ELEVEN STEPS TO PHONATHON SUCCESS

1. HIRE THE RIGHT PERSON
   1. Fight for a competitive salary
      1. Benchmark with peers
      2. Managed Call Center managers’ salary $40,000 + plus bonuses
   2. Advertise nationally
   3. Allow plenty of time
      1. Job description approval
      2. Salary approval
      3. Advertising
      4. Time for plan B
   4. Call center experience is good
   5. Right personality is great
      1. Confident and principled but fun loving
      2. Innovative
      3. Willing to learn
2. DIRECTOR KNOWS TOO
   1. Go to conferences
   2. Schedule regular time in call center
   3. Bring in consultant
   4. Your call center manager will leave and get sick – BE PREPARED
3. STUDENT SUPERVISORS
   1. One student supervisor for every 12 stations
   2. Set policies and expectations and stick to them
   3. Don’t assume they know what to do
   4. Have monthly full team meetings
4. HIRE, HIRE, HIRE
   1. Anticipate attrition
   2. Monthly hiring and training schedule
      1. Each week has a hiring activity
         1. Review resumes
         2. Interview
         3. HR paperwork
         4. Train
         5. Repeat
   3. Have potential hires visit call center before you officially hire them
5. TRAINING – fine tune as needed
   1. Listen first to calling
   2. Basics
   3. Policies and more training
   4. Listen
   5. Call with a mentor
6. SCRIPT
   1. Give them an outline
   2. Let them fill in their rapport questions
   3. Lifelines in their caller manual
   4. Organize the fact sheets
7. CALL MONTORING
   1. Invest in call monitoring software and hardware
   2. One student supervisor listening at all times
   3. Make sure every caller is coached at least once a week
   4. Keep callers on their toes that they are being listened to all the time
   5. Balance of coaching and taking too much time off phone
   6. Perfect your coaching forms
   7. Grades
   8. Make sure your student supervisors are giving solid constructive comments
   9. File forms
8. INCENTIVES
   1. Not an hourly job
   2. Tickets, stickers, and names up on a board
   3. Monthly stats meeting
   4. Top caller dinners and prizes
9. WHAT TO DO WHEN THE NUMBERS ARE BAD?
   1. Start digging in the data
   2. Focus group
   3. Spin the dial until it changes
10. SET STRATEGY WEEKLY
    1. Review all the reports
    2. A pencil is your best friend
11. STUDY FULFILLMENT
    1. Monthly review of caller fulfillment
    2. Appeal code for each follow-up
    3. Email or not to email
    4. Not all calling pools are the same
    5. No emails work!
    6. Quarterly personal email works!