

TCPA checklist

A practical guide to assessing your TCPA compliance posture

Requirements	Notes
<input type="checkbox"/> Train all telephone agents on their compliance responsibilities prior to engaging with customers.	
<input type="checkbox"/> Only call consumers between the hours of 8 a.m. and 9 p.m. according to the consumer's location.	
<input type="checkbox"/> Scrub telephone numbers against the National DNC Registry when no exemption exists.	
<input type="checkbox"/> Disclose on calls an agent name, company name and contact information.	
<input type="checkbox"/> Honor all do not call requests within required timeframes (typically within 10 business days).	
<input type="checkbox"/> Only use autodialers or prerecorded messages for sales purposes with prior express written consent.	
<input type="checkbox"/> Ensure a process exists to honor all revocations of consent when using autodialers or prerecorded messages for informational purposes.	
<input type="checkbox"/> When predictively dialing, the abandonment rate for calls answered by a live person shouldn't exceed 3% in a 30-day period (per campaign).	
<input type="checkbox"/> Include an automated opt-out feature in abandonment messages and prerecorded messages.	
<input type="checkbox"/> Maintain documentation of consent, opt-outs and call activity for audit and defense purposes.	
<input type="checkbox"/> Monitor and enforce internal (and external third parties) for compliance.	

Need help with TCPA compliance?

Wipfli helps organizations assess and strengthen their TCPA compliance programs through:

- Compliance assessments and gap analysis
- Do not call policy development and training
- Consent management and recordkeeping strategies
- Vendor and campaign compliance reviews

Contact us to evaluate your [TCPA compliance posture](#).