

Setting up an effective telemarketing campaign

Step-by-step guidance on setting up a telemarketing campaign that delivers results and ROI.





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A 'HOW TO' GUIDE

Whether conducted in-house or delivered by a specialist agency there are a number of pre-requisites that need to be taken into consideration before embarking on a telemarketing campaign.

This isn't the least expensive channel but done well it has the potential to deliver extremely high ROI, so it is worth taking time to lay the groundwork prior to launch.

With over 30 years experience delivering inbound and outbound telemarketing campaigns to some of the world's leading organisations, we pride ourselves on our best practice approach.

As every campaign is unique, it isn't possible to cover every single scenario but our aim with this guide is to highlight the main areas and potential pitfalls you need to consider.

GET STARTED →

About us

Since 1990, we have specialised in voice-based outbound demand creation, inbound lead and enquiry management, data services and pre- and post-sale telephone research.

From our 200-seat, Brighton-based offices, we provide scalable, multilingual telephone-based services for companies worldwide.

96,207+

Sales, Leads & Appointments per quarter

84,942+

Research & Customer Satisfaction Surveys per quarter

20+



Languages spoken

100+



Customer testimonials

1

Identify your prospects



Having a proper understanding of the types of organisations and the individuals within those organisations that will be responsible for making purchase decisions related to your offer is crucial.

If you don't understand this, then telemarketing will probably just be an expensive way of confirming your lack of knowledge.

Bear in mind that in most organisations the buying process for new products and services is complex and often involves a large number of decision makers, influencers, and budget holders.

A common mistake is to contact the person who understands your offer best, or who will be involved in implementation, but isn't actually going to directly benefit from it. For example, if you are selling financial software, contacting the Finance Director will be more useful than speaking to the IT department. The IT department may understand your software, but they won't necessarily appreciate the benefits of your offer.

2

Use the right data

Data is the foundation of all telemarketing campaigns.

The mathematics of telemarketing are simple: it's high cost but high value so you need to make it as effective as possible by using the best data available. Data accounts for only 5% approximately of the total cost of the campaign. It's not worth cutting costs or working with a poor-quality data set, as this will escalate other spending dramatically in the long run.

If you use inaccurate data, the first few weeks of your campaign will see your team spending the majority of their time correcting records, when they should be building pipeline and making sales. Make sure your data is not just accurate but also on profile (obvious but frequently overlooked...). If you are targeting the wrong audience, your message won't resonate, and your leads won't convert.

To prioritise your telemarketing efforts around your highest value prospects – segment lists to bring your best prospects to the surface. If you're calling into warm lists, which have been generated through other activity (emails, marketing automation, social media, events, lapsed customers, or website enquiries) segment this carefully and adapt your message based on level of engagement and buying stage.

And most importantly, all data needs to be screened against the C/TPS do not call list and any other relevant suppressions, such as current customers to avoid spamming.



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The approach



Never open a call with “How are you” unless you’ve had recent and memorable contact, otherwise it’s completely insincere.

Be clear about the purpose of the call as early as practical.

Don’t use a script for telemarketing! Some believe that a script will ensure that each call is carried out in the best possible manner and will be well structured and consistent – 99% of the time this isn’t the case. There needs to be structure and consistency to each call, but this will not come from using a script – this comes from having trained and capable agents with a clear call plan. Quality sales come from constructive and fluid conversations, driven by open questions to uncover pain points – this is very difficult to achieve using a script.

Using a script can often damage a brand rather than promote it. Most businesspeople are short of time; they do not want to hear someone read out a list of marketing messages. They will be even less impressed if the salesperson continues to doggedly stick to the script when the conversation needs to take an unanticipated turn.

If you are using a telesales team that require a script, then you are using the wrong team!

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Open questions

A key part of the call should be about asking questions.

Asking intelligent and open questions will benefit you in two ways:

Firstly, it will let you engage with the decision maker and establish yourself as an intelligent and informed individual who is worth talking to.

Secondly, and more importantly, it should uncover business pain points. These enable you to challenge their assumptions, leading your prospects to think about how your offer could help them and enabling you to discuss appropriate, relevant benefits, supported by evidence and examples.

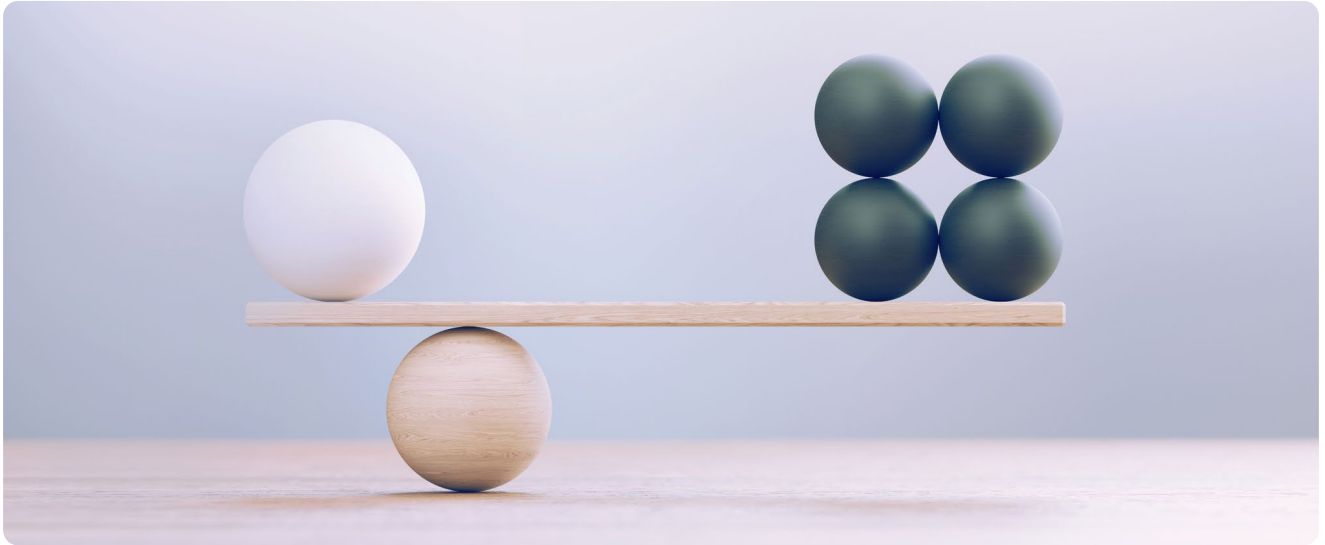
Asking closed questions like 'would you like to save 10% on your gas bill' to try to generate interest can be very damaging. These kind of "Barnum statements" alienate prospects. They will feel that you are insulting their intelligence because there is really only one answer to the question.

They also offer the prospect the opportunity to answer with a flat 'no', which is a very good way of ending the phone call and killing an opportunity.



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Benefits versus features



Business decision makers are people.

Whatever their role; people tend to buy on benefits, not features. Too much selling tends to focus on the features of the offer rather than its benefits. Be clear on the difference in your own mind and brief the callers appropriately.

You'll need to cover off features, but if you focus mainly on the benefits of your offer you will get the prospects imagination going; helping them to think about how their situation would be improved if they took on your offer. Discussing the benefits will also address the pain points that will hopefully have been identified during the questioning.

If a prospect is determined to find out about the detailed features of your offering, it's usually a strong buying signal and an opportunity to set a qualified lead or sales appointment.

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Lead qualification

A lot of salespeople will tell you that they “only need a foot in the door” to make a sale. This is rarely true and telemarketing with this kind of appointment as an objective will often fail.

If no minimum criteria are applied to the results you ask your telemarketing team to set, your sales team will start to complain about the quality of the opportunities very quickly. They will be wasting their time chasing up poorly qualified opportunities where there is no budget or no real interest in your offer.



You should always make sure robust qualification criteria are established at the start of the campaign, so that you spend your time contacting individuals who are receptive to your message, have a need for your offer, the required budget, and the authority to buy within a set timeframe.

Using a B.A.N.T framework (checking for Budget, Authority, Need and Timescale) is a sensible way to start.

Once interest has been generated it's fairly simple to establish whether your leads have met these criteria by asking simple open and closed questions.

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The callers



One of the biggest mistakes made by in-house teams is to allocate telemarketing duties to staff that have other responsibilities. More often than not staff with other tasks to complete will rapidly find other things (in fact anything...) to do rather than make sales calls.

Generating results requires both quality conversations and lots of calling – one without the other will not work.

To be successful, telemarketing needs to be carried out by staff who are exclusively dedicated to the role. Roughly speaking your callers should be picking up the phone around 15-20 times an hour, 7 hours a day, every single day!

The profile of the callers is very important too. You need callers who are able to effectively get past “gatekeepers” and then hold fluid and detailed conversations with business professionals. A poor telemarketer will yield poor results – worse still they may upset and alienate your precious prospects.

If you are not comfortable with your team of callers, don't start the campaign.

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Recording the calls

Recording the calls made during your campaign will help you improve quality through staff training and coaching. Listening to call recordings allows you to provide structured feedback to your team based on calls delivering results AND calls where no result was generated.

There are a number of recording solutions available if you are carrying out the work in house, but any specialist agency should be able to offer you this service and provide call recordings for you to review and critique.

Allowing sales teams to listen to calls before they follow up with an appointment or sales meeting underpins alignment and drives up follow up and ultimate conversion rates. Call recordings also provide you with a complete audit of what was said during the calls.

Recording the calls your team make is really important – don't start your campaign until you have a proper recording solution in place!





Just like all methods of marketing, telemarketing tends to be much more effective if integrated intelligently with other elements of the marketing mix.

Most contacts will need to be spoken to several times before they will commit to a sale or appointment. Having high-quality marketing material – website pages, digital or physical collateral – to help warm and maintain interest, can improve this nurture process dramatically.

Before you start the campaign make sure you have well put together marketing materials to help your telemarketers to build and nurture a pipeline of opportunities through to conversion.

Avoid the temptation to start calling if the collateral is not ready - on day one of calling, prospects will start requesting further information.

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Reporting and analytics



It is vital to have reporting and analytics in place to allow you to easily monitor the whole process from first call to the close of the sale – informing you of what needs to be improved and where training needs to be implemented. Reporting enables accountability, allowing managers to monitor team performance and identify areas for improvement, ultimately leading to increased productivity and better campaign outcomes.

By tracking key metrics such as call volume, conversion rates, and customer feedback, you can assess the effectiveness of your campaign and make informed adjustments. By analysing your data, you can identify trends, understand customer preferences, and continuously refine your approach to drive better results.

A specialist agency should offer data and analytics that give you complete visibility of campaign performance. If you don't have sophisticated reporting tools in house, even simple steps such as having your sales team score the meetings, they attend are really valuable. These ratings can be used to determine what works and what doesn't; helping your calling team develop their skills.

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Integration

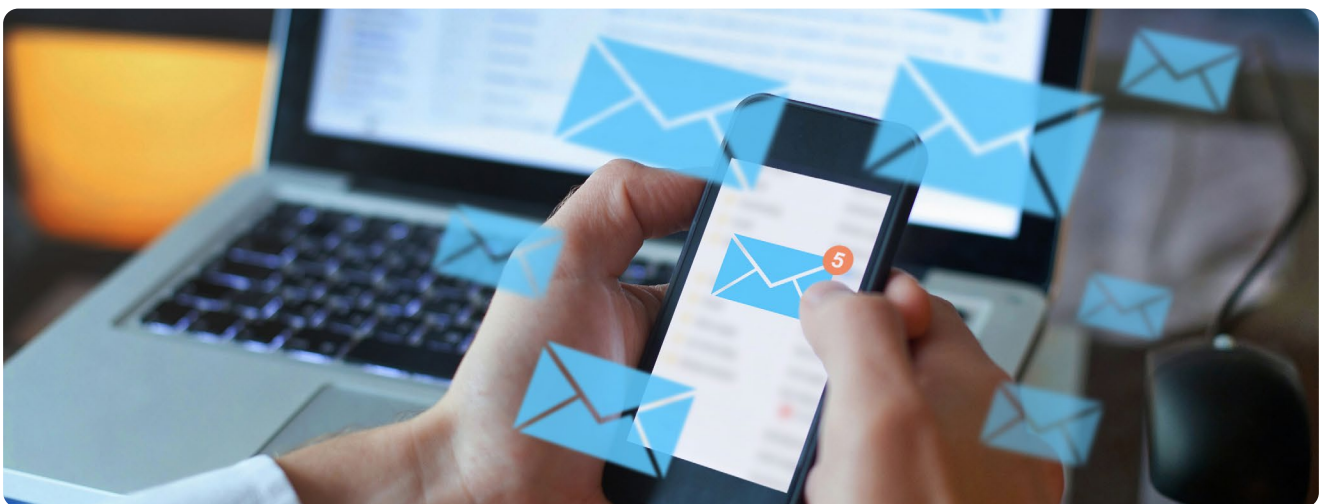
When designing your campaign, it is vital to consider what other marketing activities are taking place at the same time and synchronise your efforts.

If, for example, you are running ads on social media, make sure to brief your telemarketing team so their message is consistent and calling reinforces any advertised offers.

If you have inbound responses from advertising campaigns, segment prospects that have clicked or engaged with your ads so that your best prospects are prioritised in the calling schedule.

If you are running inbound or digital campaigns, telemarketing can support that effort and increase the overall return on investment. By calling early-stage leads generated through other channels, telemarketing can qualify, and nurture leads so that your sales team benefits from a feed of high-quality, sales-ready leads rather than chasing poor prospects that aren't ready to buy.

Integrating telemarketing alongside other channels is key to improving the return on your overall marketing efforts and to achieving a seamless experience for your buyers.





Hopefully this will have inspired you to think a bit more about telemarketing and how it could improve your business.

This is only a basic guide – give us a call to discuss your telemarketing requirements and find out we can help you grow your business.

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CALL US TODAY →