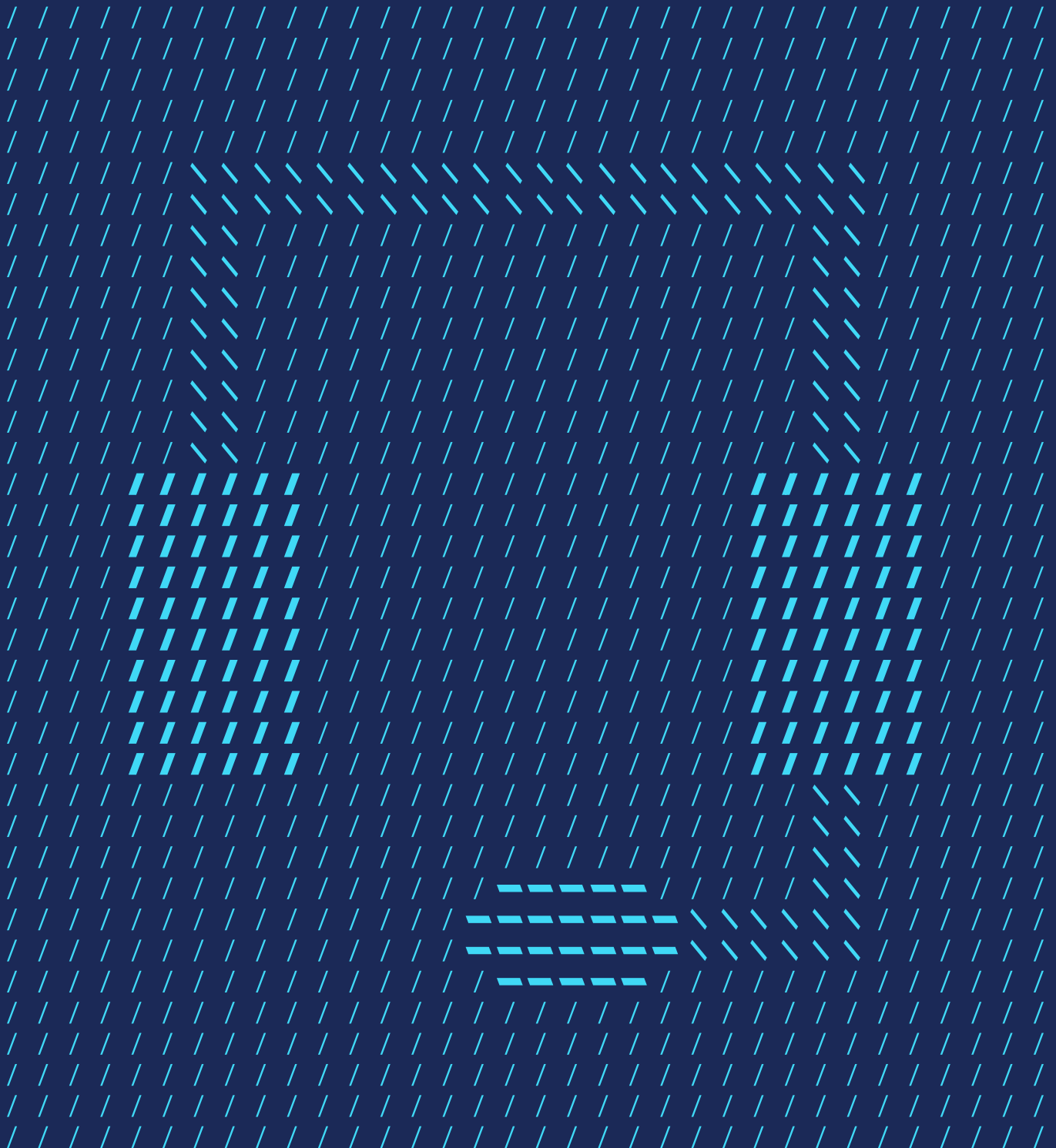


Outbound Telemarketing Campaigns Guide



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/ Acknowledgements

The DMA wishes to thank the [DMA Contact Centre Council](#), in particular Ben Lappin of The Guardian, for their contribution to these guidelines.

/ Introduction

Having clear, tangible goals is important in any organisation and enterprise: the contact centre is no different.

Running a successful outbound telemarketing campaign relies heavily on the clarity of purpose, solid processes, and clear expectations for each role, mixed with the right level of empowerment and autonomy for front-line teams, team leaders, and other key stakeholders.

Everyone involved in the programme should be able to articulate simply and coherently what they are trying to achieve, and the objectives should be represented in every aspect of campaign design.

Typically, outbound programmes focus on clear, obvious transactional outcomes, such as acquiring new customers, cross-selling, or upselling to existing customers.

However, other 'softer' calls are becoming a feature of outbound marketing. Engagement calling, such as 'welcome' calling, is focused on making sure a customer understands all the benefits of their product or on talking to them about a change in habit, and so on.

The telephone is a very powerful tool but it can also be felt by some to be intrusive.

In all of your planning and execution – recruitment, training, the approach on the call, your success criteria – you must keep this front of mind.

Telephones create the platform for a two-way tailored conversation that many mediums simply cannot match, but also puts a human voice and feel to your brand that has a very complex and emotive impact – it's worth noting that this can strengthen your relationship with your customers substantially, but also has the potential to damage it if not wielded properly.

/ Objectives

/ Objectives

Objectives for outbound campaigns typically fall into:

- **Commercial**

The financial or commercial impact you want from your programme. For example, not only an increase in sales, but also at the right cost per sale, the right revenue per sale, and appropriate longevity.

- **Transactional**

Some specific (ideally measured) behaviour that will take place after the call, for example trying a new product feature, download an app, visit a website, opt in to new communication and so on.

- **Brand/ Customer related**

How do you want the customer to feel after the interaction? What emotions do you want to foster?

/ Key Performance Indicators

/ Key Performance Indicators

A good set of KPIs is the bedrock of a campaign.

They help you measure success.

Most industries do not come close to the depth and breadth of technology available to managers in contact centres.

You can usually rely on very granular reporting on the typical metrics and have them live.

Make sure these are:

- Linked to your goals
- Available and reviewed at the right intervals

Performance

First of all, you need to identify your success criteria.

That may be sales, sign-ups, leads, appointments booked, useful contacts, saves, revenue, donations, surveys, and so on. For simplicity, we will refer to this generically as sales.

Your big costs are people and data, so it is important to have metrics that measure the performance and return on investment for both.

To measure success versus the cost of people, most centres measure sales (or transactions, etc) per hour or per day. Per hour is probably more common, especially on B2C campaigns, and allows a flat comparison of all staff, making it an easy metric to translate across full-time and part-time workers.

Per day is more common when the volume of sales (or transactions) are lower or for B2B campaigns which will tend to have a more consistent workforce.

Your main KPI for performance is likely to be sales per hour.

To measure the success of data, conversions and penetration are the typical measures to understand the yield of useful contacts and actual sales.

While this measures the return on investment for data, it is also a performance metric for individuals and teams.

Conversion should be monitored in a few different ways:

- **Decision maker contacts (DMCs) conversion**

Of all the useful contacts what percentage are sales. This allows a measure of the success of individuals, teams or a data file no matter how far you are through it.

- **List conversion**

The sales made compared to the total number of records in a file. This is a useful, sharable measure that links directly to your cost per sale.

Notes from the Contact Centre Council

Be wary of the metrics you choose and how they work together.

An award-winning sales contact centre had an underlying problem where their agents were given inbound sales conversion targets alongside ambitious cross-sell targets measured as additional revenue per sale.

Top converting agents were faced with a dilemma when they encountered customers who would not accept the bolt-ons, did not respond to the sales pitch and cancelled the sale to go online instead, as it pulled down the agents' average revenue per sale.

The behaviour spread to large portions of the sales force who were manipulating sales and reducing their conversion to make sure they hit both targets.

This was not clear to senior management for some conversion issues were discussed at board level, with possible changes to the product being the most likely solution.

It is unclear how many customers would finish the process online, but it was certainly a waste of customer's time, a waste of opportunity, a waste of resource and, ultimately, a waste of sale opportunities.

The targets were later changed to focus on revenue per contact rather than per sale to put this right and conversion increased overnight.

Should agents be manipulating their performance? Absolutely.

Do you understand why they did with such punitive and contradictory targets? Absolutely.

List penetration is a measure of how much data you have left and the quality of the data loaded.

- **Total penetration**

The amount completed on the data file which can no longer be used in the dialler.

- **DMC penetration**

How many useful contacts have been achieved from a data file. This would not include wrong numbers and inactive numbers (where a connection could not be made). This is an indicator of quality data file: less on propensity to convert, more on recency.

Productivity

Outside of the transactional metrics, general effort can be easily measured in the contact centre through your dialler or telephony system measuring times in these states.

- **Talk**

The time spent on calls, usually driven by a live call.

- **Wait**

The time spent logged in actively waiting for a call while the dialler is dialling for them.

- **Wrap**

The time spent after call doing appropriate administration work.

Most dialler systems will offer other states to help you monitor things like coaching time, Q&A time, and even toilet breaks. These are nice features but making sure agents adhere to them can be a frustrating and distracting exercise.

These are the most common measures of productivity, but they are objective measurements and present their own challenges.

A few challenges, for example, would be:

- **The Denominator**

Do you compare this to agents paid hours to get a percentage? This is common, but then presents a challenge around breaks, time for coaching, loo breaks, ad hoc meetings, briefings, important questions. You can make this a very fair metric by counting all those things to a reasonable level of accuracy, but it ends up very admin heavy and feels punitive.

- **Manipulation**

There are many ways these numbers can be manipulated, including (but by no means limited to) agents sitting on answerphones for long periods of time to make it look like they're on calls, agents leaving themselves in 'wrap', agents logging out and back in again to be the last to receive calls.

Our advice is to use productivity as a general indicator of performance and refrain from driving it too relentlessly.

Ultimately, there is a limit to how long people can maintain focus in any given period of time.

People are not machines and there is an ebb and flow to energy levels and focus over days and weeks.

Force it, and the problem spills out elsewhere – the quality of conversations dips; people take more loo breaks; overall attendance drops; deliberate and unhelpful manipulation, and so on.

Set fair and realistic targets, monitor them day-to-day, review weekly, and keep an eye on the range of performance.

If anyone is worryingly low or consistently low, you have the data to question and intervene. It's worth nothing that their other KPIs (like sales per hour) are likely to suffer as well.

Notes from the Contact Centre Council

Reaching a realistic goal can be fairly simple, and you may be surprised at how low the productivity number compares to what you pay.

Consider this: agents work 40 hours per week, have 2x 15-minute breaks per day, 1-hour coaching time, half an hour team leader one-to-one, 2x 15-minute Q&A feedback sessions, 2x 10-minute toilet breaks per day (to some that may be controversial!).

If you put all that together then the maximum productive time you will get is 85%.

Arriving at targets this way reduces the admin burden on team leaders so they can focus on conversations about driving up quality and performance.

Total paid hours			40.00
	Qty	Hours per	Total hours
Paid breaks (2x 15 minutes per day)	10.00	0.25	2.50
Coaching session (1 per week)	1.00	1.00	1.00
Team leader 1:1 (1 per week)	1.00	0.50	0.50
QA feedback (2 per week)	2.00	0.25	0.50
Toilet breaks (2x 10 mins per day)	10.00	0.17	1.67
Total deductions			6.17
Maximum productive time			33.83
			85%

Contact centres have a difficult reputation in many respects, where the focus is often put on the nature of dealing with customers and members of the public.

However, for contact centre agents, the levels of measurement and scrutiny are unlike any other job you can think of. What you are doing minute-to-minute is available for your manager to see; the details of randomly picked conversations are scrutinised against a score sheet; you have a range of KPIs that you will be regularly challenged on.

A healthy level of productivity is required for a successful campaign, however, management's attitude and approach to managing this metric will have the biggest effect on the relationship between front line staff and management.

Average Handle Time

Average of total talk and total wrap divided by total calls gives average handle time (AHT). This can be worked out per agent, per hour, per dataset, per campaign and so on.

It is a measure of efficiency – usually very important to inbound programmes, but for an outbound campaign, it tends to be a secondary metric.

Too short and you might question whether due care is going into the calls; too long and it might inhibit your ability to make sufficient calls to hit your hourly or daily targets.

AHT can also be an indicator of quality on a dataset – if it is low on a dataset relative to others, then you may question whether the customers are less responsive or open to the proposition.

In most cases for outbound telemarketing campaigns, it is a measure worth tracking in order to watch for large exceptions.

For outbound, many contact centres champion appropriate handling time, and rather than holding every agent to a goal time, the expectation will usually be a sensible length range.

Also, you can measure your productivity in transactions per hour metrics, such as calls per hour, DMCs per hour, and so on.

/ Call Flows, Call Guides and Scripts

/ Call Flows, Call Guides and Scripts

Quality

You will need ways of measuring the quality of the work done by the team on the phones.

When people talk about quality assurance, they typically mean assessing a sample of calls against a set of criteria to make sure they meet a good standard.

Essentially, this mirrors how a factory would inspect one in every hundred widgets it produces to be sure that the widgets look, feel, and work the way they are supposed to before sending out to their customers.

If you work in a business that is regulated, by the FCA for example, then quality assurance will be a big part of your programme (and if it isn't, it should be) because the regulator will hold you to certain standards and requirements like selling to prospects without giving them advice and making sure that any new customers are clear about both the benefits and limitations of the product they are buying.

The success of insurance sales via the telephone in the 2000s and the outsourcing boom before and around that time raised the bar for quality assurance best practice across the whole contact centre industry.

While this has been a big benefit, increasingly, businesses are looking at feedback direct from customers to assess the quality of their interactions.

Customer Satisfaction (or Net Promoter Scores) are becoming disconnected from the traditional or common score cards. You can fight hard for a 5-percentage point increase in QA scores, and achieve it only, to see your customer feedback metrics stay flat.

In addition, because the customer response and their rating of the experience will typically trump internal metrics, this creates a challenge to the role and relevance of QA in delivering a successful programme beyond monitoring compliance or making a crucial customer facing difference.

In outbound activity, especially acquisition, this is harder to measure. Agents are usually under some sort of transactional pressure (sales numbers, etc) which means they are more likely to bend or test the rules.

Again, start with your goals. What are you trying to achieve? How do you want your customer to feel after the interaction?

Models for monitoring quality can include:

1 Call Scoring

This entails taking a sample of call recordings and listening to them, or, where call recordings are not available, live-listening. The calls are then marked against a pre-determined list of criteria – particular questions asked, terms explained to customers, explicit consent from the customer received, and so on.

- **Benefits**

- Chosen sampling

Managers are able to select calls according to the criteria chosen to get the coverage you want (by agent, by product, and so on).

- Productivity

Calls are scored back-to-back from call recordings when you choose.

- **Challenges**

- Not live

Customer has already left the call, possibly with misleading information.

- Potentially incomplete coverage

Sampling will not cover every sale

- Regulation and technology

Regulation on the storage of payment details (including in call recordings) is stringent, and, in many cases, requires special equipment to make sure you do not record card details and so on. This can be expensive.

2 End of call verification

Having a separate individual take over at the end of the call to cover key points about the product and any agreement that the customer is entering into.

- **Benefits**

- Chosen sampling

You can select calls according to the criteria you choose to get the coverage you want (by agent, by product, and so on).

- **Productivity**

Calls can be scored back-to-back from call recordings whenever you choose.

- **Challenges**

- **Expensive and unproductive**

Sales do not come through evenly and so the resource used for verification is usually under productive.

3 End of call verification (technology led)

Some technologically sophisticated options are available for end of call verification. This is where at the end of the sale the agent will pass the customer through to a recording, possibly interactive, that confirms all of the important information.

- **Benefits**

- **Cost efficiency**

Because it is not completed by a human being, it is usually more cost-efficient and places less strain on your operation. If lots of people are suddenly making multiple sales at once, you're not queuing hot prospects at a pivotal moment.

- **Script adherence**

You can be sure that the script is adhered to without deviation or omission. For example, the agent could get distracted by a question and miss important information.

- **Challenges**

- **Questions**

If a customer has questions, the process of getting them back to an advisor, certainly the original one, can be very clunky.

- **Impersonal experience**

At the point where you want the person who has just been persuaded to buy, they are then handed off to a machine. A decreasing number of consumers see this as an issue, but it is something to bear in mind.

4 Post contact surveys

The customer is king, and their interpretation of the quality of the call, many would say, is more important than yours. Post-contact surveys are typically sent by email, but are increasingly being sent by SMS, webform, automated call recording, and surveys that capture how your customer felt about the call.

Usually this will cover customer satisfaction, customer effort, first-contact resolution, feedback on the advisor, and, in some cases, checking that the customer was told about and clearly understood the key information.

These were originally used in the customer service world, but are increasingly used in outbound campaigns too.

- **Benefits**

- Customer view

You capture how the customer felt: verbatim feedback, and numbered ranged scores that you can see move over time as you make changes to your programme.

- Cost efficiency

Typically most of the cost is in set up, execution and maintenance is usually quite cheap, in many cases included in your CRM solution

- Script adherence

The questions and the capture will not be influenced by a human being while they're being captured.

- Valued by customers

Because surveys are so common now after interacting with brands some in the industry talk about survey fatigue and consumers turning away from them, but there is an opportunity to make sure the customer feels valued by being given the opportunity to share their thoughts and feelings.

- **Challenges**

- Data and permission

You need sufficient data on the customer (like email address) and in some cases the appropriate permissions to email.

- Compliance

It is difficult to capture whether important information has been captured. in a more heavily regulated industry

- Self-selection

Customers most impressed or most dissatisfied will tend to reply, and so therefore any scoring is not necessarily reflective of the overall.

- Responding to feedback

Sometimes this can create large volumes of verbatim feedback, and responding it in a timely fashion can create new operational needs and challenges. Asking for feedback and not doing anything with it can also be counterproductive.

5 Speech analytics

You can use speech analytics to check adherence to processes, understand the reasons for calls, discover why it didn't result in success, and confirm the use of important phrases (check verbal agreement received, not sold on cancellation, etc) and a great deal more. Ultimately the scale of coverage this offers is unlike any other quality process.

- **Benefits**

- Scale

Every call handled can be monitored. This gives a great deal more coverage than you can ever hope to achieve with people listening to calls. This includes coverage of:

- Call avoidance

Are agents taking steps to shorten or lengthen calls this is easily detected.

- Combine with other data

Look at calls that have high or low CSat (or other customer scores) and see what they have in common, and if you have the data available go into even more detail.

- Sophistication

You can programme / train the systems to cover huge complexity.

- Objectivity

There is a relative objectivity and consistency that a machine will give you that is harder with a person, and even harder to achieve over several people working on the same activity.

- **Challenges**

- Cost

The initial cost and commitment of set up can be substantial and you need to commit to monitoring quality in a very different way.

- Training and programming

The initial setup can be substantial but is improving and becoming faster all the time.

6 Feedback Loops

- Quality Leaders and Team Leaders must feedback to Trainers
 - In practice, the challenges are going to be particular to each programme. Put regular meetings in the diary and make sure they happen. As a leader and an accountable person, don't feel you have to attend them all. Work on an agenda, and request a post-meeting list of notes and actions. Of course, you can participate if you wish, but don't be a log jam and hold things up.

Notes from the Contact Centre Council

I inherited an outsource outbound B2B campaign from an outgoing call centre manager that had got into terrible shape.

The trust in the relationship between supplier and client had eroded completely, the person managing the relationship with us was much more senior in the client organisation than we would typically deal with and was known for being very direct – this created quite a difficult atmosphere for productive discussion.

Quality was a huge issue, so I started with that.

I spoke to trainers, the quality team, and team leaders and discovered a range of different and vital components that I could add to the score card.

I created a very detailed, specific quality sheet to cover everything. In a meeting, I took the client through it in detail.

I sensed partway through that I was losing him with the level of detail and he snapped at me: "I just want to know that the person selling it has done their best, the retailer understands what they are signing up to, why it's better than the competitor, and that the installation will happen".

I defended my work to no avail, and promised to take it away and look at it again.

Ultimately, in terms of making the thing meaningful, he was right. I redesigned it so the criteria was even more simple, with an overall score, but with four sub-scores: skills, benefits, brand, and post-sale.

He was much happier, and the simplicity of it helped us articulate issues, tell improvement stories more clearly, defend our work when there were problems with installations.

Simplicity and clarity are key.

/ Recruitment

/ Recruitment

Attraction

When starting a campaign, you will normally be engaged in some mass recruitment, usually recruiting the bulk of your team – whether that is 5, or 50, or 500 – in a relatively short space of time.

This challenge can be daunting. Who you recruit, especially in that first wave, will be key in defining the programme, and, especially, in defining the culture.

You will need to work out what you want from applicants, what you are offering them, and where you will find them.

Positioning the role with applicants:

- What will you pay? Will you pay by the hour, by the day, or via a yearly salary?
- Will there be a bonus paid? If so, what will it be rewarding? What are the on-target earnings?
- Are there other benefits you can offer? Discounts on the products you sell?
- What are the hours of work? How often are they likely to work weekends? Is overtime commonly available?

No one grows up wanting to work in a contact centre, but it is where a great many people develop their careers – either growing in the industry, or a first step in a journey leading elsewhere. Be honest with the people you are recruiting. Too often the focus in contact centres is on career planning within the contact centre, with career paths leaning towards team leadership, admin, or quality assurance.

Although those roles are normally filled from the front-line teams, the odds for most individuals of making it to those roles are very small.

Don't be afraid to position the roles you offer as a very important first or second job in a career that will utilise those skills, for example, moving into sales roles with higher value products and higher commission after a year or two.

Staff are usually sourced from a few different places:

- **Direct recruitment**

Internal recruiter(s) posting job adverts, scouring job boards and so on. This can be very labour intensive and is very difficult at scale, even if you have a big budget to do it.

- **Agency recruitment**

Using agencies to source candidates. This is usually on a cost per successful applicant (with a rebate if the new hire does not last) or temp to perm, where the agency pays the staff and charges a mark-up on the work they are paid for.

Temp-to-perm models give you some additional flexibility, but they often do not promote a sense of stability for the new hires. Most businesses will hire with a standard probationary period, rendering temp-to-perm useless. The model can also feel punitive for the agency and impact the quality of the staff they offer you, or how willingly they might place them elsewhere.

Consider all of your options and talk to agencies about the different models.

The candidates brought in with the different models will also differ. Recruiting temp-to-perm will find people who are in market immediately, but may be unattractive to prospects who are already in another job as leaving a permanent role with the lesser security of a temp role may be too great of a risk.

'Recommend a friend' schemes are also very helpful. They generate a greater pool of candidates and mobilise your workforce on your behalf. The rewards you pay to staff can be attractive while still being cheaper than agencies (and the money goes to your own workforce). There is some evidence that they are more loyal and stay longer than those attracted through an agency. However, the rewards should only be paid after a suitable period of employment has elapsed, such as three months continuous employment, rather than on day one.

You will benefit from setting up your assessments at intervals that are appropriate for your start dates – those who are already employed will often be more committed when they are hired than applicants who are currently unemployed, and are more likely to have useful experience. Make sure you have assessments to allow enough time for successful applicants to give notice in their current roles. Also, for currently unemployed applicants, try to have your assessments reasonably close to the start date.

Assessments

Unlike most hiring, where one role is advertised and the employee sees several candidates and selects the best, recruiting at scale is a more complex challenge.

It is usually very easy to pick out those who will have a high chance of succeeding, but when you need to take on a lot of people, you need to be good at separating out or identifying the less obvious star applicants further down the list.

You're working harder on identifying those who cannot do the job, and picking between the less obvious star candidates.

The best way to do this is to have a clear idea of what you want in the candidates. This will usually be a set of core competencies or characteristics that you are looking for.

A good way to streamline the process is to design recruitment processes that allow you to see large numbers.

There are different views on this and it will be heavily informed by your attraction model (e.g. are agencies already doing a lot of pre-screening) and your location (what the local labour pool is like), but ideally you will want to see no less than three people for every role you want to hire.

Whatever screening the agency are doing may be helpful, but as they will be your staff you should personally make sure that the staff meet the standards you need.

Group assessments are a particularly effective way of assessing large numbers of people efficiently, and can give you a much better indication of the capability and personality of the candidates than just one-to-one interviews.

/ Training

/ Training

Compliance & Regulatory Requirements

- Potential data breaches
- Subject access requests
- Complaint handling and escalation processes
- [DMA GDPR guide](#)
- Requirements to the campaign, customer group, organisation or business sector

Skills and Standards

- Brand
- Product
- Soft skills, appropriate
- Pay and benefits
- Targets and expectations
- Compliance ([link to guides](#))
- Finding suitable support for training, e.g. internal L&D, outside support

Testing and Pre-Live Assessments

Before letting your freshly trained recruits loose on your customers it is important to test their skills and knowledge.

This is important for you to protect your brand, but is also an important confidence booster for the agent, reassuring them that they are ready to take their first calls.

It's important to set the standard as the right levels.

Below are two suggested ways.

Written Tests

Best for testing knowledge, particularly on product knowledge or important regulatory requirements. This should not be designed to an unattainable level, but is useful proof of learning and a measure of how much attention has been paid through the training.

'Call one' Assessments and Assessed Role Play

Take the agents through the beginning to end of a scenario to make sure they can put all of their skills and knowledge to the test.

You should prepare some pre-set scenarios including the customers circumstances, the appropriate answers to the types of questions that are needed in the call, some questions for the customer to ask the agent.

This works best if it can be observed by a QA agent, team leader or trainer, who can score the interaction based on the QA sheet so you can give immediate feedback.

The first few times a new training programme is delivered, the performance of the cohorts in these tests will usually provide very useful insight on where the training might need to be improved.

/ Running the Programme

/ Running the Programme

Contact centres are a stimulating place to begin and build your career. Where contact centres do occasionally get a bad reputation, it is often less to do with the customer facing aspects or the role.

What often makes roles in contact centres less desirable is not the customer facing part, it's the intensity of measurement and scrutiny, the repetition, the weekend work and unsociable hours.

Yes, the customer side can be difficult - rejection, complaints and so on - but what you can do to mitigate that is limited, that's the job.

How you deal with those other challenges will define your programme and directly impact your ability to retain staff and operate effectively.

Performance Management

The ongoing success of the programme comes down to regular and successful performance management. It is vital to establish a sound operational rhythm, the right touch points and feedback loops.

While a lot of focus is put on the extreme ends of performance - praise and reward for the top, support and consequences for those at the bottom - successful, sustainable programmes rely on the consistency of a "strong middle" who regularly hit their targets, week in, week out.

Creating the right feedback and support for that group will normally give greater return than ever more incentives for over performance.

Team leader

There are many different views on how best to run a contact centre most effectively, but probably the least controversial notion in the industry is that having good team leaders is one of the most decisive factors in the success of a programme.

It is the team leaders who line manage the agents on the call floor, work with them closely day to day, coach and feedback, take responsibility for the performance of their team and so on.

You should select someone with integrity, the ability to hold attention and respect, a strong communicator, and ideally someone with useful first-hand experience of outbound work.

It is also important to have the right team leader to agent ratio.

There are different views on what the right level is. This will range between 6-1 and 15-1. Beyond 15 to 1, it is unrealistic to believe that a team leader will be able to give the right level of support under any circumstances to a whole team.

What is right for you will depend on a variety of factors, including performance management expectations, administrative requirements, and duties that you expect to fall to the team leader, sometimes the team leaders will carry out a certain amount of QA and so on.

Think about what you want the team leader to be doing each week, and work out whether that is realistic. If budgetary constraints are a problem, then work back your expectations of the team leaders from what is realistic.

Bonus Structures

- If you want to incentivise performance it will depend on your budget to do so.
- There are some core things to consider:
- What performance do you want to encourage?
- What other factors do you want to incentivise? Quality scores, customer feedback, a downstream metric that considers sales that do not go through?
- Try not to make it too complex – the easier it is to work out, the more motivating it is.
- Consider time frames covered by the structure. Daily, weekly, and monthly targets are all valid approaches but can drive very different behaviours. High success volume campaigns can benefit from daily structures, where a programme with a longer sales process would usually mean that a longer performance period like a month is more appropriate.
- What will real earnings look like at the different performance levels? What will people earn on target? What will the top sellers earn? Are these figures meaningful uplifts on their basic pay?
- What controls do you put in for under performance? If people are performing at a lower rate, will you pay them less per sale? It is important to pay something for each transaction to maintain urgency.
- It is also worth keeping some of your budget back for tactical incentives, that might be a team night out for hitting a collective target or small incentives periodically that team leaders can use to buoy performance if there is a lull, and so on.
- Just as important as the agent bonus structure is the team leader bonus structure – be sure to consider that aligns with campaign goals and what the agents will be paid.
- All incentive structures should be reviewed at regular intervals.

Predictable and Manageable Check-In Intervals

Every agent on the team will need regular, structured contact with their team leader. Different operations have different requirements and expectations.

Below, you will find key activities you will need to cover with agents on a regular basis.

Where possible, templates should be available to guide the conversations and keep them consistent, as well as record what has been covered.

One-to-One Performance Feedback

A review with the agent on their various KPIs, to understand their needs and challenges and set any appropriate targets and focus areas.

This is an important opportunity to make sure the agent remains accountable for their own performance and knows that it is being monitored.

This should be no less than once per month, but can be as often as weekly if your reporting is clear enough.

Sales Coaching

Working with the agent based on their skills and the sales process with less focus on numbers. This is based first and foremost on improving the agent's ability to sell.

QA Feedback

Feedback based on quality monitoring – this will usually be quite structured and based on the detail in the feedback.

Some organisations advocate team leaders feeding this back, others direct from the QA – both approaches are perfectly valid.

Depending on the volume of QA you carry out, you may batch the task, but feedback should be given as soon as possible so that the agent might remember the call.

Team Briefing

Most teams will come together for a briefing before going on the phones.

Some advocate doing this after every break, others just in the morning, but whatever your approach this should be done daily.

It's an important opportunity to bring the team together, discuss the collective performance goals, recognise good performance, update the team on any changes or news, and seek feedback on issues.

/ The Contact Centre Environment

/ The Contact Centre Environment

To some degree the environment may be informed by where you are and what is possible. If in the corner of an otherwise busy office with people carrying out other functions you may need to make sure the team is not too loud.

If you have an office space to yourself, you may wish to dial up the energy substantially.

Whatever your circumstances you should consider a few key things.

Meaningful Work

A lot is made of “fun” in contact centres, and everyone wants to work somewhere fun. However, some of the initiatives that are common in contact centres are patronising and ultimately counterproductive.

In contact centres you tend to have young adults who want the same things from work that anyone else does - the right levels of autonomy, the ability to improve and master what they do, and understand the purpose of their role and contribution.

Before you roll out something “fun”, consider whether it would motivate you. Fancy-dress days are all too common, , too rare is a senior person coming and telling the team each month the difference the outbound programme made, it’s part in the overall sales mix and where they hope it will go.

If you’re unsure of this, don’t assume you have the answers and engage with the team, team leaders, maybe even have a small team or committee decide and communicate what the team would benefit from in this area.

Visual Environment

Because it is a highly transactional environment it is very helpful to make sure that as many of the important KPIs as possible are visible around the contact centre, updated regularly.

At the very least you should have a board where agents can put up their sales (the impact of that basic should not be underestimated) but if you have the budget and the technology, some have done great things with integrating all their KPIs on to large screens that display dials and graphs, and rotate information.

Whatever you do, make it visual.

Periodic Briefings

Keep the people on the front line in the loop — this is even more important when in outsourced environment.

/ Conclusion

/ Conclusion

The purpose of this document is to lay out the main areas for consideration when undertaking an outbound telemarketing campaign, rather than a regulatory point of view.

Embarking on an outbound campaign is a powerful way to reach your customers and showcase your brand. Following these guidelines is a first step in enabling you to develop and structure successful outbound campaigns.

For more information or additional details please email CCC@dma.org.uk

/ About the Campaign

Responsible Marketing

Changes to the governance of data have far-reaching consequences for your business.

The new General Data Protection Regulations (GDPR) has already had an effect on how your business does business, and how it manages, protects and administers data in the future.

The new regulations came into place in 2018 and are still making waves.

At the DMA, we want to demystify these regulations and offer support to help you work to the best of your ability.

We also run events to encourage the practice of Responsible Marketing. Our popular Legal Updates discuss the current political and legal affairs affecting the industry and allow you to speak directly with the DMA's finest legal minds. Keep an eye on your emails, or visit our events page to book your spot.

For those dealing with vulnerable consumers, we have a masterclass in recognising the needs of vulnerable consumers and how to make reasonable adjustments to benefit a broad range of employees working with customers in vulnerable circumstances.

This campaign is brought to you in partnership with **OneTrust**, the largest and most widely used technology platform for operationalising privacy, security and third-party risk management.

More than 2,500 customers, both big and small and across 100 countries, use **OneTrust** to demonstrate compliance with privacy regulations including the GDPR, California Consumer Privacy Act, Brazil LGPD, and hundreds of the world's privacy laws.

OneTrust's size and scale allows it to offer the easiest-to-use and most affordable solution for implementing use cases including: Privacy Maturity Benchmarking, Data Protection by Design and Default (PbD), Data Protection Impact Assessments (PIA/DPIA), Third-Party Vendor Risk Management, Incident and Breach Response, Data Mapping (Records of Processing), Customer Preference Management, Consent Management, Website Scanning & Cookie Compliance, Mobile App Scanning, Data Subject/Consumer Rights Management and Policy & Notice Management.

The platform's intelligence comes from Data Guidance by **OneTrust**, an in-depth and up-to-date source of privacy and security regulatory summaries, guidance, templates, case law, and analysis. The database is updated daily by over 20 in house privacy researchers, along with a network of 500 lawyers across over 300 jurisdictions.

OneTrust's 700 employees are located across co-headquarters in Atlanta and in London with additional locations in Bangalore, Melbourne, San Francisco, New York, Munich and Hong Kong. To learn more, visit [OneTrust.com](https://www.onetrust.com).

/ About the DMA

The Data & Marketing Association (DMA) comprises the DMA, Institute of Data & Marketing (IDM) and DMA Talent.

We seek to guide and inspire industry leaders; to advance careers; and to nurture the next generation of aspiring marketers.

We champion the way things should be done, through a rich fusion of technology, diverse talent, creativity, and insight – underpinned by our [customer-focussed principles](#).

We set the standards marketers must meet in order to thrive, representing over 1,000 members drawn from the UK's data and marketing landscape.

By working responsibly, sustainably and creatively, together we will drive the data and marketing industry forward to meet the needs of people today and tomorrow.

www.dma.org.uk

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