



CBM India Trust

Position Profile

CBM India Trust is committed to improving the quality of life of people with disabilities. CBM India addresses disability as a cause and consequence of poverty in the most disadvantaged communities of the world. We work in partnership with local, national, and international actors with the aim of creating a more equal society for all. Our vision is to have an inclusive world in which all people with disabilities enjoy their human rights and achieve their full potential.

Position: Senior Telecalling Officer

Location: Bengaluru

Reporting to: Manager - Supporter Services & Database Management

Objective:

The Senior Telecalling Officer will drive donor retention and donor acquisition through structured, high-quality outbound and inbound calling, with a primary focus (60%) on retaining, upgrading, and cross-selling to CBM India Trust's existing donor base, and a secondary focus (40%) on acquisition through internally and externally generated leads. The role combines strong calling skills — upselling, cross-selling, donor retention, and donor handling — with hands-on support to the Donor Retention Officer on backend tasks such as data entry and sorting of donation forms and donor data, ensuring accuracy and continuity across the donor lifecycle.

Responsibilities:

1. Donor Retention (60%)

- Make outbound retention calls to existing donors from CBM India Trust's donor base to renew, upgrade, or reactivate their giving.
- Cross-sell and upsell relevant giving options (higher-value gifts, monthly/recurring giving, additional programs) to existing donors based on their profile and interest.
- Handle donor queries, objections, and concerns professionally, ensuring a positive and respectful donor experience on every call.
- Support the Donor Retention Officer with backend work, including data entry and sorting of donation forms and donor records to keep the database accurate and up to date.
- Maintain organized call logs and donor notes to enable consistent follow-up and personalized engagement.

2. Donor Acquisition (40%)

- Make calls to prospective donors from internally generated leads, including referrals, events, and campaigns, as well as externally generated or partner-provided lead lists, to convert prospects into active supporters.
- Clearly communicate CBM India Trust's mission, programs, and giving options to prospective donors during acquisition calls.
- Accurately capture new donor information and coordinate with the relevant teams for donor enrolment and donation processing.

- Track and report acquisition call outcomes, including contact rates, conversions, and other relevant calling metrics.

3. Calling & Data Discipline

- Follow approved calling scripts and adapt them appropriately for donor retention, cross-selling/upselling, reactivation, and acquisition conversations.
- Record accurate and detailed call notes in the CRM/database after every call to support effective tracking and follow-up.
- Tag and segment donors appropriately, based on insights from conversations, such as upgrade potential, lapsed status, or specific program interests.
- Ensure donation forms and donor data are accurately sorted, verified, and entered in a timely manner to support smooth processing and maintain data accuracy.

4. Work Environment & Role Demands

- Handle high call volumes and occasional difficult or irate donor conversations with patience, calmness, and professionalism.
- Work under pressure to meet assigned monthly donor retention and acquisition targets.
- Balance calling responsibilities with backend data entry and donation form-sorting activities, adapting priorities as required.

5. Decision-Making Responsibilities

- Prioritize daily calling activities across donor retention and acquisition to meet assigned targets, broadly maintaining the 60:40 focus.
- Determine when a donor query, concern, or complaint needs to be escalated to the Donor Retention Officer or Manager.
- Exercise judgment in selecting the most appropriate donor engagement approach, such as an upgrade, cross-sell/upsell, or reactivation, based on the donor's profile and interests.
- Ensure the accuracy and completeness of donor data entered during backend support activities, recognizing its importance for reporting, donation processing, and future donor communication.

Qualifications and Experience:

- 4–6 years of experience in tele-calling, donor relations, customer engagement, or fundraising, with a proven ability to handle both retention and acquisition calling.
- Demonstrated skills in upselling, cross-selling, donor retention, and donor handling.
- Comfortable with data entry and basic database/CRM tools; attention to detail when sorting and processing donation forms.
- Good communication skills with a donor-centric, patient approach to calling.
- Ability to manage a mixed workload of calling and backend administrative support.

**Other Requirements**

The future job holder is expected to adhere to CBM India's policies and procedures, commit to CBM India's Child Safeguarding Policy and Code of Conduct, and follow CBM India's safety & security protocols.

CBM India encourages persons with disabilities and women to explore this important opportunity. Send your resume to jobs@cbmindia.org by September 6, 2026.