

Call Center Project Proposal

B2B Outbound Calling Program – WhatsApp Automation Client

Submitted By

Business Drive Corporation

Business Process Outsourcing & Campaign Strategy Partner

 <https://businessdrive.com>

 partners@businessdrive.com

1. Executive Summary

This proposal outlines a strategic collaboration between **Business Drive Corporation** and professional outbound call centers to support the growth of a **WhatsApp Automation Client**, a fast-scaling WhatsApp marketing and customer engagement automation platform.

The objective of this engagement is to leverage outbound voice calling as a high-impact acquisition channel to generate qualified demo bookings, increase product awareness, and onboard paid customers across India and selected international markets.

Through structured training, seamless CRM integration, strict quality controls, and performance-driven commercials, this program is designed to deliver **scalable, compliant, and conversion-focused outcomes** for all participating partners.

2. About the WhatsApp Automation Client

Business Overview

Category	Details
Business Type	WhatsApp Marketing Automation SaaS
Industry Focus	Retail, eCommerce, Education, Healthcare, Real Estate, Hospitality, D2C, Logistics
Regional Focus	India, UAE, USA, Canada, Australia

Core Platform Capabilities

- Official WhatsApp Business API integration
- Chatbot & workflow automation
- Campaign builder & broadcast tools
- CRM & lead management
- Analytics & performance reporting

Key Differentiators

- Official WhatsApp API compliance
- Automation-first customer engagement
- Easy CRM and third-party integrations

Strategic Objective

To drive qualified demo bookings via outbound calling, resulting in consistent onboarding of paid users.

3. Scope of Engagement

Campaign Type

Business-to-Business (B2B) Outbound Voice Campaign

Communication Channels

- Voice Calls (Primary)
- Email Follow-ups
- Real-time CRM Updates

Lead Stage Targeted

Top-of-Funnel (Awareness & Consideration)

Key Objectives

- Engage decision-makers across SMEs, D2C, and digital-first businesses
 - Identify gaps in customer engagement and CRM workflows
 - Present platform capabilities with relevant use cases
 - Schedule qualified product demos
 - Maintain structured and accurate CRM data
 - Enable long-term conversion through proper lead qualification
-

4. Call Center Requirements

A. Operational Requirements

Component	Details
Minimum Agents	10 full-time agents (scalable)
Infrastructure	Secure, noise-free, monitored workspace
Connectivity	100 Mbps+ bandwidth, power backup, UPS
Equipment	Noise-cancelling headsets, VoIP/GSM dialer
Working Hours	10 AM – 7 PM IST (Mon–Sat)
Compliance	NDA mandatory, GDPR & local data protection adherence

B. Agent Profile & Training Standards

- 1–2 years of B2B telesales experience (SaaS/Digital preferred)
 - Fluency in English & Hindi (regional languages are an advantage)
 - Strong objection-handling and communication skills
 - CRM, Excel, and dashboard proficiency
 - Mandatory participation in initial and ongoing training
-

C. Technology Requirements

Component	Specification
Dialer	Predictive or progressive with list segmentation
Call Recording	100% recording with minimum 90-day retention
Live Monitoring	Supervisor dashboard for real-time QA
CRM Integration	Daily updates via Sheets, HubSpot, or API
Security	SSL, VPN, restricted access, system lockdown

5. Key Performance Indicators (KPIs)

Metric	Target per Agent (Daily)
Calls Attempted	100–120
Calls Connected	40–50
Qualified Leads	8–12
Demo Appointments	3–5
CRM Accuracy	100%

6. Lead Qualification Criteria

A lead is considered qualified if:

- Business is digitally active and open to automation
 - Uses WhatsApp for customer communication (or willing to adopt)
 - Monthly marketing budget exceeds ₹10,000
 - Decision-maker (Owner / Marketing Head / Manager) engaged
 - Expressed interest in demo or information pack
-

7. Call Flow & Follow-Up Process

Call Journey

1. Call initiated by agent
2. Gatekeeper / receptionist handling
3. Connection with decision-maker
4. Platform overview with relevant use case
5. Qualification & objection handling
6. Demo scheduling (date & time confirmed)
7. CRM update, email follow-up, reminder setup

Follow-Up Timeline

- **T+1 Day:** Demo reminder call/message
- **T+3 Day:** Re-engagement if demo missed
- **T+7 Day:** Final follow-up or lead closure

8. Project Timeline & Milestones

Phase	Deliverables	Timeline
Discovery & Audit	Partner & tech validation	Days 1–3
NDA & Contracting	Legal & commercials	Days 4–5
Training & Dry Runs	Product training & test calls	Days 6–8
Go-Live & Monitoring	Campaign launch & reviews	Days 9–10
Scale-Up	Team expansion	Day 14+

9. Commercial Models

Pricing Component	Description
Pay-per-Lead	₹XX per validated lead
Pay-per-Demo	₹YY per confirmed & attended demo
Monthly Retainer	₹50,000+ (optional)
Performance Bonus	Incentives for high demo conversion & QA

Note: Better data quality and segmentation significantly improve conversion and payouts.

10. Reporting & Quality Governance

Report	Frequency	Purpose
Daily Activity Report	Daily (EOD)	Calls, lead status
Weekly Performance	Weekly	Agent-level metrics
QA Review	Twice weekly	Call quality sampling
Dashboard Access	Live	Real-time visibility

Escalation Matrix

Tiered escalation contacts for real-time issue resolution.

11. Training & Enablement Framework

Training Area	Format
Product Knowledge	Zoom + LMS
Pitch & Objections	Downloadable scripts
CRM Usage	Live demo & screencast
Shadow Calling	Supervised live calls

Refresher sessions will be conducted monthly or after major updates.

12. Strategic Value for BPO Partners

- Evergreen demand for WhatsApp automation
 - Predictable, performance-based revenue
 - High response rates from SMEs
 - Opportunity for cross-sell and regional exclusivity
-

13. Next Steps & Onboarding

Interested partners are requested to share:

1. Organization profile & references
2. Team roster with experience details
3. Infrastructure & tools overview
4. Preferred commercial model
5. Language capabilities

Our campaign manager will connect for final alignment.

14. Contact Information

Business Drive Corporation

Campaign Strategy & Partnerships Team

 partners@businessdrive.com

Proposal Prepared For

Outbound Sales & Engagement Program – **WhatsApp Automation Client**
