**Intro**

The purpose of this document is to set out the data structure that will be used to define the data set that is generated by the first call and the pitch call that are made as part of the Marketing project. This document should be reviewed by all concerned to ensure that there is agreement as to what information we are collecting.

The first call, and the pitch call are conceptually separate although in reality they may well end up occurring in the same actual telephone call.

**Outcomes**

There are two potential outcomes of the first/pitch call:

Outcome 1: The pitch is never made because the individual is not interested to hear the pitch, or the pitch should not otherwise be made. If this is the case then the reasons for this lack of interest are recorded both by referencing a pre-defined code, and by the marketing team entering a short statement in words as to why the pitch will not be made. Possible reasons for the pitch never being made can be grouped into the following categories:

* Lack of interest on part of factory
* Not appropriate to pitch (not a light knit factory etc.)
* Not contactable

Outcome 2: The pitch is made and the individual either agrees or disagrees to receive further information by post and a follow up call to see if they would like to attend the free module. If the factory disagrees, then the reasons for lack of agreement are recorded both by referencing a pre-defined code, and by the marketing team entering a short statement in words as to why the individual did not want more information.

**Data Set**

The data set that the first/pitch call process will generate will be stored automatically by the Input Program the marketing team will use when making the calls. The data will be stored in an invisible Pandas Data Frame. This Data set will not be modifiable by the marketing team.

The following variables are those that will make up the first/pitch call data set:

UID: The unique identifier of the factory

Designation: A designation code that represents the generic job title of the person within the factory that has been identified as the “Relevant Decision Maker”

Number Attempts: This is a numeric variable that represents the number of attempts it takes to reach the Relevant Decision Maker and to reach either Outcome 1 or Outcome 2. This variable will begin ‘ticking up’ once the factory has been successfully contacted and the identity of the relevant decision maker has been indentified. Therefore the number of attempted calls made in order to find out the right contact details are not counted. Only once the marketing team is trying to contact a specific individual who has been identified (rightly or wrongly) by someone representing the factory as the Relevant Decision Maker, will the number of attempts begin to be recorded. If the marketing team are later directed elsewhere the number of attempts will not reset but continue to grow. In effect this variable will measure how long it takes to reach to a decision maker once initial contact has been made with the factory.

Pitch Dummy: This is a variable that equals 0 if the pitch is not made, and 1 if the pitch is made

No Pitch Code: If it is not possible to make the pitch, then the reason for this will be recorded by the marketing team using a set of pre-defined codes.

No Pitch String: If it is not possible to make the pitch then the reason for this will be briefly recorded by the marketing team using words

Discussion Points: If the pitch is made then an ordered list of discussion points that are included in the conversation will be entered by the marketing team using pre-defined codes. For the sake of clarity in a Pandas Data Frame these are stored as python lists e.g. [8, 3, 2, 10] etc. Thus the list is stored inside the data point. Once the structure of the ultimate data set is decided upon these lists can be accessed and modified at will. If the pitch is made over more than one call, then the list will be expanded after inputting the data from the second call.

Questions/Concerns: If the pitch is made than an ordered list of question/concerns raised by the factory will be recorded by the marketing team using pre-defined codes. This will be a list as above.

Info Dummy: This is a variable that equals 0 until the factory agrees to receive more information by post and agrees to a follow up call at which point it switches to 1. If the factory disagrees to receive information then it will be equal to 2.

No Info Code: If the factory does not agree to receive more information the reason for this will be recorded by the marketing team using a pre-defined code.

No Info String: If the factory does not agree to receive more information the reason for this will be briefly recorded by the marketing team using words.

Comments: The marketing team will enter a text relating to their “general impressions” the call, the tone, any perceived problems etc.