



## **A Buyers Guide to Phone Append Services**

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WHITE PAPER

A friend of mine recently built a brand new house. My wife and I seem to always be in the midst of some kind of remodeling project so we asked him about his selection of appliances, cabinets, carpet, fixtures and windows. We were a bit surprised by his response: he said “I’m just letting my contractor select them.” But letting someone else select all the important options for you is like going out to an expensive restaurant and letting your waiter decide what you’re going to eat.

If you, like many contact centers, use a service provider to add and update phone numbers on your call list, you may be unknowingly allowing someone else to decide for you which phone numbers are the best for you and your customer. You may receive a pre-appended file from your clients or you may send them out for a phone-append process in tandem with your Do-Not-Call scrubbing. A phone append process is any process that adds a phone number to another type of contact data, most typically a name and address. It may appear that “Phone Append” is a commodity, but there are actually many different types of phone append processes and quality grades. Being a savvy information service buyer can reduce your unreachables, increase your contactability ratio and improve your conversion rate. This article will breakdown the options available to ensure the best possible results, as well as examine why phone append processes can vary so widely.

### **Question 1: How current are the phone numbers?**

There are 5 common grades of phone append services that, among other factors, defines the “freshness” of the phone numbers: Whitepage, Directory Assistance, Non-Telco Compiled, Utility Billing and Special Purpose. The grades are differentiated by a set of factors that include:

- **Freshness** of the phone numbers - how quickly updates from the phone companies are integrated into the data
- **Field Saturation** - how frequently each data field contains a value (especially the first name and street address fields which are often intermittent)
- **Geographic Coverage** – A measure of how many phone numbers a process has access to as a percentage of the total phone numbers available in a particular geographic area.
- **Type Coverage** – Does the service provide
  - landline –vs- cell phones
  - business –vs- residential phones
  - published –vs- non-published phones
- **Permissible Purpose** – for what purposes can the phone numbers be called – common purposes include marketing, non-profit, survey, funds/donation solicitation, political, collections and employment verification. Another very important and related issue is whether or not the phone numbers are on one of the state or national Do-No-Call lists.

	Freshness (in months)	Field Saturation	Geographic Coverage	Type Coverage*	Marketing Allowed?
<b>Whitepage</b>	1-12 months	medium	national	BRLP	Yes
<b>Directory Assistance</b>	daily	medium	national	BRLP	Yes
<b>Non-Telco Compiled</b>	unpredictable	high	spotty	RLWPN	Yes
<b>Utility Billing</b>	1 to 30 days	high	regional	BRLWPN	No
<b>Special Purpose</b>	varies	varies	varies	varies	No

\* type coverage: B=Business, R=Residential, L=Landline  
W=Wireless, P=Published, N=Non-Published

**Table 1. Phone Append Data Grades and Factors**

**Whitepage** phone appends use phone numbers drawn from electronic copies of phone books. These numbers were accurate and verified by the phone company but there’s no guarantee that the phone number is *still* active. Whitepage and DA/411 data can be used for marketing as long as the phone numbers are scrubbed against the do-not-call lists.

**Directory Assistance (DA)**, also known as **411** data, can be thought of as “what the phone book looks like right now” data. DA data is typically updated every 24 to 48 hours so it is very current and contains newly connected phone numbers. It also contains some records which are not published in the phone book. One of the few downsides of Directory Assistance data are data gaps. Important pieces of information like apartment numbers, or in some cases even the entire address, may be missing if the consumer requested them to be excluded from the printed phone book.

**Non-Telco Compiled** data is assembled from non-typical, generally non-utility sources of phone numbers. This data can be useful in filling in some gaps in telco originated datasets, but the freshness of this information is pretty unpredictable. These datasets are commonly “scraped” from another type of information such as warranty cards or ring-tone downloads. Since some of these data sources are “self-reported,” use this type of data carefully and don’t pay more than it’s worth.

**Utility Billing** files contain phone numbers from either a telephone company or other utility. These are generally very good in quality and completeness but they generally only cover a particular region of the country or a known subset of all possible phone numbers. This information is both hard to find and of limited permissible purpose. Typically marketing use is not allowed, but there may be exceptions for particular call sponsors (political parties, non-profits, government, etc.) or for specific call purposes like non-solicitation surveys, political campaigns, medical or emergency notification, etc.

**Special Purpose** files are compilations of records with specifically allowed uses. They are often similar in restrictions to Utility Billing based information, but they are not built, primarily from utility information. There is a wide variety of special purpose information on the market including those that provide some cell phone information and those built primarily from voter registration records which are generally limited only for use in political campaigns. Most of the phones numbers available from these special

purpose files come with some kind of restriction. In fact, if someone tries to sell you a special purpose file that has no restrictions proceed with caution.

### **Question 2 – How deep is the ocean, how wide is the net?**

The most common advertized measurement in any data-append process is the “match rate”. In the case of finding phone numbers for your file of names and addresses, the match rate is a measure of how many phone numbers your provider returns for every 100 contact records you send them. When you compare provider match rates among phone append service providers it is important to be aware of the four factors that can significantly affect the rate:

1. The quality and completeness of the name and address you send your provider
2. The breadth of data to which your provider has access
3. How effective your provider is at finding the names and addresses it has on files
4. How broad wide of a match you accept

You alone control the first factor: the quality and completeness of the name and address data you send your provider. Just keep in mind the old adage: “Garbage In, Garbage Out”. If you are buying a list from a broker or a lead generation company, make sure you’re getting good quality and consistent data formatting. Make sure your file’s contact records have the right data in the right fields. Buying a file with mailing addresses in the name field or vice-versa is a waste of money.

When shopping for phone appending services ask your provider how many different sources they use and the approximate number of contact records to which they have access. In general, bigger is better, but factor 3, search effectiveness, is where the art of phone appending comes into play. Just having access to phone numbers doesn’t mean your provider is going to find them. Ask them how much “fuzziness” they allow in their data searches. Will they find the phone number for “**John McDonald, 123 Main St**” if your contact file uses this spelling: “**Jonathan MacDonald at 123 Maine St**”? If you only want exact, literal matches, make sure they know that. Verifying a sample of the phone numbers returned to you is always a good idea.

In order to gain the broadest access to contact data, ask your service provider how many sources are available to you as well as the number of contact records to which they have access. Having only a single data source isn’t necessarily a reason to switch to another provider, but you may want to look for other providers with different data sources or a single data service provider with access to multiple sources of contact data.

For example, if you or your client only want to speak to a specific individual, tell your provider you don’t want “household” (same last name at the address but a different first name) or “address” (same address but a different name) level matches. Reputable data service companies only want you to have the data that best meets your business’ need. If a provider tries to sneak in address-only matches in order to improve their match rate and increase your charges you may want to look for a new provider. Even if you have a good, long term relationship with your data service provider, always keep in mind Ronald Reagan’s old phrase: “Trust, but verify”. If they have your interests at heart they’ll appreciate your assistance in helping them meet your needs.

**Question 3 – What is the purpose of your call?**

All phone calls are not created equally. You already know that making a call to tell a potential customer about a great new product is treated very different legally from a call made to notify a patient of an upcoming appointment. However, as general use data resources get fewer and fewer (and hence become overused) new contact data resources are being developed that allow use for outbound calling only for specific purposes. For example, calls specific to a candidate's campaign are differentiated from those for a state-wide ballot measure; political survey use is now being differentiated from political funds solicitation use. Calls on behalf of one kind of non-profit may be differentiated for those on half of another non-profit of a different kind.

The common theme, then, for contact outsourcers is specificity. A contact outsourcer knows the particular type of message or call purpose, but they may not be categorizing their customers in enough detail to obtain access to special use file only available for a specific purpose or other specific criteria.

A good example of this type of categorization that has been growing recently is that of membership. Are the individuals to whom a call is being made members of the calling organization? If so, is there any contact information available that is not available if the individuals are not members? This isn't really a matter of whether or not a person is on the Do Not Call (DNC) list. All companies making outbound calls need to pay very close attention to following the FTC's DNC regulations. Categorization of customers and call purpose is about having the widest variety of contacts with which to start. The wider the variety of contacts available to a call center, the better the opportunity to find someone to whom a call is allowed after all the necessary regulatory filtering has taken place.

This specificity trend seems to be increasing. As it does you will want to discuss with your phone append service provider or providers what options you may have for broadening your access to contact information and how you can properly communicate with your provider the categorization for the particular type of call and the particular call you are making.

**Bottom Line: Don't forget that YOU are your phone append service provider's customer.** Remember that they may have a very wide variety of customers with a broad spectrum of needs so what they have "on the shelf" may not be your best option. And above all, make sure you tell them about your specific needs and work with them to give you the best quality available for you and for your customers.