Standard Operating Procedure (SOP)

Data Selection & processing for Calling and Automated Voice Blast Calls

*Function: Data Operations*

*SOP #1 | Revision #02*

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# Purpose:

This SOP defines the standard process for selecting, cleaning, and preparing customer datasets for manual calling and automated voice blast campaigns. The goal is to ensure compliance with regulations, maintain data accuracy, and maximize campaign effectiveness.

# Scope:

This SOP applies to all teams involved in data extraction, validation, and campaign execution for calling and voice blast activities related to:

* Health check-up bookings
* Doctor consultation follow-ups
* Corporate partner utilization campaigns

# Prerequisites:

Before beginning the process, ensure the following:

* Access to source systems (CRM, data warehouse, reporting tools).
* Availability of updated DND/DNC (Do Not Disturb / Do Not Call) lists.
* Latest utilization master data (Health check-ups, Doctor Consultations).
* Approved campaign strategy (target audience, filters, timeline

# Responsibilities:

* Data Analyst: Extract, clean, and validate datasets.
* Campaign Manager: Approve final data sets for calling/voice blast.
* IT/Data Team: Manage data uploads into the dialer and monitor execution.
* Compliance Team: Verify adherence to DND/DNC and privacy regulations.

# Actives Frequency:

* Data preparation must be performed before the 4th working day of every business month.
* Ad-hoc campaigns may require additional data preparation as per business requirements.

# Procedure:

## Step 1: Data Collection

* Extract raw data from CRM, reporting systems, or partner portals.
* Pull utilization masters for Health Check-up (HC) and Doctor Consultations (DC).

## Step 2: Data Cleaning & Validation

* Remove duplicates and invalid contact details.
* Exclude customers present in the DND/DNC list.
* Standardize data formats (phone numbers, email IDs, customer IDs).
* Validate against master datasets for accuracy.

## Step 3: Data Segmentation

* For Health Check-up Booking Campaigns:
  + Target customers due for renewal or pending bookings.
  + Segment based on location, last service date, and eligibility criteria.
* For Doctor Consultation Campaigns:
  + Target customers who have booked consultations in the past but not recently.
  + Identify gaps in utilization and send reminders.
* For Corporate/Partner Utilization:
  + Select employees of specific corporate partners.
  + Prioritize based on utilization reports and partner targets.

## Step 4: Data Approval

* Prepare a sample dataset and share it with the **Campaign Manager** for review.
* Obtain necessary approvals before final upload.

## Step 5: Data Upload into Dialer

* Ensure the dialer system supports the required file format.
* Map fields correctly (Name, Contact No, Customer ID, Campaign Type).
* Perform a test upload with a small sample to validate.
* Upload the full dataset once approved.

## Step 6: Monitoring & Reporting

* Track calling/voice blast completion status.
* Monitor bounce rates, unreachable contacts, and DND hits.
* Generate campaign performance reports and share with stakeholders.

# Best Practices

* Always refresh and apply the latest **DND/DNC dataset** before calling.
* Maintain an **audit trail** of data extraction and approvals.
* Keep backup copies of all uploaded files for 3 months.
* Automate repetitive cleaning tasks using SQL queries or Power Query.
* Ensure compliance with **data privacy regulations** (e.g., GDPR, HIPAA, TRAI as applicable).

Thank You!