

TELEMARKETING CHECKLIST FOR SUCCESS

Please print out and use this checklist while interviewing companies regarding your B2B telemarketing project. If a firm meets your needs for a certain criteria, place the corresponding letter (A, B or C) next to that item. If you have any questions, please call us at [602.264.2540](tel:602.264.2540).

	Name of Company	Phone	Representative
A			
B			
C			

1. Focused and Specialized _____

Has the company managed their talents and service offerings to provide the best results for clients who are in need of a telemarketing project that only involves **Outbound Business-to-Business calls** or do they claim to do it all?

2. Less Expensive Pilot Projects _____

For the first telemarketing project, you should **invest as little as possible (not more than 50 to 75 hours) in order to get results**. If a company is not willing to show you results with a small pilot project, you should continue your search.

3. Daily Progress Reporting _____

You need to **see the progress on a daily basis** that the telemarketing company is making. They should have the technology to provide customized reports so you are always involved in the call campaign. Ask to see a sample report before making a decision.

4. Real References You can Call _____

Our recommendation is to always **ask for references** (that you can find on the Internet) and call each one to ask how their experience has been with the telemarketing company. You may want to specifically inquire about the number of appointments generated, the quality of those leads and the **overall satisfaction** of communication between the reference account and the telemarketing company.

5. Cutting Edge Software

This is often one critical area that is overlooked. Telemarketing companies should **use software that has been specifically designed for telemarketing**, not a product that was manipulated into a contact management tool. You should understand the program's **data management and reporting capabilities** and even ask for a demonstration if possible.

6. Understand Your Business

When you speak with the sales representative, did he or she take the time to research your company before calling you? Does he or she **understand your industry** and does their company have experience calling into your target market? Be careful of anyone wanting to send a proposal too soon. You should really **be comfortable with the representative and company** before you make a decision.

7. Professionally Priced

You get what you pay for. If a proposal seems to offer a bargain price per hour, think about how little the actual callers are being paid. You really want an **experienced and knowledgeable telemarketing professional** to represent your company.

