



**BPA Worldwide
Teleservice Advisory
Committee**

Operating Guidelines for Publishing Companies and
Telemarketing Agencies Involved in the Acquisition and
Requalification of Telecommunication Requests

Purpose Statement

This guide is intended to provide publishers and telemarketing agencies with suggested operating guidelines for the acquisition and requalification of "Personal Direct Requests" through the use of telephone interviews.

In addition, this guide is intended to help publishers establish quality expectations within a realistic cost and time frame, while conforming to BPA Worldwide audit rules.

Summary of BPA Worldwide Rules Relating to Telecommunication Requests

Personal Direct Request from Recipient: Telecommunication (See BPA Rules B.10.20)

- Telecommunications from individually qualified recipients requesting the publication may be reported as personal telecommunications request. All outbound Personal Direct Request from Recipient: Telecommunication requests, with the exception of subscriptions to individuals who refuse to be recorded, must be recorded and made available to the auditor at the time of audit.
- Individuals who refuse to be recorded, and inbound telecommunication requests, must be asked a personal question, which only the individual and not the publisher is likely to know. The personal question will be used to support the request, in the absence of a recording or a signature.
- If the call is being recorded, the publisher may use any of the following script options to obtain the request:

Option #1

Do you wish to receive this publication?

Do you wish to continue to receive this publication?

Option #2

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription should go to (address). Is that correct?

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription is going to (address). Is that still the correct address?

Option #3

In order to receive your free subscription to (publication name), I just need a few moments to update some information, ok? I have your name as...

In order to continue receiving your free subscription to (publication name), I just need a few moments to verify some information, ok? I have your name as...

Option #4

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we can begin sending you a free subscription to our publication, ok?

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we can continue sending you a free subscription to our publication, ok?

Option #5

Hello. This is (caller's name) from (publication name). I'd like to start your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

Hello. This is (caller's name) from (publication name). I'd like to renew your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

- All telephone interview forms should be submitted to BPA Worldwide for approval prior to its use. BPA Worldwide's approval will be given to any telephone interview form that:

Contains adequate instructions (script) to the telephone interviewer (outbound calls) or to the recipient (inbound calls), including a statement, in accordance with local laws, that the call is being recorded;

Contains the name, title, company address and telephone number of the recipient;

Contains an acceptable request question, with a personalized data question, if recording is refused by the subscriber;

Is consistent with the "Field Served" and "Definition of Recipient Qualification."

- With the exception of name, address, title, email, fax, and phone number, prior-year demographic information may not be confirmed during the telephone interview. Telemarketing vendors/agents cannot have access to the prior demographic information of a campaign.
- The qualified recipient's spouse may request the publication on behalf of the qualified recipient; this may be reported as personal telecommunication request.
- The qualified recipient's authorized assistant may request the publication on behalf of the qualified recipient. This may be reported as personal telecommunication request, provided the authorized assistant responds affirmatively to either one of these questions:

“Do you provide administrative support for _____ that includes the ability to request subscriptions for him/her?”

“Do you provide administrative services for _____ and are you (allowed/eligible/permitted) to request a publication on their behalf?”

- In one telephone interview, an authorized assistant may request a publication for more than one qualified recipient, and those requests may be reported as personal request provided the interview is recorded, and that there is a separate request question asked and answered for each recipient.
- Multiple publication telecommunication requests obtained in a single telecommunication may be counted as telecommunication request circulation, provided the interviews are recorded, a separate request question is asked and answered for each of the publications.

Request from Recipient’s Company: Telecommunication (See BPA Rules B.10.22)

- Telecommunications from a company requesting copies of the publication for employees of that company may be reported as telecommunication request from recipient's company. All outbound Company Request solicitations must be recorded and made available to the auditor at the time of audit.
- The names and titles and/or functions of the employees shall be provided.
- The name and title and/or function of the authorized requestor shall be provided along with the company, address, and telephone of the company.

BPA Worldwide Testing Procedures

Standard BPA practice is to verify all subscribers that appear on the randomly selected auditor’s test (maximum 430 records).

For telecommunication names selected on the audit test, the publisher shall provide BPA with the teleservice company call log information including: subscriber name, date of call, time of call, duration of call(2 digit minutes; 2 digit seconds), and all applicable demos. If recording is refused by the subscriber the data should also include the personal identifying information and the name of the person spoken with. The publisher shall also provide BPA with the recordings of the interviews; these can be sent in any format.

BPA will examine the call data provided by the publisher, compare the teleservice call log information to the qualified circulation list, and listen to the selected calls. In addition, BPA will call several of the test names to verify authenticity. All test records that refused to be recorded will be called.

Listening to recordings and confirmation costs are billed separate from the annual audit fee.

Operating Guidelines for the Acquisition and Requalification of “Personal Direct Requests”

Planning and Implementing an Effective Telephone Campaign

Properly planning a telemarketing campaign prior to the commencement of the calls will result in a more successful campaign in terms of the quantity, quality, and cost. In an effort to help both Publishers and Telemarketing Agencies these suggested guidelines should be followed:

1. Communicate Frequently

- Frequent communication between a publisher and their Telemarketing Agency is essential for the success of any campaign.
- Publishers should request daily reports as to the ongoing results of their campaigns.
- In a situation where a Publisher is using multiple source lists, daily communication is essential in order to determine which lists are providing the best results.

2. Reserve Time in Advance

- Publishers should reserve time with their Agencies to ensure that the required resources will be available when needed.
- The most important planning tool that a Publisher can offer their Agency is a schedule of the upcoming year's campaigns. The schedule should include the name of the magazine, the time frame in which the interviews will be conducted, and the estimated number of qualified subscribers that are to be obtained.

3. Allow Ample Calling Time

- There is an inverse relationship between the length of time assigned to a telemarketing campaign and the quantity, quality and cost of the subscribers obtained.
- You should anticipate lower costs and higher conversion rates by allowing more time for your campaign. The opposite is true if you wait until the last minute.
- Allowing ample time increases productivity by maximizing the learning curve and allowing time for call backs. In addition, publishers will have the opportunity to review results and determine if a change of strategy is needed to meet desired demographic goals.

4. Employ Data/Agency Testing

- With a list size of 10,000 names or more, it is recommended testing be conducted by the agency prior to roll out, to determine the cost per name and the quality of results. Too often volume targets are compromised due to the poor quality of data provided.

- If testing multiple agencies, each agency should be testing different nth selections from the **same** list.
- The test should be representative of the data to be telemarketed in order to ensure similar results in the roll out. The names included in the test should be randomly selected from the data (nth selection) and should be a representative percentage of the file. The list to be rolled out should be the remainder of the file.

5. Determine Realistic Goals

- Agencies should not accept work when it has been determined that the desired results are unachievable based upon the test results and/or the amount of time allowed for the campaign.
- Publishers should set realistic goals prior to commencement of any telemarketing campaign, and should communicate these goals to the Telemarketing Agency. Publishers should be prepared to provide sufficient leads to achieve the targeted goals that have been set.

6. Adhere to Governing Legal Restrictions

- Both Publishers and Agencies should be aware of their legal responsibilities, outside the scope of BPA Worldwide.
- The Agency is responsible for alerting publishers to people who request to be taken off a telemarketing list. It is the publisher's responsibility to adhere to this request.

Publishers Checklist for Managing a Telemarketing Campaign

Publishers are ultimately responsible for the accuracy of the list they provide to BPA Worldwide. The list provided for a telemarketing campaign may not be pre-populated with demographic information. In an effort to assist Publishers and their staff to effectively and efficiently conduct a telemarketing campaign, the following suggestions are offered:

1. Ascertain that the Telemarketing Agency has experience working with BPA Worldwide audited magazines. Make certain the telemarketing agency has recording capabilities and will be able to meet the BPA audit requirements. Obtain references from other Publishers.
2. A proposal describing the Agency's' experience in conducting a telemarketing campaign for the acquisition or renewal of a qualified magazine subscriber should be requested. The proposal should also include all pricing considerations.
3. Determine who the Agency's contact persons are, as well as their roles and responsibilities as they relate to your campaign.

4. To allow the Agency to gain an understanding of your magazine and the market that it serves, the following materials should be provided:
 - BPA Statement.
 - Media kit.
 - Sample issues of the magazine.
 - Questionnaires previously approved by BPA Worldwide.
 - Audit issue date, and corresponding qualification date range.
 - Direct mail materials.
 - Background information on Company and industry served by magazine.
 - List of benefits for subscribing to magazine.
 - Information on list source, including titles, business and other relevant demographic data.

5. Communicate and discuss campaign objectives and how these objectives are to be accomplished.
 - Determine the targeted number of requalifications and/or new acquisitions to be obtained.
 - Employ testing procedures to determine the quantity of leads to be provided and the timing of their delivery.
 - Provide the qualifying parameters (i.e. job title, job function, and other relevant demographic data).
 - Provide non-qualifying responses.
 - Determine which questions are mandatory and which are optional.
 - Provide record layout for incoming data and output formats.
 - Develop an interview script and obtain BPA Worldwide approval.
 - Provide instructions for handling replacement names.
 - Determine the number of call attempts that should be made prior to considering a lead a “No Contact”.
 - Determine when return data is needed.
 - Determine if pass-a-long names are wanted. If yes, determine if specific titles are required.

6. Communication and reporting procedures.
 - Determine the frequency of reports to be received.
 - Agree on the format and components of the reports including which type of negative dispositions (i.e. left company, disconnected numbers, does not qualify, etc.) are to be obtained.
 - Determine how reports are to be received (e-mail, web, etc).
 - Campaign summary report.

7. Determine the output requirements as well as the timing and format of the output deliveries.
 - Determine the required output format and compatibility with fulfillment systems.
 - Determine which abbreviations are acceptable.
 - Determine the timing and quantity of all output deliveries.
 - Determine where output deliveries should be sent (Publisher or Fulfillment house).
 - Determine if transmittal form is required with each package sent.

8. Determine the invoicing and payment procedures.
 - Agree on all pricing considerations prior to commencement of any campaign.
 - Determine how often invoices will be generated and mailed to the Publisher.
 - Determine where invoices should be sent and to whose attention.
 - Determine payment terms.

Publishers Checklist for Managing the Quality Control of a Telemarketing Campaign

The following quality control considerations are offered in an attempt to help Publishers oversee the quality control measures that their Agency employs:

1. Ensure that the Telemarketing Agency is knowledgeable as to the BPA Worldwide audit rules that govern "Telecommunication Requests," including the ability to record interviews.
2. Ensure that clear communication has taken place in terms of the campaign's objectives, reporting requirements and output requirements.
3. Gain an understanding of how the Agency compensates their interviewers.
4. Require your Telemarketing Agency to thoroughly explain all of the quality control procedures they have in place to insure the integrity of their work.
5. Gain an understanding of how your Agency trains and manages the interviewers who will be conducting the interviews of your subscribers.
6. Gain an understanding of your Agency's procedures for handling disgruntled or uncooperative subscribers. Agree on the procedures to be employed on your campaign.
7. Gain an understanding of your Agency's procedures relative to calling back a subscriber who has already been interviewed (i.e. missing or incomplete information, questionable responses).
8. Gain an understanding of the procedures that your Agency employs when they determine that a caller has been fraudulently or improperly conducting an interview. Expect 100% callbacks or alternate action to ensure publisher does not receive any subscribers through interviews conducted improperly.
9. Gain an understanding of your Agency's procedures for calling back a certain percentage of subscribers and re-interviewing them to ensure the integrity of the work conducted.
10. Monitor the interviews conducted on behalf of your publication. Continue to monitor until you are comfortable with how your campaign is being handled.
11. Call back a sample of completed interviews and compare your results to those of your Agency.

12. Gain an understanding about whether the Agency outsources any of the work to another Agency. If it does, the Agency must:

- Notify the publisher as to what portion of the work is outsourced.
- Tell the publisher to whom it is being outsourced to and give company credentials, references and contact information for monitoring.

Minimizing Recording Objections

The Teleservice Advisory Committee members have not experienced many objections to recording. They recommend building a level of engagement and trust before advising the subscriber of the recording; do not begin the conversation with “This call will be recorded...” Test multiple script versions to determine which script works best for your publication.

Personal Identifier Questions (PIQ) – only for incoming requests or subscribers that refuse to be recorded

- PIQ information must relate to the individual being interviewed. The question asked should be personal and verifiable.
- PIQ’s should not seek information that is overly sensitive to the recipient (i.e. social security number, children’s names, mother’s maiden name).
- An alternative question should be available in case of a recipient’s refusal to answer the PIQ asked.
- A refusal to answer a PIQ does not automatically disqualify a recipient. The percentage of refusals during a campaign must be kept to an absolute minimum.
- The PIQ is not required if the telephone conversation is tape-recorded. Permission to tape record must be asked and granted at the outset of the conversation. The balance of the entire conversation must be recorded on tape.
- PIQ’s must be changed annually and used only once every three years.

Sample Personal Identifier Questions

- State of Birth
- Month of birth
- Day of birth
- Number of brothers/sisters
- Town of birth
- Year of birth