

AGENT ELIGIBILITY & INFRASTRUCTURE CHECKLIST

Outbound Sales Campaign – WhatsApp Automation Client

Managed by Business Drive Corporation

1. Purpose of This Document

This document defines the **mandatory eligibility standards for agents** and the **minimum infrastructure requirements** that call center partners must meet to participate in the Outbound Sales Campaign for the WhatsApp Automation Client.

The objective of this document is to:

- Ensure high-quality customer interactions
- Maintain brand and compliance standards
- Enable smooth CRM, call recording, and QA processes
- Reduce operational and data-security risks

Only call centers that **fully comply** with this checklist will be approved for campaign go-live.

2. Agent Eligibility Requirements

Each agent deployed on this campaign must meet **all** of the criteria listed below.

2.1 Professional Experience & Background

Agents must have:

- **Minimum 1–2 years of outbound sales or B2B telesales experience**
- Prior exposure to SaaS, digital tools, CRM systems, or marketing products (preferred)

- Experience handling decision-makers such as business owners, managers, or marketing heads

Why this matters:

This campaign targets **business decision-makers**, not end consumers. Agents must be comfortable holding professional, consultative conversations rather than scripted telemarketing calls.

2.2 Communication & Language Proficiency

Agents must demonstrate:

- Clear and neutral spoken English
- Working proficiency in Hindi
- Ability to adapt language and tone based on prospect profile
- Confidence while speaking with senior stakeholders

Optional but Advantageous:

- Regional language proficiency (Tamil, Telugu, Kannada, Marathi, Gujarati, etc.)

Why this matters:

Poor communication reduces trust and demo conversion rates and can negatively impact brand perception.

2.3 Sales Skills & Behavioral Competencies

Agents must possess:

- Strong listening and probing skills
- Logical qualification ability (budget, need, authority)
- Calm and respectful objection handling
- Ethical selling mindset (no pressure tactics)

Agents must **not**:

- Rush to book demos
 - Misrepresent features or pricing
 - Use aggressive or misleading sales techniques
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2.4 Product & Campaign Readiness

Before going live, each agent must:

- Complete product knowledge training
- Understand platform features and use cases
- Know the approved pitch flow
- Pass mock call evaluations

Why this matters:

Untrained agents create poor-quality leads and increase demo no-show rates.

2.5 Technical & CRM Proficiency

Agents must be comfortable with:

- CRM systems (HubSpot / Google Sheets / custom CRM)
- Accurate and real-time data entry
- Status tagging and remark writing
- Switching between dialer and CRM during live calls

Agents who consistently fail CRM compliance **may be removed** from the campaign.

3. Agent Conduct & Professional Standards

All agents must follow these conduct guidelines:

- Maintain professional tone and courtesy at all times
- Follow approved scripts and positioning
- Respect customer time and consent
- Avoid personal opinions or unapproved claims
- Never share personal phone numbers or emails

Agents are **brand representatives** and must act accordingly.

4. Infrastructure Requirements (Mandatory)

Call center partners must maintain **enterprise-grade infrastructure** as described below.

4.1 Workspace Environment

The call center must provide:

- Noise-free calling environment
- Dedicated calling floor or cabins
- Controlled access to calling area
- Supervisor visibility and monitoring

Why this matters:

Background noise and distractions directly affect call quality and customer trust.

4.2 Internet & Power Backup

Requirement	Minimum Standard
Internet Speed	100 Mbps or higher
Network Stability	Dedicated broadband line
Power Backup	UPS / inverter / generator
Downtime Protocol	Automatic failover or quick recovery

Unplanned downtime leading to missed demos or CRM loss is **not acceptable**.

4.3 Calling Equipment

Mandatory equipment includes:

- Noise-cancelling headsets (wired preferred)
- VoIP or approved GSM dialer
- Clear microphone quality
- No speakerphone usage

Agents must not use:

- ❌ Mobile phones for calling
- ❌ Personal devices
- ❌ Unapproved softphones

4.4 Dialer & Call Recording Setup

The call center must have:

- Predictive or progressive dialer
- Call disposition and tagging capability
- 100% call recording
- Cloud or secure server storage

Recording Retention: Minimum 90 days

Access: Supervisor and Business Drive (on request)

5. CRM & Data Access Infrastructure

Call centers must ensure:

- Secure CRM login for each agent
- Role-based access control
- No shared credentials
- No local data storage or screenshots

CRM access is strictly for **campaign use only**.

6. Security & Compliance Infrastructure

Mandatory security standards:

- SSL-enabled systems
- VPN access (if required)
- System lockouts after inactivity
- Antivirus and firewall protection

Call centers must be prepared for **compliance audits**.

7. Supervisor & QA Infrastructure

Each call center must assign:

- Dedicated floor supervisor
- QA personnel or trained team lead
- Daily monitoring responsibility

Supervisor responsibilities include:

- Live call monitoring
 - QA sampling and scoring
 - Agent coaching
 - Escalation handling
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8. Validation & Audit Process

Before approval:

- Agent profiles will be reviewed
- Infrastructure may be audited
- Test calls may be conducted
- CRM access will be verified

Business Drive reserves the right to:

- Reject agents or centers
 - Pause campaigns for non-compliance
 - Request corrective action
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9. Ongoing Compliance Requirements

Even after go-live:

- Agent replacement must be approved
- Infrastructure changes must be informed
- QA standards must be maintained
- Re-training may be mandated

Failure to comply may result in:

- Volume reduction
 - Commercial impact
 - Campaign termination
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10. Acknowledgement & Confirmation

By participating in this campaign, the call center confirms:

- All listed requirements are met
 - Information shared is accurate
 - Continuous compliance will be maintained
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Document Owner

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