TELEMARKETING FOR VALUE EXCHANGE

Request for Proposal

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Overview

Practical Action is seeking a telemarketing and fulfilment agency to test a physical value exchange model in early 2027.

We will generate leads via paid digital ads (run by our digital agency, Torchbox). Prospects will request a free printed product and provide a telephone number. The successful agency will contact these leads and fulfil their order, with a view to converting them to make a regular gift.

This is initially a proof-of-concept test, with the potential to scale significantly if it demonstrates an acceptable return on investment.

- Telemarketing/fulfilment budget: up to £20,000 (incl. VAT)
- Expected launch: January/February 2027
- Proposal deadline: 27/11/2027
- Appointment: By 18/12/2027

We are looking for a partner with experience working with charities (ideally including those in the international development sector) and delivering telemarketing campaigns in service of acquisition objectives.

About us

Practical Action is an international development charity taking practical action on the frontlines of today's environmental crises to create the big changes needed to reduce poverty. Together we're creating greener, fairer ways to make a living, and building resilience to the shocks climate change brings. These are real-world, locally-led solutions, designed to grow and last.

We're working to deliver three big, global changes:

- Big change on food – produced sustainably and sold fairly,
- Big change on energy – clean and accessible for everyone, and
- Big change on climate risk – safer lives, stronger livelihoods.

Around one third of our income is given by individual supporters, most of whom are based in the UK. As part of our 2030 strategy we are aiming to grow our supporter base and scale and diversify our acquisition channels and tactics.

We have secured budget to undertake this test within FY2026-27 with a view to producing a proof of concept, from which we can decide whether to allocate additional budget to scale up in the future, dependent on return on investment.

The project

Work to date

In early FY2026-27 we launched a digital value-exchange test, using paid advertising across Meta and TikTok promoting five digital lead magnets - PDF guides to cutting down plastic, a recipe guide, etc. People would receive these free resources by providing their email address, with those providing marketing consent subsequently receiving a five-email automated conversion journey through DotDigital.

This activity required us to establish new data flows between the advertising platforms, sign-up forms on our website, DotDigital, our CRM (Raiser's Edge NXT), and PowerBI reporting dashboards.

The lead generation element has performed well, demonstrating appeal to our target audiences and that we can generate leads at a viable cost. Performance varied by product and platform.

However, the subsequent email conversion journey has not converted those leads into donors at the level we had hoped.

Next phase

We now want to build on what we have learned by testing a physical value exchange model, producing printed versions of the lead magnets, and introducing telemarketing into the conversion journey. The aim is to understand whether telephone engagement can convert this demonstrated interest into regular giving more effectively, and whether the model has the potential to become a scalable acquisition route for us. We don't currently use telemarketing elsewhere in our fundraising or supporter stewardship. However, as part of our wider work to improve supporter journeys, we would welcome a partner who can bring broader charity telemarketing expertise and identify opportunities or learnings that could be applied beyond this initial test. We are currently in the process of updating the relevant internal processes and compliance documentation, including our legal basis for collecting and using telephone numbers for marketing and fundraising.

The successful telemarketing partner will work closely with Practical Action and our digital agency, Torchbox, to develop the data flows and reporting needed to understand performance across the entire acquisition journey. Our ambition is to create a single source of truth, connecting paid media spend and leads generated with contact rates, telemarketing outcomes and regular giving conversions. We would expect regular sharing of performance insight so that paid media targeting, creative, lead generation, telemarketing and fulfilment can be optimised collaboratively as a single acquisition funnel.

Objectives & budget

The primary purpose of this activity is to determine whether physical value exchange followed by outbound telemarketing can provide Practical Action with a scalable and financially sustainable new supporter acquisition route.

The test should enable us to understand:

- the proportion of leads that can successfully be contacted by telephone;
- conversion from contacted lead to regular giver;
- average regular gift value;
- cost per regular giver acquired;
- differences in performance by lead magnet, audience and acquisition source;
- the economics of the model, including lead generation, telemarketing, and fulfilment costs;
- the potential longer-term return on investment and scalability of the approach;
- opportunities to optimise creative, targeting, calling strategy and script during the test.

We have a budget of up to £20,000 (incl. VAT) for telemarketing, printing, and postage, with additional budget for lead generation.

Scope of work

Telemarketing	**Fulfilment**
• Develop and deliver caller briefing and campaign training in collaboration with us. • Receive new leads, potentially daily or at a pre-agreed cadence. • TPS screen/data validation. • Make outbound calls within an agreed lead-response window. • Agree and develop scripts. • Test calling strategy/script variants. • Capture postal addresses. • Make the regular-giving ask. • Capture required outcomes. • Process or securely transmit donation details through a pre-agreed mechanism. • Return call outcomes/data to Practical Action. • Provide call recordings for QA. • Agree an approach to handling vulnerable supporters, complaints and requests to opt out of future contact.	• Print agreed value-exchange products. • Hold/manage stock if applicable. • Generate fulfilment packs. • Dispatch within agreed SLAs. • Manage returned/undeliverable items. • Report fulfilment volumes and costs.

Quote requirements

We would expect your proposal to include the following:

- A brief outline of your experience with charities, lead generation, and specifically physical value exchange (plus an overview of the TM team / who will be making the calls)
    - Your proposed approach to this test, including a calling strategy and details of how you would optimise the campaign once live
    - Benchmarks from comparable charity value-exchange campaigns, including contact rates, conversion rates, average gifts and cost per acquisition, where available.
    - Clear costs and pricing model for telemarketing
    - Including specific charges for TPS screening / data validation of any kind
    - Price for number of products / script variants
    - Any charges for changing scripts (tweaks vs. re-writes), or extending campaigns
    - Any setup fees and/or management fees
    - Any minimum required spend
    - Clear costs and pricing model for print and postage fulfilment aspect (and whether this would sit internally or be managed by a third party, including how this relationship would work in the latter scenario)
- Low / central / high scenario forecasts based on our available budget, including your recommendation for the lead volumes required to produce robust and meaningful test results. Please clearly state the assumptions used for contact rate, conversion rate, average regular gift and cost per regular giver. (Please explain the basis for your recommended lead volume and the level of confidence you believe this would provide in assessing the viability of the model.)
    - Rough workback schedule from setup to launch, including caller training time
    - Account management approach – what we could expect, whether you use employed vs outsourced callers and whether teams are dedicated or shared
    - Your preferred approach to data flows, highlighting transfer method/API/SFTP capability, encryption, frequency, field mapping, unique lead IDs, deduplication, error/rejection handling, audit trails, reconciliation, retention/deletion and Power BI reporting requirements.
- Any further / more specific requirements regarding data setup beyond what's outlined in the appendix below. And any elements of the plan you would recommend changing or doing differently to maximise the likelihood of the test succeeding?

Assessment Criteria

We will be assessing quotes based on the following criteria:

- Relevant charity telemarketing and value exchange experience
- Proposed strategy and approach
- Forecast performance and evidence supporting assumptions
- Pricing / value for money
- Data, compliance and information security
- Testing, optimisation and reporting capabilities
- Scalability of approach
- Account management and cultural fit

Schedule

- Proposal deadline: 27/11/2027
- Please provide your proposal via email to marketing.procurement@practicalaction.org.uk with the subject line ‘Proposal Response: Telemarketing for Value Exchange - [vendor name]’

- Appointment: By 18/12/2027
  - We're aiming for this activity to go live in early calendar year 2027 and conclude before 1 April.

Appendices – further context

Data Flows

The successful agency will be expected to work with Practical Action to establish appropriate secure and automated data transfers wherever practicable. Our anticipated data flow is outlined below, but we welcome recommendations for a more secure, efficient or scalable approach.

- Telephone data is expected to be captured via sign-up forms on our website and/or native lead-generation forms on paid media platforms. Our preferred approach is for lead data to flow into Raiser's Edge NXT and onward to the telemarketing agency securely and as close to real time as practicable. We welcome recommendations from agencies on the optimum data flow, particularly where this could reduce the time between lead capture and first contact.
- Telephone leads data transfer from Raiser's Edge NXT out to the TM agency would be set up via a secure FTP site
  - Data transfer of successful leads contacts, converted lead addresses and donation information from TM agency back to Practical Action would be set up via securely shared excel sheets or SFTP data transfer
  - Example phone call data would be shared securely from TM agency to PA for review
  - Paid digital ads data flows set up by PA to combine costs and lead data into central PowerBI dashboard – conversion data from RE:NXT will also be pulled through into this dashboard which can be viewed by both agencies

Value Exchange – Lead Magnets

We have been testing the following five products which can be provided on request:

- 12 Steps to cutting plastic use
- Guide to changing minds about climate change
- Good Play! Family Activity pack
- Regenerative Agriculture gardening guide
- Leyla Goes Latin recipe guide (featuring our ambassador, MasterChef's Leyla Kazim)