

# **WORKING WITH EXTERNAL AGENCIES: RELATIONSHIPS, QUALITY AND CONNECTION**

**24<sup>TH</sup> APRIL 2025**

**Alex Mackain-Bremner**

**(OI Telefundraising & retention Specialist)**



**OXFAM**

## A bit about me....

- 22 years in tele-fundraising
- 7 years for Oxfam International
- Unashamed Trekkie....!



**Tele-fundraising &  
Retention Specialist in  
Global Public  
Fundraising team,  
across 20 markets**

***‘...promoting best practice in the use of the  
telephone to create engaging conversations and  
generate sustainable long-term income for  
Oxfam...’***

***Make it so...’***

## WHAT I'M GOING TO TALK ABOUT today....

1. WORKING IN PARTNERSHIP WITH YOUR AGENCIES
2. Working to A telefundraising programme & plan
3. Final Q & A's

# WHY DO WE want to WORK IN CLOSE PARTNERSHIP WITH OUR AGENCIES ??

- *To deliver targeted results for Oxfam at an acceptable cost*
- *To ensure donor satisfaction & engagement*
- *To develop the relationship between agency and inhouse team*
- *To share responsibility for the management of the telemarketing programme*

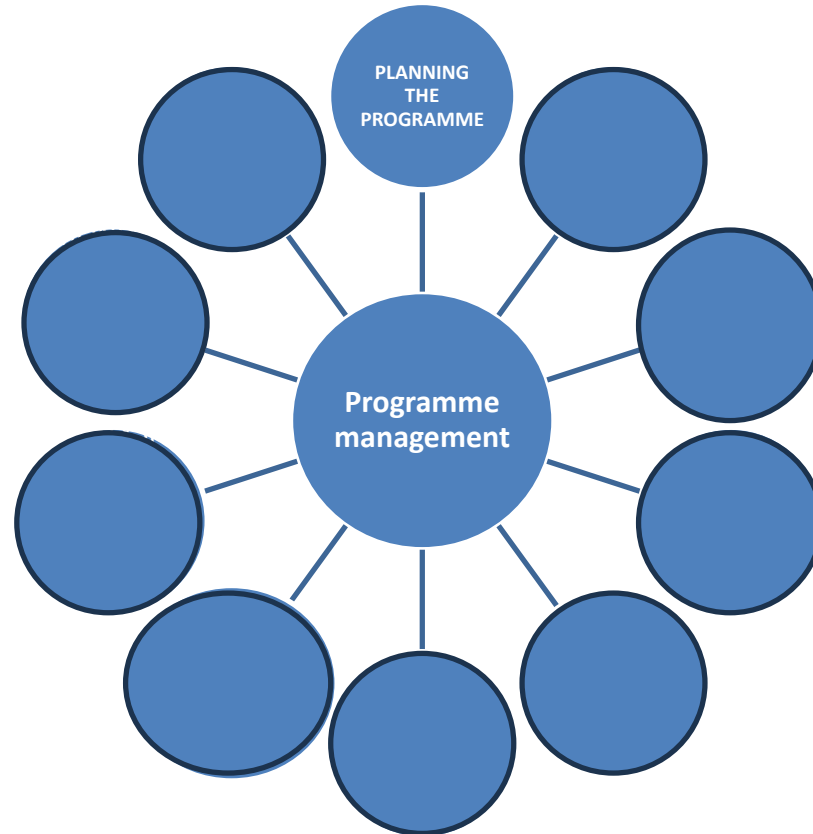


# PROGRAMME management principles

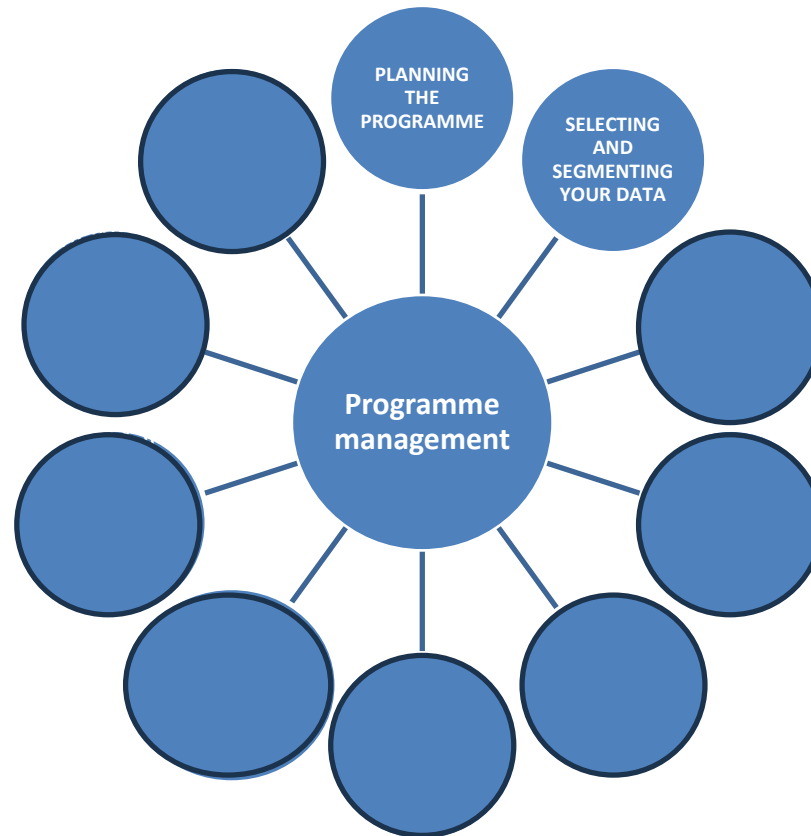
- *Whose responsibility is it to manage Telefundraising campaigns?*
- *What are the most effective ways to manage them?*
- *What tools do we need?*



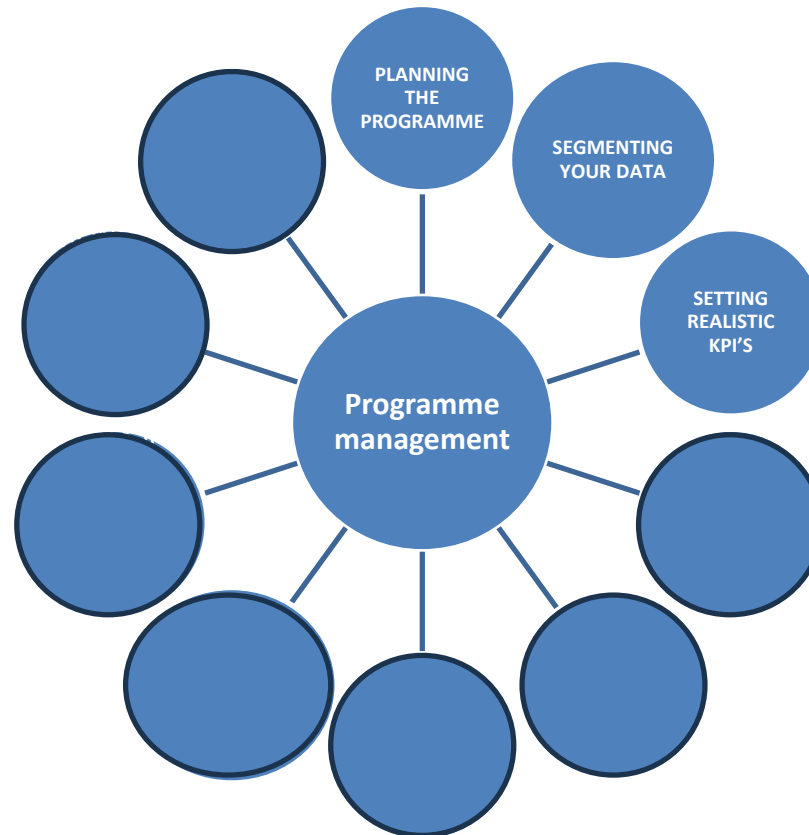
## KEY ELEMENTS OF SUCCESSFUL SHARED PROGRAMME MANAGEMENT



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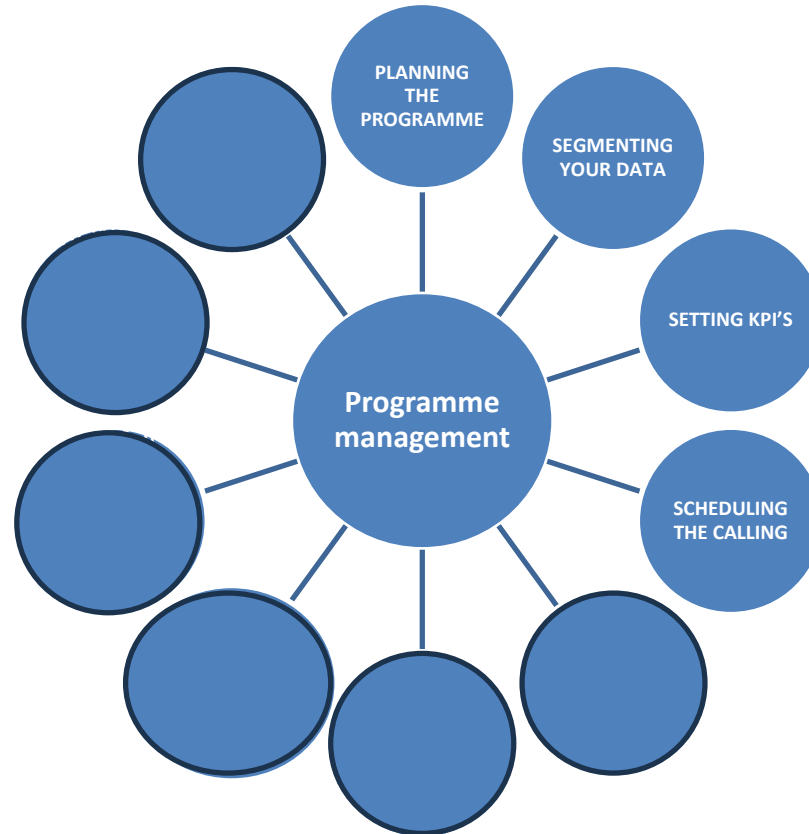


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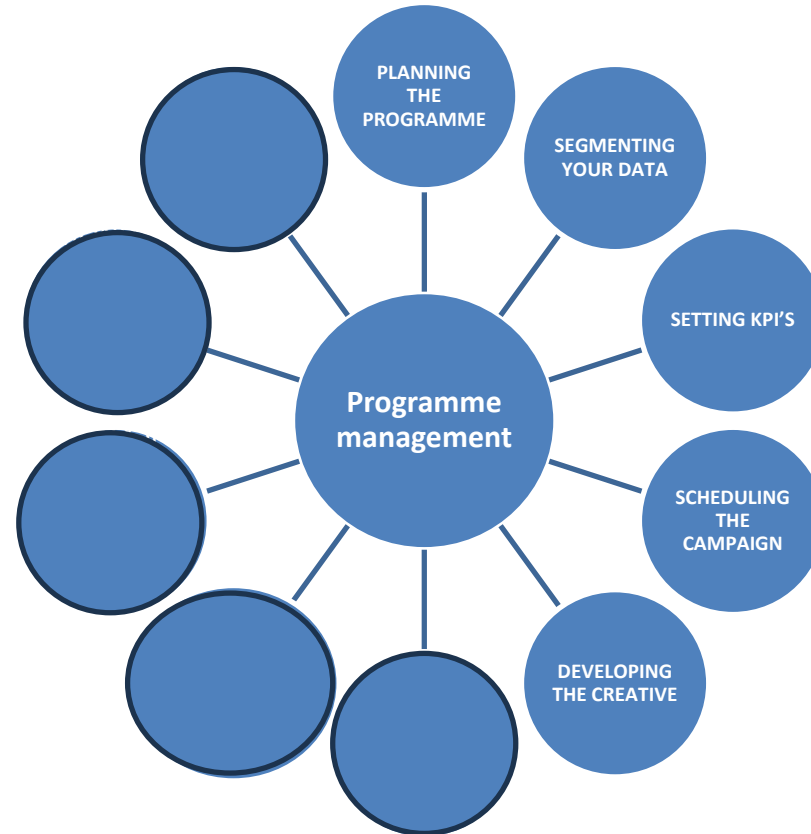




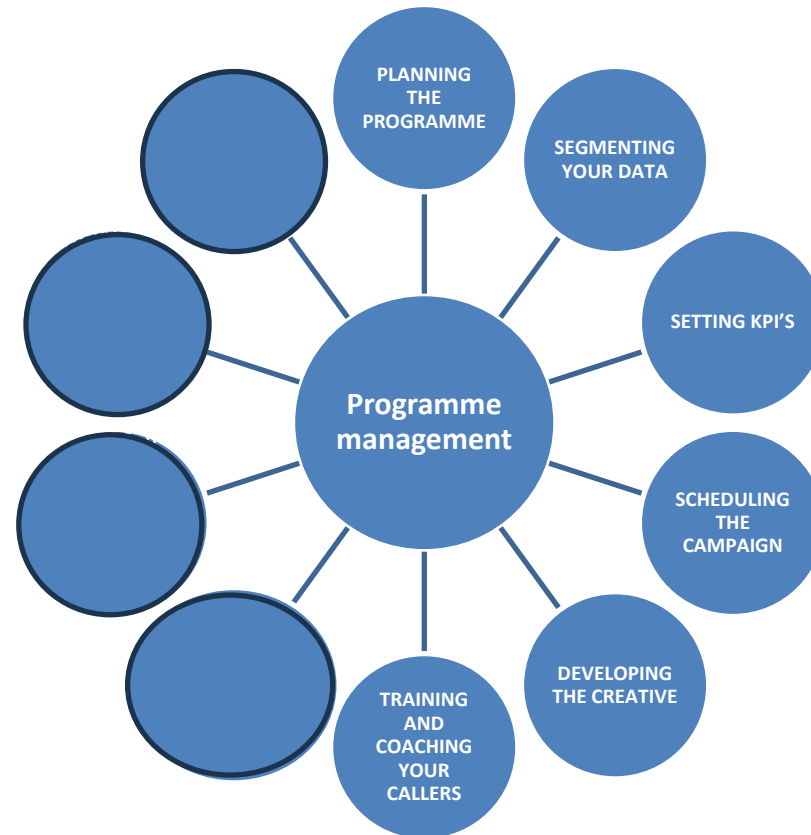
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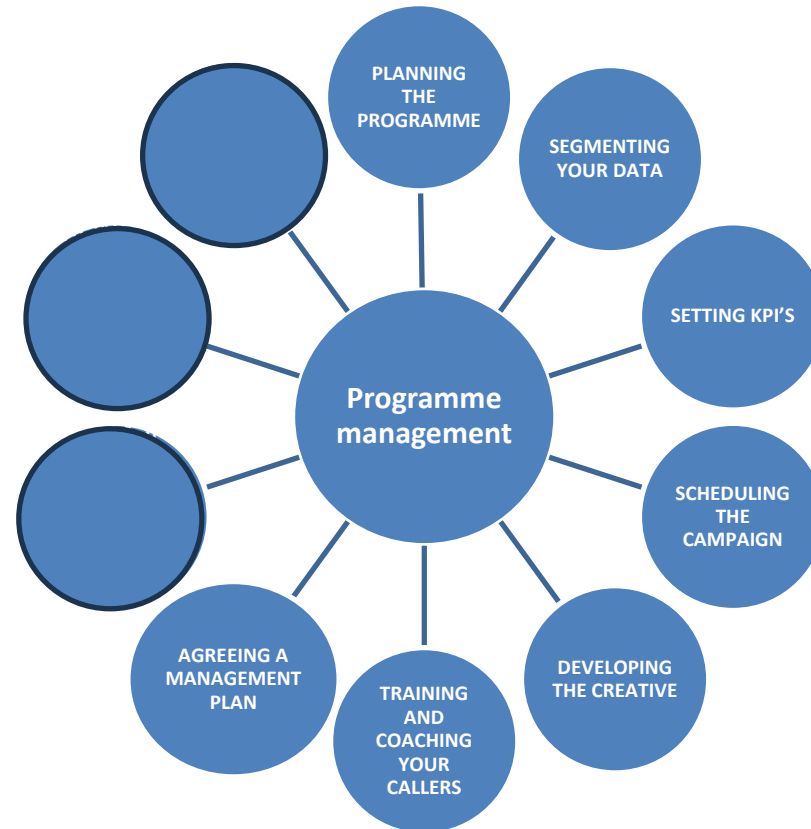
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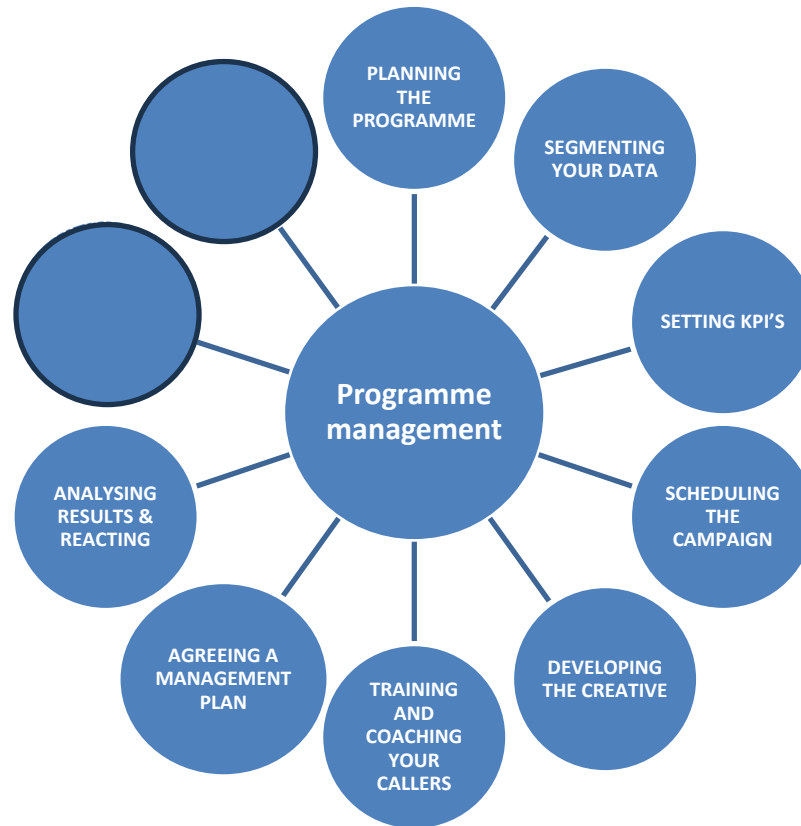
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# Planning an annual telemarketing programme



**What are your core objectives in using the telephone?**

**How does this inform your telemarketing strategy?**

## SETTING & agreeing the programme OBJECTIVES...

Scenario 1 – high income objective

CAMPAIGN	Calls	RG Response	No. of RG's	Average RG	Income: Year One
Lead Generation	10,000	5.0%	500	€ 60	€ 32,000
Reactivation	20,000	10.0%	2,000	€ 60	€ 120,000
Quick Winback	2,000	27.0%	540	€ 65	€ 35,700
One off to RG	15,000	6.0%	900	€ 60	€ 62,400
Upgrade	30,000	30.0%	0	€ 40	€ 367,800
Total	77,000		3,940		€ 617,900

## SETTING & agreeing the programme OBJECTIVES...

### Scenario 1 – high income objective

CAMPAIGN	Calls	RG Response	No. of RG's	Average RG	Income: Year One
Lead Generation	10,000	5.0%	500	€ 60	€ 32,000
Reactivation	20,000	10.0%	2,000	€ 60	€ 120,000
Quick Winback	2,000	27.0%	540	€ 65	€ 35,700
One off to RG	15,000	6.0%	900	€ 60	€ 62,400
Upgrade	30,000	30.0%	0	€ 40	€ 367,800
<b>Total</b>	<b>77,000</b>		<b>3,940</b>		<b>€ 617,900</b>

### Scenario 2 – high volume new donors objective

CAMPAIGN	Calls	RG Response	No. of RG's	Average RG	Income: Year One
Lead Generation	30,000	5.0%	1,500	€ 60	€ 96,000
Reactivation	20,000	10.0%	2,000	€ 60	€ 120,000
Quick Winback	2,000	27.0%	540	€ 65	€ 35,700
One off to RG	10,000	6.0%	600	€ 60	€ 41,600
Upgrade	15,000	30.0%	0	€ 40	€ 183,900
<b>Total</b>	<b>77,000</b>		<b>4,640</b>		<b>€ 477,200</b>

## DEVELOPING AN ANNUAL CALLING SCHEDULE....

<b>Telemarketing campaign</b>	<b>Apr</b>	<b>May</b>	<b>Jun</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Total Contacts</b>
Lead Generation & Conversion	2,500	2,500	2,500	2,500	2,500	2,500	3,500	3,500	3,500	1,500	1,500	1,500	<b>30,000</b>
RG Reactivation								1,000	3,000	5,000	5,000	5,000	<b>19,000</b>
One off to RG	2,500	2,500					2,500	2,500					<b>10,000</b>
Annual RG Upgrade			3,000	3,000	3,000	3,000							<b>12,000</b>
Rolling New RG Upgrade	250	250	250	250	250	250	250	250	250	250	250	250	<b>3,000</b>
Rolling Quick RG Winback	100	100	100	100	100	100	100	100	100	100	100	100	<b>1,200</b>
Rolling New One off to RG	100	100	100	100	100	100	100	100	100	100	100	100	<b>1,200</b>
New RG loyalty calling	100	100	100	100	100	100	100	100	100	100	100	100	<b>1,200</b>
<b>Total contacts</b>	<b>5,550</b>	<b>5,550</b>	<b>6,050</b>	<b>6,050</b>	<b>6,050</b>	<b>6,050</b>	<b>6,550</b>	<b>7,550</b>	<b>7,050</b>	<b>7,050</b>	<b>7,050</b>	<b>7,050</b>	<b>77,600</b>

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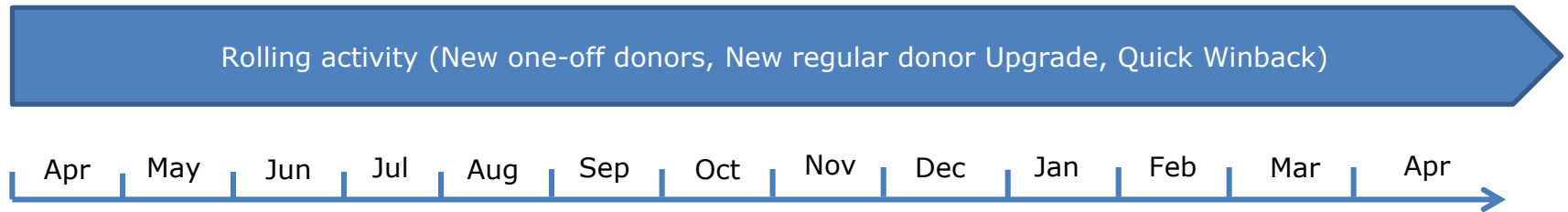
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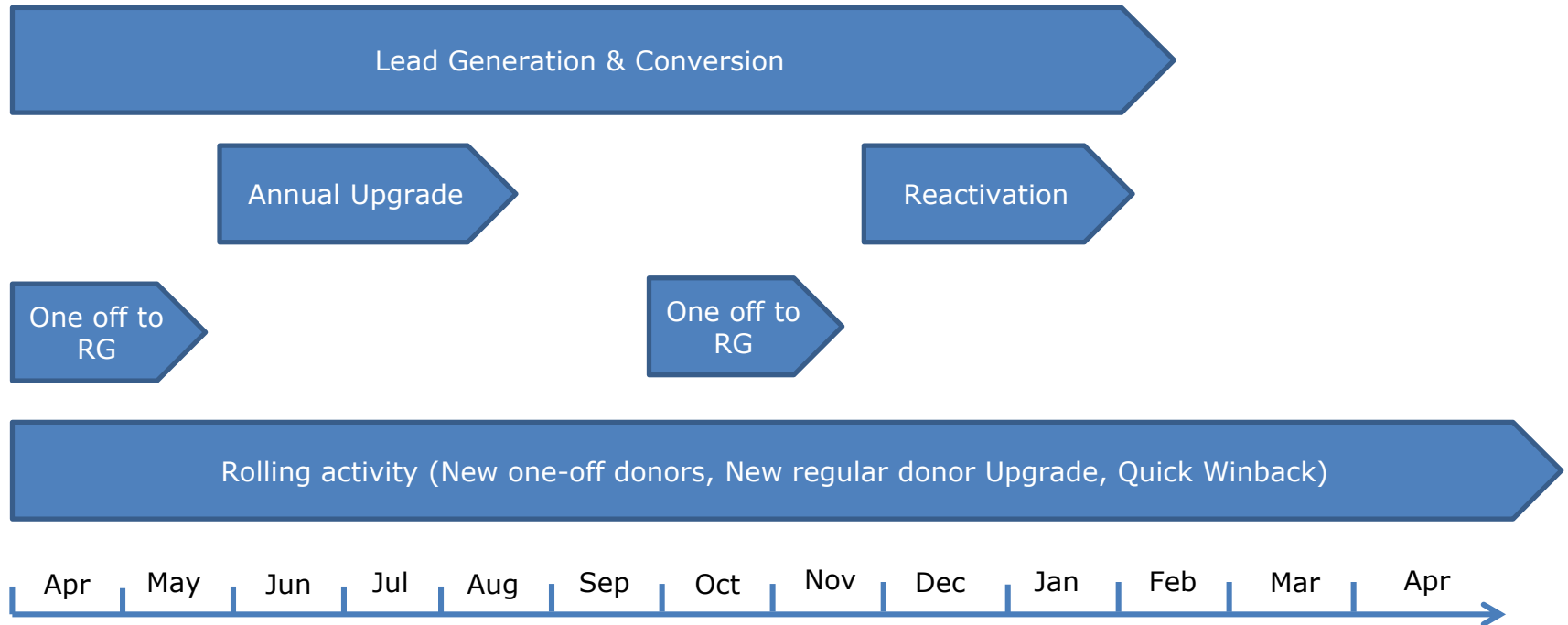
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# AN INTEGRATED TELEMARKETING PROGRAMME

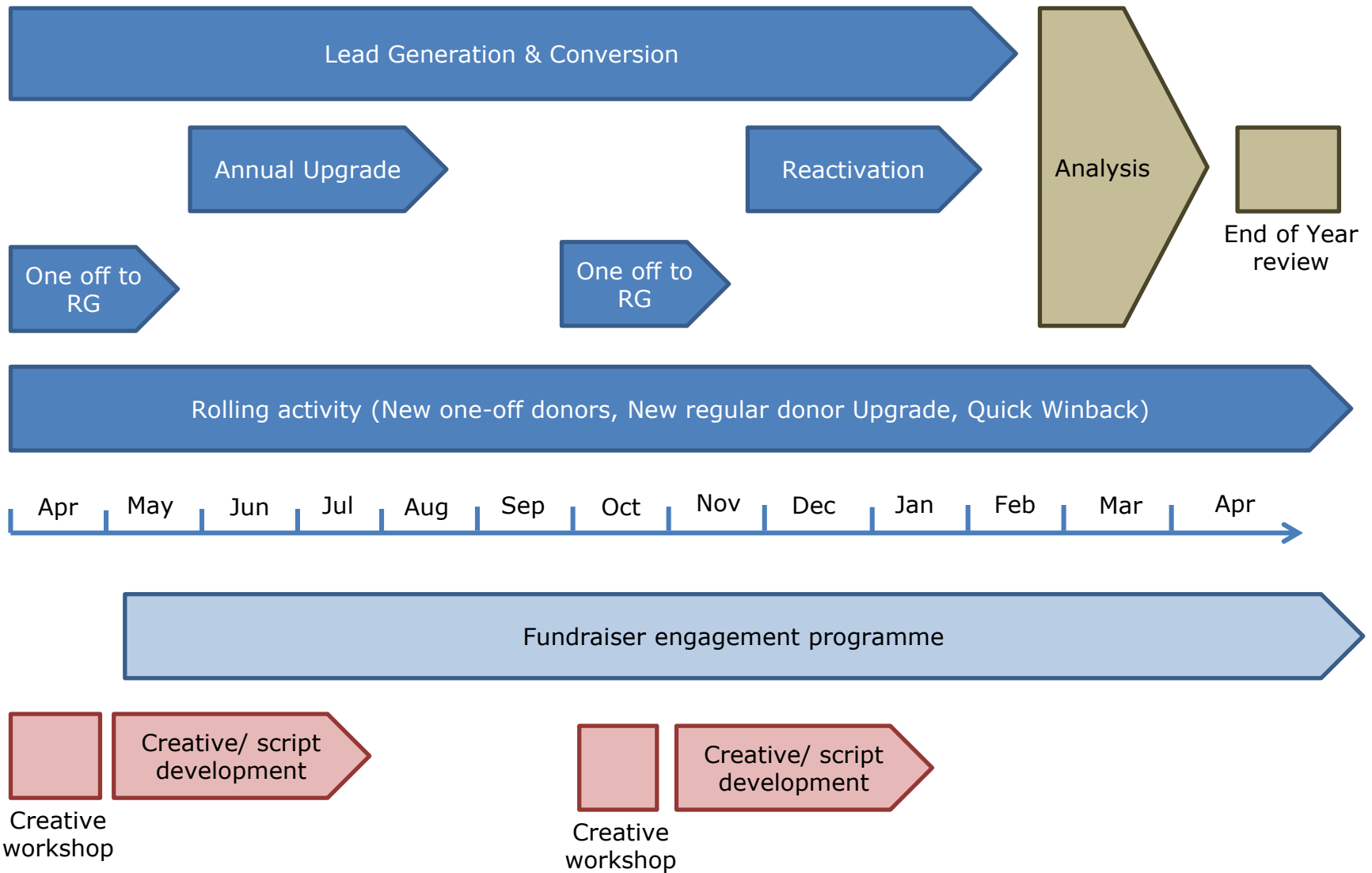




# AN INTEGRATED TELEMARKETING PROGRAMME



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# Set a programme meetings cycle....

- **Annual Planning**
  - Lets you schedule the programme together, find opportunities and create joined-up planning
- **Planning meetings & campaign reviews**
- **Annual creative review**
  - Uncovers your best stories, propositions and cost handles
  - Lets you create a testing plan
  - Understand each others' needs and sign-off process
  - Tone of Voice Workshop
- **Innovation sessions**
  - Explore new products and fundraising techniques
  - The agency applies sector insight and learning



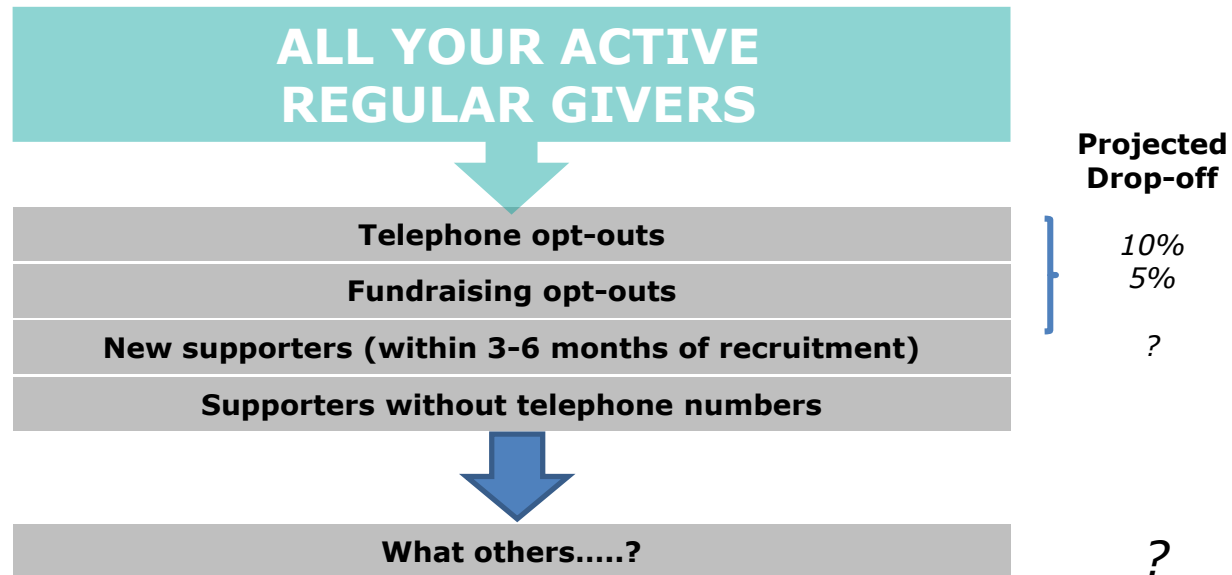
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approaching data selections together...

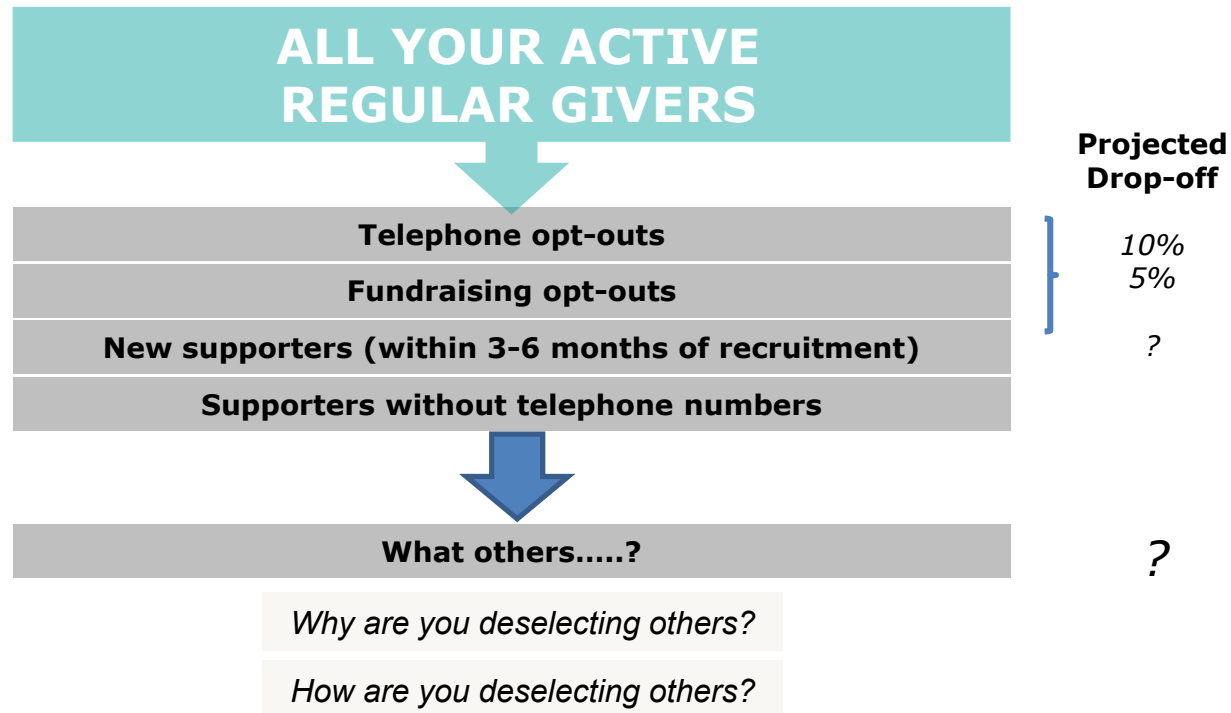
**ALL YOUR ACTIVE  
REGULAR GIVERS**



approaching data selections together...



approaching data selections together...



***Are you removing your most responsive & profitable segments from your upgrade campaign because of your deselection processes?***

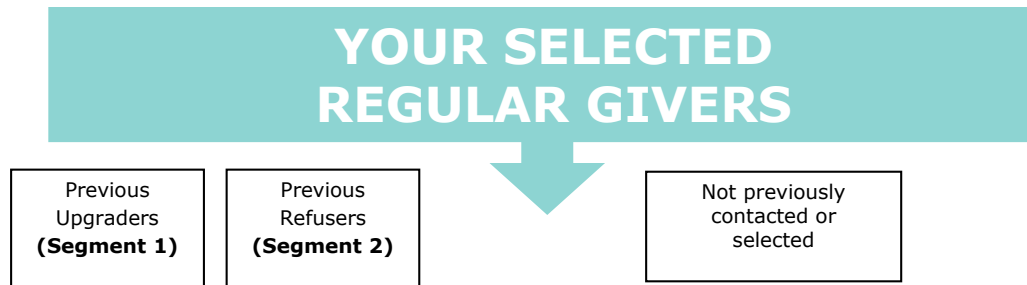
***Do you have a process to call any unselected data at the end of the year?***

Creating the segmentation strategy...

**YOUR SELECTED  
REGULAR GIVERS**

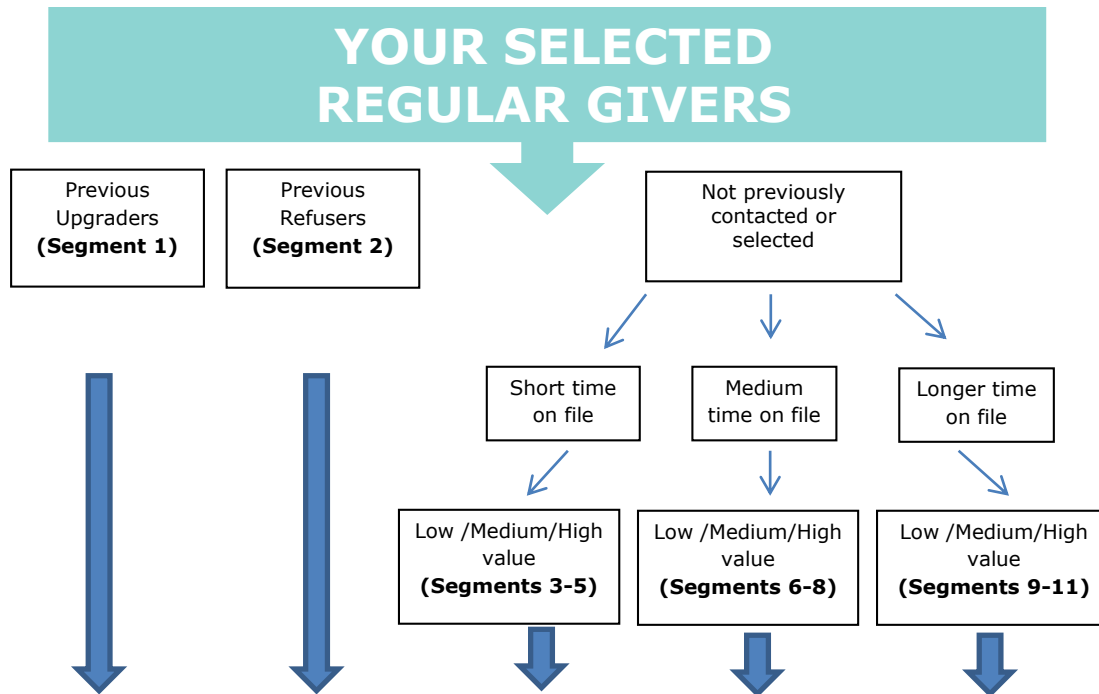


## Creating the segmentation strategy...

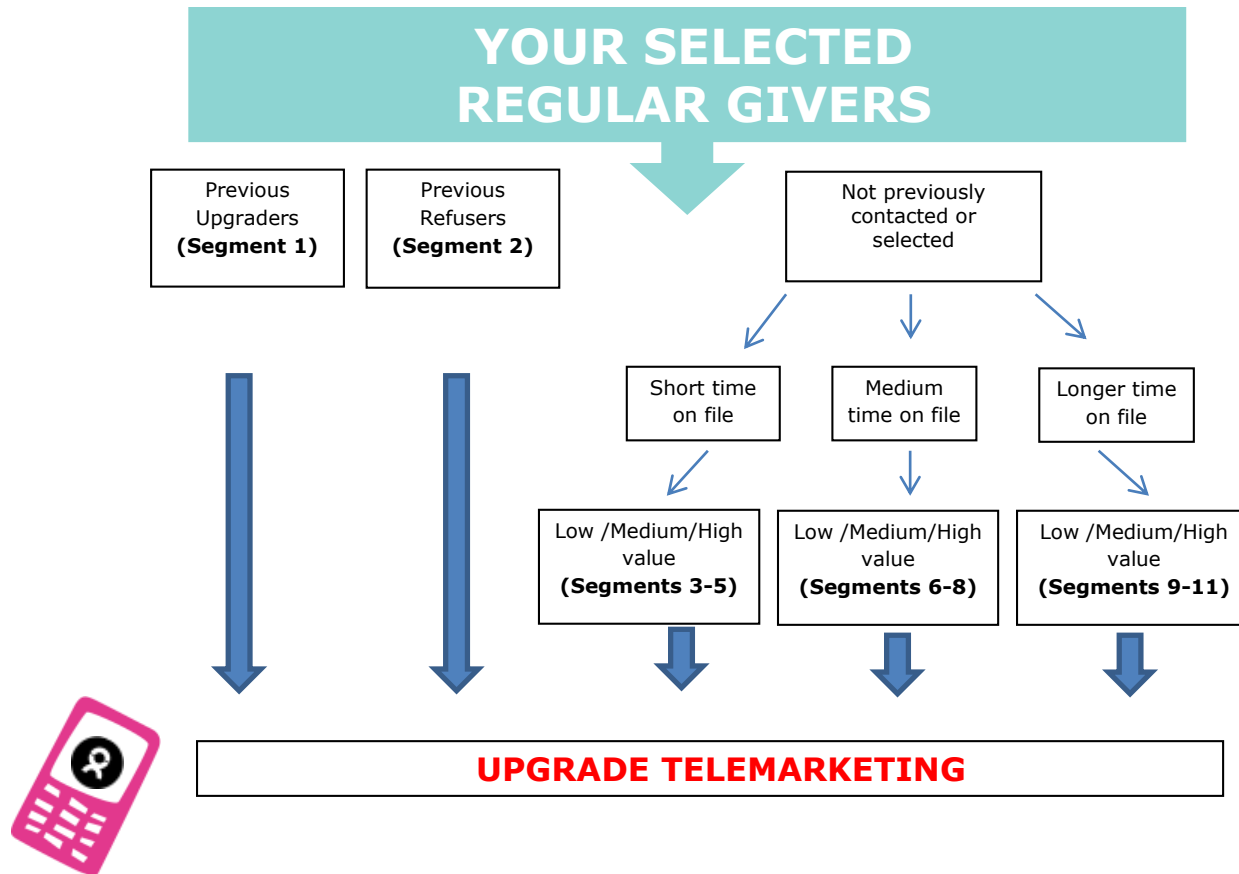




## Creating the segmentation strategy...



## Creating the segmentation strategy...



## Agreeing KPI'S AND the reporting TEMPLATE....

UPGRADE KPIs	Upgraders	Refusers	Not Called	Total
Total number of Regular Givers	2,000	5,000	3,000	11,000
Total number of Regular Givers selected for TM upgrade	1,500	4,000	1,500	7,750
Selection Rate	75%	80%	50%	70%
Total number of Contacted Regular Givers	900	2,400	600	4,388
Contact Rate	60%	60%	40%	57%
Total number of Upgrades	360	600	180	1,359
Upgrade Rate	40%	25%	30%	31%
Average Upgrade Amount (Euro)	3.50 €	2.50 €	4.00 €	3.00 €
APPROX. ANNUAL INCOME	€ 15,120	€ 18,000	€ 8,640	€ 49,658
Cost	€ 4,500	€ 12,000	€ 3,000	€ 21,938
ROI	3.4	1.5	2.9	2.3

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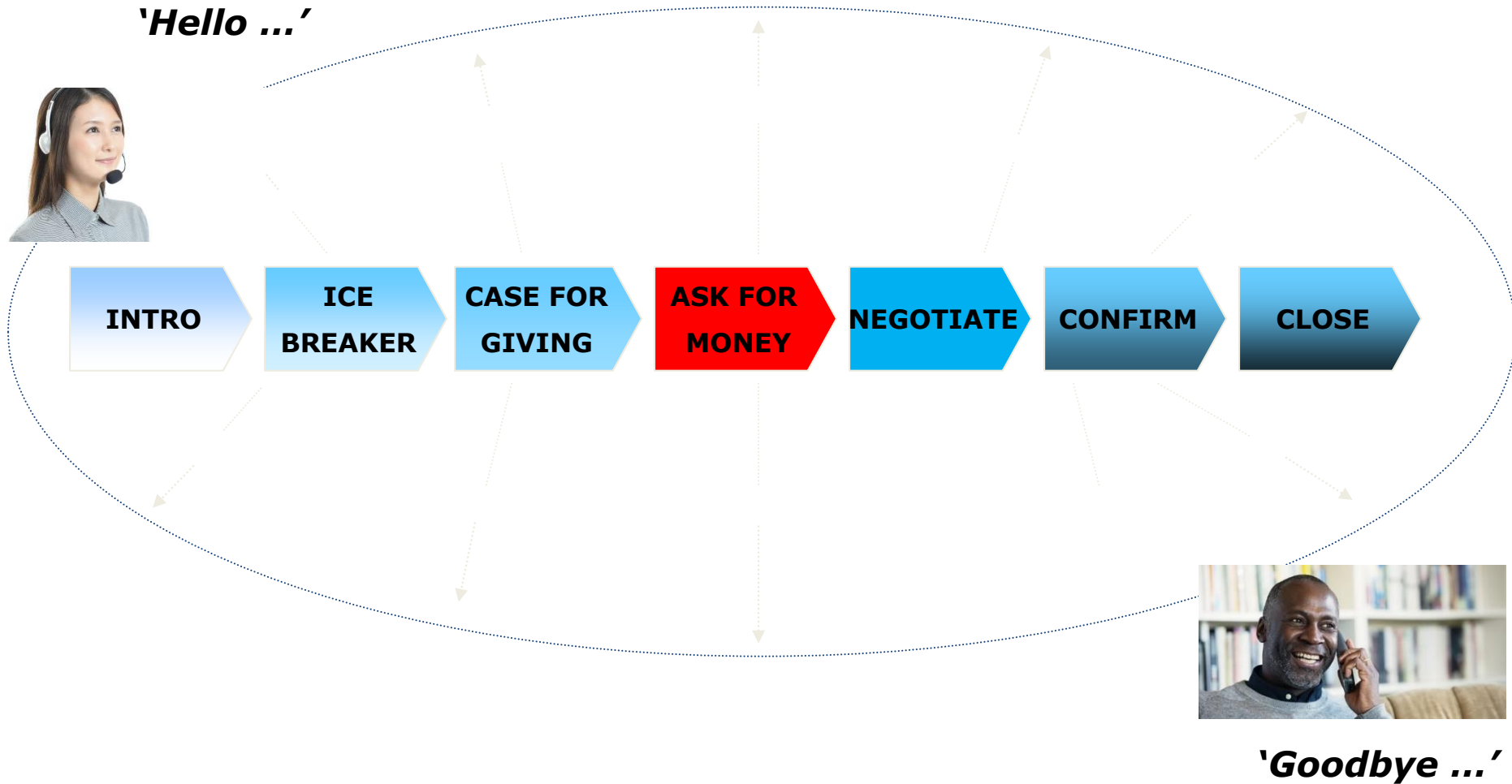
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- We also agree how we are going to manage the costs together to keep within budget & deliver the required campaign ROI
- We agree the costing structure (eg fixed cost per call, hourly charge, cost per upgrade etc) and create a plan together to manage to this

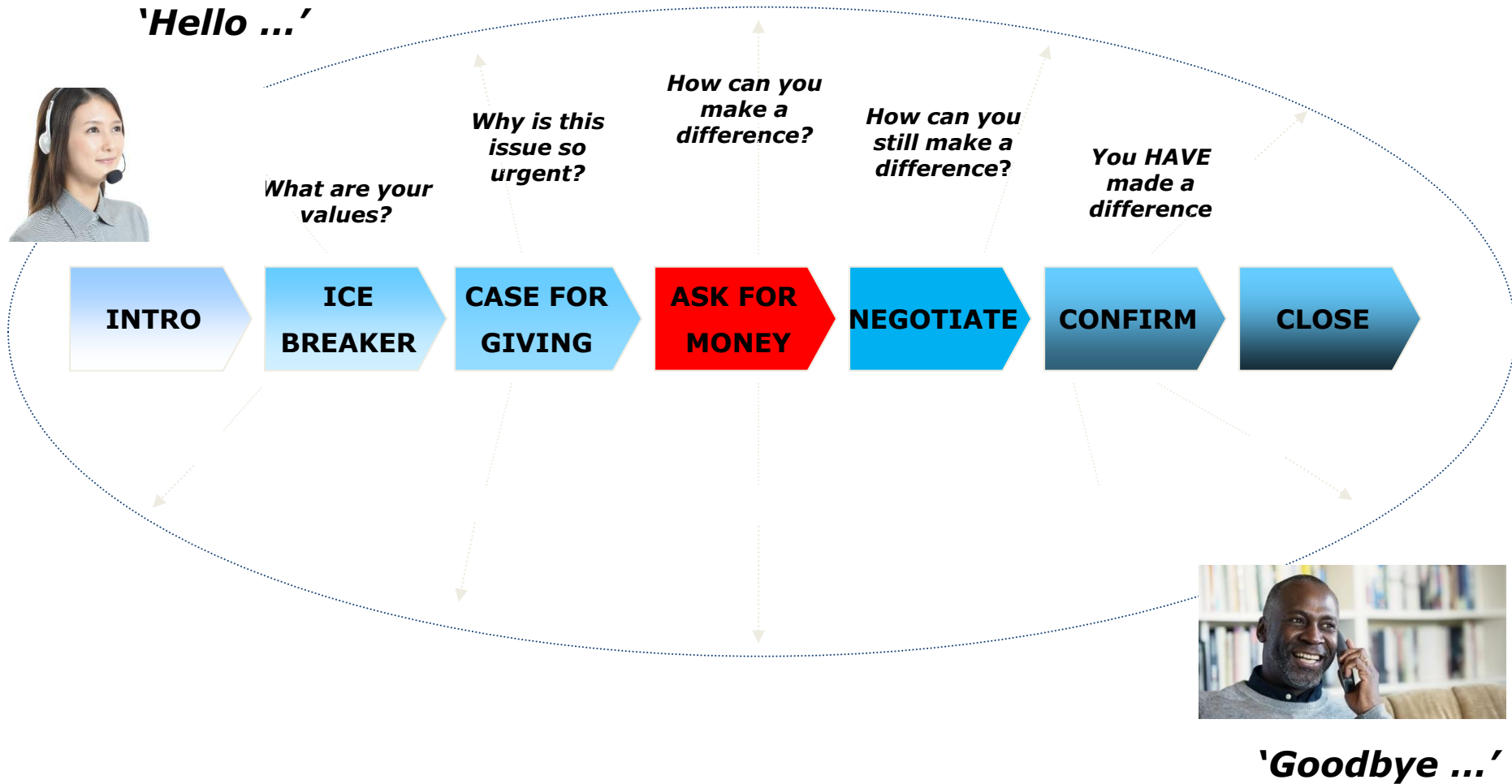
# **CREATIVE & SCRIPT PLANNING**

# Defining the CALLING SCRIPT STRUCTURE together...

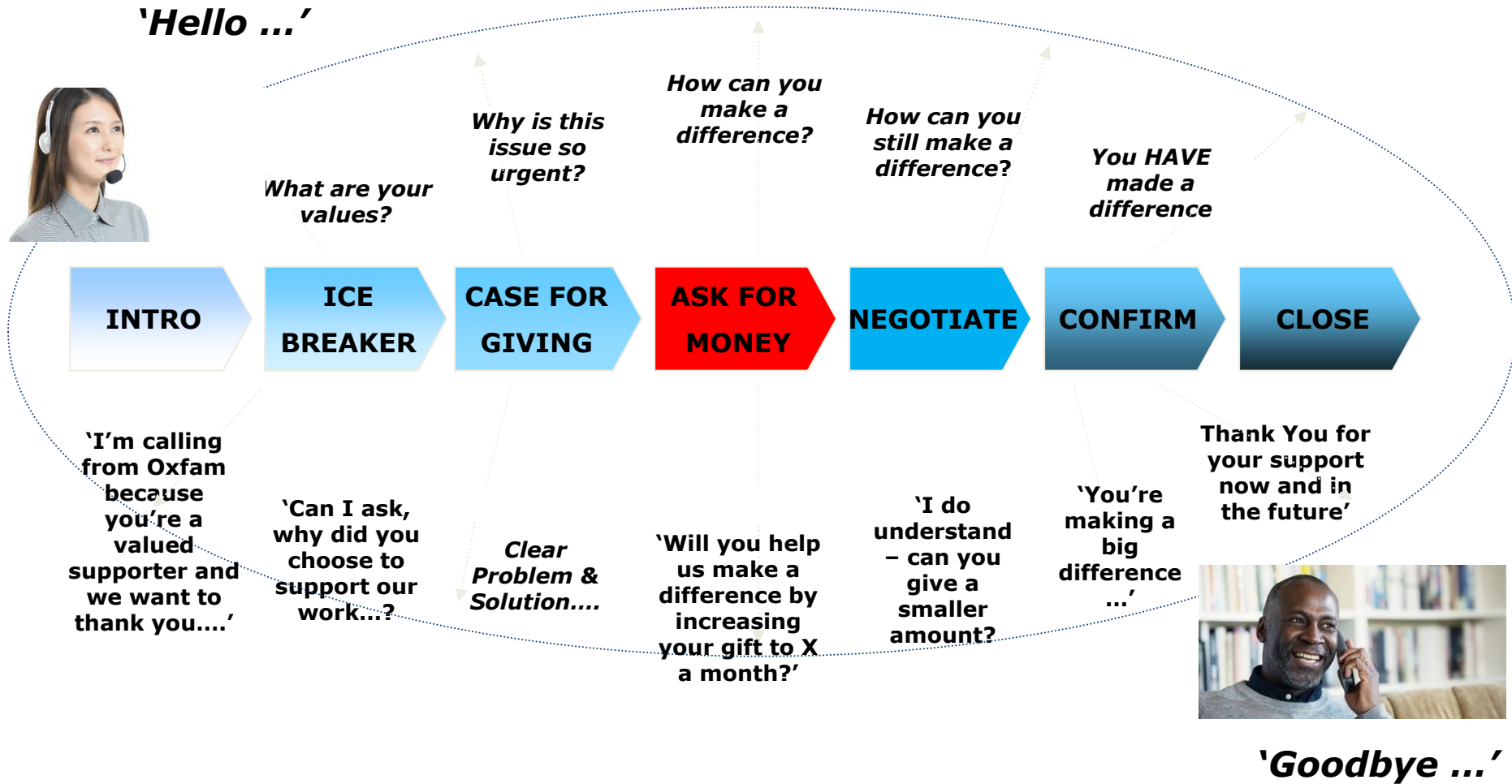




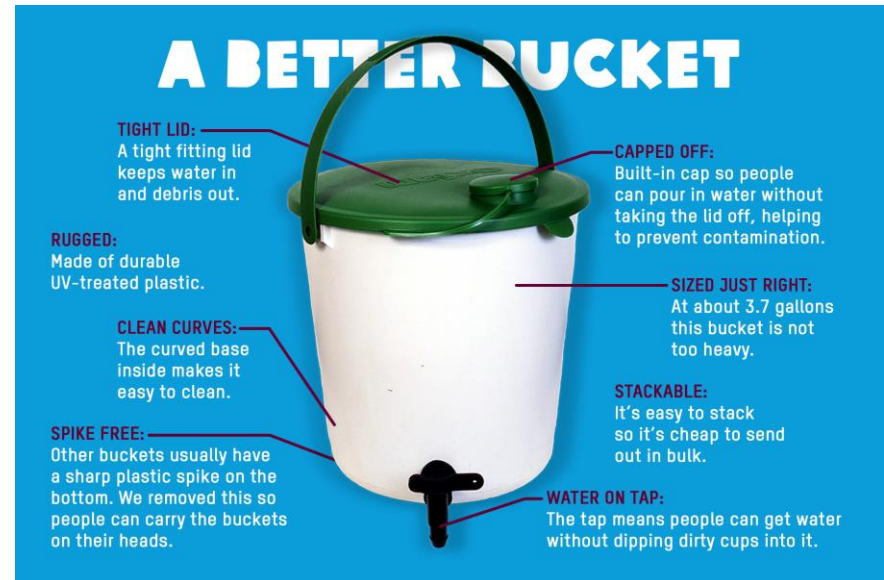
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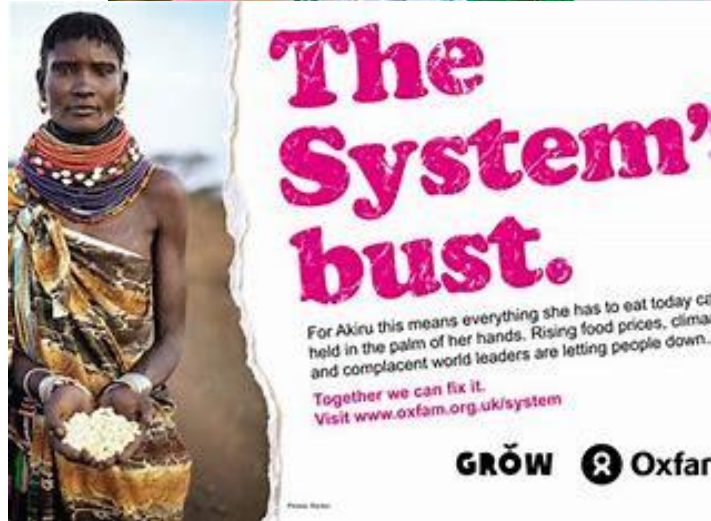
# Defining the CALLING SCRIPT STRUCTURE together...



## AGREEING THE Creative theme(s) TO TEST....



## AGREEING THE Creative theme(s) TO TEST....



# **BRIEFING AND TRAINING YOUR CALLERS**

# TRAINING CALLERS

What makes good fundraiser briefing sessions?

- Fundraiser interaction & activity
- Self realisation & insight
- Agency facilitators



*It's not all about content but also about involvement and atmosphere.*

*Training should be a process not an event.*



## CreatING engagement from your callers....



The best engagement programmes make your agency's fundraisers feel that they are fundraising on behalf of Oxfam's cause and not the agency.

Fundraiser engagement programmes drive passion, commitment and confidence in the calling team. These work best the more we are involved.

This maximises campaign performance and improves donor experience, driving loyalty and commitment.

# **CAMPAIGN PLANNING MEETINGs**



## Telefundraising CAMPAIGN PLANnING & set up cycle



## WHO NEEDS TO BE involved IN your planning meetings?

**Data selections & segmentation**

**KPI's & campaign income and ROI targets**

**Creative topic & scripting approach**

**Calling schedule & programme**

- Agency account manager
- Agency data manager
- Your CRM Manager?
- Your Head of Individual Giving?



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Agency account manager  
Your Head of Individual Giving?



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Agency account manager  
Agency creative manager

SCRIPTING



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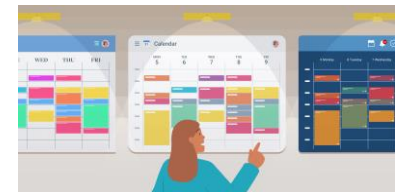
**Data selections & segmentation**

**KPI's & campaign income and ROI targets**

**Creative topic & scripting approach**

**Calling schedule & programme**

Agency account manager  
Agency scheduling manager



Campaign planning schedule

Action	Responsibility	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10
Campaign planning meeting	Agency/You										
Create & supply campaign set-up schedule	Agency										
Create & distribute campaign strategy brief	You										
Create & supply internal data selections brief	You										
Run data selection & provide counts	Database manager										
Create data segmentation	You										
Supply data to inhouse team/agency	Database manager										
Load data to calling platform	Agency										
Confirm data load	Agency										
Test data returns	Agency										
Confirm data returns load	You										
Create internal/external reports	You/Agency										
Create draft script	Agency										
Approve draft script	You										
Campaign management document created	Agency										
Caller briefing (s)	Agency/You										
Calling starts	All										
Review campaign (at end of calling)	Agency/You										

Creating a Campaign set-up schedule

Campaign planning schedule

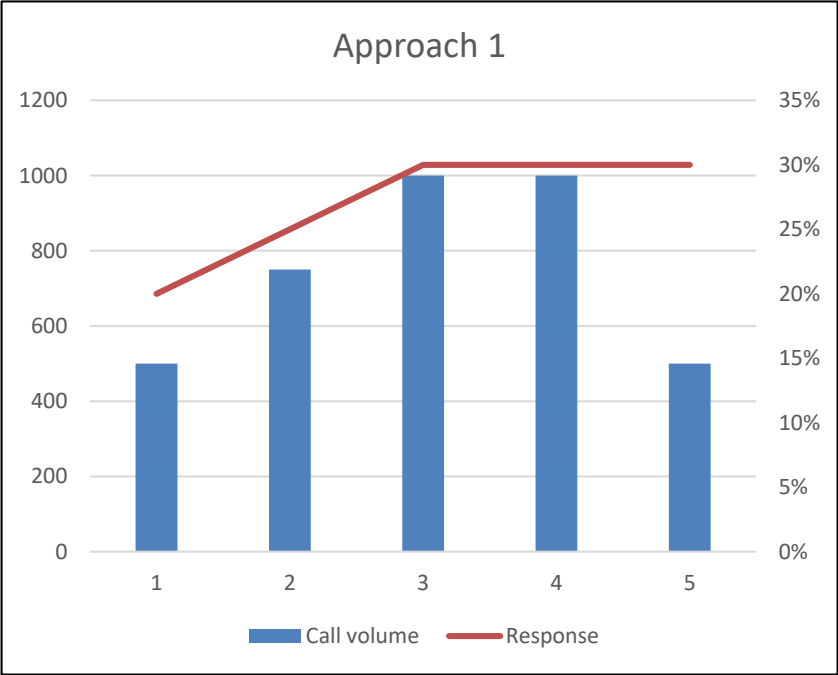
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Confirm data load	Agency										
Test data returns	Agency										
Confirm data returns load	You										
Create internal/external reports	You/Agency										
Create draft script	Agency										
Approve draft script	You										
Campaign management document created	Agency										
Caller briefing (s)	Agency/You										
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Review campaign (at end of calling)	Agency/You										

Creating a Campaign set-up schedule

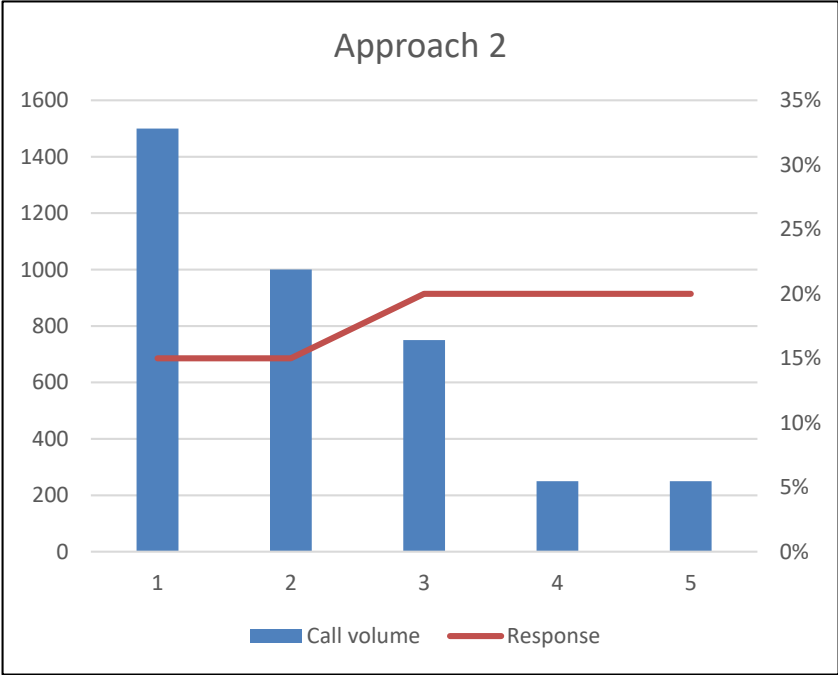
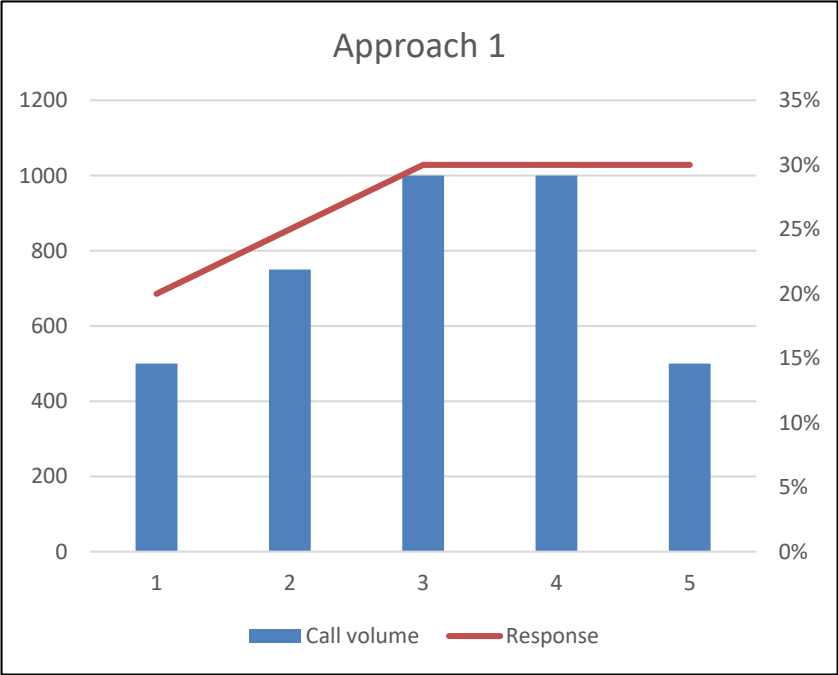
**PLANNING THE CAMPAIGN**  
**CALLING SCHEDULE together**



# Why is a calling schedule important?



# Why is a calling schedule important?



## Why use CALL SCHEDULE approach 1?

- More testing opportunities
- Greater control over performance
- Easier to manage contact rates
- Easier to manage caller performance
- Easier to identify best performing callers
- Maintains high contact rates

## USING shared TOOLS TO ASSESS CALLERS' SKILLS....

Scoring callers on things like their empathy, the interest they are showing, their tone of voice.....

Soft skills question	Criteria	Score
Is the caller making an effort to build rapport with the supporter through their icebreaker question?	<i>Asking open questions, using verbal nods, demonstrating interest through their responses</i>	0/1/2/3 Yes/No
Does the caller use a varied and natural tone when delivering their call guide?	<i>Emphasising appropriate words/sentences, steady pace</i>	0/1/2/3 Yes/No
Was the caller polite to the supporter at all times and did they thank them appropriately?	<i>Staying polite and positive even if the supporter may not be responding positively. Thanking them where relevant</i>	0/1/2/3 Yes/No
Did the caller make an effort to use their own words where relevant to ensure their scripted delivery remained natural?	<i>Using linking/bridging sentences when moving onto the next section of the call guide</i>	0/1/2/3 Yes/No

*Your score criteria can either be a sliding scale or a simple Yes/No*

A Process to continually develop callers.....

**Ongoing coaching and development is as important as the initial training sessions**

- Do you/your agency listen to, and feed back to individual callers on their calls?
- Do you/they have a scoring sheet to keep track of individual caller development?
- Do you/they allow callers to listen to their own calls? (Tip: it's the best way for them to identify their own strengths and weaknesses)



## LISTENING & REACTING TO CALLER FEEDBACK together ....

“Supporters are saying they can’t afford to give....!!”

“I don’t feel that the people I’m talking to are at all inspired by the script, they’re not engaging with the topic ”

“Almost nobody is increasing at the first amount I’m asking them for... ”

“A lot of people know why I’m calling and are stopping me early in the call by saying that they don’t want to increase their gift...”

“I’m finding that supporters are really wanting to know about the work we’re doing on climate justice..”

## AGREEING & working to A CAMPAIGN MANAGEMENT PLAN

Week	1	2	3	4	5
Scheduled calls	500	1000	1000	1000	500
Calling team size & make-up	5	10	10	10	5
Segment selection	Previous non-contacts	Non-contacts & refusers	All	All	All
Objectives	Test your script with this segment  Identify the best performing callers	Introduce other segments	Is your campaign hitting target?  Coaching support for underperforming callers	Continuing on target	Optimise contacts in the best performing cells  Keep best performing fundraisers
Engagement	Debrief with callers at end of first week Listening session	Second caller briefing? (Include an existing caller for feedback to new team)		Test new creative if results not on line	'Last push' motivational tactics
Analysis	Call approach/creative	Look at your segment performance against targets	Individual caller performance by segment	New initiatives to increase response/value/ROI	

A black and white photograph of a chalkboard. The words "Any Questions" are written in a white, cursive script. The word "Any" is on the top line, and "Questions" is on the bottom line. The chalkboard has a dark, textured background with some visible chalk marks and smudges.

Any  
Questions