How To Conduct a Welcome Call Campaign

Our guide covers the opportunities and challenges presented by a B2B welcome call programme and illustrates how a well-conducted programme is an important component of effective customer relationship management.



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You've closed a sale and won a new customer. What next?

Providing a positive customer experience after a sale is absolutely essential for any organisation that wants to increase customer lifetime value. Loyal customers not only provide a sustainable source of revenue, but also become brand advocates who spread positive word of mouth.
Research continues to prove the value of good customer relationship management. A study by Business Consultancy, Walker, suggests that customer experience will overtake price and product as the key brand differentiator by 2020 . It therefore makes good business sense to have a clear customer retention plan in place – starting as soon as the prospect is converted.

A welcome call programme is such a simple yet valuable step in any customer relationship management strategy. Checking in with new customers allows you to keep the momentum going after a sale. And if you do this over the phone, you can make this valuable touchpoint a more personal one – and forge a human connection that paves the way for a long-lasting and mutually beneficial business relationship.

Why run a welcome call programme?

This type of proactive outbound calling campaign can add value to your business in many different ways.

Let's explore some key goals:

1. Make your introductions

On a practical level, a welcome call allows you to introduce your customers to their assigned points of contact within your organisation. Knowing exactly who to contact in an emergency or time of need is likely to make customers feel more in control of their product or service experience. And on a more emotional level, this reassures them that any issue they may have – big or small – will be personally taken care of going forward.

2. Make a personal connection

As a recent Forbes article puts it, "In today's digital world, nothing replaces the human touch. As smartphones and laptops take over our daily interactions, the desire to speak to a human being in real life or over the phone is becoming a novelty."

Importantly, a welcome call is an opportunity to give your customers personal attention and let them know that you value their business and care about their success beyond the sale.

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A simple call to say, "Thank you for your business," is much more impactful than a generic online "rate us" request or an impersonal customer satisfaction survey sent via email. In our digital world, a phone call not only makes your brand stand out, it creates a human connection right from the very beginning of your relationship.

3. Answer questions

There's a good chance that new customers will have a question or two about the solution they've just invested in. A welcome call is the perfect opportunity to handle queries then and there. This means there will be fewer inbound queries to handle down the line; and you'll quickly provide customers with the tools they need to gain greater value from your offering.

4. Enrich customer data and gather account insights

Use this opportunity to set up your customers correctly on your system and gain more comprehensive data for ongoing marketing efforts. You can achieve a lot in one call, by:

- Confirming contact details and closing any gaps in personal data
- Securing opt-ins for future marketing communications
- Gathering insights to support segmentation strategies
- Expanding beyond one point of contact at the organisation by identifying other key users, influencers and decision-makers on the account

Most importantly, you can build an early understanding of your customers' needs, preferences, challenges and goals. This facilitates much stronger and more focused communications and interactions going forward.

5. Gauge satisfaction

Research shows that only 1 out of 26 unhappy customers voice their complaints, while the rest silently seek greener pastures. A well-conducted welcome call can help your organisation to reduce churn by addressing this challenge and should form part of an ongoing programme where you check in regularly with your customers. This way, you'll know sooner rather than later whether your organisation is delivering on its promises and meeting your customers' expectations. And if there are any issues, you'll have an opportunity to acknowledge these instantly and escalate them to the relevant department for prompt resolution. You can also feed the intelligence back to the relevant departments to enhance product and service quality.

6. Support TCF Compliance

Beyond measuring satisfaction, checking in with customers after the purchase is a legal requirement in certain industries. Firms regulated by the Financial Conduct Authority (FCA) are expected to comply with its 'Treating Customers Fairly' (TCF) regime. Under TCF, one of the six required outcomes is for customers to feel confident that they are being clearly and thoroughly informed before, during and after the sale. Welcome calls are therefore an important step in any post-purchase TCF compliance process – enabling you to meet your obligations around ascertaining the suitability of products and ensuring customers understand the benefits, features, costs and risks. When welcome calls are conducted by experienced agents in this field, in a compliant and auditable manner, you can reduce risk and show that you're placing customer interests at the heart of your business model.

Read more about this topic here

5 steps to welcome call success

Now that you have a clear understanding of what you want to achieve during your welcome call programme, let's explore how you can realise these goals.

1. Call in good time

When customers have just invested in your company, they are likely to be receptive to engagement. This is because your brand is top of mind and, as mentioned, they may have questions that they have been meaning to ask. When you time your welcome call well, you can reach the customer while they are still in this engaged frame of mind and make them feel secure in the choices they have made. Don't wait too long to make the call. We advise that you reach out within a day or two of the sale. Also, a welcome call shouldn't be a one-off interaction where the customer never hears from you again, but rather form part of a defined on-boarding package.

2. Make a positive first impression

Set the right tone from the get-go by encouraging two-way dialogue with your customers. Instead of using the welcome call to further an up-sales or cross-sales agenda, use this time to focus on the relationship. Encourage conversation rather than looking for a gap to make another sale. And when your customers do respond or share an insight, acknowledge that you have heard them and show you value their input.

3. Listen and take action

If you call your customer and discover they're unhappy or unsure, it's an opportunity to turn a negative customer experience into a positive one. But this can only happen if you listen

intently and act fast. If you can't resolve the issue or answer the question there and then, be sure you have a system in place for responding to complaints, comments and questions quickly. A swift resolution shows customers that you take their success seriously. This will hopefully make customers feel more comfortable sharing additional insights with you in the future – because customer intelligence is the key to building long-lasting and profitable relationships.

4. Don't take a blanket approach

While every new customer deserves a courtesy call to welcome them into the fold, it's advisable to customise your messaging and approach to suit each customer or key account. You should also prioritise resource and effort according to the potential lifetime value of each customer, with the aim of investing more in relationships that are most likely to be profitable in the long term.

With larger accounts in a B2B sales context, integrate your welcome call programme into your key account strategy – as a valuable touchpoint for capturing insight and building a richer understanding of that client. As the relationship grows and understanding is developed, your entire organisation will be able to better anticipate that client's needs and proactively suggest products or services. This provides your team with a more authentic way to cross- and up-sell.

5. Leverage the right skills

Some sales and marketing executives believe that welcome calls are a tick-box exercise that can be delegated to junior staff. But we believe that this customer touchpoint is so valuable that it should be handled by skilled and experienced agents – otherwise the relationship could be damaged in its nascency.

If you don't have sufficient skills or expertise in-house, it is worth considering outsourcing your welcome call programme to a specialist agency that has the expertise to gain optimum value from this important relationship-building opportunity. Outsourcing allows you to scale to manage fluctuating requirements, or simply handle welcome calls promptly and systematically while your in-house team focuses on core sales and marketing activities.

Emotional connections count

With so many companies competing to earn and build customer loyalty, a phone call to a valued new customer is a simple, but immensely powerful way to create a strong emotional connection and make your brand stand out.

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Research by the Harvard Business Review reveals that on a lifetime value basis, emotionally connected customers are more than twice as valuable as highly satisfied customers

A well-planned and executed welcome call programme allows you to tap into your customers' emotional motivators such as their need to feel secure, to feel a sense of belonging and to have confidence in the future. Those emotionally connected customers will in turn achieve a higher lifetime value and contribute more to the overall profitability of your business.

To find out how we can help you implement an effective welcome call programme, get in touch.

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Hopefully this guide will have inspired you to think a bit more about telemarketing and the value it can bring to your business. For more information on our services visit our website, or give us a call to discuss your requirements and how The Telemarketing Company can help support your sales and marketing strategy.

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