

Standard Operating Procedure

Outbound Sales Campaign – WhatsApp Automation Client
Managed by Business Drive Corporation

1. Purpose of This SOP

This Standard Operating Procedure (SOP) defines the **step-by-step operational guidelines** for executing the Outbound Sales Campaign for the **WhatsApp Automation Client**.

The SOP ensures:

- Consistent execution across all call center partners
- High-quality customer interactions
- Accurate lead qualification and demo booking
- Full compliance with quality, data, and brand standards

All agents, supervisors, and managers involved in this campaign must strictly adhere to this SOP.

2. Campaign Objective & Success Definition

Primary Objective

To generate **qualified product demo appointments** with business decision-makers who have a genuine need and intent to adopt WhatsApp automation solutions.

Secondary Objectives

- Identify customer pain points related to communication and CRM workflows
- Educate prospects about WhatsApp automation capabilities
- Create a healthy, conversion-ready sales pipeline

Definition of Success

A successful call results in:

- Engagement with a decision-maker
 - Clear identification of business need
 - Qualification against defined criteria
 - A confirmed demo appointment with date and time
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3. Campaign Operating Structure

Roles Involved

A. Sales Agents

- Perform outbound calls
- Qualify leads
- Book demos
- Update CRM in real time

B. Supervisors / Team Leads

- Monitor live calls
- Ensure SOP adherence
- Conduct daily QA checks
- Support agents with escalations

C. Business Drive Campaign Team

- Provide scripts and training
 - Monitor quality and performance
 - Validate leads and demos
 - Handle escalations and optimization
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4. Daily Agent Workflow

Each agent must follow the below workflow **every working day**.

Step 1: Login & System Check

- Login at assigned shift time
- Verify headset, dialer, internet, and CRM access
- Confirm lead list availability

Step 2: Call Execution

- Start outbound calling using assigned lead list
- Follow approved call script only
- Maintain professional tone and clarity

Step 3: Call Documentation

- Update CRM immediately after each call
- Select correct call outcome and lead status
- Add concise but accurate remarks

Step 4: Demo Booking

- Book demos only for qualified leads
- Confirm date, time, and contact details
- Ensure prospect agrees to attend

Step 5: Follow-Up Execution

- Perform follow-ups as per defined timeline
- Ensure reminders are sent and logged

5. Call Attempt Guidelines

Parameter	Standard
Calls per Agent per Day	100–120
Connection Target	40–50
Max Call Attempts per Lead	3
Gap Between Attempts	Minimum 24 hours
Call Recording	Mandatory





Agents must **prioritize quality conversations** over speed or volume.

6. Call Conduct & Communication Standards

Mandatory Communication Principles

- Speak clearly, confidently, and respectfully
- Introduce self and company honestly
- Avoid jargon or misleading claims
- Actively listen to customer responses

Prohibited Practices

-  False promises
 -  Aggressive or pressure selling
 -  Misrepresentation of features or pricing
 -  Use of personal contact details
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7. Lead Qualification Process

Agents must qualify every prospect based on **defined criteria** before booking a demo.

Mandatory Qualification Checks

- Business type and size
- Current WhatsApp usage
- Customer communication challenges
- Monthly marketing or automation budget
- Decision-maker authority
- Interest in seeing a demo

If any critical criterion is not met, the demo **must not be booked**.

8. Demo Booking SOP

When to Book a Demo

A demo may be booked only if:

- The prospect meets qualification criteria
- The decision-maker is engaged
- There is clear interest and intent

Demo Booking Steps

1. Confirm decision-maker availability
2. Agree on demo date and time
3. Reconfirm phone number and email
4. Update CRM immediately
5. Trigger demo confirmation email/WhatsApp

9. Follow-Up & Reminder Process

Follow-Up Timeline

Timeline	Action
T+1 Day	Demo reminder call or message
T+3 Day	Re-engagement if demo missed
T+7 Day	Final follow-up or closure

No lead should remain **untouched or untagged**.

10. CRM Usage & Data Accuracy

CRM Update Rules

- Every call must be logged
- Status must match call outcome
- Remarks must be clear and factual
- No blank or duplicate entries

Common Errors to Avoid

- Booking demos without notes

- Incorrect lead status tagging
- Delayed updates

CRM accuracy directly impacts payouts and performance evaluation.

11. Quality Assurance (QA) Standards

QA Evaluation Criteria

- Script adherence
- Product understanding
- Objection handling
- Tone and professionalism
- CRM accuracy

QA Process

- Random call sampling
- Supervisor-level monitoring
- Feedback sessions with agents

Consistent QA failure may result in agent or partner disqualification.

12. Escalation Handling

Agents must escalate:

- Lead objections beyond authority
- CRM access issues
- Script or product doubts

Supervisors escalate unresolved issues to Business Drive.

13. Performance Review & Corrective Action

Performance Review Frequency

- Daily activity review
- Weekly performance review
- Monthly trend analysis

Corrective Actions

- Additional training
 - Script reinforcement
 - Volume reduction
 - Temporary pause if required
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14. Compliance & Ethical Standards

All calls must comply with:

- NDA obligations
- Data protection laws
- Telecalling regulations

Any violation is subject to **immediate action**.

15. SOP Acknowledgement

By participating in this campaign, the call center confirms:

- Understanding of this SOP
 - Commitment to follow all procedures
 - Acceptance of performance and quality governance
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Document Owner

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