

ANSWER-RATE & COMPLIANCE CHECKLIST

Twenty checks that keep calls connecting and keep you on the right side of the rules. Tick what you can prove today. Every unticked box is either lost revenue or open risk.

01 NUMBER REPUTATION

- ☐ Calls are signed with **STIR/SHAKEN “A” attestation** by your originating carrier.
- ☐ Numbers are **registered with the carrier analytics providers** (e.g. Free Caller Registry).
- ☐ **CNAM / branded caller ID** is set and matches your business name.
- ☐ **Daily volume per number** stays in a steady, predictable range; no spikes on fresh numbers.
- ☐ **Spam-label status** is checked per number on a schedule, not when sales complain.
- ☐ **Answer rate is tracked per number**, weekly. No rotating numbers to dodge labels.

02 CARRIER & ROUTING HEALTH

- ☐ **Answer rate and SIP failure codes** are tracked per carrier, per hour.
- ☐ An **alert fires** when a route's failure rate leaves its normal band.
- ☐ A **failover route** exists and has been tested under load, not just configured.
- ☐ The share of **very short calls** is tracked; spikes are investigated.

03 CALLING RULES & CONSENT

- ☐ **National DNC** scrubbed at least every 31 days; **internal DNC** honored across campaigns.
- ☐ **Reassigned Numbers Database** checked where you rely on prior consent.
- ☐ Calling window enforced in the **called party's local time** (federal: 8am–9pm).
- ☐ **State windows and frequency limits** enforced per lead (e.g. Florida: 8am–8pm).
- ☐ **Abandonment ≤ 3%** per campaign per 30 days; a rep connects within 2 seconds of the greeting.
- ☐ **Consent records** are stored per lead and retrievable on request.

04 DATA & OWNERSHIP

- ☐ **Dispositions map consistently** between dialer and CRM.
- ☐ **Recordings** are retained per policy and access-controlled.
- ☐ **Dialer database backups** are proven by a test restore.
- ☐ **One named owner** for dialer, carriers and compliance alerts.

Fewer than 16 ticked?

Get a scored audit and a fix list.

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This checklist is general information, not legal advice. Telemarketing rules vary by state and change often. Have qualified counsel review your compliance program.