



CALL CENTER ONBOARDING GUIDE

Outbound Sales Campaign – WhatsApp Automation Client

Managed by Business Drive Corporation

1. Introduction & Purpose

This Call Center Onboarding Guide serves as the **primary reference document** for all call center partners participating in the **Outbound Sales Campaign for the WhatsApp Automation Client**, managed and governed by **Business Drive Corporation**.

The purpose of this document is to clearly define:

- How the campaign operates
- What is expected from call center partners
- How quality, compliance, and performance are measured
- How Business Drive supports and governs the campaign

This guide ensures **uniform execution**, protects **brand integrity**, and enables **scalable growth** across multiple call center partners.

All participating call centers are required to **review, understand, and comply** with the contents of this document before campaign activation.

2. Campaign Overview

This campaign is a **Business-to-Business (B2B) outbound sales initiative** focused on generating **qualified product demos** for a WhatsApp-based marketing and automation platform.

Key Campaign Characteristics

Parameter	Description
Campaign Type	B2B Outbound Voice Sales
Product	WhatsApp Marketing & Customer Automation Platform
Target Customers	SMEs, D2C brands, service providers
Decision Makers	Business Owners, Founders, Marketing Heads, Managers
Sales Objective	Identify qualified prospects and book demos
Geography	India (initial phase), GCC & SEA (expansion phase)

The campaign targets businesses that already use or are willing to use **WhatsApp as a customer engagement channel** and are actively exploring automation to improve efficiency, response time, and conversions.

3. About Business Drive Corporation

Business Drive Corporation acts as the **campaign owner, execution authority, and quality controller** for this outbound sales initiative.

Business Drive's Role Includes:

- Designing the overall sales strategy
- Selecting and onboarding call center partners
- Creating and maintaining sales scripts and SOPs
- Providing training, documentation, and enablement
- Monitoring live performance and quality
- Acting as the bridge between the client and call centers

Business Drive ensures that **every call center operates as an extension of the client's sales team**, following the same standards, messaging, and ethical practices.

4. Engagement Model & Responsibilities

This campaign follows a **partner-led execution model** with centralized governance.

A. Call Center Partner Responsibilities

Participating call centers are expected to take **full ownership of day-to-day execution**, including:

Sales Execution

- Conduct outbound calls only to the provided lead database
- Use **approved scripts and positioning** without deviation
- Speak only with business decision-makers or authorized representatives
- Clearly explain the value of the WhatsApp automation platform

Lead Qualification

- Identify genuine business needs
- Validate budget, authority, and intent
- Avoid booking demos for unqualified or uninterested prospects

Data Management

- Update CRM **in real time** after every call
- Use correct lead status and remarks
- Maintain accuracy and completeness of data

Operational Discipline

- Ensure agent punctuality and availability
- Maintain call recordings and reports
- Cooperate with audits, QA checks, and reviews

B. Business Drive Responsibilities

Business Drive will support partners through:

Enablement & Training

- Product knowledge sessions
- Pitch walkthroughs and objection handling training
- CRM usage training

Governance & Monitoring

- Live call monitoring access

- Regular QA scoring and feedback
- Performance tracking and reporting

Commercial Management

- Validation of leads and demos
 - Commercial reconciliation
 - Timely payout coordination
-

5. Onboarding Process Flow

To ensure smooth activation, all call centers must complete the following steps:

Step 1: Partner Evaluation

- Review of company profile and references
- Assessment of relevant outbound B2B experience

Step 2: Legal & Compliance

- NDA execution
- Commercial terms finalization
- Acceptance of campaign policies

Step 3: Infrastructure & Team Validation

- Verification of agent eligibility
- Dialer, recording, and CRM readiness checks
- Supervisor availability confirmation

Step 4: Training & Enablement

- Product training
- Sales pitch & objection handling
- CRM walkthrough

Step 5: Test Calls & QA Approval

- Mock calls or pilot calls
- Quality evaluation
- Approval for production

Step 6: Campaign Go-Live

- Official launch
 - Daily monitoring and optimization
-

6. Compliance, Confidentiality & Data Security

Compliance is **non-negotiable** for this campaign.

Mandatory Compliance Standards:

- NDA must be signed before lead access
- Lead data is strictly confidential
- No data sharing, resale, or reuse
- No offline storage or screenshots
- CRM access limited to authorized personnel
- Mandatory call recording with retention

Call centers must comply with:

- GDPR (where applicable)
- Local data protection and telemarketing laws

Any breach may lead to **immediate suspension or termination**.

7. Quality Standards & Brand Representation

Agents represent both **Business Drive** and the **WhatsApp Automation Client**.

Quality Expectations:

- Professional tone and respectful communication
- Honest, transparent product positioning
- No false commitments or pricing guarantees
- Proper objection handling without pressure tactics

Brand Protection Rules:

- No unauthorized claims
- No personal WhatsApp numbers or emails

- No misleading sales practices

Brand integrity is a **top priority**.

8. Performance Monitoring & Reviews

Performance is tracked using **quantitative and qualitative metrics**.

Key Evaluation Areas:

- Number of qualified leads
- Demo booking accuracy
- Demo show-up rate
- CRM compliance
- Call quality scores

Review Structure:

- Daily activity monitoring
- Weekly performance reviews
- Periodic QA audits
- Scale-up or corrective actions

High-performing centers may be rewarded with:

- Increased volumes
 - Better commercial terms
 - Regional exclusivity
-

9. Escalation & Support Mechanism

Business Drive provides a structured escalation framework.

Common Escalation Scenarios:

- CRM access or data issues
- Lead quality concerns
- Script clarification
- QA or payout disputes

Escalations must follow the defined hierarchy to ensure **quick and fair resolution**.

10. Acknowledgement & Acceptance

By participating in this campaign, the call center confirms that it:

- Has reviewed and understood this document
- Agrees to all operational and compliance requirements
- Commits to quality-driven execution
- Accepts performance-based evaluation

This document forms the **foundation of the partnership**.

Document Owner

Business Drive Corporation

Campaign Strategy & Partnerships Team

 partners@businessdrive.com

