Outbound Dialer Buyer Checklist

2026 Edition - For sales and operations leaders choosing smarter outbound tools

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1. Dialer Flexibility

- Supports manual dialing
- Includes predictive dialer option
- Includes progressive dialer option
- Easy to switch between modes
- Built for both volume and conversation quality

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2. CRM Integration

- Native integration with our CRM (e.g., HubSpot, Pipedrive, Salesforce)
- Real-time two-way sync
- Easy to set up, no middleware required
- Syncs contact status, notes, and outcomes
- Automatically updates lead stages or pipelines

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3. Reporting & Coaching

- Real-time dashboards (calls per rep, connect rate, etc.)
- Call recordings available for QA
- Coachable metrics (talk ratio, handle time, outcome tracking)
- Exportable reports (CSV or API access)

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4. Compliance & Control

- GDPR/TCPA-compliant
- Supports DNC lists and time zone rules
- Call recording opt-in settings
- Admin-level access and role-based controls
- Local presence dialing available

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5. User & Team Experience

- Intuitive interface (reps can start using it same day)
- Fast onboarding and documentation
- Built-in call scripts or lead notes
- Works for remote/hybrid teams
- Reps actually like using it

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6. Pricing & Support

- Clear per-user pricing (no hidden fees)
- No long-term lock-in or seat minimums
- Responsive support (chat, phone, or email)
- Onboarding included or easy to manage in-house
- Scales with us as we grow