

What Makes a Call Successful? (Or, a case for analyzing call center data)

By Peter B. Wylie

I've been at this data mining in fundraising thing now for the better part of nine years, and the lion's share of my efforts has been in educational advancement. If you've read some of the stuff I've written or heard me talk, you know I'm always pushing institutions to analyze the huge amount of information they collect on their alums. My point (repetitious and tiresome as it might be) is simple: If you don't analyze this data, you're ignoring powerful predictors of giving. Put more bluntly, you're leaving money on the table for some other worthy (or not so worthy) cause to come along and scoop it up.

So ... what am I up to here? Well, for a number of years I've been thinking about all the calling that educational institutions do. (Trust me. They do a *lot* of calling. Some call hundreds of thousands of alums in a year's time.) And recently I've started educating myself about all the data colleges, universities, and schools collect and store electronically regarding what happens on these calls. If you're even tangentially involved with the work of your call center, you're way ahead of me. You know that a huge amount of data gets stored. A few examples:

- time, date, and duration of call
- caller gender (that's right)
- city, state, and zip code of alum
- result of call when alum is reached (call back, call later, pledge, refusal, etc.)
- birth date of alum
- whether the alum works for an organization that will match a gift

And on and on it goes. But here's the rub: I don't see much evidence out there in higher education and independent school advancement that all this data is getting effectively analyzed — analyzed so these institutions can maximize the huge amount of time, cost, and energy they put into their calling programs.

We could speculate on some reasons for this lack of analysis, but right now I just want to fire you up. I want to take you through a mini investigation of some data I analyzed at a university that does an enormous amount of calling. I hope what I say will intrigue you and cause you to conclude: "Whoa! We need to be doing this kind of analysis on our own calling data."

Some Background

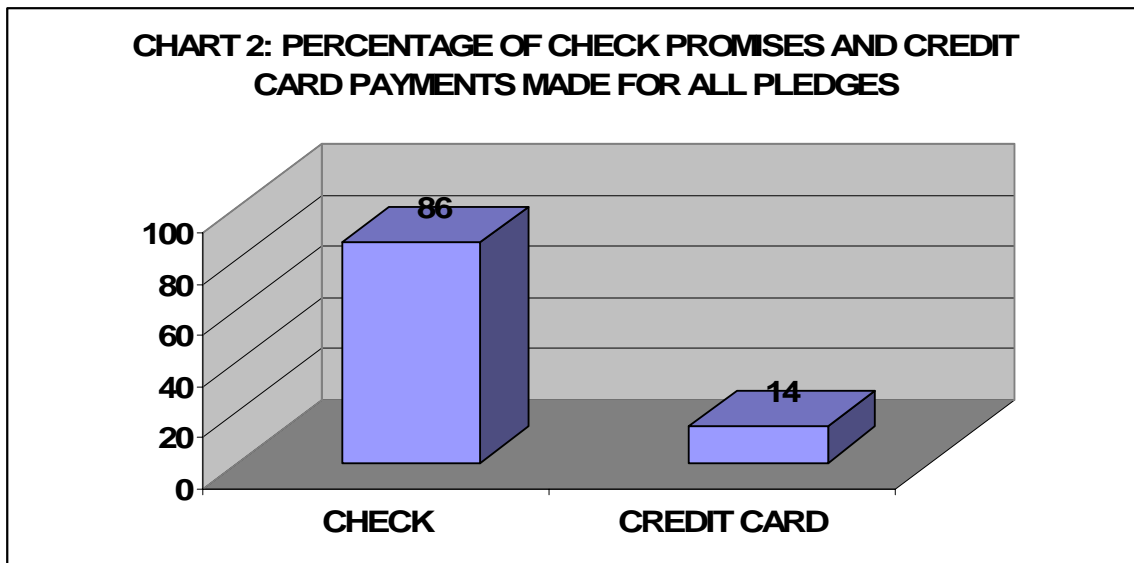
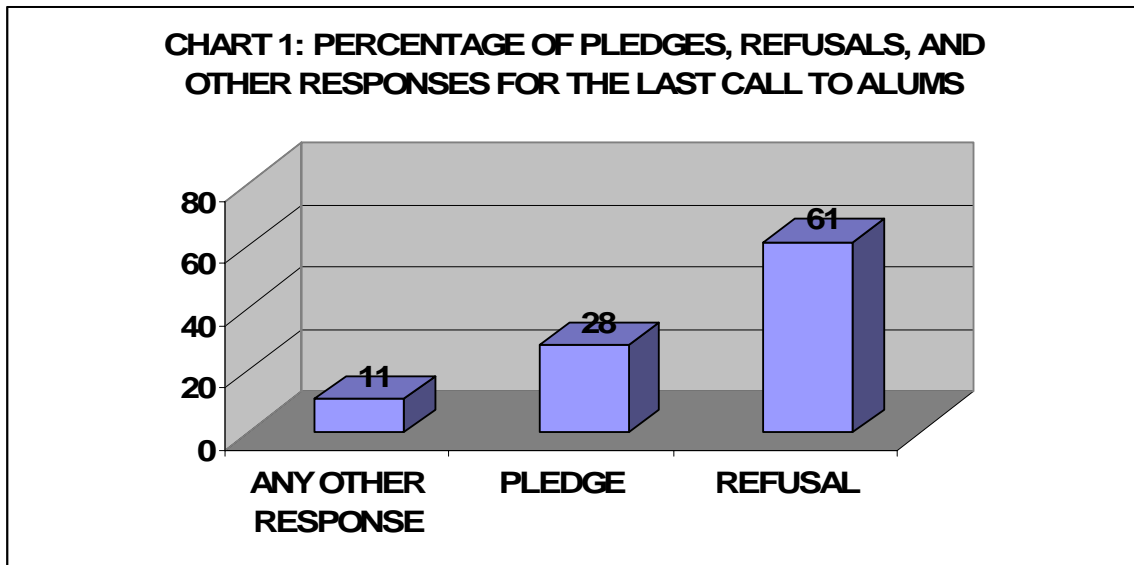
For obvious reasons I can't tell you the name of the university that provided the data for this study. Let's just say that it's a large higher education institution with a very active call center. Calls are made five days a week by a staff of 30 or so student callers who contact more than 250,000 alums within a calendar year. I worked with a random sample

of about 20,000 alums drawn from this universe. Each alum was called within 10 months of this writing.

I was particularly interested in variables that were related to these outcomes:

- the percentage of pledges versus refusals for the last call made to the alum
- the percentage of pledges made by check versus credit card (credit card payments are pretty much a guarantee of pledge fulfillment.)
- the dollar amount of the pledge received

Here's the overall picture for these outcomes for the entire sample:



[Chart 1](#) shows that about three fifths of the alums (on the final call) refused to make any pledge. Slightly less than 30% made a pledge. And the remaining 11% gave a response (such as call back) that motivated the caller (or call center manager) to make no further attempts. [Chart 2](#) shows that most of the pledges (more than 85%) were promises to send a check to the school; less than 15% were actual credit card payments. (Obviously, the institution would prefer a credit card payment because that obviates any concern about fulfillment of the pledge.)

The mean (average) pledge dollar amount per alum called was slightly more than \$33.

What Makes a Successful Call?

I want to be clear that this is one exploratory study in an area crying out for comprehensive research. What I say may not hold up when studies are done at other schools with better variables and better experimental designs than I was able to use here. That said, I think I uncovered three factors that are probably strongly related to whether a given call yields a pledge, the size of the pledge, and whether or not the caller is able to get a credit card payment for the pledge. The three factors are:

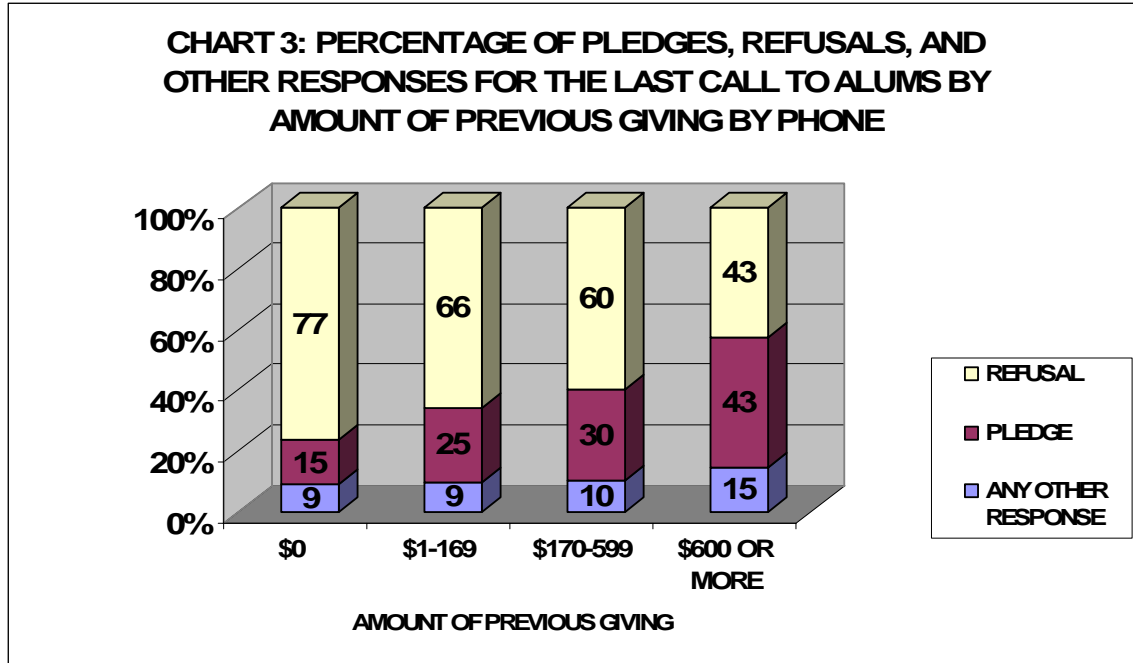
- who is called
- the experience of the caller
- how long the call lasts

Who is called

This factor should come as no big surprise. All the call center folks I've ever talked to segment the alums being called by (among other variables) how much the alum has previously given when called for a pledge. (And that's certainly the case for the university whose data I used here.)

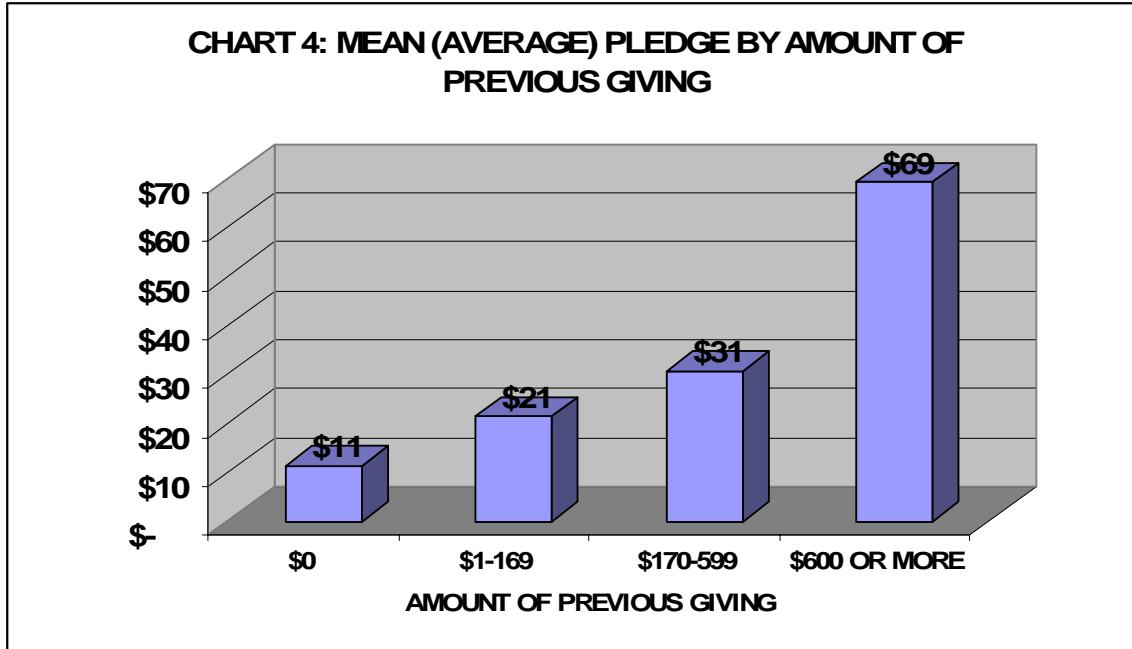
To simplify matters, I divided the 20,000 alums called into four roughly equal-sized groups:

- those who had given nothing at all by phone
- those who had given between a dollar and \$169
- those who had given between \$170 and \$599
- those who had given \$600 or more

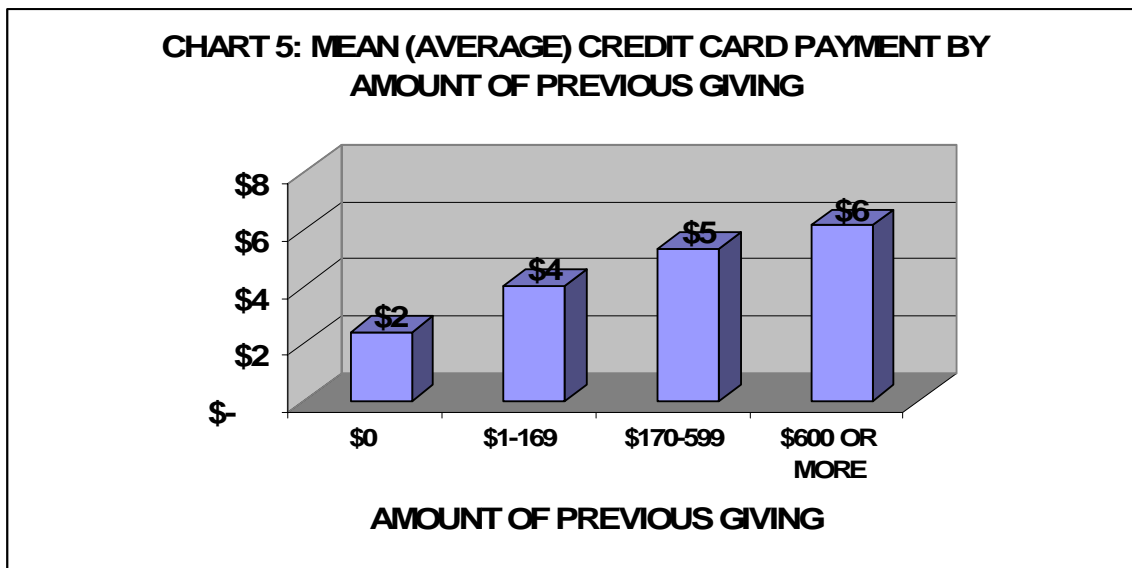


As you can see in [Chart 3](#), there is a strong relationship between how much alums had given by phone and their pledge rate for this study. Those alums who had previously given \$600 or more were almost three times as likely to make a pledge as alums who had never given by phone (43% versus 15%).

[Chart 4](#) gives us a different (but corroborative) look at the relationship between previous phone giving and pledging. If anything, the relationship looks even more pronounced than it does in [Chart 3](#). Notice that the mean (average) pledge for alums who have given \$600 or more is six times greater than the mean pledge for alums who've given nothing previously.

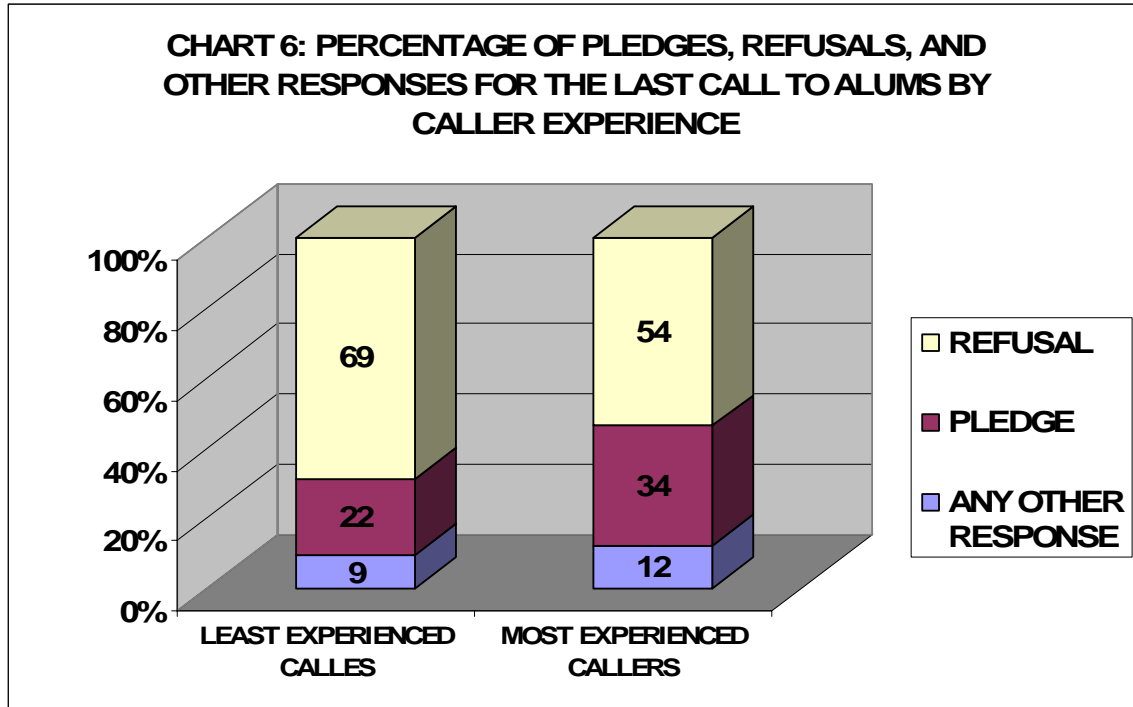


Lest we get too carried away, however, let's look at the mean credit card payment by previous giving. When we divide the total amount of pledges paid by credit card by the number of alums in each previous giving group, we get the results you see in [Chart 5](#). Two things seem to jump out from this chart: One, the average credit card payment (regardless of the previous giving group) is quite meager. Two, the differences among the groups are far less impressive than they are in [Chart 4](#). It may be a lot easier to get a promise of a check from the \$600 or more group than from the \$0 group. But that's clearly not the case for a credit card payment.



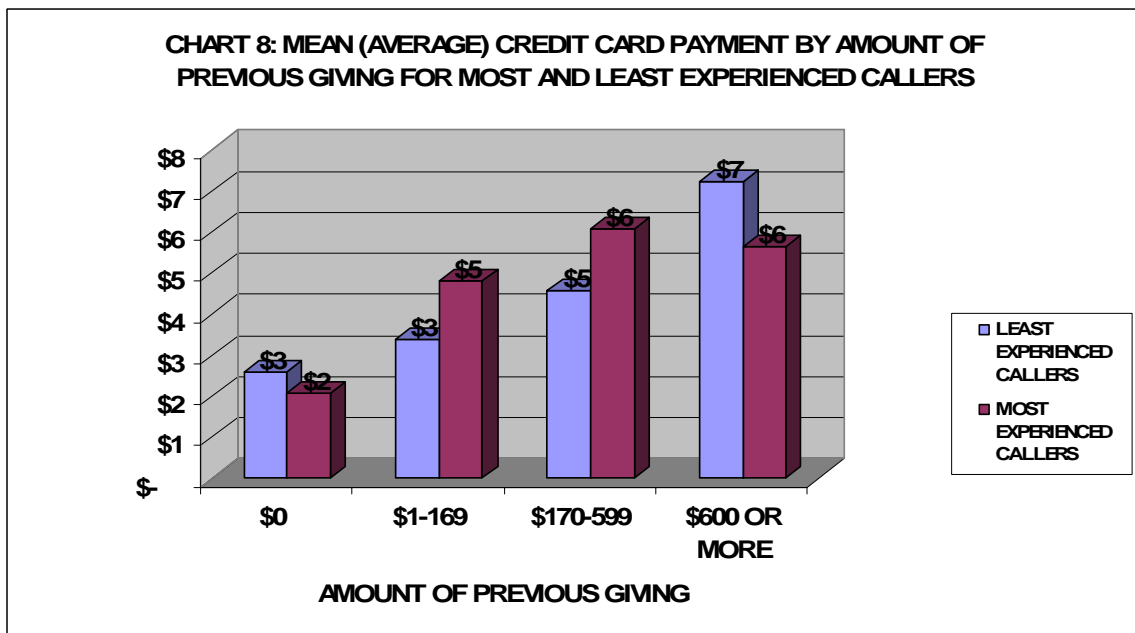
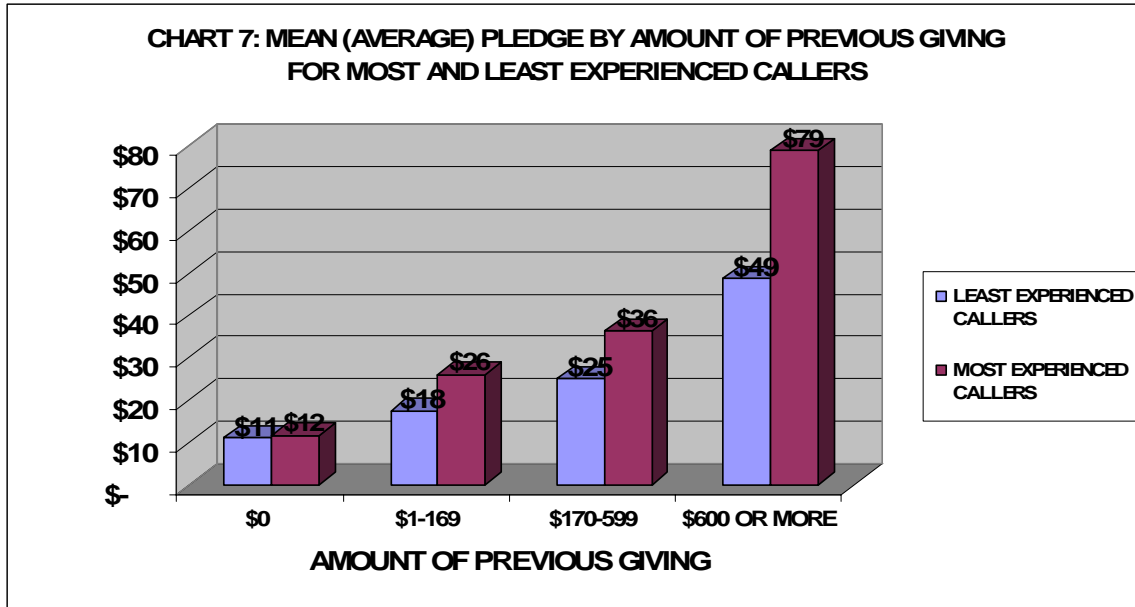
Caller experience

To get a measure of caller experience I computed the number of calls each caller had made during the period of this study. Those who had made 400 calls or more I arbitrarily called “most experienced callers.” Everyone else I labeled “least experienced callers.” Admittedly, this is a pretty crude measure, but given the data I had to work with I was at a loss to come up with anything better.



[Chart 6](#) shows pretty clearly that the most experienced callers were considerably better than the least experienced callers at getting pledges and at not getting refusals. But, again, let's hold on a moment.

Look at [Chart 7](#). Here we see the mean (average) pledge by caller experience broken out by level of previous alum giving. What's going on here? Well, it appears that the most experienced callers are better than the least experienced callers at getting bigger pledges from alums who have given \$600 or more previously. But what about the difference between these same two groups of callers when it comes to alums who've never given before? They look pretty much the same.

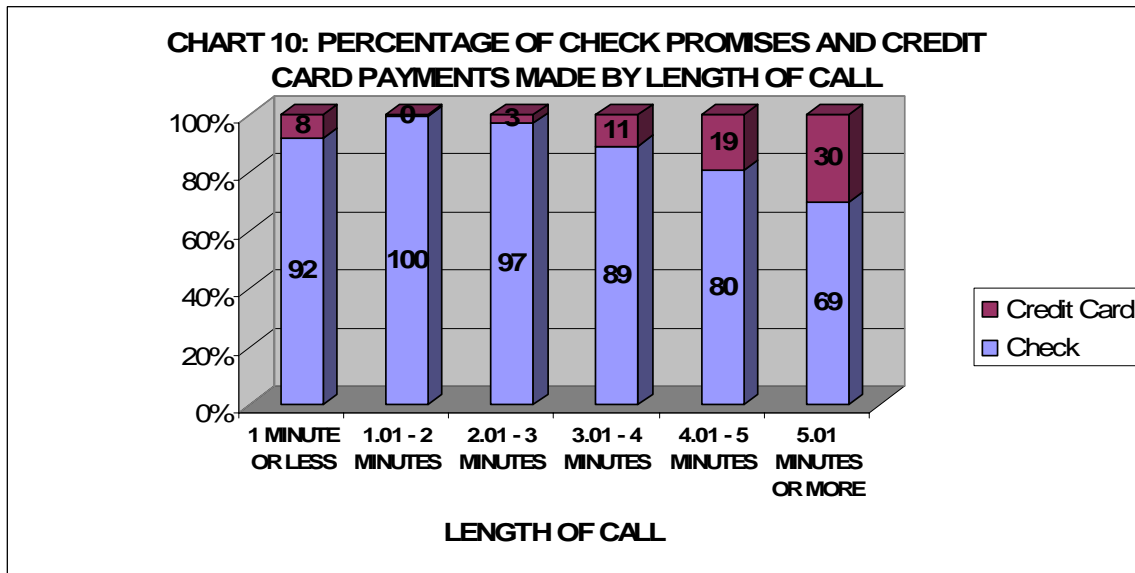
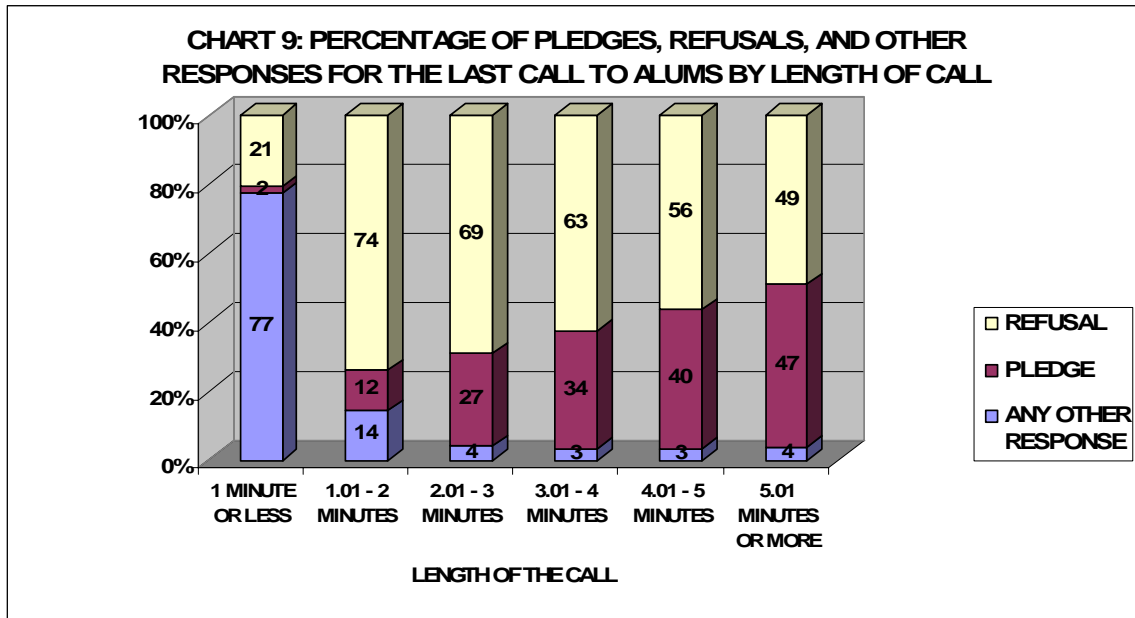


And when we look at [Chart 8](#), the plot thickens. Here we see that the credit card payments the two experience groups get are about the same regardless of the level of previous alum giving.

How long the call lasts

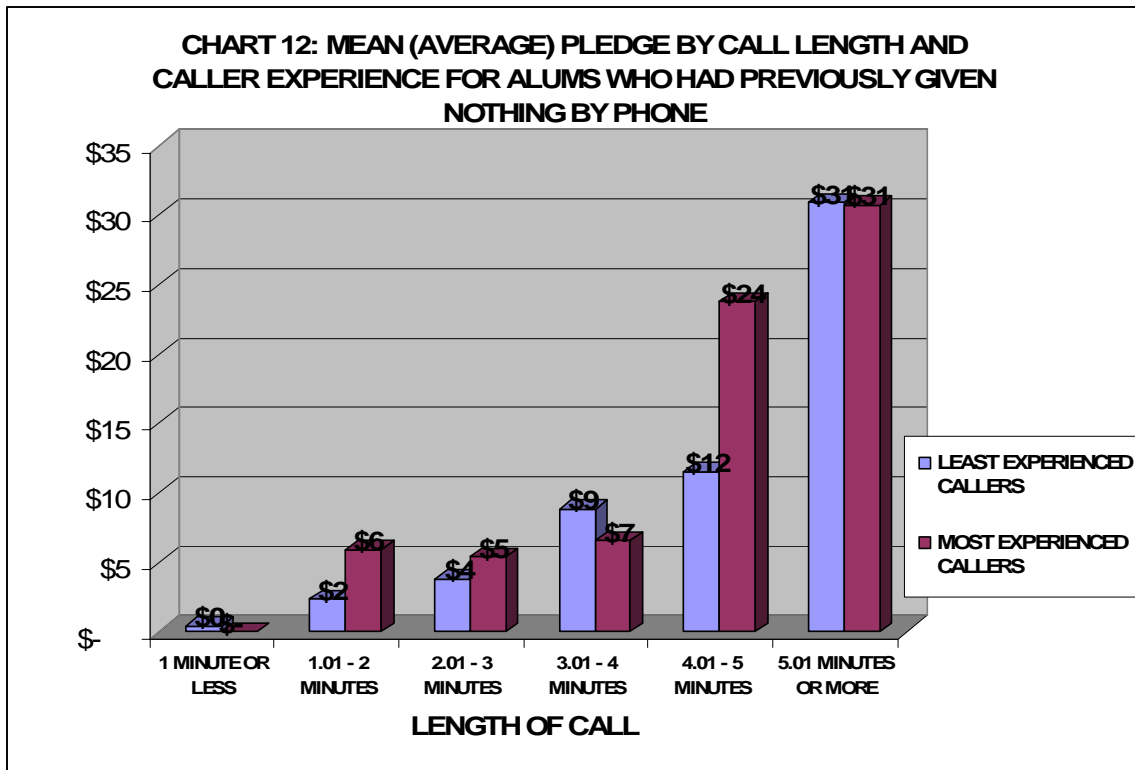
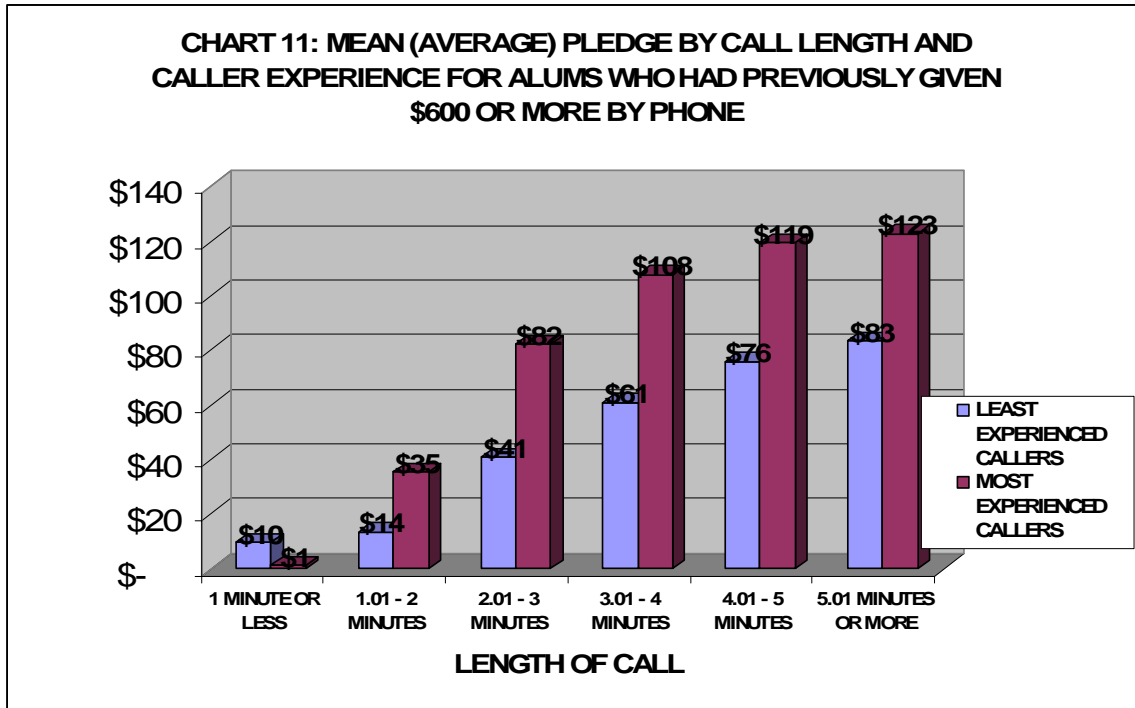
Given all the data that calls center collect it's easy to measure the length of each call. I was particularly interested in how pledge making was related to how long the caller stayed on the phone with the alum. So I divided the length of all calls into six groups. (You can see these groupings on the bottom of [Chart 9](#).) And from [Chart 9](#) it's pretty

obvious that the longer the call lasts (up to a certain point, of course) the greater the chances of getting a pledge and the lower the chances of getting a refusal.



That's sort of what I expected to see. However, I was a little surprised to see what emerged from [Chart 10](#). Notice how the chances of getting a credit card payment go up rather dramatically if the call lasts longer than three minutes.

And now let's look at [Charts 11](#) and [12](#). [Chart 11](#) shows the mean (average) pledge that least and most experienced callers got by length of call from alums who had previously given \$600 or more. [Chart 12](#) shows the mean (average) pledge that least and most experienced callers got by length of call from alums who had previously given nothing.



What do we have here? Well, with alums who've previously given \$600 or more, the most experienced callers are more successful than the least experienced callers. We

already know that. But the big thing that stands out is the dramatic rise in pledge amounts as the length of the call goes on, regardless of the experience of the caller.

And [Chart 12](#)? Well, that chart also shows us something we already know. That the least experienced callers get about the same level of pledge as the most experienced callers. So experience doesn't seem to be the key factor with this group. The key factor seems to be how long the call lasts.

Some Conclusions

I believe that science (especially the kind of applied science that has always fascinated me) is an incremental process. No one study is definitive. Groups of studies that build on and challenge each other are the stuff of which good theory and good practice are built. So nobody should gallop off with what I've reported here and dramatically start changing how they run their call centers. And I'm not worried that anyone will do that.

What I am worried about, however, is that those of us involved in educational advancement (be it secondary school, college, or university) won't start acting more scientific about our fundraising efforts. The data are there and the resources and the good minds are there to do it. This little study is a case in point. I hope it encourages you to think about replicating it in your own call center. I hope it encourages you to think what implications the study might have for who you hire for your call center and how you train them. I even hope it encourages you to question what I've reported – to find holes in it and come up with something that's more enlightening. I'd probably find that more than a little threatening, but I'd get over it. I always have.

Peter B. Wylie is a nationally recognized industrial psychologist and data analyst who teaches advancement professionals how to mine donor databases to find predictors of giving. He can be reached at pwylie@datadesk.com.

Wylie is the author of [KeyDonor: Multimedia Course in Data Mining for Fundraising Professionals](#) (Data Description Inc., 2006) and [Data Mining for Fund Raisers: How to Use Simple Statistics to Find Gold in Your Donor Database—Even if You Hate Statistics](#) (CASE, 2004). Order them online at www.case.org/books or by phone toll-free at 1-800-554-8536.

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