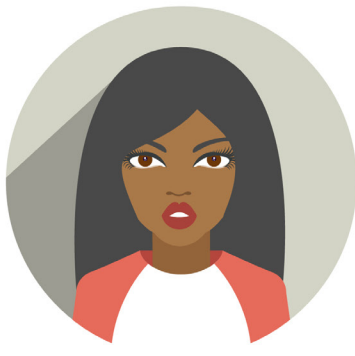




How to choose the best agency partner for you

10 key considerations



Looking for an extra pair of hands to have one-to-one conversations for new member acquisition, welcome and touchpoint calls, renewals and lapsed members?

Are you are considering outsourcing telephone calls to increase the number or frequency of outbound calls with your members or prospective members? If so, your organisation's reputation is at stake. It is therefore vital that you make the right choice of agency partner to get the best results and avoid potential damage to your brand.

Different agency partners will vary hugely in their approach, staffing, style and systems. But there are some key considerations that will help you choose the best agency partner for you.

1 Cultural fit

- Does the agency share your organisation's values at all levels?
 - Does your team get on well personally with the agency account management team?
 - Is the agency work environment satisfactory? Would you be happy working there?
-

If the agency has a different culture to your organisation, the style and content of the calls that they make on your behalf may not be well-received by your members. Campaigns may also not be account-managed in the right way for you.

Make sure that you visit the agency in person before engaging more fully with them. This will help you understand who is actually making the calls and who is managing the callers. A good cultural fit is as important, if not more important than an agency's track record or competences because it will affect all aspects of member experience, campaign delivery and your working relationship.

2 Membership campaign experience

- Does the agency have specific membership marketing campaign experience?
 - Does it 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; and is this a good or bad thing?
-

You should make sure that the agency you choose can demonstrate a successful track record of delivering successful membership campaigns. They will be able to offer you more fresh ideas and guidance if they have delivered a range of campaigns for different membership clients.

3 Telemarketing competence

- How high is telemarketing on the list of services on the agency's website?
 - How many years' experience do the agency principal, account manager and supervisor have?
 - Does the callers' experience and telephone talent give you confidence that they can represent you well and engage with your members?
-

Telemarketing is a specialist marketing service and there is more to it than you might think.

To deliver telemarketing excellence requires several competences: careful planning, a detailed campaign brief and call guide, effective supervision, well recruited and skilled callers, effective administration and active data management (see our Membership Campaign Checklist).

You should therefore look for a partner whose *core competence* is telemarketing, but that you are confident can deliver all these competences for a successful campaign.

4 Legal compliance

- Can the agency demonstrate that it complies with all relevant legislation?
 - How does it propose to manage campaign calls?
 - How will it keep your data secure at all times?
-

Agencies must follow all legislation relating to the processing and use of data and dialling, including the General Data Protection Regulation (GDPR), Data Protection Act 2018 (DPA) and the Privacy and Electronic Communications Regulations 2003 (PECR).

If your member audience has not consented to sales and marketing calls, you will need to screen your data and exclude those that have registered with the Telephone Preference Service (TPS) or the Corporate Telephone Preference Service (CTPS). You should also exclude your own 'do not call' list.

You should make sure that your agency keeps your data secure at all times to the highest standards. This could include data encryption, using high-grade Secure Sockets Layer (SSL) or Secure Shell (SSH) when data is being transferred using and 256-bit Advanced Encryption Standard (AES) when 'at-rest' (being stored and processed on the agency's server).

If you are new to outbound calling, you can find out more about the relevant legislation on the Information Commissioner's Office (ICO) website at <https://ico.org.uk/for-organisations/>. Scroll down to the section links for 'Electronic communications and marketing' and 'Guide to the General Data Protection Regulation (GDPR)'.

5 Quality assurance & accreditations

- How does the agency deal with quality assurance?
 - Does it have quality management system in place?
 - What accreditations does it have?
-

At the very least, agencies should be able to share their quality management system with you. This should cover all areas of the agency's work. Look for agencies that are accredited to ISO 9001:2015 / ISO 27001, the international quality management system (QMS) standard that can help any sized organisation consistently meet the needs of their members and other relevant stakeholders. You can also look for MemberWise Recognised Supplier status. This demonstrates that the agency has a track record of delivering successful membership campaigns.

6 Administration

- How will outcomes from the calls be handled?
 - How will campaign progress be reported and how often?
 - What details will I get in my reports?
-

Administration can make or break on outbound calling campaign. It does not matter how good the preparation or the calls are, if the administration is a let-down. Make sure that you establish all the main and secondary outcomes at the outset and what happens next, how quickly and who is responsible. Agree which campaign reports you require, how frequently you would like to receive them and what information each must contain.

A good agency will discuss the administration and reporting with you in-depth before the first call is made. This will ensure that you know what you and your members can expect and when.

7 Technology

- How does the agency make use of technology?
 - What technology does the agency use to manage campaigns?
 - What experience of your membership Customer Relationship Management (CRM) application does the agency have?
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The importance of technology increases with the size, duration and complexity of your campaigns.

A mid-size agency should be making use of leading edge cloud-based technology to make calls as quickly and efficiently as possible and to integrate calling with sending emails. This technology helps achieve the best results, automate reporting on the metrics that you think are the most important and keep costs down.

It is also very helpful if your agency has first-hand experience of your membership CRM application. You may want your agency to use a third-party license to provide direct access to update data and call information. Or, if direct access is not preferred, the agency can replicate your data field protocols to ensure that you can easily import campaign data into your CRM database. This will ensure that you know what you and your members can expect and when.

8 Size and scalability

- Would a freelancer, telemarketing agency or contact centre be best?
 - Will you be a big fish in a small puddle or a tiny fish in a huge ocean?
 - If you need to roll out the campaign, can the agency up-scale accordingly?
-

Choosing the most appropriate outbound calling partner can be a difficult choice. If you have a small campaign and the value of what you are promoting is low, a freelancer may be the best option. If you are planning a larger campaign or require more complex reporting, with the option to upscale the campaign, it is likely that a specialist outbound telemarketing agency may be more appropriate. Contact centres may be appropriate for very large campaigns and those blending inbound and outbound contact.

Your requirements may change over time. You should work with a partner that can offer you the flexibility that you require and that can stop and start campaigns at short notice. They should also be able to increase or decrease their resources depending on your needs as they change.

Typically, the best approach is a pilot campaign. This will help you demonstrate the likely return on investment you can expect, should you decide to roll out the campaign or repeat it annually. It will also allow you to test different approaches without a large financial commitment.

9 Location

- Where is the agency located?
 - Should the agency be very near us?
 - Should I consider overseas agencies?
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You should, in most cases, select an agency that you can visit in person in order to support the work of the agency's account management team. This will help to ensure that they are applying best practice and enable you to review campaign outcomes. This does not mean that they must be on your doorstep.

To achieve the best results, you should also set aside time to help support the training and development of the callers representing your organisation. Regular visits will help you build rapport with your agency partner's staff and ensure good communication.

It may be appropriate to consider agencies based overseas, for reasons of cost or multi-lingual capability perhaps. You should still though make regular visits. This can be done face-to-face or by video/tele-conference or using a local-based trusted agent.

10 Cost

- How does the agency make use of technology?
- Do costs vary for different types of campaign?
- Should I pay by day or for outcomes only?

Telemarketing costs vary significantly, depending on the agency's overheads and specialist knowledge. A freelance telemarketer may charge £150+vat per day. A telemarketing agency may charge £200-£350+vat per day.

Some agencies may charge different rates for different types of campaign. For example, membership acquisition or retention campaigns are likely to cost more per day than those for data cleansing. This is due to the callers requiring different skill-sets and experience for which resourcing costs are different.

The lowest cost is not likely to offer the best quality. It has been known for some rogue telemarketing agencies to offer pricing below their break-even costs in order to win contracts. Value for money is more important than low costs. The best combination is competitive costs, high quality work, a good cultural fit with your organisation, an open relationship and the right infrastructure to support your campaigns.

Payment on a day rate is most common. Telemarketing is a professional service and overheads must be covered for the agency-client relationship to be sustainable.

NEXT STEPS...

Contact us today to discuss your next campaign....



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