

Outbound Campaign Process Guide

Process and technical documentation sample

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Purpose and Audience

This guide helps authorized operations staff prepare, validate, test, launch, and close an outbound contact campaign using an approved campaign-management platform.

Who

Operations representatives responsible for campaign file preparation and launch.

When

Use this procedure after an approved outbound campaign request and contact list have been received.

Before You Begin

- Confirm that you have access to the approved spreadsheet application and campaign-management platform.
- Confirm that the request has the required business approval.
- Use only authorized contact data and approved caller-identification information.

1. Receive and Validate the Request

- Open the campaign list and confirm that each record includes a unique customer identifier, customer name, and valid 10-digit telephone number.
- Confirm that required values are stored in separate, consistently formatted columns.
- If required information is missing or blank, return the file to the requestor for correction before continuing.
- Ignore supplemental fields that are not required by the campaign platform unless the approved campaign specification identifies them as necessary.

2. Format the Campaign File

- Insert a Unique ID column before the customer identifier and populate it with sequential numbers for every record.
- Confirm that the customer identifier, name, and telephone number fields match the approved import format.
- Add a campaign-display column and populate it with the approved campaign name. This value supports both the representative's on-screen display and downstream reporting.
- Add the approved caller-identification value for the campaign's region and business line. Do not substitute toll-free or unapproved numbers.
- Save the file using the standard naming convention: Test_YYYYMMDD_CampaignName_ListName.

3. Conduct a Test Import

- Open the campaign-management platform and navigate to the approved import function.
- Create a test campaign using the same name as the prepared file.
- Choose the designated test queue or skill and set the approved expiration date.
- Map every file column to the corresponding platform field.
- Run the test import and review the validation results.
- Correct all reported errors and repeat the test until the import succeeds.
- Deactivate the test campaign after successful validation.

4. Launch and Close the Campaign

- Create the production copy of the validated file and remove the Test prefix from the filename.
- Repeat the approved import and mapping steps using the production file.
- Confirm the record count, campaign name, caller-identification value, queue or skill, and expiration date before activation.
- Activate the campaign and confirm that it is available to the assigned representatives.
- When the campaign is complete, deactivate it according to the retention and closure procedure.

Quality Check

- Required fields are complete for every record.
- The test import completed without errors.
- The production campaign uses approved naming, routing, and caller-identification values.
- The campaign was deactivated after completion.

Competencies Demonstrated

- Task-based process documentation
- Workflow analysis and sequencing
- Prerequisite, exception, and quality-control writing
- Audience-centered technical communication