for customer experience**
Customer experience is what is important in your timing – so make sure that you allow for the time it can take for a call to actually connect and start to ring. Ensure your customer gets the full 15 seconds of ring time.
- **Allow extra connection time for mobiles**
Mobiles, in particular, can take several seconds to actually start to ring.
- **Allow for optimal dialler performance**
Look at good operational practice. Too long a ring time has a negative impact on dialler performance because it extends your calling cycle and makes it more likely that answering machines will cut in.

Dialler abandonment timing

- **Connect calls within two seconds**
Connect calls to your live agent within two seconds of your call being answered.
- **Set up abandonment message**
The DMA Code and Ofcom policies stipulate that If your call is to be abandoned because a live agent is not available, you must play an information message within two seconds of your customer picking up your call; i.e.:
 - No later than two seconds after the telephone has been picked up
OR
 - No later than two seconds after an individual begins to speak (or 'start of salutation')

Dialler abandonment rate

- **Maximum acceptable abandonment rate**
Set an abandon rate that is appropriate to your data and audience – and typically no higher than 3%.
- **Balance abandonment rate against efficiency**
Find the lowest abandonment rate that still delivers high agent performance against an acceptable number of customers receiving an abandoned call.
- **Calculate acceptable rate for each campaign**
Calculate each campaign at different abandonment rates to find your most appropriate rate.

For example, if reducing your rate from 2.5% to 2% will add two seconds of idle time per agent per call, how will your cost in lost agent time per week balance against the lower number of customers receiving abandoned calls?
- **Set a lower rate for warm lists**
Expect your abandonment rate lower when warm calling to current or higher-value customers.
- **Set automatically and manually-tuned abandonment rates**
If your dialler equipment can self-tune to an abandonment rate, set the rate no higher than 2.8% per campaign.

If you manually control dialling aggressiveness, aim for an abandonment rate no higher than 2.75%.

This approach gives you room for occasional rate spikes whilst remaining compliant.
- **Stay compliant per 24-hour period**
Monitor and adjust your abandonment rate for each campaign through the course of each shift.
Regulations require that your rate will be no more than 3% per campaign over a 24-hour period.
Ofcom define a 24-hour period as being between midnight and midnight on a calendar day.



Testing predictive diallers

Predictive diallers are the devices that cause the most problems with nuisance and silent calls – so it is vital that you test these specifically, as well as part of your end-to-end solution.

- **Employ third-party testing**
All testing should be done by an independent third party to provide an objective view.
- **Test relevant factors**
Testing simulates a large volume of live calls to ensure your predictive dialler is performing its job to the required standards.
- **Tests include:**
 - Applying various answering machine tones to ensure that answering machine detection is optimised and your error rate (i.e. number of false positives) is reduced
 - Measuring the time between your customer answering the phone and reaching a live agent
 - Determining if a line is released by the contact centre technology when a customer hangs up
 - Applying various call termination treatments (such as answered, busy or unobtainable) to emulate real outbound call situations
Proving that your organisation can be alerted when your over-dial rate exceeds a certain limit (for example, a 3% call abandon rate)
 - Verifying that the caller line identification (CLI) is presented
- **Capture baseline configuration**
Capture a predictive dialler baseline configuration to show that your dialler works within the regulations.
- **Use as benchmark**
Compare this baseline to later performance and return to it if necessary.

Answer machine detection (AMD)

Answer machine detection is a technology which uses various techniques to automatically detect if a call has been answered by a live caller or some form of answering machine (either physical machine, voicemail system or network-based call messaging service).

- **Identify system failings**
AMD technology is not currently 100% reliable and can fail in one of two ways:
 - **A 'false positive'** – where the AMD technology incorrectly judges a live customer to be an answering machine
 - **A 'false negative'** – where the AMD technology incorrectly judges an answering machine to be a live caller and connects the call to your agent
- **Factor in 'reasoned estimate'**
In most cases, your customer's experience of a false positive is a silent call followed by a disconnection.
For this reason, Ofcom rules state that you must factor in a 'reasoned estimate' of false positives into the abandoned call figures that count towards your maximum 3% abandoned call rate.
- **Detailed information about handling false positives and false negatives**
For detailed information on the statistical treatment of both false positives and false negatives and how you should handle them within your dialler management strategy, read the DMA paper, endorsed by Ofcom, here: www.dma.org.uk/article/calculating-abandoned-calls-in-the-light-of-the-ofcom-2008-statement



- **Understand answering machine redial rules**

Ofcom also requires that calls dialled using AMD and classified as an answering machine cannot be dialled again for a 24-hour period unless you have an agent reserved – similar in essence to the 72-hour rule for handling calls abandoned by a predictive dialler.

- **Allow for AMD pitfalls**

Although it is clear that in some circumstances AMD technology can improve the performance of your predictive dialling campaigns, you should also note three clear negative aspects to the technology:

1. Poor experience for your customer in the event of a false positive
2. Effectiveness of your predictive dialler is impaired because your abandoned call rate has to be artificially suppressed to cater for the estimate of false-positives
3. Effectiveness of your dialler is further impaired because of the 24-hour rule, which means that either your call cannot be re-attempted for another day or, if that is not an option, your call must be made without using the dialler's pacing technology

- **Avoid AMD unless <1% false positive rate**

Because of the margins for error, the DMA advises that unless your system has been tested and achieves a false positive rate of 1% or less, it does not make commercial sense to use AMD in your telemarketing campaign at present.

Because AMD exposes you to the risk of breaching the silent calls thresholds (with subsequent regulatory consequences), and because of the detriment to customer experience, using AMD is not currently best practice.

International telemarketing

There are a number of specific issues to consider if you conduct either inbound or outbound calls with customers who are based abroad.

If you are considering outsourcing this function, see the *Outsourcing international campaigns* section of this guide.

Compliance

- **Use professional advice to ensure compliance**

Different countries will have their own laws and standards that you are likely to be subject to – for example, and of crucial importance, telemarketing operates on an opt-out basis in the UK but within an opt-in framework in many other countries.

Marketing laws in any country are likely to be complex and open to interpretation, but with significant ramifications if you get it wrong.

Always seek professional advice from a legal expert before beginning any telemarketing activity.

- **Basic compliance**

We recommend that you do the following as a minimum requirement, on which to add further measures according to the advice you receive:

- **Use UK framework as minimum standard**
- **Only use opted-in data**
- **Always present a CLI on outbound calls**

- **Seek external professional advice**



Language

- **Aim to offer native and alternative language options**

It is ideal for all calls to be conducted in the language that is native to the customer – although the demands of budget, timescales and practicality sometimes makes this unachievable.

It is thus important that you try to ensure that your customer is offered an alternative language choice that they are likely to understand.

Typically this will be English, but may be another major language such as German or French.

- **Consider a neutral primary language**

Ensure that you and your agents are aware that language and country cannot always be used interchangeably.

In some cases it might be more appropriate to use a second language to avoid cultural difficulties.

For example, inbound calls from Belgium may well be better answered in English rather than in French or Flemish. Similarly, inbound calls from Switzerland may best be taken in German, depending on the likelihood of area of origin, but again may best be taken initially in English.

- **Have language support readily available**

Ensure that you have the appropriate language support available so that your agent can quickly transfer the call to a native speaking agent if necessary.

- **Key considerations**

As there are a large number of multi-language countries, weigh up the key considerations when designing your campaign, including:

- Region and specific locale of your target audience
- Your audience's propensity to speak English
- Likely native and second language preferences
- Nature of the call
- Use of technical or industry-specific terms
- Cultural nuances in regards to language selection
- Need for agents to recognise, understand and accurately capture names and addresses in their correct format
- System requirements to handle non-English characters and formats
- System requirements to capture and store language preferences

Accents

- **Consider compatibility of accents**

As many UK customers have discovered over recent years, simply offering appropriate languages is not necessarily sufficient to support a good level of communication and mutual understanding.

For example, do not assume that English-speaking agents can automatically communicate effectively with other English speakers – a strong accent can seriously hinder communication and in some cases completely undermine the effectiveness of the call.



Cultural support

There are a number of cultural aspects that need to be considered as a part of international telemarketing.

- **Ensure agents understand regional dialects**

Use native language speakers who can grasp the idiosyncrasies and idioms of the languages and dialects they will typically encounter – including the particular vocabulary, usage, connotations and cultural references of specific regions or demographics.

- **Identify geographical variations**

Ensure that your agents understand important geographical or other characteristics of your customer's situation, such being able to differentiate between countries, provinces and other boundaries.

For example, an insurance claim or a legal issue may be affected by which part of the UK an incident has occurred or the customer is normally resident.

- **Identify cultural differences**

Ensure that you also understand differences based on other cultural references, even when dealing with nominally English-speaking territories.

For example, agents dealing with trans-Atlantic customers should be aware of differing vocabularies and of alternative conventions for dates, weights and measures and even the way that building floors are notated.

- **Train your agents to avoid pitfalls**

There are literally countless cultural references that are largely taken for granted in day to day life and these continually change.

Consider compiling a list of any particularly important, difficult or topical idiosyncrasies that might cause confusion, inconvenience, offence or even a financial cost to your customer.

Beyond this, provide your agents with general information or training to equip them to deal comfortably with any such situations and spot any potential confusions before they turn into problems.

International calling times

You should always aim to make outbound calls at a time that your customer finds most acceptable and useful.

- **Plan calling times sensitively**

Do your research and account for any easy-to-anticipate timing factors, such as:

- **International time zones**

Identify your customer's time zone – and be aware that it may vary from customer to customer even within a single country.

- **Local public and religious holidays**

Public and religious holidays vary greatly from country to country and even between specific regions.

- **Standard working days and hours**

Many countries do not have a Monday-to-Friday working week or a typical 9-till-5 working day.

Whether you're calling B2B and looking to catch your customer at work, or B2C and looking to talk to them during their personal time, schedule your calls carefully around typical local working hours.

- **Topical events**

Keep your eye on your customer's area news and take into account any topical events that might affect the appropriateness or effectiveness of your call – such as elections, festivals, extreme weather or major sporting events.



Inbound sales calls

Attracting and converting inbound prospect calls

The phone continues to be a very successful and convenient way for customers to contact your brand and take the next step on their buying cycle – whether that is to request information, book a test drive, register for an event, make an appointment or make a purchase.

Inbound telephone marketing services should provide the backbone of any reputable organisation's interaction with its customers and prospects.

- **Use strong calls-to-action**
Use strong calls-to-action to encourage productive inbound calls – for example, “call now for a free quote”.
- **Have a clear telephone numbering strategy**
Avoid use of ‘opaque’ numbers where the cost to your customer is unclear or confusing.

Do not use premium numbers that, whilst generating revenue for your company, are expensive for your customer and likely to lose their long-term custom.

Handling inbound calls

- **Ensure your agents are skilled and knowledgeable**
Customers now contact companies at a more advanced stage in the sales cycle than ever before – and are often armed with in-depth information about your company, your product or service and rival offerings before they even pick up the phone to your brand.

Therefore, a critical part of using inbound calling to its best effect is to ensure your CCT has highly skilled and motivated agents who are knowledgeable and equipped to handle prospect enquiries in a nuanced and empathetic manner – building rapport and engagement with your customers during the call.
- **Train agents to put your customer first**
Ensure that your agents are trained to help your customer by addressing their individual needs. Make sure your customer feels guided through their enquiry process.
- **Gather information to improve your service**
Sensitively and appropriately encourage your customer to share information – such as updated contact details, decision-making criteria, position in the buying cycle, reasons for complaint and so on – that will allow you to improve the service you are able to offer them and your other customers.
- **Keep automatic systems simple**
Customers regularly cite complicated call routings and dead-ends as their top source of frustration when calling a business.
 - Do not ask your customer to make more than two or three layers of selection to get to the information of service they require
 - Avoid any looping, where your customer's choices take them back to where they started
 - Avoid any dead-ends, cul-de-sacs with no appropriate options left or points at which the call cuts off
 - Offer a ‘get out’ option to speak to a live agent at every stage
- **Always have enough agents available**
If you leave your customer hanging on the phone for too long, you will lose them.

Make sure you anticipate call volumes and have enough highly skilled and knowledgeable agents to receive all calls within a reasonable timeframe – with flexible resource available to cover unusual peaks in demand.



- **Key principles of receiving calls effectively**

To successfully receive inbound calling to its best effect, follow these simple but effective principles:

- Listen first, don't talk
- Ask open-ended questions
- Build trust and rapport
- Do not interrupt
- Never make assumptions
- Repeat and verify points
- Ask for more information if needed
- Agree next steps and actions with the customer
- Never promise anything you cannot guarantee
- Update your data, in response to the call, to keep it relevant

- **Capture data naturally**

Use a robust data capture tool or CRM system to capture caller data in a natural manner and route calls dynamically.

Nurturing and retaining customers

It is obvious that 'happy' or 'highly satisfied' customers cost less, spend more and stay longer than unhappy or even merely 'satisfied' ones.

There is increasing evidence of a correlation between companies who perform at the top of various stock markets and high Customer Satisfaction Index (CSI) scores.

By servicing customer complaints and enquiries well, companies ensure higher levels of customer satisfaction, which translate into increased loyalty and ultimately higher profits.

Conversely, unhappy customers share their unhappiness with many people and have the potential to critically impact your company and brand.

- **Identify key customer service points**

Delivering customer service excellence is in essence the most potent tool any company has in its marketing armoury.

Identify the key contact centre touchpoints at which you can make the greatest positive impact and develop customer care strategies to make the most of these.

For example, you may choose to target:

- Care lines
- Complaint lines
- Helpdesks
- Support networks
- Hotlines
- Information desks
- Enquiry lines

- **Treat all response-handling as a vital business asset**

It is often a challenge for in-house call centre practitioners to convince wider stakeholders that investing in best practice can transform the operation from a cost centre into a key business asset – or even a profit centre.



Campaign delivery



The potential for inbound response handling to deliver real competitive advantage is set to explode with the increase in online, social media and multi-channel communications as part of your customer's response experience.

Badly handled interactions have the potential to go viral and impact a client's brand like never before.

- **Construct a strong business case for best practice investment**

Map your business case with:

- Reference to the latest robust CSI data and case studies
- Projections around customer lifetime values
- Predictions for brand equity

- **Avoid service short-cuts**

Do not take short-cuts in your provision of best practice inbound customer service.

For example:

- Do not route complex calls down a self-service or IVR route if it compromises your customer's experience
- Do not off-shore relationship-building activities to cheap, low-quality suppliers or low-cost locations – where the ability to build genuine customer rapport and leverage cultural resonance can be impacted by using non-native agents

- **Set robust measures to ensure quality**

Some example SLAs and KPIs for consideration are:

- ASA (average speed to answer) of 80% of calls answered within 20 seconds
- Abandoned rate of less than 5%
- AHT (average handle time) as agreed with your CCT
- Customer satisfaction of 90% of customers happy with service received
- First-call resolution rate of 90% of calls resolved first time
- Cost to serve
- Cost to retain
- ROI

Conversation continuity

- **Connect customer to same agent where possible**

Across all contact channels, including social media, try to route your customer to the last agent with whom they interacted, if possible.

Call recording

- **Inform customer that call is being recorded**

If you are recording the call, you must state this to your customer this right at the beginning of the call – either by a recorded announcement or by your agent.



Call cost

The cost of the call should not be disproportionate to the product offered.

See the relevant pages of the CAP Code for advice about chargeable calls and how you should communicate these to your customer:

- **Chargeable 0870 numbers**
www.cap.org.uk/Advice-Training-on-the-rules/Advice-Online-Database/Chargeable-0870-numbers.aspx
- **Chargeable 0845 numbers**
www.cap.org.uk/Advice-Training-on-the-rules/Advice-Online-Database/Chargeable-0845-numbers.aspx
- **Chargeable 08 numbers in general**
www.cap.org.uk/Advice-Training-on-the-rules/Advice-Online-Database/Chargeable-08-numbers-General.aspx
- **Chargeable 0843 and 0844 numbers**
www.cap.org.uk/Advice-Training-on-the-rules/Advice-Online-Database/Chargeable-0843-and-0844-numbers.aspx
- **Premium-rate Services: 09, 0871, 0872 and 0873 numbers**
www.cap.org.uk/Advice-Training-on-the-rules/Advice-Online-Database/Premium-rate-Services-General.aspx
- **PhonepayPlus Code of Practice on premium rate services**
www.phonepayplus.org.uk/For-Business/Code-and-Help.aspx

Customer identification

- **Put identification process in place**
Take the steps necessary to ensure that your inbound customer is always identified correctly, if they are an existing customer.
- **Ensure call handler has authority**
If you are using third-party call handling, ensure they have the requisite authority to verify your customer.
- **Identify your agent to the customer**
Ensure that your agent gives their name clearly at the beginning of the conversation and repeats it if requested by the customer.
- **Dealing with vulnerable consumers**
For fuller advice on how you should handle interactions with vulnerable consumers, see the *Inclusivity and vulnerable consumers* section of the DMA Telemarketing guide.

Call content

- **Answer promptly**
Make sure that your customer's call is answered by either a live agent or an IVR within a reasonable timeframe, as per the table above.

If this is an announcement it should be a delay of no more than 10 seconds.
- **Identify your organisation immediately**
Make clear the name of your organisation or the brand that your customer has called, so they know that they have dialled the right number).



- **Manage customer expectations**

Tell your customer what will happen next. Remember that this call is an important part of their customer journey and will strongly impact their impression of your brand.

- **Avoid a silent line**

Never leave your customer with a silent line whilst waiting in a queue. Play music or informational messages whilst they are on hold so that they know their call is still live and in your queue.

If you use IVR, make sure that update messages are played no more than 20 seconds apart.

A caller should also not be left with a silent line whilst on hold even if this happens after their call has been answered – for example, whilst they are being transferred to a different department or your agent is looking up information.

- **Play compliance notifications**

Play any necessary compliance messages in your announcements.

For example, you might need to inform your customer that “all calls are recorded for training and monitoring purposes” – or you might need to play a regulatory message, such as “we are authorised and regulated by the Financial Conduct Authority”.

- **Ask your customer to be prepared for their call**

If relevant, ask your customer to make sure that they have any required details to hand, such as their policy or account number.

Interactive Voice Response (IVR) routing

- **Use IVR to improve the call**

If you use IVR, make sure that its purpose is to optimise the call flow for both your customer and your organisation.

- **Limit IVR system complexity**

Do not use more than three or four options at each level – and limit your system to at most three or four levels of automatic options before connecting your customer to an agent.

- **Repeat all messages**

At each stage, give your customer the ability to hear the message and options again.

- **Offer ‘go back’ option**

Always include a ‘go back a level’ option if your IVR has more than one level.

- **Offer option to speak directly to an agent**

Give your customer the option to speak to a live agent if they are struggling with your IVR platform.

- **Monitor IVR performance**

Monitor your IVR for performance indicators such as call time taken at each level, any common wrongly-selected options and any points at which customers abandon calls or request to speak to a live agent.

Consider improving your customer’s experience by making commonly selected options quicker, easier and more intuitive to find.

- **Integrate IVR with agent scripts**

Make sure that any appropriate information captured by your IVR is passed through to your agent taking the call.

For example, if your customer has already given their account number to your IVR system, do not make them go through that process again with your agent.

- **Comply with data protection regulations**

Ensure that you comply with all data protection regulations and PCI DSS security standards and only pass appropriate levels of information to your agent – such as your customer’s reference number or policy number.



Once call is answered by a live agent

- **Apply with codes of practice**

As well as the DMA Code, your particular industry may well be covered by an additional set of regulations or a code of practice. Always check and comply with these regulations.

- **Make all processes as simple as possible**

Make the process as open and straightforward as possible for your agent to take your customer's order or handle their enquiry. Ensure that every aspect is clear, simple and signposted.

- **Minimise call transfers**

If your customer's call needs to be transferred then make every effort to ensure that this happens only once.

- **Minimise and clarify compulsory data fields**

Make the interaction or transaction between your agent and customer as easy as possible to complete by only making data fields compulsory if they are absolutely necessary to complete the order or enquiry.

For example, you may require your customer's address in order to post your response, but you do not need to gather their email address.

If you wish to collect such data for other purposes, such as marketing or after-sales care, make this explicitly clear and collect this information as a clearly additional and optional process – and make sure that your customer has given their express permission.

Call duration

- **Track call duration**

Call duration is an important metric to define as an indicator of call quality.

- **Set call duration targets to support good service**

When analysing call duration and setting duration targets, consider these from your customer's point of view and ensure that your call is long enough to be high quality.

Whilst it may be appealing to target a low call duration to handle more calls with fewer agents, they may not have enough time to correctly understand and answer your caller's query if they are feeling rushed.

Call quality

- **Continually audit call quality**

Continually audit your inbound calls for quality.

Either listen live or listening to call recordings at least once a month.

- **Monitor every agent**

Quality check at least one call per agent per week.

Audit both voice AND data – do not just listen to their call recording on its own without checking that they have entered all data correctly.

- **Set standards according to nature of business**

Expect to work to much higher minimum standards in some sectors, such as financial services.



Response/service levels

- **Main considerations**

Monitor your response/service levels, particularly:

- Average speed of answer
- Average wait time
- First call resolution
- Maximum abandoned rate

- **Manage customer expectations**

Where possible, use Interactive Voice Response (IVR) to detail the average wait time to be answered and length of the call.

- **Monitor your customer service levels**

Treat your customer service levels as business-critical and continually monitor them to identify issues or improvements.

Set levels that are appropriate to both your industry and to the channel in use. This will ensure that you enjoy maximum use of your marketing spend and provide an optimum service to your customers.

Some typical service levels are:

Media Type	Service Level Type	Consideration
Inbound call	Answer time	80% within 20 seconds (industry standard calls) 95% within 10 seconds (high priority services)
Inbound call	Answered %	Typically 95% or more of the calls offered
Email	Answer time	80% within 4 hours are common 95% within 1 hour for high priority such as complaints, during working hours. An auto-reply should only count as an answer if it is tailored to the content of the original email contact
Email	Lost	0%
WebChat	Answer time	80% within 20 seconds Treat the same as voice where possible
WebChat	Lost	5% or less of total chats requested
SMS	Answer Time	Same as email
SMS	Lost	0%
Social media channel	Answer Time	Within one hour



Opening hours

- **Consider customer needs**

Your inbound service opening hours should, wherever possible, match the needs of your customer and the nature and service that you are offering.

For example, you might expect services for stolen credit cards to be available for longer than a customer care line for a vending machine.

- **Clearly display opening hours**

State your service hours clearly wherever your contact details are displayed.

If your contact centre is closed, play a message making your current opening hours clear.

Inbound business continuity

- **Keep an up-to-date Business Continuity Policy**

Have a defined Business Continuity Policy in the event that your inbound resource is forced to close during normal operating times or cannot meet demand, perhaps during an unexpected surge or crisis.

At the very least, you should have a message on your website and in your Interactive Voice Response (IVR) message to inform your customer:

- The extent to which your service is limited
- What this means for them
- When you expect full service to be resumed
- If appropriate, what remedy for lack of service will be in place and when



Outsourcing contact centres and telemarketing (CCT)

The UK contact centre and telemarketing industry currently employs over one million people. It is a successful and growing industry – and a major contributor to UK plc.

It is also something that we do very well in the UK – with plenty of excellent outsource suppliers eager to partner organisations that are seeking a professional, specialist call centre service.

Yet, surprisingly, contact centres are not a function that is regularly outsourced. Research shows that when a company decides to outsource, 55% will choose to outsource information technology but only 15% will choose to outsource contact centres/call centres (source: *The Black Book of Outsourcing*).

Often, the reason companies do not outsource sales is because they believe it is a core competency of their business and must be kept as an internal function.

But a good contact centre or telemarketing agency will operate as a seamless extension of your in-house resources, as well as bringing invaluable specialist skills, understanding and capabilities that offer you significant competitive advantages – much as you would expect when outsourcing your marketing to a specialist creative agency.

Scope of this guidance

This outsourced telemarketing guidance covers:

- Inbound and outbound
- B2C and B2B
- To and from the UK

It is important to note that these guidelines apply to clients and outsourced contact centres calling UK customers irrespective of whether the contact centre is based in the UK or abroad.

This section will help you identify your core competencies, list the advantages of outsourcing and provide a blueprint for selecting your ideal supplier. It will also give you an understanding of how to manage your relationship with your chosen contact centre or telemarketing agency.

Why outsource?

Organisations choose to outsource their CCT requirements for differing combinations of various benefits.

Research shows that reducing costs is the main reason for outsourcing, but there are many other considerations:

- **Reduce costs**
Simple economies of scale, as well as the possibility to only 'pay for what you use', mean that outsourcing invariably reduces costs.
Any increase in costs is usually outweighed by improvements in performance or sales.
- **Focus on core competencies**
Every organisation has core competencies – and outsourcing enables your management team to concentrate on areas that deliver real profit.



Campaign delivery



- **Improve flexibility**

Outsourcing removes the fixed cost of staff during slow periods, allows for quick increase in resource during busy campaigns or unforeseen surges and means that you only pay for the work done.

You might choose to outsource just the excess of inbound calls during busy periods – or to outsource the entire function, not just the overflow.

- **Acquire specialist skills**

Your in-house staff may have inadequate skill sets which can result in minimal improvements to your telemarketing in the future.

Outsource companies specialise in CCT and have well-trained, experienced staff with the most current skills and technology. It is essential to their competitiveness and business survival to continue to bring better ideas, innovations and practices to the table – providing you with access to important optimisations and competitive advantages that you would not be able to deliver in-house.

And as customer experience becomes multi-channel, it is increasingly important for CCT companies to be expert not only on the telephone but also in digital media. These skills and the ability to integrate customer relationship management across multiple inbound channels might be more difficult to evolve in-house.

- **Focus on strategy**

Outsourcing inherently releases your managers from tactical, day-to-day functions – and frees them up to concentrate on strategic decisions that have more impact on your organisation's future.

- **Avoid major investment**

Keeping CCT in-house means it will inevitably require significant and continuous investment in order for it to stay modern and competitive.

Outsourcing moves that requirement to another company that is able to develop and spread those costs across multiple clients and exchange learning from one project to another.

- **Assist fast growth**

Rapidly growing companies can find their management team is stretched.

Outsourcing can provide short or medium-term relief and assistance and remove major obstacles to growth.

- **Access expert management**

Poor in-house management can result in high staff turnover, increased absenteeism and poor sales figures.

Outsourced firms will have managers with more experience of handling telemarketing teams across a wider range of sectors.

Often overlooked, there is a benefit in using a CCT outsource firm that is considered to be 'best in class'.

Stakeholders will recognise that you have chosen to use a firm that has pedigree, substance and a reputation for good CCT work.

- **Improve financial ratios**

Many clients can also significantly improve their financial ratios by moving contact centre costs from a fixed cost line on the company balance sheet to a variable cost via an outsource partner.

This can drastically reduce fixed headcount costs and improve 'profit per head' ratios.

- **Improve performance**

Sometimes it is valuable to benchmark the performance of internal sales teams against an outsource supplier.

This can improve service levels as well as sales.



Is outsourcing right for you?

Before outsourcing, you will need to confirm that it is right for your organisation, your customers and your stakeholders.

- **Consider creating an outsourcing team**

If necessary appoint an outsourcing team within your organisation with the responsibility to evaluate the strengths, weaknesses, opportunities and threats throughout your organisation and to research potential CCT suppliers that would suit your needs.

- **Identify your core competencies**

Take time to identify your core competencies.

Core competencies are those functions that define your company as unique – such as your unique product or offering – and that give you a competitive advantage.

Never outsource your core competencies – but consider outsourcing anything that is draining time, energy and resources from them.

If your sales or CCT function is not a core competency then progress to the next stage.

- **Assess outsourcing thoroughly**

Conduct a thorough investigation of why you might want to outsource and the impact it is likely to have:

- Your CCT objectives
- Strengths, weaknesses, opportunities and threats of your in-house CCT abilities
- Strengths, weaknesses, opportunities and threats of outsourcing
- Potential CCT suppliers

- **Use DMA outsourcing decision card**

Use the decision card on the following page to identify the questions you might need to answer when deciding to outsource.

These questions will help ensure that your journey to outsourcing will be inclusive, accurate and more controlled and structured.

Your outsourcing team should ensure that as many departments as possible are consulted and contribute to the decision card.



Contact centre and telemarketing (CCT) outsourcing decision card

This decision card should help you to consider the key factors that will influence your decision to outsource and your selection of a provider.

Seek contributions from all relevant or affected departments and stakeholders within your organisation so that any issues are identified at this stage of consideration.

Use these responses to help your outsourcing team identify any potential issues that need to be answered before you can outsource your contact centre function – and either resolve each concern or put a mitigation strategy in place.

For example, discuss internally if some internal stakeholders believe that your contact centre is a core competency, or put support in place for any services your preferred provider cannot fulfil.

In-house ability		Yes	No
1	Is this function part of your core competencies?		
2	Can you cope with highs and lows in demand?		
3	Do you have the in-house expertise to provide this service?		
4	Do you have enough available staff to provide this service?		
5	Can you contractually outsource this service?		

Risks		Yes	No
6	Would loss of day-to-day management of CCT harm your organisation?		
7	Would loss of CCT expertise have a negative impact?		
8	Is quality of service delivery a concern?		
9	Would response time to problems be reduced?		
10	Would current contract performance be negatively impacted?		

Goals		Yes	No
11	Can you clearly define your goals for CCT?		
12	Are your goals for CCT long term?		
13	Can you objectively measure achievement of these goals?		
14	Are objective measures currently in place for CCT?		
15	If your goals and objectives are not achieved, will this impact your company negatively?		

Suppliers		Yes	No
16	Have you got a known outsource provider for CCT?		
17	Do the mission and strategic goals of the CCT provider align with your company's mission and strategic goals?		
18	Is the CCT provider able to provide the service you need?		
19	Has your company had previous relationships with a CCT provider?		
20	Is the CCT provider known to deliver a high-quality service?		



Choosing a CCT

Cost should never be your only consideration when choosing a CCT – and probably not even your first consideration. The wrong partner will be a costly and potentially critical mistake even if (and perhaps even because) they are the cheapest.

Here is a quick checklist of factors to thoroughly research and consider when assessing each potential supplier:

Organisation

- **Understand CCT's set-up and security**

- A brief history of the CCT's organisation
- Details of any parent company and what guarantees it will provide over the provision of the contract, if appropriate
- Details of the CCT's turnover and profit for the previous three financial years
- Details of any external funding of the business – such as investments or grants, plus details of how this may affect the provision of service to your business
- Does the CCT's structure offer any potential additional benefits – such as international reach or close links with social media agencies?

Ability to deliver

- **Understand capabilities**

- How the CCT's revenue and staff are divided between B2B and B2C
- Details of its operational centres and the seat/agent capacity of each
- Details of the location(s) it intends to use for the delivery of your services and its rationale behind the use of these location(s)
- Detailed information as to its understanding of the local labour market
- Location of its dialler management, quality assurance and other management support functions

- **Investigate experience**

- Does the CCT have relevant experience of the type of calls you wish to outsource?
- Does it have any clients who you consider to be a direct competitor?
- Would this be an asset or liability to your own activity?
- Can it provide examples of successful campaigns working within your industry sector?
- Consider asking for:
 - Details of current industries and vertical markets where they have previous experience
 - Details of your main competitors they currently work for, if any
 - How would they ensure confidentiality between your team and any other competitor-related teams?
 - References or testimonials from other clients
 - Sample telephone numbers for test calling into the call centre, or test outbound calls



Credibility

- **Accreditations**

- Does the CCT have any of the following accreditations:
 - ISO9001 – Quality
 - ISO27001 – Information Security Management
 - DMA Data Seal – Information Security Management
 - Investors in People (IIP) – Training and care of employees
 - EN15838 – Customer contact centre quality
- Is it active in any telemarketing lobbies or legislation/regulatory committees to further the telemarketing trade – the Direct Marketing Association, for example?
- How does it support and enforce the UK telemarketing and Ofcom regulations?

- **If you intend the CCT to take payments on your behalf:**

- Is the CCT accredited by the FCA?
- If so, when was it accredited and when was its most recent FCA audit?
- Is it Payment Card Industry (PCI) compliant?
- If so, to which PCI level is it compliant?

Culture

Even if everything about a potential supplier looks and sounds right on the surface, your campaign will be undermined if this does not translate into a positive atmosphere, attitude and approach on the call centre floor.

Remember that it is ultimately the agents on the phone that will be representing your brand and turning your sales, marketing and branding investments into sales and positive customer perception.

- **Get a feel for the culture of the call centre**

- Does the CCT feel like it can promote your product or service to your customers in line with your brand strategy?
- Can it understand and relay your company ethos and values to your customer?
- Is the CCT environment one in which you would be happy for your own staff to work?
- How will the CCT make your outsourced team's working environment match your in-house environment?
- Can it provide examples of how they have done this before for other clients?

Project team

The following roles are key to any telemarketing campaign.

- **Get to know key CCT team**

Always ask for details of the individuals within the CCT who would fulfil these roles:

- Operations Director
- Call Centre Manager
- Team Manager



- Quality Assurance/Compliance Manager
- Recruitment and Training/Development Manager
- Dialler Manager
- **Check staffing record and approach**
You should also check their recruitment, retention and training with the following questions:
 - What are the most common methods of recruiting agents?
 - After initial induction, describe the training and development that an agent would undertake?
 - During this period, how would the performance of the agent be managed and improved?
 - What is the approach to agent coaching and development?
 - What type of training and development do team leaders and managers receive?
 - Who would carry out agent coaching?
 - What is the average annualised attrition rate over the last 12 months for the following?
 - Agents
 - Team leaders
 - Managers
- **Check pay and performance**
Ask your potential CCT about their pay and performance policies:
 - What contract structure does it offer its agents – including basic pay, contracted hours, sickpay, probation periods, notice periods and employee benefits?
 - What type of incentive or bonus plans, if any, are offered to motivate agents?
 - How are performance targets and delivery against them communicated to agents – and how often?
- **Check working arrangements**
Understand the CCT's day-to-day operation of your project:
 - What are the current hours and days of operation?
 - Are there any shift patterns?
 - Is there support for evening (5pm-8pm) or weekend-only campaigns?
 - What is the normal ratio of agents to supervisors for inbound, service and outbound campaigns?

Synergy

Synergy is all about shared ambitions and goals which results in better co-operation.

Any fundamental differences can impact on your relationship after several months and should be part of your consideration.

- **Ensure excellent synergy of aims**

Make sure that you and your CCT have a good synergy at a corporate level as well as at management and tactical level.

For example:

- If you are keen to exploit the European market then choose a CCT that shares this ambition, rather than one that is only interested in the UK market.
- If your management team is conservative in their approach, be wary about trying to work with a more aggressive CCT.



Campaign delivery



Location

You will need to be able to work closely with your CCT's account management team to ensure best practice is strictly applied and to review the campaign results.

If the CCT is difficult to reach at regular intervals this could compromise the effectiveness of your campaign.

- **Meet face-to-face on a regular basis**

Regular visits will allow you to build a rapport with your calling team and often facilitates a better communication flow and relationship.

You should not choose a CCT purely because of its close proximity to your offices – but it is inadvisable to choose one that you cannot realistically visit frequently.

Best practice suggests that you – or perhaps a third party acting on your behalf if your CCT is overseas – should make regular visits to your CCT for training, monitoring and development of the agents handling your calls.

You may also be able to make productive virtual visits using supporting technology – but it makes good business sense to combine this with some visits in person.

Compliance

- **Check compliance policies, procedures and safeguards**

- How does the CCT propose to manage your campaign?
For example, will it use automated dialling equipment to make calls?
If so, can it demonstrate compliance with the relevant regulations?
Is the proposed solution appropriate for your business?

- **Check against DMA best practice guide**

Check your CCT's policies against the requirements covered in this guide and the *DMA Data guide*.

Quality management

- **Check CCT's quality management**

Ask your CCT to provide details of:

- Any external quality accreditations they possess
- Call monitoring policy and quality management system
- Typical call evaluation form and marking guidelines
- How often it would expect to carry out a call calibration session with you to benchmark call monitoring and quality standards
- How frequently senior management will monitor calls
- Procedure for managing agents who are not adhering to quality standards.
- Call recording system – and where calls are stored
- Process for high volume call retrieval
- How long they are able to store non-sale and sale call recordings for
- Service level they will offer around call retrieval



CRM compatibility

- **Check for CRM compatibility**

The issue of Customer Relationship Management (CRM) software compatibility is often overlooked. It is important that you can share data with your CCT and that they can share activity and updates with you.

Increasingly CRMs are cloud-based, but today's dynamic customer environment often requires real-time data exchange between client and supplier.

In many cases an interface can get two systems talking, but they can be expensive to develop if they do not already exist.

Other options can be explored including direct, secure links.

Check that your CRM is compatible with the one used by your CCT and future-proof it by discussing your planned developments.

Cost

Remember that behind any CCT service costing are many factors – including the cost model used, recruitment of agents, investment in better technology, investment in servicing your account, investment in better processes and the quality of the environment in which your agents will be working, as well as the CCT's profit margin.

The quality of the agents, training, call centre environment, processes and service that you will be using to promote your business can only be as good as the investment you make in them.

Do not automatically choose the lowest upfront cost as this may not provide you with the best quality service or most compatible supplier over the following months and years.

- **Always interrogate the costs in depth**

If a prospective CCT provides a quote that does not appear to cover its costs, it is unlikely that it will be able to deliver good results or a reliable and compliant service.

Some DMA client members have raised complaints that 'rogue' CCT suppliers are providing very low cost quotations, but when awarded a contract simply do not complete the agreed work to an acceptable level.

Analyse any quote in depth and quiz your potential supplier in detail about any aspect that you wish to clarify or double-check – if the CCT is a good company, they will be more than happy to explain their quote and show you why and how it distinguishes their bid from any others.

- **Get the right cost model to suit both parties**

The wrong cost model can get expensive down the line and make for an unhappy working relationship – to no-one's benefit.

Understand the various cost models available, including:

- **Cost model/remuneration structure**

- Cost per customer serviced
Including bonus or incentive structure for efficiencies achieved whilst continuing to meet SLAs and KPIs
- Cost per customer lifetime value (CLV)
- Cost per customer revenue generated (% thereof)
- Cost per customer profit generated (% thereof)
- Cost per customer incremental revenue generated (% thereof)
- Cost per value of sale



- **Standard 'activity-based' remuneration model**
 - Cost per full-time equivalent (FTE) per month
 - Cost per agent per hour (wrapped in with management and telecommunication costs)
OR
 - Non-wrapped in (i.e. management and telecommunication costs charged separately)
 - Cost per agent per logged-in hour (i.e. excluding breaks, training and off-line time)
 - Cost per agent productive hour (i.e. an agent's 'talk-time')
- **Risk/reward/performance (or 'results-based') remuneration model**
Typically part fixed fee, part performance-related fee:
 - Cost per call handled (inbound and outbound)
 - Cost per lead, sale, acquisition, retention, re-activated customer, cross-sell or up-sell
 - Cost per first call resolution
 - Cost per customer satisfaction
- **Open book costing model**
 - Cost plus margin

Supplier/client relationship and responsibilities

Successful outsourcing depends on a well-managed relationship.

The initial conversations to find the best match for your organisation are the ground work for a successful partnership.

Successful relationship attributes

Great supplier-client relationships rely on the same common-sense attributes as any other relationship, including:

- **Shared and common goals**
Team up with a partner organisation that has a good cultural fit – one that understands your business stage and goals, values your ambitions and shares the same approach to doing business.

Partners who understand the business and challenges of each other are far more likely to be able to work through any issues and be able to spot new opportunities for each other.
- **Clear roles**
Work with clearly defined and recorded roles, responsibilities and accountabilities for core processes.

Always have a formal performance management schedule – including meetings, timings, purpose and objectives, agreed agendas, attendees, required outputs, breach and grievance management.
- **Agree clear performance measurements**
Set clear SLAs, KPIs and other measures of performance.
- **Good management processes**
Only use escalation routes as a point of last resort, not as a management.
- **Information sharing**
Share knowledge and information regularly to optimise leverage and opportunities to add value in both directions.



- **Clear, constant communication**
Build clear channels of communication that are open and easy at all times.
- **Mentality of equal, strategic partnership**
Promote an equal, mature, constructive collaboration based on creativity, innovation, confidence and independence of thought.
- **Equal contribution**
Make equal contributions, but in different ways according to expertise.
- **Positive problem-solving**
Use issues as an opportunity to seek win-win solutions, rather than as a point of contention and blame.
Speak openly about problems and seek early resolution.
- **Honesty**
Be open and honest throughout.
- **Flexibility and understanding**
Look for a partner that shares the same core mentality, but accommodate other ways of working.
If you have chosen your partner organisation well, you should be able to trust that they will fulfil their side of the arrangement in the way that gets the best out of them.

Governance

Governance of the contract between you and your CCT should be clear, unambiguous and flexible enough to allow adaptation, growth and innovation.

Good governance is an agreement between partners that future-proofs the relationship. It frees both parties up from managing the day-to-day relationship and empowers each side to contribute their very best performance and ideas.

- **Define governance model in writing**
Define the terms, policies and measures that will constitute your relationship, including:
 - Sign-off on commercial terms
 - Sign-off on business plans
 - Agreement on KPIs
 - Sourcing and exiting partners
 - Approving propositions
 - Escalation points for unresolved issues
 - Initiation of breach plans
 - Responsibility for performance
 - Attendance of business reviews
 - Resolution of day-to-day operational issues
- **Be comprehensive**
Ensure that as well as covering issues specific to outsource CCT, your contract and governance cover all the general telemarketing and one-to-one best practice contained in the rest of this and all other DMA guides.
- **Agree accountability**
Agreeing who is responsible for decision-making for each part of the process is paramount to establishing a successful governance model on both sides.



Campaign delivery



Assigning accountability is primarily about identifying which party is best placed to decide upon each area of the relationship and given them the freedom to make the decision they feel is right – without feeling compromised or undermined.

Do not approach accountability from the perspective of who will be responsible if something goes wrong – having a strong governance model in place, with appropriate levels of autonomy and trust declared, is the best way to minimise the opportunity for failure and will allow each party to stand up and take responsibility for fixing issues when they do arise.

- **Define how relationship will operate**

To formally review CCT performance you should agree a governance framework along these lines:

- **A weekly operational performance review**

This could include:

- **Actions from previous meeting**
- **Detailed performance review for previous week**
Including SLA and KPI performance.
- **Operational and process issues**
What is not working, what needs fixing, what changes need to be made, what improvement plans are in place.
- **Upcoming activities**
Early notice of planned propositions, campaigns, changes to sales approaches, pricing and so on.
- **People**
Training delivery, absence and attrition issues, new starters, best performers, awards.
- **Quality and compliance**
Review of complaint volumes and types, quality reporting and outcomes, quality plan.

- **A higher level monthly business review**

This could include:

- **Actions from previous meeting**
- **Detailed performance review**
Including SLA and KPI performance.
- **Commercials**
Including issues for resolution.
- **Client organisation update**
Changes and developments happening in your business.
- **CCT update**
Changes happening in the CCT.
- **Upcoming activities**
Early notice of planned propositions, campaigns, changes to sales approaches, different data sets, new call types and so on.
- **People**
Training delivery, absence and attrition issues, new starters, best performers, awards.
- **Quality and compliance**
Review of complaint volumes and types, quality reporting and outcomes, quality plan.
- **Partner issues**
Discussion on any outstanding issues that require resolution.



- **Improvement plans**
Review of any actions captured into joint improvement plans.
- **Guest speakers**
Any guests asked to attend to provide overview of specialist area, such as marketing or propositions teams.
- **A senior level quarterly business review:**
 - **Actions from previous meeting**
Including SLA and KPI performance.
 - **Client organisation update**
Developments of note, strategic update.
 - **CCT update**
Changes happening in CCT organisation, new client wins, developments of note.
 - **Performance review (high level)**
Focus on specific areas of excellence or issue, with a pack issued in advance for attendees to read and highlight points of interest.

Trend analysis (positive or negative), data performance and issues, CCT feedback on sales processes and ways of working.
 - **Agreement of hours and sales targets for upcoming quarter**
 - **Commercial review**
How well commercials are working, specific issues for either side, review of quarterly costs and outcomes.
 - **Review of coming quarter**
Upcoming changes at your organisation, ideas and suggestions for added value, opportunity for CCT to propose additional work/processes or doing things differently
 - **Discussion around any form of breach plans where appropriate**
 - **Guest speakers or visits to other areas**

Compliance

There are specific legal rules to which you must adhere concerning data and telemarketing – with important distinctions of responsibility between clients and suppliers.

Compliance with these rules is not just an obligation, but also helps to ensure that you target and communicate with your customers appropriately and minimises the likelihood of your company causing a nuisance.

Using a reputable outsource provider should ensure you remain current and compliant with all legislation, but responsibility for the legality of calls remains with you.

The rules you need to obey will depend on whether your call is business-to-consumer (B2C) or business-to-business (B2B). Below are those that regulate telephone calls – but as CCTs move to providing digital services, such as email, web based services and SMS text messaging, it is wise to investigate other legislation and standards.

While you can outsource the function of CCT work, you cannot outsource your legal responsibilities.

Key legal points

The following is a quick guide to some of the main points, relevant to both B2C and B2B.

See the *Compliance* section of this guide and the *DMA Data guide* for full details of your general legal obligations.



- **CCT must identify itself**

Your CCT must make it clear they are calling on behalf of your company – it is illegal for them to state or imply they are employed by your company.

- **Ensure CCT has sourced data responsibly**

Your CCT cannot generate call lists by random number or sequential dialling, either manually or by computer.

- **All contact data must be correctly screened**

After generating your calling list, the numbers must be screened against your company's in-house suppression file.

Additionally, your outsourced CCT may possess its own suppression file against which you may choose to suppress.

You must also screen your calling lists against the TPS and CTPS files as appropriate.

See the *Screening and suppression* section of the *DMA Data guide* for full details.

- **Client is data controller, CCT is data processor**

It is reasonable to assume that in the case of the outsourcing relationship, the client or company on whose behalf calls are being undertaken is the data controller and the outsource CCT company is the data processor.

It is also wise to make this relationship clear in your contract with the CCT and, as a result, also make it clear who owns the data.

Each of you has responsibilities accordingly, which you can understand in full by seeing the *DMA Data guide*.

The DPA defines the meaning and basic responsibilities of the two roles as follows:

Data controller

A person who, either alone or jointly or in common with other persons, *determines the purposes for which and the manner in which* any personal data are, or are to be, processed.

Data processor

Any person, other than an employee of the data controller, who *processes the data on behalf of* the data controller.

- **Data controller remains responsible for compliance**

Data processors are not directly subject to the DPA. The data controller remains responsible for ensuring that all processing complies with the DPA, whether it is done in-house or outsourced to a data processor.

- **Client remains responsible for payment compliance**

If your CCT is taking payment over the phone on your behalf, you are still responsible for ensuring that all payment and personal information is handled in a fully compliant manner.

- **Use the DMA template Data Processing Agreement**

A template for a Data Processing Agreement is available from the DMA here:

dma.org.uk/article/data-processing-agreement-template

- **See DMA Data guide for further information**

For full guidance on acquiring, caring for and using customer data, see the *DMA Data guide*:

dma.org.uk/guide/data-guide

- **See ICO for further information**

The ICO has published a good practice note, *Outsourcing: a guide for small and medium-sized businesses*, which gives further advice about using data processors:

ico.org.uk/media/for-organisations/documents/1585/outsourcing_guide_for_smes.pdf

- **Understand and ensure data protection compliance**

As data controller, you must keep to the eight principles of data protection, as outlined in the *DMA Data guide*.



Data ownership

- **Establish ownership of data**

It is important to establish, during any outsource activity, who owns the data.

- **Client retains ownership of data they provide**

In most inbound and outbound scenarios it will be the client, rather than the outsource agency, who will provide the data for calling and so the issue of data ownership is relatively straightforward – the original and the updated data is owned by the client.

- **Clarify ownership before the campaign**

For outbound calling where the outsource agency has collated data on behalf of the client, the issue of ownership can be more nuanced – but the assumption is that data is being collated and called/validated/updated on behalf of the client, who will become the ultimate data owner.

- **Ensure sourced data is compliant**

If you are renting or buying data, get assurance the source data has been collected in accordance with the DPA and PECR.

- **Understand ownership of rented data**

In the case of renting data, you will also need to be clear and understand at what point you own the data – typically once the customer has indicated they wish to buy or confirmed or has give a positive response and their permission to be contacted again.

Proposed changes to EU legislation mean that this is likely to change soon – moving the UK to a fully opt-in approach.

For full information, see the DMA *Data guide* or contact the DMA for further guidance as legislation is updated:

dma.org.uk/guide/data-guide

Exit strategy

Within your contract you should include provision of what happens if the relationship fails or a natural parting of ways may come about as two businesses evolve in different directions – despite best efforts this does and probably will happen at some stage.

- **Build exit strategy into each aspect of your agreement**

Make sure you clearly address what will happen with regards to every part of your relationship, such as:

- Timescales
- Commercial settlement
- Business continuity
- People
- Responsibility transfer
- Return of assets
- Data transfer and disposal
- Retention of IP or ownership of assets
- Agreed public statement and confidentiality
- Non-compete clauses and cooling-off periods
- Legal aspects of any failure



Outsourced campaign delivery

Agreeing CCT campaign objectives

When designing your campaign, it is important to consider in detail the services you have agreed with your CCT.

This should be in the form of a contract or letter of intent if you have agreed to pilot before full contract. It should have clear definitions of terminology, KPIs and their make-up, success measures and an agreed expectation of ROI.

- **Here is a basic project example:**

Brief

Deliver a team of 150 FTE agents (equivalent of 150 full-time employees) to deflect 60% of expected call demand as a result of a product recall issue.

The services start date will be 18th October 2013 for a period of six months, due to end 18th April 2014.

A series of FAQ's will be provided to answer customer queries. These will also capture any complaints or expressions of dissatisfaction by customers to be exported overnight to complaints teams to manage.

Provide your CCT with a call scripting flow chart and expect them to build a script with the ability to export customer notes and end of day reports in CSV format, via an SFTP site on an overnight load process.

In addition, supply your CCT with expected staffing requirements using historic behaviour.

Example success KPIs

- 60% of calls deflected from customer services
- Average handle time (AHT) of less than 240 seconds
- 80% of calls answered within 20 seconds
- 95% of all calls answered

- **Monitor quality**

Monitor real-time operations, adjust schedules to meet your campaign objectives and be prepared to change your expectations during pilots/trials.

- **Measure actual ROI**

ROI is a key measure of the success of your outsourcing, but quite often it is estimated on the assumption that KPIs and targets will be met.

In reality, you should calculate ROI based on actual campaign results to determine whether a full contract is viable.

- **See further details**

For further information, see the *Quality assurance* section of the this guide.

SLAs and KPIs

Working in collaboration with your supplier, set clear, realistic, achievable and fair targets from the outset.

Focus on quality

- **Focus on quality of outcome**

Performance measurements should be focused on value and achievement.

For example, worry about how many qualified leads are generated and how satisfied customers are with the quality of the call, rather than getting too blinkered by granular metrics such as call duration or ring times.



- **Take context into account**

Be realistic and fair with your targets – ensuring they take into account the activity, market, consumer trends and compliance conditions, as well as your sales proposition.

- **Check that targets are mutually beneficial**

Make sure that your targets agree with your supplier's own ambitions so that you are both working to the same goals.

For example, your desire to hit big short-term targets might inadvertently demand telemarketing practices that would clash with your supplier's business need to preserve their reputation as a more considerate, customer-focused CCT provider.

- **Set performance-related rewards**

Include healthy stretch and incentives for over-achievement and penalties for under-achievement, with consideration for variances.

Define Service Level Agreements (SLAs)

- **Set clear SLAs**

Service Level Agreements (SLAs) are designed to guide and monitor each party's obligations to make an agreed process work – such as acceptable margins for error, response timescales and data accuracy.

For example, this could be a commitment from you to deliver accurate call forecasting for inbound call activities to ensure your CCT delivers against call handling SLAs.

- **An inbound SLA example:**

You might agree that as long as the volume of calls your CCT receives stays within a variance of a certain percentage, then your CCT commits to answering X% of them within an agreed number of seconds, with an acceptable abandon rate of Z%.

If the call volumes, the answer time or the abandon rate varies beyond the agreed margin, communicate quickly to understand the issue and agree a constructive solution.

- **An outbound SLA example:**

For outbound calling, your CCT's performance metrics might relate to the quality of data that you supply – so they will conduct a certain number of calls per hour as long as your data is accurate to within an acceptable margin.

As always, flag up and discuss immediately if any part of the SLA drifts out of its agreed variance.

- **Expect your SLAs to work both ways**

For service level agreements (SLAs) to be robust and enforceable, they should be based upon commitment from both you and your CCT to deliver against agreed performance criteria.

In other words, in order for your CCT to meet their performance targets, you will need to fulfil your parts of the process according to the SLA.

- **Calibrate quality processes**

Calibrate your quality process with your CCT's at the outset of any new campaign.

Listening to call recordings together while checking against a pre-agreed matrix is a great way to do this.

- **Monitor calls regularly**

Work closely with your CCT to monitor calls for overall quality management and performance optimisation.

Set clear Key Performance Indicators (KPIs)

- **Set clear KPIs**

KPIs (Key Performance Indicators) differ from SLAs in that they focus on results, i.e. what comes out of the



process rather than process itself. KPIs set the benchmarks that must be reached in order for ongoing overall campaign and/or business targets to be fulfilled.

For example, whilst your SLA might agree a certain number of calls to be made per day, your KPIs state how many new customers need to be gained from that activity in order to make it profitable.

- **Monitor and discuss KPI performance regularly**

Ensure that you receive KPI information as often as you need to in order to spot issues or opportunities – and work quickly and collaboratively with your CCT to respond to different scenarios.

For example, if you are conducting a regular, low-level prospecting campaign then you might only want to analyse your KPI performance on a monthly basis – but if you are in the middle of a major campaign, or are using a new marketing channel, you are likely to need to track and respond to performance on a weekly, daily or even more regular basis.

Review your KPIs periodically to ensure changing circumstances, increased activity complexities and market conditions are taken into consideration – with the aim always to keep your KPIs at an ambitious but achievable level.

Outsourcing international campaigns

The majority of this document considers telemarketing within the UK – i.e. telemarketing activities carried out on behalf of UK-based organisations to customers in the UK.

However, a substantial volume of international telemarketing activity is conducted from the UK, particularly in the B2B sector.

- **Be aware of international compliance differences**

Compliance currently varies from country to country. As an example, the UK has an opt-out system for telemarketing, but in Germany it is an opt-in system. So Germans have to confirm they want to receive telemarketing calls, and calling a person that has not added their name to the list can result in heavy fines.

- **See specific advice for international telemarketing**

See the *International telemarketing* section of the DMA Telemarketing guide for guidance on specific issues including:

- Language and accents
- Cultural support
- International calling times
- Compliance

www.dma.org.uk/guide/telemarketing-guide

- **Seek external professional advice**

Centralise or de-centralise?

In discussion about outsourcing your CCT, you will need to decide on whether to use centralised approach, appointing a UK-based company with international native speakers, or a de-centralised approach, with local CCTs in each of your target countries.

- **Consider centralised for smaller projects**

As a very broad rule of thumb, a small project of, say, three languages and involving less than 400 calling hours (approximately 1,500 completed contacts) may be more economical to run from a multi-lingual UK CCT.



Campaign delivery



- **Consider de-centralised for larger projects**

A larger project, again in three languages but comprising 5,000 calling hours (approximately 15,000 completed contacts) may be delivered more economically using a call centres in each of three countries.

- **Investigate pros and cons for both approaches**

Calculate both options for your international campaigns before outsourcing.

There are issues with either method. For example, you may have difficulty getting native speakers for a centralised model, but control and management might be more difficult with a de-centralised model.



Campaign response



Results and ROI

Carefully define costs and required ROI based on your campaign objectives.

Use these measures not only to judge your current campaign, but also to preserve the integrity of your future work.

- **Preserve your future marketplace**

With increasing numbers of customers signing up to the TPS and CTPS registers, your pool of prospects is not infinite and will quickly decrease if your telemarketing is not useful to them.

Conserving this precious resource is absolutely vital – so if your campaign is generating low conversion rates then you are only likely to be switching off your audience forever.

If you are seeing low conversion rates, pause your campaign immediately, find out why it is performing badly and only roll it back out if and when you find a much more appealing and successful approach.

- **Carefully assess campaign impact on customers**

If your communication is proving inappropriate to your target, seriously consider the impact of your campaign on those customers and prospects who you convert and those that you don't.

- **Quickly suppress poorly-performing data**

Measure your ROI in data sets.

Do not damage your brand, your client's brand and your profit margin by continuing to outbound call using lists that aren't delivering required results.

Continuing to call regardless of negative results will have a major negative impact on your prospects, customers and agents alike.

Campaign monitoring

Review campaign daily:

- **Review daily**

Review each campaign after 24 hours of calling

- **Re-evaluate samples**

Re-evaluate a sample of each data set, DMC, conversion rates, complaints, feedback from outbound staff and customers.

- **Check against objectives**

Check that your campaign is achieving your original objectives.

- **Re-forecast**

Update forecasts and check ROI.

- **Monitor customer dissatisfaction**

Keep in mind customer dissatisfaction levels and evolve your campaign to minimise these.

- **Watch for conversion rate drops**

In particular, monitor your conversion rate very closely.

Your campaign may start well, as it is likely you have prioritised your data before calling – but as it continues, your conversion rate will often drop as the tail end of the list is re-processed.

Assess when to stop running the campaign to avoid increased customer dissatisfaction.

- **Monitor KPIs**

Campaigns never run exactly to plan, so continually monitor performance against your key performance targets throughout the campaign period.



Measuring campaign performance

Make sure you have the following figures to help you assess your ongoing campaign performance:

- **Productivity**

- Calls with dial tone
- Engaged calls
- No answers
- Wrong numbers
- Gone-aways
- OCRs
- Decision maker contacts (DMCs)

- **Performance**

- Number of DMCs
- Presentation of call objective
- Capture of call outcome:
 - Part-completed
 - Call-backs
 - Not interested
 - Not relevant
- Reasons for above
- Successful calls

- **Results**

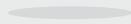
Successful call outcomes

- Contacts/DMCs achieved
- Case or enquiry resolution
- Information gathered
- Leads profiled
- Appointments booked
- Sales generated
- Hot, cold or warm leads generated
- Research and questionnaires completed

Non-successful call outcomes

- Reasons why

a-z



Glossary



Glossary

Agent

A person who speaks to your customers and prospects on the phone on your organisation's behalf.

Above the line

Advertising that uses mass media channels, such as television.

Automated call distributor

The equipment used by a live bureau to manage and report on incoming call traffic.

Automated call handling

Same as *IVR*.

Abandoned rate

The percentage of calls made to a CCT that are abandoned by the customer before speaking to an agent.

ASA

Average speed to answer.

AHT

Average handle time. The average duration of a call during one transaction.

Attrition rate

The percentage of staff that leave, expressed over a period of time (usually annual).

Below the line

Advertising that uses one-to-one media channels, such as telemarketing.

B2B

Business-to-business. A communication between one business and another, rather than between a business and a consumer (B2C).

B2C

Business-to-consumer. A communication between a business and customers.

BIS

The Department for Business, Innovation and Skills. BIS is supported by a wide range of organisations to deliver services, information and advice.

BTEC

Business and Technical Education Council. A national body which validates vocational courses, generally Ordinary or Higher National Certificates.

CCT

Contact centre and telemarketing agency.

CLI

Caller Line Identification. A telephone service that transmits and displays a caller's number to the customer's telephone.

Client

The buyer of a service offered by a supplier. Typically this is a brand owner.

CLV

Customer Lifetime Value. The nett profit attributed to the entire future relationship with a customer.

**Consumer**

A person acting in a private capacity and not for the purposes of a trade or profession.

Contact centre

A 'bureau' or 'contact centre' is a company, acting on behalf of an advertiser, employed to run a direct response campaign – i.e. to make or receive customer telephone calls and fulfil the customer's request.

CRM

Customer Relationship Management.

Cross-sell

Selling a compatible product to an existing customer. Also see *up-sell*.

CSI

Customer Satisfaction Index. UKCSI is the national measure of customer satisfaction in the UK.

CTPS

The Corporate Telephone Preference Service. The central opt-out register where UK companies can register their wish to not receive unsolicited sales calls. See also *TPS*.

Many countries have similar lists. See *DNC* and *Robinson List*.

Customer

Anyone with whom the client has an existing relationship.

Data

Individual pieces of information on a person that can be used in one-to-one marketing.

Data controller

A person or organisation that determines the purposes for which any personal data is processed.

Data processing

Collecting, storing or carrying out any operation on data.

This extends to the erasure or destruction of data and to its disclosure, transmission, dissemination or otherwise making available.

Data processor

A person or organisation that collects, stores or deals with personal data on behalf of a data controller.

Data Protection Principles

The eight enforceable rules contained in the Data Protection Act 1998. These prescribe the required conduct for the lawful management of personal data.

Data subject

A living individual who is the subject of personal data.

Data supplier

A data controller who makes data available to third parties for use in their one-to-one marketing activities.

Data user

An organisation making use of either its own data or of data obtained from other sources for any marketing purpose.

DDI

Direct Dialling Inward. A service whereby a call made to a DDI number can be routed directly to an internal extension without intervention by a switchboard operator.

**Dialler**

An automatic telephone dialling system that dials from a list of numbers and turns the call over to an agent when a human responds.

Distance selling

The offering of goods or services to a customer (an 'offer'), with a view to concluding a contract for those goods or services without the buyer and seller meeting face to face.

DMA

The Direct Marketing Association. All members agree to abide by the DMA Code.

DMC

The Direct Marketing Commission. Enforces the DMA Code and adjudicates on member organisations accused of breaching it.

DMC

Decision maker contact. See also *hit rate*.

DNC

Do Not Call. The Do Not Call list is the US version of TPS – a central register of people who have opted-out of receiving telemarketing calls.

Note: in the US this does not include some sectors, such as political parties and charities, and differs from TPS in this respect.

DPA

Data Protection Act 1998.

FCA

Financial Conduct Authority. Replaced the FSA. See www.fca.org.uk.

FSA

Replaced by the FCA.

Hit rate

The rate at which you connect with a decision maker on the phone. See also *DMC*.

Horizontal markets

Goods or services that are applicable to a broad range of industries or customers – for example, computer security.

ICO

The Information Commissioner's Office. See www.ico.org.uk.

ICSTIS

See PhonepayPlus.

ISR

Inside Sales Representative. See also *agent*.

IVR

Interactive Voice Response. The process whereby incoming calls are handled by a pre-recorded message using specialist computer and telecoms equipment. Also known as 'automated call handling' or 'voice interactive computer'.

KPI

Key Performance Indicator. A quantifiable measurement that can be used to track the progress in achieving important goals within a company

Lead

The identification of a person that has a need and the ability to purchase.

**Live operators**

People specifically employed and trained by a CCT to handle incoming calls.

Market share

A brand's share of the total sales of all products within the product category.

Mind share

A brand's share of the market's awareness or popularity of a product type or category.

Mobile marketing

The sending of commercial communications using text, picture or video messaging via a mobile handset or connected device.

NVQs

National Vocational Qualifications. Work-based awards in England, Wales and Northern Ireland that are achieved through assessment and training.

Ofcom

The independent regulator and competition authority for the UK communications industry. See www.ofcom.org.uk.

OCR

OCR (Oxford, Cambridge and RSA Examinations) is an examination board that sets examinations and awards qualifications including GCSEs.

PCI

Payment card industry.

PCI DSS

Payment Card Industry Data Security Standard. See www.pcisecuritystandards.org

Personal data

Information from which a living individual can be identified – whether from that information alone or when combined with other information.

PhonepayPlus

Formerly known as the Independent Committee for the Supervision of Standards of Telephone Information Services (ICSTIS). The organisation that regulates phone-paid services in the UK. See www.phonepayplus.org.uk.

Premium rate services

Services that use a telephone number to charge customers higher than average call rates. The money paid for by users is shared between the phone network and the organisation providing the content.

Profiling

Gaining deeper insight about your customers to help identify a target market.

Proposition

The offer or message you deliver to your customers and prospects.

Prospect

Anyone who is targeted for outbound telemarketing. It can either be a customer or someone who has no existing relationship with the brand.

Robinson List

Many countries have a Robinson List. Similar to the TPS, it is an opt-out register of individuals or organisations that wish to opt-out of receiving unsolicited one-to-one marketing. See www.fedma.org.

Seat

Refers to the capacity of a CCT. For example, a 400-seat CCT can hold up to 400 active agents.

**Sensitive personal data**

Data is regarded as sensitive if it relates to racial or ethnic origin, political opinions, trade union membership, religious beliefs, physical or mental health, sexual life, the commission or alleged commission of an offence.

SLA

Service Level Agreement. The performance objectives reached by agreement between the user and the provider of the service.

SMS

Short Message Service. A communication sent via a mobile handset using text, picture or video messaging.

Talk-time

The number of minutes per day an agent is talking on the phone.

TAM

Telephone Account Management. For example, customer liaison, rapport building, enquiry management, order taking or new product launch.

Telemarketer

An individual who practices selling goods or services to customers by means of the telephone or of surveying customer preferences in telephone conversations.

TPS

The Telephone Preference Service. A central opt-out register whereby individuals, sole traders and partnerships can register their wish not to receive unsolicited sales and marketing telephone calls.

TUPE

The Transfer of Undertakings (Protection of Employment) Regulations 2006. Protects employees when a business transfers to a new owner.

Up-sell

A technique where the seller induces the customer to buy a more expensive product or service. See also *cross-sell*.

Vertical markets

Goods or services applicable to a specific industry or group of customers – for example, computer software for hotel bookings.

Vulnerable consumers

The term 'vulnerable consumer' includes, but is not limited to, people with disabilities, the elderly and those for whom English is not their first language.

Voice Interactive Computer

Same as *IVR*.

