VCC:Live

The 10 Golden Rules of Successful Outbound Campaigns

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Preface

We can probably all agree that for-profit businesses would fail without making sales. Yet, the words ‘cold calls’ make many of us run for the hills.

The good news is, cold calls can still be effective for making business without annoying everyone who picks up the phone. As long as you respect your clients and their time, pay attention to local regulations and create the right strategy, cold calls are no longer a road to hell.

Anyone who’s ever been in charge of an outbound campaign knows that communication with your leads is just the tip of the iceberg. There’s a ton of background work before, during, and even long after the project.

Luckily, in our modern, digital era, there’s a wide range of tools and methods available that can make your work easier, while converting more clients. Yet, many businesses still don’t take full advantage of them.

In this guide, we have collected the top 10 rules for a successful outbound campaign. With a motivated team and a cloud-based, omnichannel contact center software you have everything you need. Let us teach you how to use these tools right!

We’ll guide you through the entire process from start to finish. You’ll learn how to define your campaign’s goals, and based on that, the right KPIs you’ll need to track.

Then, you’ll discover how to create a great, easily updatable script that will help your agents’ workflow rather than turning them into monotonous robots.

You’ll know what to pay attention to when purchasing a high-quality database, and picking the right dialer technology that will process it correctly. The right technology can help you prevent illegal activities such as phone harassment, or simply annoying your contacts. It will protect your prospects by letting them opt out for good, or avoid calling them at the wrong time.

Next, we'll discuss in detail how you can automate as much of your processes as possible, so that you save time and resources, while preventing yourself and your team from burning out.

You won't know how your campaign is doing until you figure out how to read the report and statistics, and how to monitor real-time activity. This is crucial to keep it all under control and to be able to jump in and change directions whenever possible.

Lastly, we'll talk about how to keep your team motivated. Don't skip this part. Having the right technology and knowledge is essential, but it'll only get you so far if your agents and supervisors hate what they do, get unmotivated and start slacking off, or even get rude with the contacts. Contact centers are highly stressful environments, so investing in the well-being of your people won't go in vain.

We hope this book will help you with your next outbound campaign!

Enjoy!

Albert Kató
Sales Manager at VCC Live

I. Introduction

There are many different types of outbound campaigns. Telesales, prospecting, appointment setting, debt collection, surveying – the list is endless.

Outbound campaigns are strategically different to receiving inbound calls, and finding the most effective way to contact your customers and prospects is critical to business success.

If you want your outbound efforts to lead to success, you can't just jump into it.

Whenever you're about to make a large number of outgoing calls in a short period of time, you need to plan every step from start to finish, including what happens in the periods before and after your campaign.

In this guide, we've collected the most important rules to follow if you want to ensure your outbound campaigns run with success.

1. Define the Goals and KPIs of the Campaign

Thorough planning is essential to the success of any campaign. With a clearly defined plan, you know exactly how to get started, what to do, and how to track whether all goes according to plan in your outbound campaign. So, before your agents start dialing, take some time to clarify the exact details of your campaign.

Always start with the end result in mind and then reverse-engineer to determine your starting point and milestones.

Ideally, you should be able to answer the following questions before you begin:

- How do you define success for your campaign? What is the end goal?
- What are the client's expectations and KPIs?
- How are you going to track if it's going well? What weekly, daily, hourly KPIs are you going to track?
- How many agents do you need? Can you add more later on? Define expected workload and calculate resources needed.(E.g. number of agents, shifts, lists.)
- How many days do you need for the campaign, and how many hours a day will it take?
- How many leads do you need to convert for success? What is the ideal conversion for success? Build the operation and resources around it.

After carefully planning the goals of your campaign, it's time to determine your most important

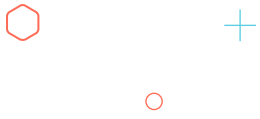
metrics and KPIs. This helps you track your progress continuously, and know immediately when something needs tweaking.

While these metrics might be different depending on your industry and type of outbound campaigns, we recommend tracking:

- The cost per acquisition (the cost of acquiring one paying customer on a campaign)
- The success or conversion rate (the number of conversions or successful events divided by the total number of reached prospects)
- The average handling time (how much time it takes for one agent to complete a call and the connection rate (how many clients do you actually reach from your database)

When you track the results and performance of your campaign in real time, you'll know if you're headed to the right direction or something needs to change. And trust me, some things always need to change.

You most likely won't be able to predict exactly how the project is going to perform, so the only way to prevent wasting time and money is to catch mistakes early on and do more of what works well.



2. Create a Bulletproof Script

A good script can save you time, money, effort, and help you sell more.

If your contact center software allows you to set up a customizable script to display on your agents' screen, don't miss out on making the most of it.

While you don't want to sound robotic, a good script can help you stay on point and be concise with your message without wasting your client's time and your own resources. Think about how many more calls you can make a day if each call is just 30 seconds shorter!

A script is also useful for compulsory messages (e.g. The call is being recorded) and to display each client's details and history for the agent.

When your agents make dozens, or even hundreds of calls a day, expecting them to always know what to say and how to say it on the fly is close to impossible. This is especially true when you have a statutory requirement to read out specific terms to the prospect. A script can serve as a guide when they feel stuck.

What makes a good script?

- It encourages agents to get to the point as soon as possible. Nobody likes to waste time!
- It flows naturally, tailored to your prospects' personality and needs.
- It contains every bit of information you want your agent to ask or mention.
- It uses full sentences, but encourages agents to use their own words and add their personality if they prefer.
- It's agile, scalable and flexible. That is, the script is not set in stone but can be tweaked along the way.
- The software allows you to update it quickly, so you don't waste days with a less than stellar script.

- The agent can add information to it during or after the call about the client.
- It offers multiple answers, scenarios. Every customer and every agent is different, therefore no two calls will be the same. Prepare your agents for the unexpected as much as possible!
- It includes a call to action so your client knows what's next, and they're more likely to take action and covert.

A good script isn't confining. In fact, it helps your agents be more flexible and confident even in unexpected scenarios. You can brainstorm about these possible scenarios in advance and try to determine what your clients might say. This can even include their reasons for not converting!

Once you put together a strong script with multiple specifically detailed outcomes, make a few test calls to see how it works in real life. You might be surprised how often words just don't flow the same when you say it out loud!

When you launch your project, randomly listen to a few calls and give your agents feedback. All your agents have different personalities so you can't expect all of them to achieve the same results with the same script. This is another reason why offering multiple options can help.

Finally, if your project allows it, get your prospects to leave feedback on the agent they talked to. This way you'll know how the call made them feel, and you'll have a better understanding of what needs to change.

To sum it up: create a strong, flexible, concise script, but never stop optimizing it. With VCC Live's fully customizable script editor, you can create and optimize scripts until you reach the desired outcome.

3. Ensure Data Quality

There's no outbound campaign without a database to call.

But, just because you purchased a large database, it doesn't mean it will lead to sucscess. As usual, quality matters more than quantity. You will convert more leads from 10 highly qualified contacts than from 100 low-quality ones.

So What Makes a Good Database?

First of all, check where your data comes from. Is it a reliable source? How did you find it? What makes you think that the contacts on the list will be great candidates for your purpose?

Second, have the right data. What information is crucial for your campaign? A phone number is enough, or you also need their full names? Maybe you need to know where they live or when they were born. Ensure you have all the necessary information when starting out.

Third, make sure that the list is still up-to-date. Don't buy old lists, especially when you target the younger generations. People's contact details can change rapidly, and the more incorrect, outdated information you have in your database, the less calls will go through. Besides, many campaigns are time-bound. Imagine selling roof tiles to people who just started building their houses versus those who finished two years ago!

Getting your hands on a good database is not just about converting more prospects.

If your agents keep running into wrong numbers, they'll soon get bored, annoyed, and even frustrated when they get rejected continuously.

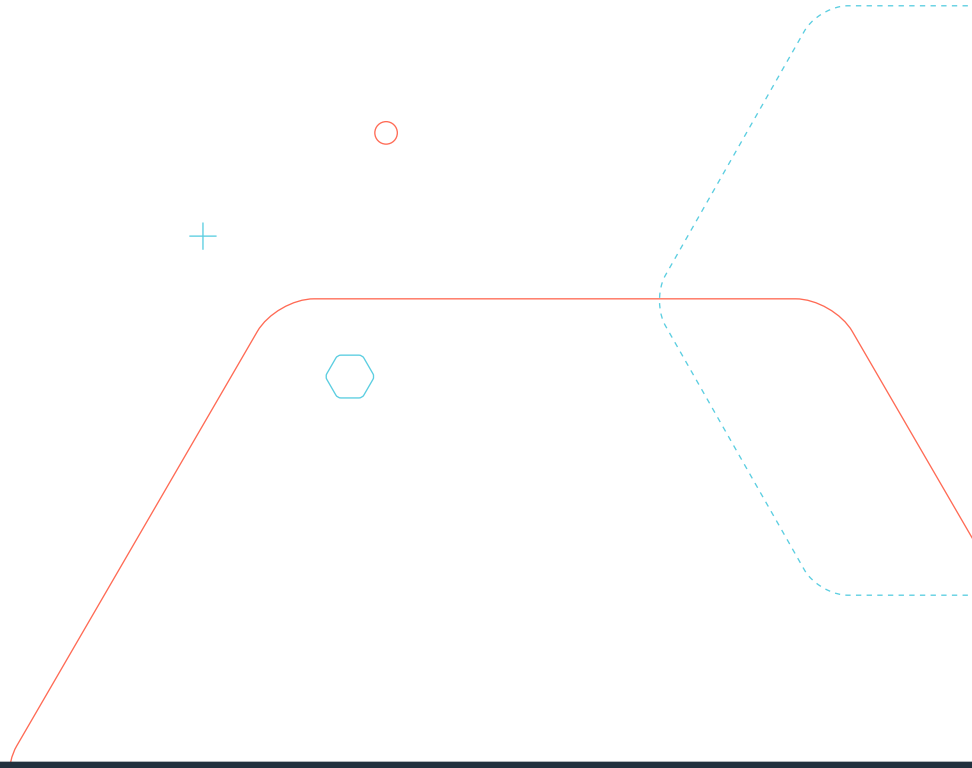
Call center agents tend to burn out easily, so it's important to keep them motivated and excited. We'll talk more about this later.

How to Make Sure You Have a High-Quality Database?

If you follow the three rules above, there's only one more thing you can do to make sure that your list will do. You need to test it.

Get a sample of your database. For example, if you have 10,000 contacts, take 100 randomly, and start dialing. This will give you an idea.

Lastly, be flexible. We mention it a lot, because it's crucial. Always be ready to change things, and this is just as true in the case of your database. Make sure your contact center software allows you to update your database with new information, and add new contacts, at any point during your campaign.



4. Pick the Right Dialer Technology

Sure, the human aspect is crucial to your success, but if you don't have the right dialer technology for your outbound campaign, you might still be doomed to fail.

You're probably over the good old landline phone (hence why you're reading these lines) and switched to a contact center software.

When making calls through a contact center software, make sure you can choose between the following dialing options: **Preview, Power and Predictive.**

All of these dialing modes allow you to upload a database and, just like a phone book, it hands you those contacts to call. The difference is in the method the calls are started.

The preview dialing method prompts the agents a list of prospects to call, but it's up to them when they click to call them. The order is more or less up to the agent. This is ideal when more time is needed for research and preparation in between calls. This is also referred to as **manual dialing**, because the calls are started manually, at the agents' own time.

The power dialing method removes the option to start the calls manually, and instead, the machine will start the calls automatically, in order. This can save up a lot of time, although agents may still have idle or waiting time.

The predictive dialing method is the most intense solution. The machine starts the calls automatically, and an algorithm calculates the right speed, frequency, and the number of calls that need to be made simultaneously for maximum chances that the client picks up the phone. The system predicts and recalculates chances after each call. The agent will only get connected once the client is already on the line. While this solution can be overwhelming for agents, it is by far the most efficient solution for large outbound campaigns. Several studies have shown that with a predictive dialer, you can reach up to 49 minutes of active talk time per hour within your team!

Make sure that the dialer you pick is reliable, stable and robust, so you can trust it to do the job. You don't want your dialer to go rogue with the call frequency. A good dialer solution will keep dropped calls to the minimum, and in case it does happen, it will automatically add protection. That is, when a client picks up the phone but no agent is available to talk to them, the next time the system will make sure to reserve an agent for that client.

We also recommend that you use **AMD** (Answering Machine Detection), so that your agents don't waste time on listening to a machine. AMD can detect if a call will go to voicemail and automatically terminate it before connecting it to your team.

Another method you can use for outbound campaigns is **OIVR** (Outbound Interactive Voice Response). In this case, instead of employing a large number of agents, you can play a pre-recorded message to your prospects and have them navigate in a menu of options.

Just like in the case of the scripts, you need to continuously monitor how the calls are going and adjust accordingly. The right predictive dialer is one that the supervisor can tweak and update at any moment, or else you might just be flushing money down the toilet by wasting precious time with the wrong settings and paying agents that do nothing.

Make sure you don't need to call customer service for every single little change you want to make in your dialer's settings. Most solutions (including VCC Live) offer you training so you can use software without hand holding.

> VCC Live's **predictive dialer** is super easy to set up and we can change the settings without involving the IT department. With the previous system I used, I had to wait sometimes for days until the IT team was able to deal with my setting requests. With VCC Live, our supervisors can change settings at any time during the campaign, allowing them to fine-tune the dialer as the team processes the database.
>
> **Arnold Vancsók** Call Center Manager **Protocall**

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5. Comply with Outbound Calling Regulations

Now that you know who you'll call and what technology you'll use, it's time to take rules of engagement and regulations into account.

Essentially, it's defining how and when you'll communicate with your prospects for the best results, without crossing any lines.

You've already defined the goal of your outbound campaign, so keep this in mind now. Start with the end in mind and work backwards.

You know how many clients you need to convert, but you also need to define how far are you willing to go with each client.

Be clear on the following:

- How many times is it okay to call the same person before you give up or they get annoyed?
- What are the regulations in your target countries? Is it illegal to call too often, or at certain times?
- What do you do if the client is busy? How soon would you call them back?
- What happens after the call? Are you going to send them a follow-up email or text message?
- What happens if a prospect turns you down? Is it a lost cause or will you try again?

You may close more deals if you call the same clients multiple times a day, but it might ruin your reputation long term, and even result in lawsuits. Get informed about the regulations in your target countries and avoid abuse at any costs. Your prospects might not sue you for continually harassing them, but they'll sure get annoyed with your company, which won't improve your chances.

Define how many times it's okay to call in your target country, industry and audience and don't exceed that number. VCC Live offers a **do-not-call list** (called Robinson List) where you can add prospects who wish to opt out. They stay in your database (they might still want to call you because of previous purchases), but your dialer won't call them automatically.

While you can significantly decrease the number of **dropped calls** with VCC Live's predictive dialer, there's always a small chance that the algorithm predicts the wrong number. What can happen is that more people pick up the phone than expected, and someone doesn't get connected with an agent. This can feel like a phone prank. To make sure this never happens again, the next time the dialer calls the same prospect (it's recommended to wait 24 hours, but you can change this setting), the system will reserve an agent for them. Whichever software you choose, make sure that you and your contacts are protected by these features.

There are many different scenarios you need to prepare your agents for, and you can easily miss out on closing a prospect if you don't treat them the right way.

When a client is busy, don't waste their time. Ask what time they will be free and set up a **callback** for that time. Most contact center solutions (including VCC Live) let agents do that during the conversation, and will automatically call the contact back at the right time.

Clients can give many excuses for why they turn you down, and while they should be respected, not all of them mean it's game over. Prepare your agents for the most likely "might change their mind" scenarios and add them to the script!

Trust me, it's much better to have some well-thought-out answers than having your already overwhelmed agents improvise on the spot. Attempting to change someone's mind is always tricky, and if you're not careful, it will just come across pushy and might even leave a bad taste in people's mouth. And you know that bad opinions spread fast.

Learn along the way. There will definitely be many scenarios you couldn't possibly foresee. Listen to the conversation, see how the communication went and add it as an example to the script.

The easier the communication flows with the prospect and the better they feel during the conversation, the more likely you will make the sale – and sell again in the future.

6. Maximize Your Outreach With Automation

Do you still believe that the more hours of work you put into a project, the better results you will get? In the age of technology, often the exact opposite is true.

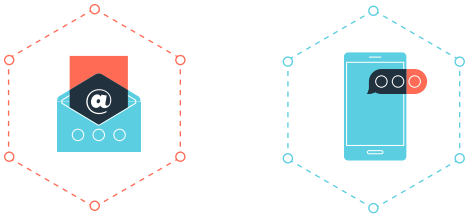
If you, your supervisors or agents spend time on tasks that can be automated, the work that needs human force is neglected.

Everything that can be automated without affecting the quality of the result, should be automated, to help your team work more efficiently. Automating your processes can help you **get more results in less time**, but by eliminating a large amount of "busy work", you and your team will also be **less overwhelmed and burnt out** by the end of the day!

In the case of an outbound campaign, it starts with your contact center software. As we discussed above, using a predictive dialer can significantly increase your active talk time (**up to 49 minutes per hour!**) by eliminating database search, manual dialing, wasting time on answering machines and busy lines, and so on.

It's best if you don't need to keep callbacks in mind either, but the dialer automatically calls the client back at the pre-agreed time.

Through VCC Live, you can also **send out mass emails and text messages** (you could include your phone number in the message), or do it one by one by tying them to a specific event. For example, when your agent talks to your prospect and sets the disposition 'Purchase was made', it can automatically trigger an email that sends them an invoice with their correct information! This saves time but also prevents mistakes.



You can **integrate your CRM** with VCC Live to bring more context to your communication. Have all the data from your CRM right in front of you, without having to export, store, import data, and risk losing some of it along the way.

Create daily, weekly, monthly **automated exports** from your **reports and statistics**. Receiving a regular report delivered to your inbox that you can access even from your phone can help you stay up to date.

Stepping out of the contact center software, another great way to automate is using an email marketing software. You can collect leads through lead generation opt-in forms on your websites, send regular emails and segment your audience based on their behavior. Add Zapier to the equation, and you'll be able to connect your database with VCC Live!

Zapier is the one of the best tools to automate your workflow. You can connect many tools, for example Slack, Trello or the G-Suite (Google Drive, Google Calendar), so don't miss any to-dos notifications, reminders and changes. It might seem like a lot of hassle to set up all these systems, but trust us: it pays off long term.

7. Keep Up With Trends and Leverage Multiple Channels

In the age of cloud-based omnichannel contact center software solutions, why would you limit yourself to phone calls? There's a wide range of communication channels you can use that your contacts might respond to better.

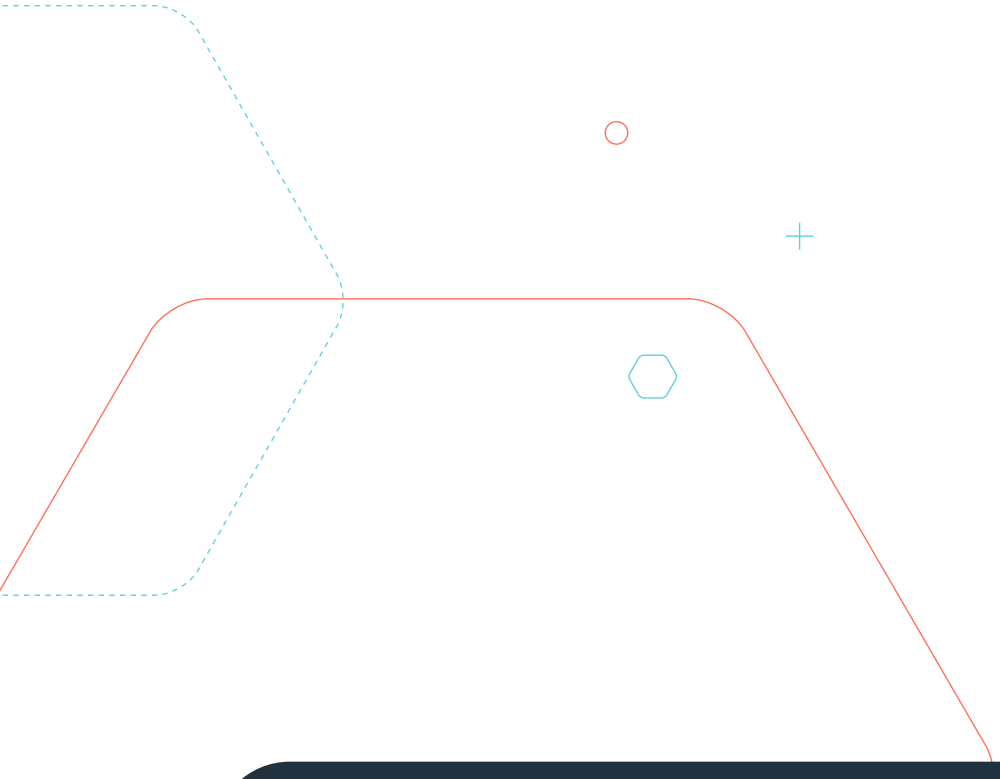
Some people might be more than interested in your company, but simply hate being put on the spot on the phone. Why not contact them via email, so that they can read it, do their research and respond in their own time?

Social messaging and SMS are highly popular ways to communicate. Target your clients and let them contact you via social media and text message, or send out mass SMS with your upcoming offer.

Is the goal of your outbound campaign to collect debt? Make it convenient for your clients. They might not have their credit cards handy when you call them, but would be happy to pay right away when they get an email with a QR code in it. Alternatively, set up an OIVR (Outbound IVR), so they can pay using voice commands or the buttons on their phones. Yet others might prefer to pay on the spot during the call and they would just postpone paying multiple times if they get contacted via email. Prepare for these scenarios too.

Offer multiple options, your clients will appreciate your flexibility. You can even do an A/B test and see which channel brings in the best results.

First-call resolution sounds dreamy, but in many cases (especially in sales), it's not enough. Even if your prospect seems to be on board after the first call, don't stop there. Lead nurturing can help you turn one-time purchases into frequent buyers, customers into raving fans that not only buy more from you, but believe in your company and talk about you to their friends. Consider your business and goals, and set up your follow up stream. Will you call them a week later to ask them if they're still satisfied? Are you going to email them with a coupon code or invite them to your referral program? Think about the entire customer journey and use the tools available to you to make your clients happy. A good customer experience always makes a difference.



8. Keep the Project Flexible and Scalable

Although we mentioned this many times throughout this guide, this point is so important that we really didn't want you to miss it.

Planning in advance is not enough. You need to stay flexible throughout the whole project.

The thing is, the planning you make before launching the project is mostly just an educated guess. Sure, it's likely a good one, but even if it's based on real past data, you can't predict the future. You can, however, see the present and make adjustments along the way.

The sooner you change directions based on the results you get, the better chance you have for great success.

What Can You Do to Keep Your Project Flexible and Scalable?

- **Be on top of data.** Select the indicators that will show you if your project is successful, and monitor your progress continuously.
- **Be willing to let go and change.** It might be hard to let go of a good idea you had, but just because it worked yesterday, it might not work tomorrow anymore.
- **Be flexible with your prospects.** Your agents might be working during the day, but the majority of your contacts are only available in the evening. Can you adjust your agents' shift?
- **Be open to two-way communication.** After initial contact, your prospects might want to talk to you again to find out more, ask about the product or raise their concerns. If there's a need for this, encourage your agents to schedule callbacks or make your contact information public so that your contacts can reach you. With tools like VCC Live, your agents can receive incoming

calls during an outbound campaign, but you can also assign them to a different team.

- **Don't waste time.** If something doesn't work, you're basically throwing money out of the window. Know how to change settings, update scripts, re-adjust agents quickly to stay efficient within hours.
- **Know how to adjust resources.** If the project goes better than expected, how soon could you add further agents to your team? Can you increase your budget without waiting days for approval? How about increasing the size of your database?
- **Follow the trends.** Some products sell better when tied to a specific event. During the holidays when everyone is ready to buy gifts, your campaigns might convert better. Besides, you might need to prepare for an increased amount of incoming calls too!
- **Run A/B tests**. If you have a hypothesis but not ready to get rid of the existing setup yet, split up your campaign and test different versions. Run it for a few days to see if your version is worth switching to.

Nothing is set in stone and you can't see what the future holds, so all you can do is wait to see how things go, keep an open mind and tweak the project as much as needed.

If you only want to keep one piece of advice in this guide, pick this one.

9. Monitor Campaign & Agent Performance Constantly

You've defined your goals and KPIs, and now your campaign is up and running. No time to lean back just yet - now it's time to see how your campaign is doing!

If you've read this guide up until this point, you already know why this is important. As we've mentioned already, every part of your campaign needs to be monitored, so that you always know if you're on the right track, or something needs adjusting.

Even the most well-written script can be disastrous if the agents are not skilled enough. You might offer the necessary training before your campaign, but you'll only really know how good the agents are when they start talking to real clients.

Ideally, your contact center software has its own monitoring and reporting system.

Monitoring your campaign and your agents isn't just about knowing how much time they spend on a call and how many contacts convert. Within your contact center software, you can listen to phone calls - even better, listen to them real-time and train them live while they're talking to the client!

With VCC Live, you can enter tutor mode and give instructions to your agents, but your client won't hear it. Your team can get used to the task easier and learn the job better through real examples. You can also just listen to the conversation in real time without the agent knowing it, and only jump in if you feel like adjustment is necessary.

Apart from the content of the call, use the statistics, logs and reports available to you to see how your agents perform and calculate the success of your campaign.

Of course, it's impossible to monitor everything and not go absolutely crazy. This is why defining metrics and having a well-functioning monitoring and reporting system in place are crucial.

Some of the Things That Are Worth Tracking:

- Cost per acquisition (the cost of acquiring one paying customer on a campaign)
- Success or conversion rate (the number of conversions or successful events divided by the total number of reached prospects)
- The connection rate (how many clients do you actually reach from your database)
- Average waiting time (the average time the agent has to wait on the dialer between calls)
- Average handling time (how much time it takes for one agent to close a client)
- Afterwork / wrap up time
- How much time they spend in "Available" status
- How much time they spend on a break and how often
- Which agent converts the most prospects.

We recommend tracking real-time data to see if calls are being dialed properly and are distributed more or less evenly among agents. With real-time monitoring, you can catch quickly when there aren't as many successful calls as there should be. If this happens, you might need to tweak your predictive dialer settings, or update your database.

Don't neglect this feature: real-time decision making can save you more money, time and effort than you would expect.

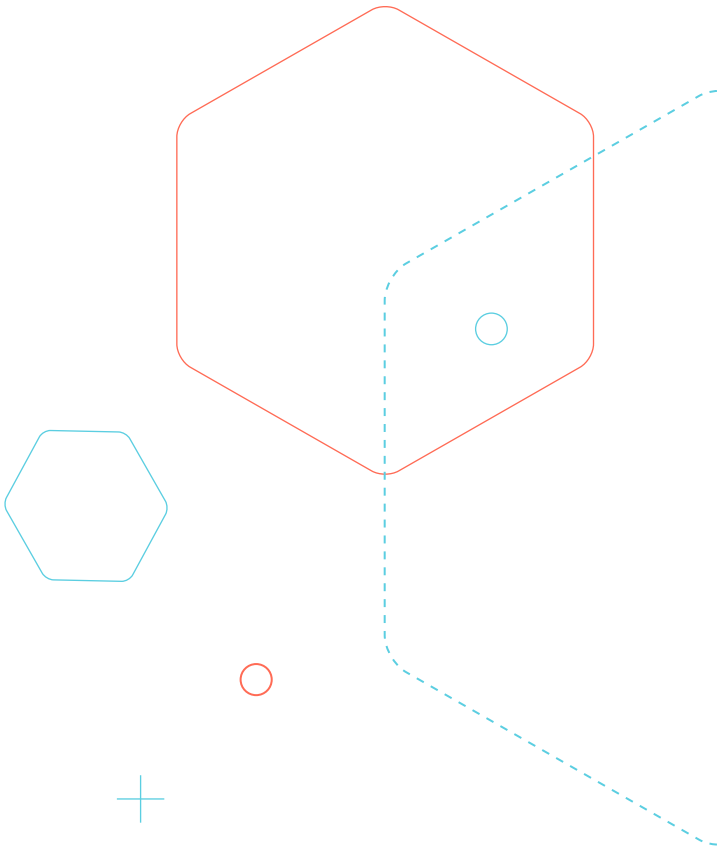
Check the reports at least once at the end of your day to see how many contacts were reached and how many of them got converted successfully. You can see the averages too: the average handling time or the average waiting time, for example.

While it doesn't hurt to keep an eye on everything, follow the Pareto principle most of the time. Based on this principle, 20% of the indicators will tell you about 80% of your campaign's success.

These key indicators will be different for every industry and goal.

If you're working from an office, put up a screen so you and your team can see the most important KPIs at all times. In addition to always having the numbers in front of you, this will motivate your agents and supervisors as well.

Continuously checking the reports are also important if your agents get paid based on their performance.



10. Keep Agents Motivated and Celebrate Their Success

It's easy to burn out in a contact center, so part of your job is to incentivize agents and keep them excited about their jobs.

Weekly, monthly and quarterly **bonuses** are always big motivators, but should you reward the team or the individual? To decide, you need to know your team and what motivates them more. Often, team bonuses can be more motivating, especially if the team members work in the same office and know each other well.

This removes the competition which, for many, **causes unnecessary anxiety.** If the entire team gets a bonus, the agents look at each other as team members rather than competitors they need to fight. This solution lets them celebrate each other's successes without envy, and they will motivate each other to be better. This can keep up the good spirit and make the work more pleasant.

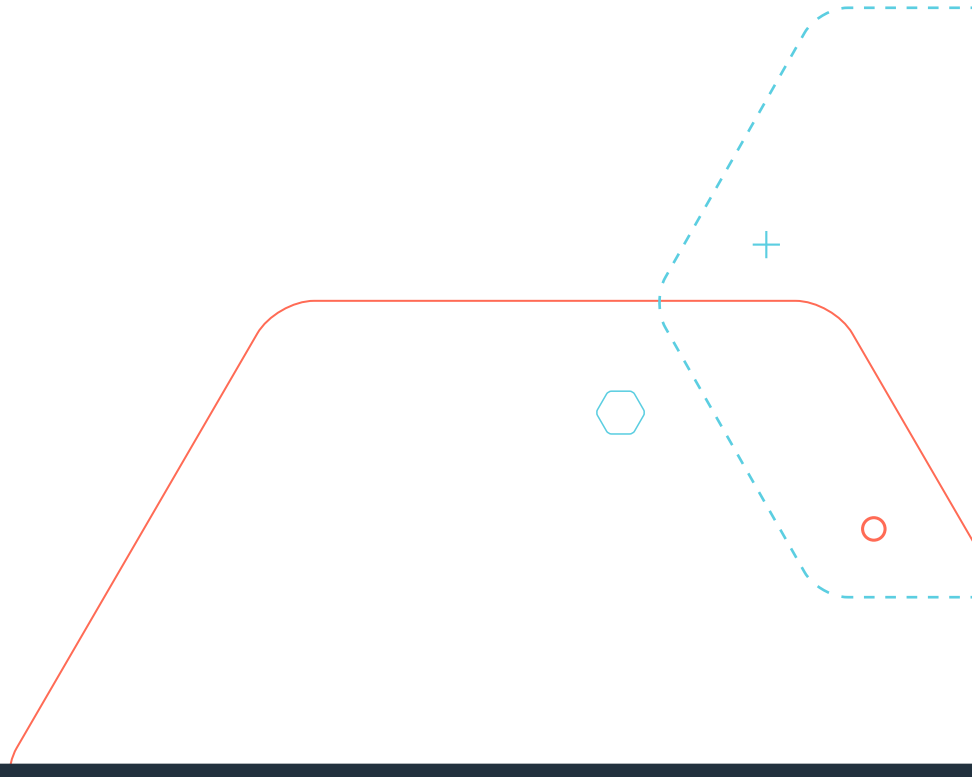
On the other hand, if your agents have competitive personalities, individual bonuses can make them work harder. If you find it hard to decide, don't worry: you don't need to choose. Offer mixed bonuses: there are pre-determined KPIs to achieve the team bonus, and some others to get individual bonuses as well.

If your campaign only runs for a short period of time and the environment is starting to get stressful, **don't wait until the end** to reward their efforts. You can set up daily, or even hourly sprints and give fun rewards to those who perform the best! Money is nice, but often fun prizes like a bottle of

champagne or ordering pizza for the whole team is a better way to let them blow off some steam.

Schedule **regular 1-1 feedback sessions** with your agents and let them give you feedback too. They'll feel more heard and therefore happier, and this gives you a chance to get to know their personalities better.

Motivating the agents will only get you so far if the supervisors are miserable. It's crucial to keep them motivated as well with bonuses, encouragement, games, and anything else that fits your company culture. If you have many agents broken down into smaller teams with their own supervisors, reward the best performing supervisor, and encourage the lower performing ones to improve.



III. Conclusion

Running a successful campaign has many components and every single one is a bit different, depending on the industry, the end goal, the current trends and the clients itself. While there's no one-size-fits-all approach to what makes a successful outbound campaign, if you follow the 10 golden rules detailed in this guide, you'll maximize your chances of success.

Are you still looking for a cutting-edge contact center solution that allows you the flexibility and wide range of possibilities detailed in this guide?

Contact us and schedule a demo today!

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VCC Live is a Cloud Contact Center Software provider for companies dealing with wide-ranging customer communications through a variety of channels, including phone, email, chat, and social media. The company is based in Budapest-Hungary, has clients in more than 50 countries, and serves over 10,000 operators globally. It also works with 20 international telecommunication partners.Contact VCC Live for a personalized deployment plan to move your contact center to the cloud!