Carnegie Mellon

Telemarketing Ambassadors

Student Supervisor Handbook

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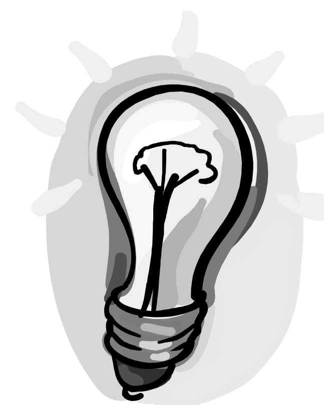
Section A

Student Supervisor Job Description

Duties:

1) Supervise nightly and/or weekend calling sessions to promote the achievement of performance goals.
2) Assist in 1st, 2nd, and ongoing training of callers to maintain adequate staffing to meet team goals.
3) Ensure that callers are trained and developed in accordance with departmental procedures and standards.
4) Evaluate caller performance and diagnose causes of variance from statistical requirements. Initiate corrective actions to maintain performance at agreed upon levels.
5) Monitor callers for the purpose of administering focus groups and providing callers with individual, constructive feedback.
6) Develop creative and innovative incentives/motivational plans to minimize caller turnover, maximize productivity, and maintain a positive environment. Produce a creative project within six weeks of each semester to enhance learning and motivation.
7) Perform four hours of caller recruiting within the first month of each semester.
8) Call one shift per month outside of scheduled supervising shifts, shifts with less than 15 callers, and additional shifts at the Telemarketing Supervisor's request.
9) Assist the Telemarketing Supervisor in preparing and completing the calling shift.
10) Maintain confidentiality of alumni records and operations of the telemarketing program and its staff.
11) Provide a positive example for student callers.



Qualifications:

- Minimum of 2 semesters of Telemarketing Ambassador experience.
- Demonstrated problem-solving abilities.
- Strong interpersonal and leadership skills.
- Ability to organize and prioritize work.
- Ability to manage and motivate student employees to achieve goals.
- Availability to work a minimum of 2 shifts.
- Demonstrated reliability and dependability.

Commitment:

The calling shifts will occur from 6:30pm to 9:30pm, Sundays through Thursdays, and additional shifts as announced each semester. Supervisors will be expected to arrive 30 minutes prior to the start of the shift to prepare for the calling session and will be expected to stay 30 minutes after the shift to complete nightly tasks and reports. Supervisors will be required to attend a bi-monthly staff meeting as outlined in the "Attendance Policies" section♣.

Position Overview:

Supervision of student callers is highly demanding. Working in a fast-paced environment requires a great deal of patience, self-motivation, interpersonal skills, and organizational ability. Maintaining the quality of this personalized telephone fundraising campaign is essential to reaching the Annual Fund program's fiscal year goals.

Compensation:

Pay for Student Supervisors starts at $10.00 per hour.

♣ Supervisors assisting with training will begin training shifts at 5pm and will be permitted to leave at 9pm.

Attendance Policies

Supervisors

Supervisors must report for their shifts promptly at 6 pm and will be required to stay until 10:05pm. In the time outside of the calling shift, Supervisors will be asked to perform certain duties within the calling room that are outlined in this handbook.

Supervisors must work a minimum of 2 shifts per week. The days are decided upon at the start of each month. Supervisors may work more than the required 2 shifts, but it must be as a caller. Supervisors are required to find a replacement for days that they are unable to work. A phone contact list for the current semester's Supervisors will be provided at the first shift.

Supervisors are required to attend a bi-monthly telemarketing staff meeting. The day will be decided upon at the start of each semester. Meetings will start promptly at 5pm and dinner will be provided.

Tardiness from Supervisors will not be tolerated—for both the start of the shift and returning from break. A positive example must be set for the callers. Supervisors will receive written warnings for tardiness—three warnings will result in dismissal.

Supervisors will not be required to work during Finals Week of any semester. Supervisors who choose to work during finals will be calling and will be eligible for any additional shift bonuses offered.

Supervisors are responsible for signing up for required recruiting duties, motivation projects, and calling shifts. A calendar will be provided at the start of each semester listing deadlines, due dates, and available time slots. Completion of these duties by the appropriate date will be strongly enforced. All scheduled times must be approved by the Telemarketing Director.

All Supervisors will be evaluated at the conclusion of each semester. At this evaluation, the Student Supervisor will be asked to re-apply for the position.

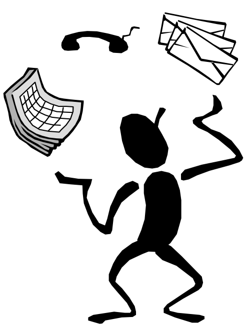
Student Supervisor Semester Requirements

- **Supervising 2 calling shifts per week**
- **First and Second Training of new callers, as needed**
- **Recruiting new callers**
- **Calling one or more shifts per month, as needed**
- **Motivation projects**
- **Preparing weekly focus topic for staff meetings via e-mail**

Supervising Shift Duties

Answering Questions
Supervisors will answer callers' questions based on information they have learned through training, staff meetings, briefings, and calling experience. Questions tend to center around responding to questions posed to callers from alumni and parents, combating refusal reasons, and recording data on pledge cards and contact summary sheets. Please refer any complex or controversial questions to the Telemarketing Supervisor.

Monitoring
In order to ensure that the callers are upholding our professional practices, they must be monitored. While the newest callers and callers that are having difficulty should be a priority, ALL callers must be monitored for quality assurance. For monitoring, Supervisors use the "monitoring log" to take notes on a caller's strengths and weaknesses (Form A). After listening to a caller, the supervisor is expected to speak with the student regarding his/her performance. The caller is required to sign the monitoring log. After speaking with the caller, the supervisor must continue to monitor the caller for improvement based on the feedback he/she received. Keep in mind that the monitoring log and the monitoring sheets contain information about a caller's performance—so they must be kept confidential. These materials should be placed in the storage cabinet when not in use.



While monitoring, if a caller is overheard saying something unprofessional or otherwise in conflict with our program's goals, Supervisors must intervene immediately before the caller repeats the mistake. Otherwise, listen to a few of the ambassador's calls in order to provide individual and/or group feedback in an information session.

Things to Listen for:

- Proper introductions to prospects
- Following the script, but not "reading" the script
- Laddering down the ask and dealing with objections
- Thank you/ask for charge/send back in a few weeks
- Appropriate conversation
- Correct information provided about Carnegie Mellon
- Controlling the call—avoiding weak language
- Using the right "ask amounts"
- Time between dials

☺

Monitoring is not only done using the monitoring phone—always listen to and assist the callers while working in the calling room!

Information Sessions

Information sessions are an efficient way to provide constructive feedback and receive feedback. The groups should consist of 3-4 callers and should last no longer than 10 minutes. Callers should be chosen to participate in these groups by a common topic that they could most benefit from learning more about. For example, callers that have difficulty developing a rapport with prospects may be chosen for an info session together.

There are a number of activities that can be done within a group session:

* Role-playing with the supervisor while other callers critique
* Role-playing between 2 callers while the Supervisor critiques
* Offering specific strategies and examples to correct common problems/difficulties
* Quizzing the callers based on their weaknesses
* Discussing/providing useful handouts

An alternative method for information sessions is choosing callers of different levels to participate in one group. For example, the group would consist of a weak caller, and average caller, and a strong caller. Choose the strong caller so that he or she can provide useful techniques and strategies for the specific weakness of the other callers. Provide the Telemarketing Director with a written report summarizing the session in order to track caller progress following the group (Form B). Possible topics for these information sessions are listed in the back of this handbook.

Motivation/Games

This is one of the most important aspects of the job. The Telemarketing Ambassador job can be repetitive for callers, especially if they are having a difficult shift. Motivation and games are used to increase the success of our program and the retention of quality callers. If students enjoy their job, they are more likely to work hard. The nights that we have games, Student Supervisors will be in charge of running them and the rules will be explained at the start of the shift. **Callers that are LATE for the shift or callers that are on their first shift will not be allowed to participate.** Whether or not we play a game, motivation techniques must be employed at all times.

Here are a few motivational techniques:

- Learn the names of all callers
- Get to know caller strengths and weaknesses—to recognize consistency & improvement
- Spend time each shift with speaking each of the callers individually
- Announce callers' names for charges/upgrades/new donors/high level pledges.
- LISTEN—Keep an ear open while walking around – sometimes callers make a good call but still get a refusal – we need to recognize the good call.
- Monitor the callers' progress toward the nightly goal-announce the standings frequently
- Encourage the competitive spirit during games so that callers challenge each other
- Check tally sheets throughout the shift and give the callers strategies and advice for refusals they've received.
- Be POSITIVE and ENERGETIC!!!

Remember…

The Telemarketing Ambassador program offers bonuses and prizes as incentives for callers to <u>rise above expectations</u>. The <u>best</u> callers are driven by a desire to do a good job—not just

Handling Deceased Prospects

A "Deceased" call is an unfortunate occurrence, but must be handled by Student Supervisors or the Telemarketing Supervisor. Callers do not handle this issue for a number of reasons:

1) Out of respect for the deceased's family, a supervisor takes the time to confirm the information.
2) The graduate's name is printed in *Carnegie Mellon Magazine*—and it is a liability if false information is printed (i.e., the grad did not really pass away).
3) The graduate's record must be updated so that the family does not continue to receive mailings and phone calls from Carnegie Mellon. Always confirm the graduate's name, college, year of graduation, and date of death, if possible—but have the student sign the lead. Please mark **your initials** next to the "Deceased" code.

Checking Tally Sheets

As callers are leaving for the night, Student Supervisors may be asked to help the Telemarketing Supervisor check the callers' tally sheets. The most important things to look for are the caller's name and ID number, the date, the totals in every column, and that the total hours worked is marked at the top of the sheet. The Student Supervisor must initial all tally sheets that s/he checks.

There are a couple main difficulties that callers have with tally sheets:

- Calculating contacts & pledge rate
- Remembering to put the TOTAL hours worked on the top of the sheet

Nightly Tasks

At the start of each semester, Student Supervisors will be given a calendar of duties for the term. It will outline what each supervisor is to do each shift that s/he works. If a supervisor is filling in for another, s/he will fulfill the duties of that supervisor. Before and after each calling shift, Student Supervisors will be expected to perform basic tasks to prepare for and complete the shift. There will be a nightly task sheet posted in the Telemarketing Supervisor's office. When a supervisor completes a task, s/he will initial the box (Form E).

Other tasks will be added as they arise, but the following are the basic tasks:

Before the shift:

- Take out caller name cards
- Put out tally sheets
- Assist with distribution of leads and briefing materials
- Put flyers/notices in caller mail folders
- Get snacks ready
- Set up any games for the calling shift

After the shift:

- Clean cubicles/ verify that callers have cleaned their cubicles
- Put snacks away
- Update totals on bulletin board
- Check supplies (pens, white out, paperclips, rubber bands, training materials, correction sheets, etc.)

- Tally totals on caller pledge sheets for the night

First Training Duties

An outline for First Training is provided at the back of this handbook.

Start of Shift
The Student Supervisor must distribute nametags to facilitate interaction among new callers and Student Supervisors. Distribute paper and pens to encourage new callers to take notes.

Binder
The Caller Training Manual is continuously revised and updated. Involve the students by having them take turns reading parts of the manual aloud. Spend the most amount of time discussing the different populations that we call, the anatomy of a call, and overcoming objections. Ask the callers questions about the sections just discussed. Ask the callers to practice filling out pledge cards and tally sheets. This will keep the information fresh in their minds.

Discuss Script Re-writes
Tell the callers their assignment for Second Training is to rewrite the script in their own words using the packet. Distribute the script-rewriting packet and make sure to tell the callers to have their scripts ready for Second Training, or they will be sent home. Encourage them to make the script sound natural and conversational.

Quiz
The quizzes will be done individually. Do not let the new callers use the manuals. The Telemarketing Supervisor will be correcting the quizzes and meeting with the callers during their Second Training to discuss their performance.

Sign-up for Second Training
The callers in First Training will be given a special sign up sheet for Second Training. They will only have two options to choose from[♦]. If a caller cannot work either of the two days, s/he must speak with the Telemarketing Director.

Mail Folders
Give the callers name labels and show them their folders in which they are to keep their manuals. They are not allowed to keep the resource binders, but able are to keep their training manuals and handouts.

Update Caller Database & Caller-in-Training Track
The Student Supervisor performing First training will update the caller database in the computer at the end of the night. The database is in an Excel spreadsheet that allows us to keep track of all our past and present callers. The Caller-in-Training Track allows us to monitor when callers are doing their training and first shifts. It also helps us to schedule their evaluation. Please see the Telemarketing Supervisor to access the spreadsheets.

[♦] These will be the next two scheduled Second Training sessions.

Second Training Duties

An outline for Second Training is provided at the back of this handbook.

Collect and Correct Re-written Scripts

During briefing, the Student Supervisor will read through the re-written scripts of those callers in Second Training and make corrections. The script must be professional, yet conversational and needs to flow smoothly from one section to another.

Review the Anatomy of a Call

Student Supervisors should review the different parts of the call, how to segue between the parts, and how to overcome the most common objections in order to refresh the callers' memories from First Training.

Role Play

Callers can be separated into pairs to practice their scripts or can role-play with the Student Supervisor. Before offering any feedback, ask the other callers-in-training what the strengths and weaknesses of the call were. The callers may also be given specific role-playing situations to act out (e.g. prospect is retired/paying off school loans/children are in college).

How to Fill Out the Pledge Card

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How to fill in the Tally Sheet

Have callers practice filling out the tally sheets completely:

- Name/ID Number/Date/Hours Worked
- All the Totals areas on the tally sheet
- Record Attempts/Pledges/Refusals/Already Gave
- Record Payment Methods
- Calculate Contacts, Pledge Rate, Calls per Hour

Card Filing

Ask the callers to practice filing leads in the appropriate bins. Incorporate a quick review game with lead filing. Fore example, give the callers different situations ad have them fill out pledge cards, tally sheets, then file the leads. The person who gets the answer right gets a point or a prize (candy, etc.) Also give a prize to the person with the most points at the end. Make sure to go over the lead filing guide.

Discuss the Resource Binders

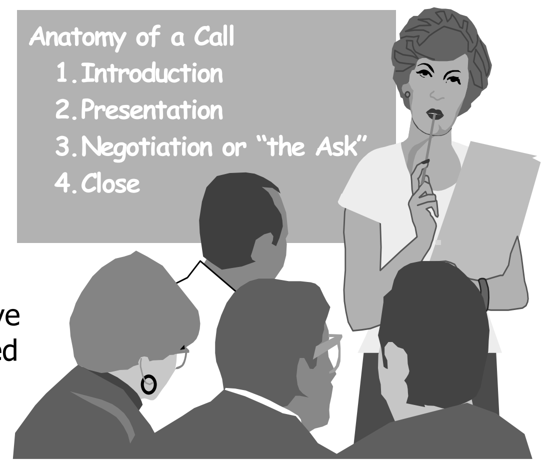
Show the callers the Resource Binders that are available at each cubicle. Tell them these are resources they may use to answer questions from prospects. The most important sections to point out are the phone numbers of the different departments.

Monitoring/Listening to Phone Calls

Callers in Second Training should listen to the stronger callers on the phone. This is more time efficient than just listening as the Student Supervisor makes phone calls. The Student Supervisor doing Second Training needs to pay close attention in order to rotate the monitoring phone as callers get contacts. Before the callers get on the phone to make practice calls, ask them if they have any questions about anything they heard while listening to the other callers.

Make Practice Calls

Second Trainers must make at least 3-5 practice calls before the end of training. This helps new callers get used to getting on the phone and (hopefully) practicing their scripts. This is also a good time to show the callers how to develop a system of calling and filing to increase their efficiency and contact time. Another activity that can be done is calling the Telemarketing Supervisor on her office phone. This gives the Telemarketing Supervisor a better idea of the level of comfort the student has on the phone—more so than monitoring those few initial calls.



Role Playing Quiz

After the callers finish making practice calls, they will receive a quiz based on an imaginary call. This test will be collected and corrected by the Telemarketing Supervisor, and it will be discussed with the callers on their first calling shifts.

Re-grouping Session

After Second Trainers have finished their practice calls, re-group. This is the chance that callers have to ask any questions and clarify any confusing situations that came up during calling.

✓ Providing Feedback ✓

The Telemarketing Supervisor chooses Student Supervisors because of their hard work and leadership abilities. Student Supervisors should have complete confidence in their ability to offer feedback to callers. All feedback given to callers must be constructive—that is, it includes strategies for improvement. When initially approaching callers, it is important to first tell them what they are doing well, then talk about what they need work on. Also, all feedback sessions should end with a positive comment of encouragement. In order to monitor the effectiveness of the feedback offered, the Student Supervisor must continue to work with eh caller throughout the shift watching for improvement. Informal feedback sessions at the callers' cubicles are strongly suggested in addition to the more formal "Information Sessions."

Occasionally, the Student Supervisor may come across a student caller that is not very receptive to feedback. If any caller reacts negatively to being spoken to, handle the situation with professionalism—never argue. Provide factual statements regarding the caller's performance and report the situation immediately to the Telemarketing Supervisor.

Additional Duties

Recruiting

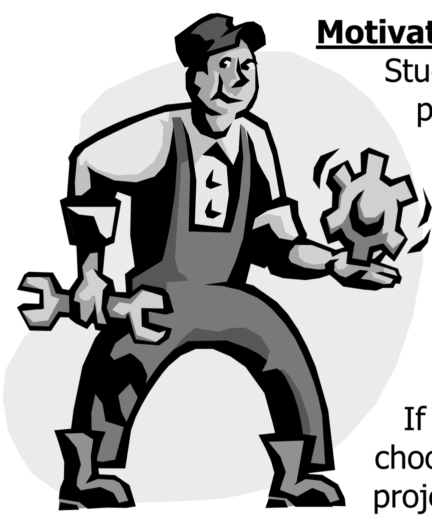
Student Supervisors must perform a minimum of four hours of paid recruiting with in the first month of each semester. Recruiting duties may include:

- Posting Telemarketing Ambassador flyers
- Monitoring recruitment tables in the University Center
- Putting Table Tents on the UC tables and handing out flyers
- Restocking recruiting cards around campus
- Making reminder calls for First Training

Supervisors will be given a calendar on which to sign up at the start of each semester.

Calling

Student Supervisors are responsible for signing up for one calling shift per month. Supervisors will also be asked to call when there is low attendance (less than 14 callers) for a shift, as well as at the Telemarketing Supervisor's discretion. Calling fives Supervisors a greater understanding for what the callers may be experiencing. This also keeps calling skills strong—and student callers gain greater respect for the Student Supervisor position.



Motivation Project

Student Supervisors must complete one motivation project per semester. The purpose of these projects is to MOTIVATE and EDUCATE the callers. The due date will be announced at the start of each semester. There are a number of formats that may be used:

- Games
- Posters
- Handouts
- Etc.

If necessary, the Telemarketing Supervisor will assist with choosing topics, but will not assist with the completion of projects.

Discussion Topic

Student Supervisors will be emailed a question or topic approximately one week before the next Staff meeting. Supervisors must email their answers and thoughts by NOON the day of the Staff Meeting to allow the Telemarketing Director to prepare any meeting materials. Feedback from the Student Supervisors and Mentors is essential for improving and expanding the phone program.

Outline for First Training

(Starts at 5:00pm)

A. Introduction (10 minutes)
- Trainer introduces self and role within the program
- Ask students to introduce themselves
- Have students read introduction letter from the Director of the Annual Giving Program

B. Describe University Advancement, Annual Giving, Telemarketing Ambassadors, and the relationship between them (5 minutes).

C. Discuss fiscal year, why we raise money, where the money goes (10-15 mins)
- Unrestricted vs. Restricted Gifts
- The Annual Fund, Parents Fund, Discretionary Funds, UEF, GEF & GSF

D. Populations we call (15-20 minutes)
- Graduates—alumna, alumnus, alumni, alumnae
- Recognition Levels—Highlanders, Pipers Honors, Cameron Clan, ACS
- Lapsed, Lybunt, Sybunt, Never
- Parents, Recent Grads, Undergraduate, Graduate, Heinz, GSIA
- Pledge & Contact Expectations of each group
- Different approaches taken with each group by donor type, college experience, and age
- How to increase contacts within a population

E. Typical Calling Shift (10 minutes)
- Expectations are based on previous results and the population called
- Structure of a shift
- Monitoring and Group Information Sessions

F. Policies and Procedures (15 minutes)
- Absence Policy
- Tardiness
- Confidentiality
- Performance Standards and Reviews
- Warnings/Grounds for Dismissal
- Contract (callers will receive a signed copy to keep in their folders)

10-MINUTE BREAK

Outline for Second Training

(Start 6:30pm-After briefing)

A. Introductions and Collect Script Rewrites

B. Review "The Anatomy of a Call" (10 minutes)

- 4 parts of the call—Introduction, Presentation, Ask, Close
- How to transition between sections of the call
- Overcoming "not Interested"/"Can't Afford" Objections

C. Role Playing, Practicing the Script (45 minutes)

- Role Playing—Callers make a practice call with Supervisor and/or using re-written script and the other callers provide feedback
- Using strong language to convey confidence
- How to go to the next level—Reviewing reasons for charges, high level pledges, and upgrades
- Knowing Carnegie Mellon facts—mention effective conversation points
- Review responses to more specific refusal reasons for the Lapsed population (the group they'll be starting with)
- Phone etiquette

10-MINUTE BREAK

D. Filling out the Pledge Card and Tally Sheet (30 minutes)

- Documenting and recording pledges (including charges & restricted gifts), refusals, already gaves, can't reaches, and unspecifieds
- Appropriate comments for "Additional Information" and "Call Back On"
- Review how to handle a "Deceased"
- Completing all areas of the Tally Sheet for the end of the night, contacts, pledge rate

E. Review Game (15 minutes)

F. Listen to callers in the calling room and make practice calls (30-60 minutes)

F. Test (10 minutes)

- Collected and will be returned on first shift with comments from the Telemarketing Director

Don’t forget to have the callers schedule themselves for calling shifts!

Form A

Phone Monitoring Records

Caller: ____________________________ Date: ___/___/______

Strengths	Weaknesses

Comments/Suggestions: ____

____

After speaking with the caller, fill out the following section.

Did the caller improve after hearing feedback? Y N Explain: ____________________________

Supervisor/Mentor: ______________________ Caller Signature: ___________________________

Form A

Phone Monitoring Records

Caller: ____________________________ Date: ___/___/______

Strengths	Weaknesses

Comments/Suggestions: ____

____

After speaking with the caller, fill out the following section.

Did the caller improve after hearing feedback? Y N Explain: ____________________________

Supervisor/Mentor: ______________________ Caller Signature: ___________________________

Form B

Information Session Report

Supervisor/Mentor: ____________________________ **Date:** ____/____/______

Participating Callers:

______________________________________ ______________________________________

______________________________________ ______________________________________

Topic of Discussion: ____

Focus Group Activities:

____

____

____

Caller Concerns/Comments:

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____

____

Briefly give an overview of the focus group (participation, strategies, anticipated difficulties, caller potential, suggestions, etc.).

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____

____

Supervisor/Mentor: _______________________________________

Telemarketing Director: __________________________________

Form E

Student Supervisor/Mentor Task Sheet

Supervisor/Mentor: ______________________________ **Date:** __ /__ /______

Write your initials in the box when the task is completed.

Before the shift:

1) Take out Name Cards ☐
2) Put out Tally Sheets ☐
3) Assist with Distributing Leads ☐
4) Put Flyers/Notices in Mail Folders ☐
5) Prepare Snack set-up ☐
6) Prepare for Game(s) ☐
7) ____ ☐
8) ____ ☐

After the Shift:

1) Clean Cubicles ☐
2) Put away Snacks ☐
3) Tally up Tally sheets ☐
4) Update info on Bulletin Board ☐
5) Check supplies (Cups, Pens, Training Materials, etc.) ☐
6) ____ ☐
7) ____ ☐

Supplies Needed:

____

____

____

Form F

Telemarketing Ambassadors
Shadowing Form

Name of Caller: ____________________________ **Date:** ____/____/_____

Was the caller prepared for the shift (i.e. had script, new caller folder)?	Y	N
Did the caller participate in Q & A sessions?	Y	N
Did the caller ask the same questions repeatedly?	Y	N
Did the caller respond well to constructive feedback (i.e. use it in future calls)?	Y	N
Did the caller demonstrate a positive attitude?	Y	N

Based on monitored calls, discuss this caller's **strengths**:

____

____

____

Based on monitored calls, discuss this caller's **weaknesses**:

____

____

____

Discuss any possible difficulties you anticipate with this caller:

____

____

____

On a scale of 1-10 (1=weak, 10=strong), please rate the caller's potential as a fundraiser:

Comments:____

____

____

Student Supervisor/Mentor:____

Telemarketing Director:____

Information Sessions—Topic Suggestions

<u>Starting a Conversation</u>
Hints: Current events at Carnegie Mellon, callers' college experiences, open-ended questions

<u>How to Individualize and Personalize a Call</u>
Hints: Using prospect's major, where prospect lives, prospects' job, prospect's campus experience to start conversation and listening to clues in the prospect's responses

<u>How to Segue</u>
Hints: Transitioning form the conversation to the ask using transitional phrases, acknowledging the end of the discussion, and redirecting the call

<u>Laddering Down with Confidence</u>
Hints: Personalize and expand giving reasons, using strong language, persistence

<u>Controlling the Call</u>
Hints: Weak language to avoid, words that convey confidence, responding with facts—not arguing

<u>Overcoming Objections</u>
Hints: Not interested/cant' afford, controversial refusal reasons, reasons specific to populations, responding to an initial no.

<u>Securing Charges</u>
Hints: Offer with confidence, stress ease, immediate benefit, expectations

<u>High-level Pledges & Upgrades</u>
Hints: Detailed and compelling giving reasons, increase in tuition, keep pace with technology

<u>Participation</u>
Hints: Why it is so important, alumni and parent participation rates, grants, rankings, preventing unspecifieds

<u>Assessing Performance:</u>
Hints: What are the callers' strengths (personal opinion), what are the callers' weaknesses (personal opinion), what are some strategies to address weaknesses, what motivates the caller, what type of feedback does the caller prefer