



AMENDMENTS TO BPA WORLDWIDE BUSINESS PUBLICATION STANDARDS

BPA WORLDWIDE BULLETIN 21-2

December 2021

Effective immediately, BPA Worldwide Business Publication Standards are amended as follows (~~deleted material in strike through font~~; ***new material in bold italic typeface***):

1-2 515 Direct Request: Telecommunication

- (a) Telecommunications from individually qualified recipients requesting the publication may be reported as personal telecommunications request. All outbound Direct Request: Telecommunications 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.
- (b) Subscriptions to individuals who refuse to be recorded, inbound telecommunication, and interactive voice response (IVR) requests shall comply with the following conditions:

A question approximating the following shall be asked and answered during the telephone interview: "Do you wish to receive (continue to receive) this publication?" Yes ... No ... A personal identifying question must be asked and answered. Some examples... "To permit future verification of your request, please give us your month and/or date of birth - Month... Day..., or mother's maiden name or high school graduated from." Other forms of personalized questions which only the recipient and not the media owner is likely to know, may be asked as an alternate should the recipient not provide an affirmative response to the original question. Once a particular question is used and the answer stored, a different question shall be used for future request questions. If the respondent refuses to answer any and all personal questions, the interview may be considered a request if the interview is recorded and the respondent indicates affirmative to the request question. The personalized question is not required for faxes, or if the interview is recorded.

If the call is being recorded, the media owner 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 may 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 may 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?

(c) A telephone interview form shall:

Contain 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;

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

Contain an acceptable request question with a personalized data question, coupled to the request for subscribers who refuse to be recorded (as defined in Section 1-2 515b). The personalized data question is required only if the telephone call is not recorded;

Be consistent with the "Field Served" and "Definition of Recipient Qualification"; and

When calls are recorded it is acceptable to confirm name, address, title, email, fax, phone number, and prior-year demographic information during the telephone interview.

(d) The qualified recipient's spouse may request the publication on behalf of the qualified recipient. This may be reported as "Direct Request: Telecommunication".

(e) The qualified recipient may request the publication for themselves and up to one other co-worker and have both requests reported as "Direct Request: Telecommunication".

- (f) A co-worker may request the publication on behalf of two other qualified co-workers through one phone call and the two requests may be reported as "Direct Request: Telecommunication" provided the "co-worker" making the request isn't also requesting for themselves (maximum two requests). Requests for multiple (three or more) persons shall be reported as Request from Recipient's Company (See 1-2 519).

Media owners contacting a co-worker to elicit direct request: telecommunication shall comply with the same conditions concerning telecommunication requests set forth in these standards. In addition, the media owner shall obtain the full name and job title of the individual spoken with. If recipient's name and title is not received refer to Standard 1-2 525 Communication (Other than Request): Telecommunication.

- (g) Telecommunication requests for a multiple of different publication brands 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 publication brands, and such circulation is in conformance with Standards 1-2 514e and 1-2 515j.
- (h) Prior testing of scripts, systems and procedures for soliciting telecommunications requests may be required to determine auditability.
- (i) For incoming requests received through telecommunications, adequate records verifying the time and date of call shall be maintained. In addition to the personalized request question, the recipient may be instructed to provide a unique identification code taken from the media owner's label.
- (j) Media owners shall be responsible for maintaining the following records, which are to be made available to the auditor at the time of audit and/or during random visits:

All telephone company invoices.

All computer-generated data, including summaries by date of calls received, telephone numbers of calls placed and received, and computer logs of tasks performed.

Recordings, where permitted and available, shall be inspected by the auditor to verify adherence to the BPA Worldwide-approved interview form and the proper recording by the interviewer of the recipient's response. Whenever conversations are recorded, the recipient shall be advised, in accordance with local laws, that he/she will be recorded. Monitoring of live interviews also may be conducted for the same purpose.

- (k) The media owner shall be responsible for the documentation and accuracy of telecommunication requests, including those requests obtained through outside telemarketing firms.
- (l) The auditor will compare and cross-check all records and make any other tests deemed necessary, including follow-up telephone contact and/or mail confirmations, for complete and accurate authentication of the request and qualification information. The media owner shall be billed for the extra costs incurred for any special confirmations conducted by BPA Worldwide or its agent, unless included in a current "fixed price agreement".
- (m) All other specific standards pertaining to the use of promotional incentives for personal written request circulation or in the merging of publications' circulation apply to telecommunication requests (See 1-2 224 and 1-2 243).

(n) For those media owners wishing to use Short Message Service (SMS) to renew previously requested subscriptions, an outline of the program and transcript of the text message shall be submitted to BPA Worldwide for approval prior to use. BPA Worldwide's approval will be given to any renewal SMS program that meets the following conditions:

Media owner must have expressed consent from the subscriber to communicate via SMS.

The outgoing text message contains adequate description of the nature of the request.

The outgoing text message contains adequate request question and instruction to the recipient.

The outgoing text message, or a subsequent text message sent after the recipient renews their request, provides the recipient an opportunity to update their information.

The program captures the outgoing phone number, the phone number of the recipient, the time and date of the outgoing message, the time and date of the recipient's reply, and the recipient's message.

Publications must maintain proof of the initial request.

Documentation of the respondent's conformance to the Field Served and Definition of Recipient Qualification shall be available either through previous request or secondary source and be current within three years of the analyzed issue.