



Verified Audit Circulation Telemarketing Guidelines

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TELEMARKETING GUIDELINES

Summary

This guide is intended to provide publishers and telemarketing agencies operating guidelines for the acquisition and requalifications of Direct Request from Recipient and Direct Request from Recipient's Company subscriptions through the use of telephone interviews.

Direct Request from Recipient/Recipient's Company

Telecommunications from individuals may be qualified as direct request from recipient or direct request for recipient's company.

During the telephone interview, a question similar to the following must be asked and answered:

- “Do you wish to receive (continue to receive) this publication? (Yes/No)

A personal indentifying question (PIQ) must be asked and answered. Example:

- “To allow future verification of your request, please provide your...”
 - State of birth
 - Month of birth
 - High school graduated from

With the exception of the name, address, title, email, fax and phone number, prior-year demographic information may not be confirmed during the telephone interview. Telemarketing vendors/agents cannot have access to the prior demographics information of a campaign.

The qualified recipient's spouse/domestic partner may request the publication on behalf of the qualified recipient.

The qualified recipient's authorized assistant may request the publication on behalf of the qualified recipient. The name and title of the qualified person's authorized agent must be provided. This may be reported as a personal telecommunication request provided that the authorized assistant can answer positively to either one of these questions:

- “Do you provide administrative support for (name of recipient) that includes the ability to request subscriptions for him/her?”
- “Do you provide administrative services for (name of recipient) and are you (allowed/eligible/permitted) to request a publication on their behalf?”

In one telephone interview, an authorized personal assistant may request a publication for more than one recipient provided that a separate request question is asked and answered for each recipient.

Multiple publication telecommunication requests can be obtained in a single telecommunication provided that a separate request is asked and answered for each of the publications.

Telecommunications from a company requesting copies for their employees may be qualified as direct request from recipient's company. In addition to the information for the recipient(s), the name title and/or function of the person requesting the subscription must be provided along with the company name, address and phone number.

If the interview form is in writing, the interviewer must sign and date the telemarketing form.

Verified will review telephone interview forms/scripts prior to use free of charge at a client's request. We don't require the script to be reviewed.

For the Audit

During the audit, a randomly selected number of subscribers will be selected for review.

For telecommunication names selected on the audit test, the publisher shall provide a call log including: subscriber name, date of call, time of call, duration of call, all applicable demographics and personal identifying information and the name of the person spoken with.

Personal Identifier Questions (PIQ)

PIQ information must relate to the individual being interviewed. The question asked should be personal and verifiable.

An alternative question should be available in case a recipient refuses to answer the PIQ.

A refusal to answer the PIQ does not automatically disqualify a recipient.

PIQs must be changed annually or each time the recipient is re-qualified, whichever happens first.

Sample Telemarketing Script

INTRODUCTION:

“Hello, may I speak to (subscriber’s name)?”

“Hi, my name is (telemarketer’s name) and I am calling from (publication name).”

“We are calling to offer you a FREE subscription to (publication name) and we just need a few minutes to update your contact information and ask a few brief questions.”

“Would you like to begin/continue receiving your FREE subscription to (publication name)?” [**“YES” ANSWER REQUIRED**]

If YES:

“Good. I’ll be quick. First, I need to verify your mailing address. Our records show it as:”

CONTACT INFORMATION:

- Name
- Title
- Company
- Company Division
- Company PO Box
- Company Mail Stop/Suite
- Company Street Address
- City
- State
- Zip
- Email
- Phone
- FAX

QUESTIONS:

Q1: “What is your primary type of business/industry?” (select one)

Q2: “Which of the following best describes your title classification?” (select one)

“To verify that you and I spoke today, what (personal identifying question)?”

“Thank you for accepting a FREE subscription to (publication name). Thank you again and have a great day.”