Fifteen Ways to Get the Most Value from Your Warm Transfer Operation

BY ANDREW D. CARR

My partner Jeff Feuer and I have been operating warm transfer businesses for a combined 54 years. We are happy to share this list of 15 nuggets from our collective wisdom and experience. If you are managing a call center operation to prequalify incoming sales leads, before warm transferring them to your sales team, these tips are for you.

1. **Make sure the staff making your dials is stable and focused.** If the warm transfer agents come and go, or only work a few hours or from home, you will simply be unable to maintain quality or consistency.

2. **Dial the prospect <u>less than a minute</u> from when the Internet lead was submitted.** Any longer, and you'll lose!

3. **Match your agents to the receiving sales team's profile.** You want your warm transfer agents to sound like they might be from the business unit they are calling for. For example, if it is a US firm, your agents <u>must</u> have a neutral accent. Many Americans will simply hang up on a foreign accent.

4. **Create in advance a simple but compelling reason for the transfer.** You want a reason that will dictate the need for the transfer, and an explanation for why the transferring agents can't just take care of it themselves. A good solution would be calling to correct their account, where only the transfer-to agent has access to the system needed to finish that task.

5. **Don't reward warm transfer agents based on transfers.** This is a recipe for disaster. They will inevitably send over questionable transfers to make a buck, and your relationship of trust with the receiving sales team will be imperiled.

6. **Measure your warm transfer agents on quality.** For example, you might measure agents on such factors as adherence to the script, and how they sound as they speak it. That way you will actually reward agents when they back off a questionable situation.

7. **Experiment with different ANIs (Automatic Number Identification),** if your technology permits it. If your prospects want you to call them, then be explicit, using a text string in the ANI message. On the other hand, if your prospects are not particularly inclined to take your call, use a nondescript number local to the prospect in your ANI.

8. **Never use Answering Machine Detection.** You may be tempted, in light of the high percentage of answering machines that show up in any outbound campaign. But even the best detection systems will inadvertently hang up on a percentage of real people, and this is not only lost business, it's always at a level far in excess of the regulatory limit.

9. **Simplify how prospect profile information can be retrieved by receiving agents.** Consider from scratch how the agents receiving the transfers should look up any additional prospect information, if you have some. Options range from a screen pop based on the ANI visible in the receiving telephony system, to verbally passing on an ID number or prospect phone number, to repeating the prospect's name. The most effective technique involves a number of some kind, which avoids the frustration of trying to spell names.

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10 **Track the percentages of bad leads by source.** It is easy these days for dishonest people to create realistic-seeming Internet leads. Unfortunately, the only way to minimize the damage is to track lead performance by source, over time. The good news is that a properly configured warm transfer operation will quickly surface problems—like wrong numbers—and help you identify bad apples faster than a regular call center.

11 **Focus on data security.** If data is entering or leaving your building, make sure everything about it is secure and encrypted. Store only those data elements you need, and get them off your servers once you no longer actively need them.

12 **Choose technical features carefully.** Fancy report interfaces are nice, but they often serve to divert attention from the real meat of your warm transfer operation. What's most important is that you collect and analyze your day-to-day calling operations data regularly. This will help you identify problems and tease out useful insights. Don't throw anything out—you're sure to want it later.

13 **Remove obstacles from the transfer process.** Examine every aspect of the interface between your agents and the receiving sales team, and look for ways to make the transfer as fast and smooth as it can be. Where to look first? The IVR at the receiving call center. Remove as much of the language and options as you can. Everything you do to make the transferring process smooth and short increases your sell-through rate.

14 **Ensure your agents have a career path.** This is always important, but for entry-level employees with a high-volume, scripted job like this one, it is especially critical.

15 **Consider outsourcing your warm transfer activity.** To be good at warm transfers, you have to have scale. Even with almost no lead volume, you'll need to schedule about four agents to be able to guarantee a prompt response. People have breaks and lunches, and are sick. Plus, you have to be ready to take several calls at the same time. If four agents makes your program too expensive, you'll need to investigate a solution where those agents are shared with other, real-time, functions—which reduces their effectiveness on the phone. And worse, if you are part of a large firm, very likely your telephony department will be fiddling with the IVR and not keeping you in the loop. (We know. One of our clients made a half dozen unannounced revisions in the first month we worked for them!) Everything you do—your scripting, your staff—must be flexible enough to handle these unexpected variations, or you will lose sales. Outsourcing takes these headaches away.

If you are ready to talk to the warm transfer professionals—if only to test them against your in-house operation—call Jeff Feuer now, at (888) 399-0826. We can take your warm transfer program to the next level, in terms of speed, accuracy, and sales conversion rates, and save you money at the same time.