What to Check When Buying Screened Live Transfers

Getting the most from a screened live transfer program

Advertisers who buy live transfers expect each connected call to bring a real opportunity. But not all screened live transfers are equal. The process that qualifies a caller before routing them to your business can vary significantly between providers. Without a clear understanding of what happens before that call lands on your phone, you risk paying for conversations that should never have reached you.

A systematic approach to evaluating your call tracking setup helps you confirm that every transfer meets your standards. This checklist covers the key points to review, from how calls are screened to how they are billed.

Confirm the screening criteria match your goals

The first thing to verify is what "screened" actually means in your program. Some providers filter calls based on caller intent, while others simply route any call that lasts longer than a few seconds. You need to know exactly which criteria are applied before a call is transferred.

Ask for a clear definition of the screening process. Does it check for a live human on the line? Does it verify that the caller is interested in your specific service rather than a general inquiry? The more precise the screening, the higher the quality of the live transfers you receive. If the criteria are too broad, you may get calls from people who are just browsing or who were misdirected.

Review transfer rate and acceptance rate data

Two numbers tell you a lot about the health of a call program: transfer rate and acceptance rate. The transfer rate shows how many calls that enter the system actually get passed to you. A low transfer rate might mean the screening is too strict, or that the traffic sources sending calls are not well targeted.



The acceptance rate measures how many of those transferred calls you actually want to take. If you decline a high percentage of transfers, the screening may not be aligned with your ideal caller profile. Compare these rates over time and across different sources. A sudden drop in acceptance rate could signal a change in the quality of the traffic feeding the program.

RidgeRise Media works with advertisers to align these metrics with their business goals, so that every transfer is a candidate for conversion rather than a waste of time.

Check for duplicate suppression

Nothing damages a campaign budget faster than paying for the same caller twice. Duplicate calls can happen when a caller redials, or when the same phone number appears in multiple sessions. A solid duplicate suppression system prevents repeated transfers from the same source within a defined window.

Verify that your provider has rules in place to block duplicate calls. Ask about the time frame used for matching and whether it applies across all campaigns. Some systems also check for partial number matches to catch callers who block their caller ID. Without these checks, your screened live transfers may include calls that should have been filtered out.

Understand how call duration is factored in

Live transfers are often billed based on call duration. But the clock should not start until the call is actually connected to your team. Some providers begin charging from the moment the caller dials, which includes ring time and any automated prompts.

Ask for a breakdown of how call duration is measured. Look for a setup that starts billing after the transfer is completed and the caller is on the line with your representative. Also check whether very short calls are excluded from billing. A call that lasts only a few seconds may be a misdial or a hang-up, and you should not pay for those.



Monitor call disposition and quality

After you take a transfer, what happens next matters. Call disposition tracks how each call ended: was it a sale, a lead, a callback request, or a dead end? This data helps you measure the effectiveness of the screening process.

Set up a system to log dispositions consistently. Share this data with your provider so they can refine their screening rules. Over time, you will see which traffic sources produce the best dispositions and which ones generate disputed calls. Disputed calls are those where the caller was not interested or the connection was poor. Tracking these helps you identify patterns that need fixing.

Verify source tracking accuracy

Every screened live transfer should be traceable back to the marketing source that generated it. Source tracking lets you see which publishers, campaigns, or keywords are driving the calls that convert. Without accurate tracking, you cannot optimize your spend.

Check that the tracking system captures the source at the moment the caller dials, not after the transfer. Some providers use dynamic number insertion or unique toll-free numbers to tag each call. Confirm that the source data survives the transfer process and appears in your reports. If the source is listed as "unknown" for a significant number of calls, the tracking setup needs attention.

Review billing for consistency

Billing should reflect the calls you actually received and accepted. Compare your call logs with the provider's invoices. Look for any charges for calls that were not connected, that were duplicates, or that lasted less than the minimum billing increment.

If you have a flat-rate or cost-per-call agreement, confirm that the volume matches your expectations. For programs with variable pricing based on call duration, review the average call length and see if it aligns with your experience. Billing disputes are easier to resolve when you have clear records on both sides.



Build a feedback loop with your provider

The best screened live transfer programs improve over time because the advertiser and provider communicate regularly. Share your acceptance rate data, call disposition trends, and any patterns in disputed calls. This feedback lets the provider adjust their screening rules and traffic sources to better match your needs.

Set up a monthly review of the key metrics: transfer rate, acceptance rate, average call duration, and source performance. Use these conversations to identify opportunities for tighter screening or broader reach. RidgeRise Media supports advertisers in building this feedback loop, turning raw data into actionable refinements.

Final thoughts

A successful live transfer program depends on more than just volume. By checking the screening criteria, monitoring call quality, and maintaining accurate tracking, you can ensure that every call you pay for has the potential to become a customer. Treat your call tracking setup as a living system that needs regular attention, and you will get the most from your advertising spend.