



Building your in-house telephone team

How to get started and what calls to prioritise



OXFAM

There is no them, just us.

www.oxfam.org.uk

A decorative graphic at the bottom of the slide featuring a large green semi-circle on the left, a series of vertical green lines of varying heights in the center, and a solid green circle on the right.

Who am I?



Oliver Pancoust

Who's in the room?

Name

Role

Organisation

Location

What's the plan?

Audience interaction

Why in-house

How we did it

Prioritising calls

Learnings & recommendations

Questions



Quick polls

1- Do you currently have an in-house telephone team?

Yes

No

2- Are you considering an in-house telephone team?

Yes

No

3- How confident do you feel about setting one up?

Scale of 1-5

1- Not confident at all

5- Extremely confident



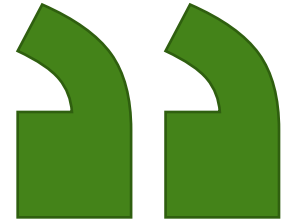
Word cloud activity

1- What is the biggest advantage of having an in-house team?

2- What might be the biggest challenge?



For me, it's about having regular, up-to-date insights that help us optimise journeys and messaging to better engage supporters. When you have teams who truly understand the work, they're able to reflect back valuable insights from the conversations they're having — and that's incredibly powerful.



Alicia Bainbridge, Head of Campaign Engagement

Why we took it in-house

COVID-19 shut down F2F fundraising – we needed a plan

Repurposed our F2F team – talented fundraisers with great instincts

Closer to our supporters, faster feedback loops and very cost-effective



Setting up the team: What it took

Clear vision and leadership buy in

Systems setup – calling software, hardware,
CRM access, data handling protocols

Scripts – TM compliance blended with what
works in F2F

Recruitment – management & fundraisers all
taken from F2F

Cross team collaboration – Data teams,
Supporter Relations, Compliance

Launching the team: start small, learn fast

Started with Thank You calls to existing supporters

No financial ask at first, but supporters offered donations anyway

Shifted to Upgrade calls, built confidence & momentum

Quick wins with campaigns with high ROIs gave us internal buy-in

What calls should you prioritise first?

It depends.

Return on investment?

New regular givers?

Retention?

Upgrades
Gift Aid

Reactivation
Lead generation

Welcome Calls
Thank you/Loyalty

What we learned along the way

What worked?

Starting with thanks you calls built confidence

Our F2F team had the skills, we juts gave them a new tool

Supporters loved hearing from us

Internal collaboration was essential

Early wins helped secure buy-in

What was challenging?

Data flow – integrating new systems takes time to perfect

Data volumes – as the team grows so do their needs

Managing call quality at scale – taken on a new compliance role

Phone opt in rates across supporter database

Advice for others

Have a plan

Start small

Get advice

Learn as you grow

Questions?



OXFAM

Thank you.

Email: opancoust2@oxfam.org.uk

LinkedIn: Oliver Pancoust