



## TERMS OF REFERENCE

**Post Title: Fundraising Officer (TA) for Telemarketing**

**Duty Station: Mandaluyong City, Philippines**

**Level: NOA**

**Duration: 364 Days**

**Funding:** WBS: 3420/A0/06/777/001/001

GRANT: SP180034

**Supervision:** Chief of Private Fundraising and Partnerships (PFP) for the interim until new Individual Giving Officer (Individual Giving) is hired.

### **PURPOSE OF ASSIGNMENT:**

Under the supervision of the Individual Fundraising Officer, this post will primarily be responsible for planning and the day-to-day supervision of the Telemarketing (TM) fundraising channel for donor acquisition, donor retention and customer service through third-party outbound telemarketing agency/ies and through the UNICEF in-house donor care team. This post will also assist in the implementation of fundraising program activities from time to time as needed/ required.

With special emphasis on converting one-off donors into regular monthly givers (pledge) or multiple one-time givers, this post will assist in the development of donor journeys, where TM channel plays a role in proactive donor saving and reactivation, donor upgrades and other value maximization efforts, as well as donor care and supporter surveying. Therefore, the post will lead and monitor launch and implementation of TM related campaigns, which will contribute to the diversification of the individual giving's pledge program.

### **MAJOR DUTIES AND RESPONSIBILITIES:**

#### **Summary of key functions/accountabilities:**

#### **1. Implementation of telemarketing donor acquisition, retention and legacy campaigns:**

- a. Working with the Individual Giving Officer (NOB) and the Donor Acquisition Officer (NOA), support with the development, roll-out and day-to-day monitoring of donor acquisition TM campaigns and multi-channel journeys (e.g. conversion of one-time donors, direct-to-pledge conversion, reactivation, tactical or seasonal acquisition campaigns, etc);
- b. Working with the Individual Giving Officer (NOB) and the Donor Retention Officer (NOA), support with the development, roll-out and day-to-day monitoring of donor retention TM campaigns and multi-channel journeys (e.g. proactive and reactive donor saving, upgrade, value maximization, and donor care service);
- c. Working with the Major Donor Officer (NOB), support with the development, roll-out, and day-to-day monitoring of legacy campaigns, as necessary;
- d. Oversee TM back-end structure, review data segmentation and campaign fulfillment for any new campaign initiatives;
- e. Monitor daily payment processing related to TM campaigns, identify concerns and act accordingly;
- f. Organize briefings and trainings to TM agencies and in-house donor care personnel for any campaigns, emergencies or special events.

**2. Performance monitoring for telemarketing fundraising (efficiency, productivity and quality):**

- a. Develop Quality Assurance plans and tools for the in-house team and third-party agency/ies, in cooperation with the NOA and NOB officers for donor acquisition, retention, legacy and major donors;
- b. Ensure that all aspects of the TM program — from script development to quality conversations and donor data processing—adhere to QA standards and have clear KPIs;
- c. Monitor daily, weekly, monthly performance of TM KPIs, including but not limited to reach rate, conversion rate, fulfilment rate, average gift, call capacity, agent performance, donor feedback, QA scoring and call calibration, and ROI;
- d. Ensure income and telemarketing targets are met according to the work plan and budget;
- e. Work with the IG team and business intelligence officer to ensure the TM program is data-driven and processes are optimized. Present reports on TM operations regularly and provide recommendations related to enhancements in areas of telemarketing and multi-channel journeys that need improvement.

**3. Operations oversight:**




- a. Build close working relationships with agencies to ensure smooth and organized operation;
- b. Provide regular support and training to contractors and in-house agents engaged in telemarketing operations. Organize weekly and monthly meetings with internal or external stakeholders to ensure on-going commitment on the deliverables;
- c. Become proficient in the use of the systems related to the functions. Maintain or set up tracking and reporting in the CRM (Salesforce);
- d. Identify potential service providers, manage procurement processes and select the best fit. Ensure that all contracts are kept up to date and all UNICEF procedures are followed through.

**4. Donor Care / Customer Service Hotline:**

- a. Review and optimize multi-channel donor care service, provided by the in-house team and external agency, in order to increase supporter satisfaction and loyalty.
- b. Provide, when necessary, customer support such as addressing donor inquiries, requests and/or complaints via mail, email, phone, social media, etc.; escalate inquiries to the appropriate supervisor for further action.
- c. In coordination with IG NOA and NOB officers, review donor feedback (complaints, compliments) on regular basis.

**QUALIFICATIONS AND COMPETENCIES:**

Education:	<p>University degree in any of the following:</p> <p>Business, Marketing, Management, Research/Statistics, Communication, Arts, Social Sciences, or a related field.</p>
Experience:	<p>At least one (1) year of relevant work experience is required in the telemarketing/BPO/sales/marketing/customer service industry.</p> <p>Additional experience in fundraising/resource mobilization, public relations, account management, brand management, business development or other related fields would be considered an asset.</p> <p>Experience in the latest developments in contact center industry, customer relationship management and supporter experience are highly desired. Strong skills in Microsoft Excel are desired.</p> <p>Candidates must also possess or demonstrate:</p> <ul style="list-style-type: none"> <li>· Strong interpersonal skills</li> <li>· Strong organizational and planning skills</li> <li>· Strong communication and presentation skills</li> <li>· Analytical thinking</li> <li>· Drive for results</li> </ul>
Language Requirements:	<p>Fluency in English and Filipino is a requirement, both oral and written.</p>

Prepared by:	Endorsed by:	Approved by:
		
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