

# **ACT! database cleanup**

July-September, 2003

**Goal:** to update all contacts not yet updated this year.

**Process:** Initial one-time call to request updated information

**Number of contacts:** 1298

**Project start:** July 31, 2003

**Deadline:** September 10, 2003

## **Expectations and metrics**

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This project is designed to give you the opportunity to develop speed and comfort with telemarketing in a low-pressure situation. Since you have had an opportunity to develop comfort and practical knowledge on the previous telemarketing project, this project includes specific and realistic performance goals:

- Average of 15 outbound dials per hour.
- Perform telemarketing 20 hours per week for the duration of the project
- Total of 300 outbound calls per week.

During this time, you will also be handling some inbound calls as contacts return your messages. However, the rate of 15 dials/hour is under typical standards for professional telemarketers (20-30 dials per hour). Hopefully, by the end of the project your speed and comfort should improve significantly.

Based on these figures, calling through the list one time should require 4½ weeks. Since you are juggling other responsibilities, the project is scheduled for 5½ weeks to account for interruptions and other project work..

You will be expected to set aside for this project 2½ hours before noon and 2½ hours after noon on Monday, Tuesday, Wednesday and Thursday for a total of 5 hours per day. The remainder of each day, as well as all day Friday, is available to make up time that is pre-empted by other duties or absences.

## **Performance and development**

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### ***Qualitative reviews***

Your calls will be monitored periodically by the Program Consultant/Marketing or other designated individuals (CSCC employees and/or consultants). This is standard practice in managing and developing telemarketing personnel and does not reflect dissatisfaction with your work. Monitoring will be used to refine the script, verify that processes and procedures are effective, and will also give you the opportunity to receive coaching and feedback on your work. Observations made during monitoring will be used in the biweekly reviews below.

The Director and Program Consultant/Marketing will meet with you to formally review your progress at 2-week intervals. The purpose of this review will be to:

- Review progress on the project
- Identify refinements needed to processes and procedures
- Identify modifications needed to the ACT! database
- Identify any needs for additional training, coaching, or development in telemarketing and/or customer service
- Help you to be more effective and productive in managing your time and multiple projects

### ***Quantitative (call volume) review***

Call volume will be evaluated as follows:

- **Over 300** outbound dials per week: Excellent performance.
- **270-300** outbound dials per week: Acceptable performance.
- **Under 270** dials per week: Performance needs improvement.

Under 270 outbound dials should be documented and justified in your weekly reports. If this call volume is justified based on circumstances, your evaluation will be adjusted appropriately on a case-by-case basis.

- Telemarketing should be considered your top priority at this time. If you are unable to complete this volume of calls due to other duties or events beyond your control, please keep the PC/Marketing updated continuously (verbally, by memo, or by email) and document the issue in your weekly reports.

### ***Followup to reviews***

Depending on your progress and findings from the biweekly reviews, any of several actions may be warranted:

- Note made of good performance
- Assignment of further development such as coaching or seminars
- Adjustment of metrics
- Revision of processes and/or procedures
- Modification of the ACT! database
- Corrective action as necessary if performance is consistently below expectations and not attributable to other factors

## Reporting

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You will be expected to report your progress weekly. These will be used in your biweekly reviews. Please complete the following and place it in the PC/Marketing's mailbox by noon each Friday.

- Report of your time spent on telemarketing and online professional development courses in half-hour increments.
- Note of any project work or circumstances beyond your control that prevented you from meeting the standards of 15 dials/hour, 20 hours/week, and/or 270-300 dials/week.
- ACT! history summary report (instructions below)

If you have scheduled Friday off, these reports are due by the end of day Thursday. In the event of an unscheduled absence, these reports are due by 11am on the following Monday.

If you run into any difficulties with systems, unforeseen circumstances, or need any other assistance, please let the PC/Marketing know immediately. These reports are not meant to take the place of usual day-to-day interactions with your coworkers.

## Process

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1. Do a lookup by ACT! group: **Telemarketing:Cleanup July 2003**
2. Call the contact.
3. Explain that you are updating Columbus State/B&I's business customer database.
4. Ask to update their contact information. Make sure to request FAX and email.
5. As the last question, ask if they would like a representative to follow up with them regarding any training needs. Route these leads appropriately by email.
6. Record the Verification and Verify Date.
7. Record each call or message left in ACT as a History item.

### **General tactics**

- Use receptionists/attendants where possible. If the phone rolls to voicemail, hit \* or 0 or \*0 to go to the attendant. Ask him/her to verify the contact information.
- If the number is disconnected, try to find out if the company is still in business. Use the phone book and Internet as necessary.
- If the contact is no longer with the company, try to find out who in their organization has an equivalent position. Ask other contacts in the company if you have them. If there is no one to take his/her place, ask for an HR or training manager.
- As a 1-time call project, you should not attempt to call back contacts unless they return your message. Attempt each contact once, leave a message, and move onto the next.
- If the number has been disconnected, the contact is gone (no replacement), or the customer asks to be removed from the mailing list, select "No" under the **User Fields** tab, **Mailing List** field.
- If a company is out of business, do not attempt to call other contacts from the same company. Do pull up each contact in ACT, create a Note indicating the company is out of business, and update the Verification, Verify Date, and Mailing List fields. Each contact for a company out of business **does count** as a dial for purposes of reporting.

## Script

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“Hi, my name is \_\_\_\_\_ and I’m updating Columbus State Business and Industry Training Services’ customer database. Could I take a few moments of your time to update your contact information?”

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❖ *If Yes, proceed to script.*

❖ *If No or **Can’t talk right now**, “Is there another time I could contact you to verify your information?”*

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❖ *If you are talking to the contact listed in the database: “First, can I ask you to verify your name and title? Our database has you listed as \_\_\_\_\_ (name), \_\_\_\_\_ (title) at \_\_\_\_\_ (company). Is that correct?”*

❖ *If you are **not** talking to the contact listed in the database: “First, can I ask for your name and job title?” (get their information) “I have your company listed as \_\_\_\_\_ (company). Is that correct?”*

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“Next, I’d like to verify your address and phone number. We have your phone number as \_\_\_\_\_. Is that the best number to reach you?”

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❖ *If a fax number is listed: “I have your fax number listed as \_\_\_\_\_. Is that correct?”*

❖ *If a fax number is not listed: “We don’t have a fax listed for you. Could I get your current fax number?”*

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“OK, let’s check your mailing address. We have you at \_\_\_\_\_ (address, city, state, ZIP). Is that current?”

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❖ *If an email address is listed: “I have your email address listed as \_\_\_\_\_. Is that correct?”*

❖ *If an email address is not listed: “Do you have a business email address that I could enter into our system?”*

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“Thank you again for your time today. My last question is, would you like to have a Business and Industry Training Services representative contact you regarding your organization’s training needs?”

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❖ *If yes: “I will make sure someone gets in touch with you. Do you have any particular areas of interest for training?” (get their information) “Thank you for your time and we will have someone get back to you soon.”*

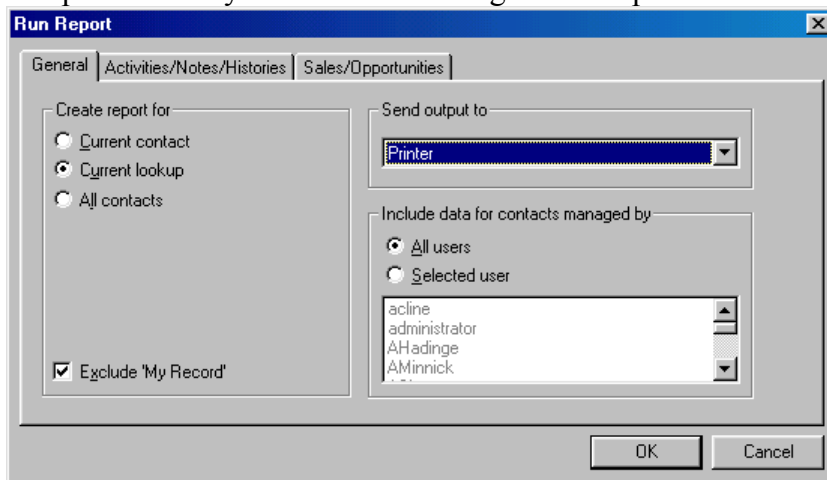
❖ *If no: “OK. Thank you once more for your time and feel free to contact us if you have any training needs in the future.”*

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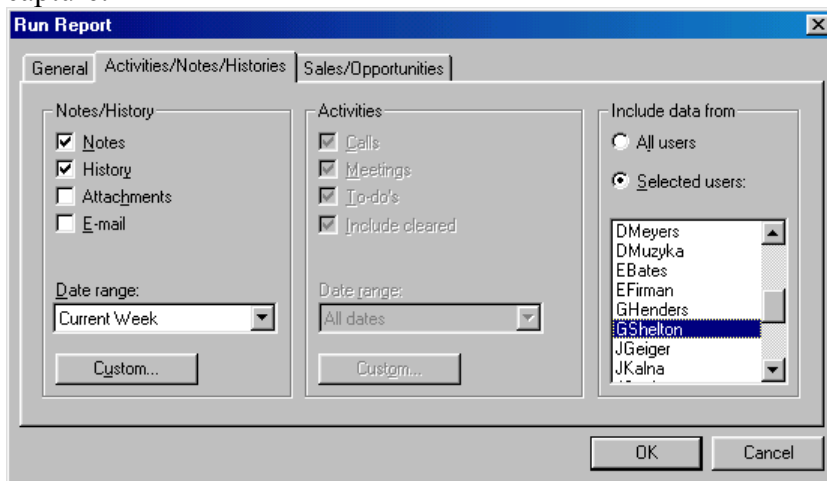
## Creating a history report from ACT!

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1. Lookup the **Telemarketing:Cleanup July 2003** group.
2. Select **Notes/History** from the **Reports** menu. The Run Report dialog box will appear. Set all options so they match the following screen capture.



3. Select the **Activities/Notes/Histories** tab. Set all options so they match the following screen capture:



4. Click OK.
5. The report will print.

## Telemarketing and professional development time tracking

Week beginning Monday, \_\_\_\_\_

<b>Time</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Friday</b>
8:30-9					
9-9:30					
9:30-10					
10-10:30					
10:30-11					
11-11:30					
11:30-12					
12-12:30					
12:30-1					
1-1:30					
1:30-2					
2-2:30					
2:30-3					
3-3:30					
3:30-4					
4-4:30					
4:30-5					
<b>Total hours</b>					