Call Center RFP Template

Selecting the Right Outsource Call Center Partner for your Business
Selecting an outsource call center partner is difficult and time consuming. Because you are selecting a partner that is an extension of your business, your choice must be compatible, experienced, reliable, and cost effective.

Key areas you need to consider when evaluating an outsource call center partner:

**Specialization**
- Review the outsource call center experience in your industry or a related industry.
- Learn the focus of their services, including types of calls (inbound/outbound, location, onshore or offshore markets served) and their language capabilities.

**Technology**
- Understand if the outsource call center has the technology that meets your multichannel campaign parameters. Determine if they have redundant systems and technologies such as interactive voice response (IVR), email support, live chat support, social media services, or cloud-based software solutions.

**Compliance & Certifications**
- Depending on your industry, be sure to check the outsource call center certifications, including whether they are compliant with the Payment Card Industry Data Security Standard (PCI), HIPAA Certified, or ISO9000.

**Years in Business & Company Culture**
- A matching culture is essential when starting this important partnership. Ask how long the call center has been in business and determine if it is financially stable. Talk with them, get a copy of their audited financials, and interview their references to find out if their culture fits with your culture.

**Capacity**
- When you’re seeking an outsource call center to manage the excess call volume you cannot manage in-house, it is critical that the partner you choose has the flexibility and capacity to meet your requirements regardless of call volume or time of year.

**Performance & Quality Matrix**
- Evaluate the outsource call center practices used to maximize performance. Analyze their training, management, quality monitoring, remote call monitoring, incentives, and motivational practices to ensure they can perform as promised.

**Making the Choice**

As you can see, selecting the right outsource call center partner for your organization can be a daunting and difficult task. Making the right choice is a critical business decision. Outsource Consultants has created a Call Center Request for Proposal (RFP) Template to help guide you through the critical questions to ask as you solicit bids from potential call center vendors. This invaluable tool will help thoroughly explain your needs and expectations and also provide tips to help narrow down the key areas to consider when selecting the best vendor for your company. Companies big and small looking to outsource to a call center can benefit greatly from this Call Center RFP Template.
**RFP Submission Schedule & Timeline**

The following table is an overview of the selection activities and timeline.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>TIMEFRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Release Date</td>
<td>Day #</td>
</tr>
<tr>
<td>Non-Disclosure Form must be signed, executed, and received by Date and sent to RFP PERSON@MY COMPANY no later than XX PM.</td>
<td>Day #</td>
</tr>
<tr>
<td>Intent to Bid Email must be received by Date and sent to RFP PERSON@MY COMPANY no later than XX PM.</td>
<td>Day #</td>
</tr>
<tr>
<td>Any follow up questions must be submitted by Date and sent to RFP PERSON@MY COMPANY later than XX PM. All vendor questions and responses will be shared with all responding vendors via email.</td>
<td>Day #</td>
</tr>
<tr>
<td>One (1) electronic copy of the RFP Response must be submitted to ABC COMPANY via email by close of business Date (XX PM) to RFP PERSON@MY COMPANY.</td>
<td>Day #</td>
</tr>
<tr>
<td>Finalist Review, Reference Checks, and Conference Calls</td>
<td>Day #</td>
</tr>
<tr>
<td>Site Visits</td>
<td>Day #</td>
</tr>
<tr>
<td>Selection Appointment</td>
<td>Day #</td>
</tr>
<tr>
<td>Contract Finalization</td>
<td>Day #</td>
</tr>
<tr>
<td>Implementation Process</td>
<td>Day #</td>
</tr>
<tr>
<td>“Go Live” Soft Launch Date</td>
<td>Day #</td>
</tr>
<tr>
<td>Full Launch</td>
<td>Day #</td>
</tr>
</tbody>
</table>

Client reserves the right to accept or reject any or all proposals, waive any non-material irregularities and technicalities and may, at its sole discretion, request a clarification or other information to evaluate any or all proposals. Client reserves the right, before awarding the contract, to require Applicant(s) to submit evidence of qualifications or any other information Client may deem necessary. Selection of vendor by Client does not constitute a contractual agreement.

As you can see, selecting the right outsource call center partner for your organization can be a daunting and difficult task. Making the right choice is a critical business decision.
1. About Company
(Provide company background information here)

2. Statement of Purpose
(Goals and Objectives of RFP)

3. Call Center Outsourcing Program Overview
(Program overview and goals) Describe the process of how the calls are being handled currently.

4. Training
(Describe the training timeframe)

5. Monthly Call Volume Estimates
(Provide daily, weekly, and monthly call volume with as much detail as possible)

6. Personnel Requirements
(Describe the profile of the agent)

7. Key Call Center Vendor Requirements and Capabilities
   7.1. Call Center Vendor Evaluation Criteria

7.2. Key Performance Indicators (KPIs) - Metrics

   7.2.1. Customer Service Metrics (Omit if not Customer Service)
The following metrics will be carefully monitored and reported at the end of each month.

<table>
<thead>
<tr>
<th>METRIC</th>
<th>MONTHLY TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abandon Rate</td>
<td>The target abandon rate is to be below X%.</td>
</tr>
<tr>
<td>Average Call Length</td>
<td>Average call length is shorter than X minutes.</td>
</tr>
<tr>
<td>Average Answer Time</td>
<td>Average answer time is under X seconds.</td>
</tr>
</tbody>
</table>

   7.2.2. Telesales Metrics (Omit if not Telesales)
The following metrics will be carefully monitored and reported at the end of each month.

<table>
<thead>
<tr>
<th>METRIC</th>
<th>MONTHLY TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion Rate</td>
<td>Monthly conversion rate target is to exceed X%.</td>
</tr>
<tr>
<td>Product Mix</td>
<td>X% monthly sales target.</td>
</tr>
<tr>
<td>1st Month Retention</td>
<td>Target an average first month retention of X%.</td>
</tr>
<tr>
<td>Call Volume</td>
<td>Daily inbound call volume target of X calls per day.</td>
</tr>
<tr>
<td>Abandon rate</td>
<td>The target abandon rate is to be at or below X%.</td>
</tr>
</tbody>
</table>
7.3. Vendor Information

- NAME:
- ADDRESS:
- CONTACT:
- PHONE NUMBER:
- WEBSITE:
- FAX NUMBER:
- # OF YEARS IN BUSINESS:
- LOCATION(S):
- NUMBER OF EMPLOYEES/SUPPORT STAFF/LOCATION:

7.4. Company History
Please provide information on the company history and brief biographies on key personnel and employees who will be assigned to our program. Along with:

- Services provided and key industry specializations
- Organization Chart
- Mission Statement
- Describe general company culture
- In what languages do you have capabilities
- What is your average daily call volume (per location)?
  - Average call volume by day?
  - During your busiest week?
  - What is your seasonality?
- Revenue for the last 3 years

7.5. Relevant Experience
Please provide information regarding your relevant experience pertaining to the scope of this outsourcing program.

7.5.1. Customer Service Experience
Please list any relevant customer service experience and case studies.

7.5.2. Inbound/Outbound Telesales Conversion Experience
Please list any relevant inbound telesales experience and case studies.
7.6. Program Management

- Please describe the implementation process and typical timeline for a new account.
- Please describe your forecasting process.
- Which staffing and/or scheduling tools do you use?
- Please provide detailed information on the following topics:
  - Supervisory procedures
  - Quality control on all projects
  - Account management process
  - How many accounts does one account manager handle?
  - How large is your client services group (number of Managers)?
  - Program process change procedures
  - Problem resolution process of client issues

7.7. Call Center Information

7.7.1. FACILITIES

- Are you open 24x7? If not, what are your hours and days of operation?
- Do you have blended seats capability?
- Total number of seats (Percentage of Inbound vs. Outbound).
- How many call center sites? Locations? Number of seats per location?

7.7.2. TRAINING

- How many trainers do you have? Requirements to be a trainer?
- Describe in detail your training curriculum for CSRs. How long is your new hire training?
- Describe your training strategy including all delivery methods for content facilitation.
- Describe the training services you provide inclusive of content management and curriculum development processes.
- Describe in detail your process for measuring the effectiveness of training. Describe how you identify knowledge and/or skills gaps within your employee base and your process for course recovery.

7.7.3. QUALITY

- Do you have remote monitoring capabilities? Can clients dial in at any time?
- Do you digitally record all calls? If not, what percentage?
- Describe your change management process and practices.
- Describe Quality Assurance process.
- Describe processes for call monitoring and expected and realized benefits of the interaction monitoring process.
- Describe the agent feedback process and monitoring thereafter.
- How many calls are monitored on a monthly basis?
7.7.4. Personnel

- What is the average tenure for CSRs?
- How many Spanish-speaking agents do you have? Other languages?
- What is your annual turnover rate?
- How do you motivate your CSRs to increase sales conversions?
- What is your CSR/Supervisor ratio?
- Are your CSRs dedicated or shared? What is the percent shared vs. dedicated?
- Describe programs designed to facilitate employee retention inclusive of employee morale, recognition and overall management of turnover.

7.8. Reports

- Please provide a sample of your:
  - Standard call reports
  - Do you have real-time reporting for statistics?

- Explain your ad hoc reporting capabilities.

- Detail Key Performance Indicators (KPIs) used in each of the functional areas of the call center. Include definitions, how computed, reporting frequency, and processes and programs in place for corrective actions.

- Partner will provide daily reporting on inbound and outbound call activity including: sales, conversion rate, calls delivered and calls handled, abandon rate, agent statistics, etc.

- Client will provide timely reporting on:
  - Sales processed
  - Product mix sold
  - First Month Retention

- Live reports must be accessible which include the Call Status Reports on a daily basis:
  1) Call Statistics Detail and Summary Reports which include information on:
     *(reports can be broken down by current day, specific day, or date range)*
     a. Statistics
     b. End of Call Disposition
     c. Call Counts (daily, weekly, monthly and annual)
     d. Reason for call (Call Disposition)
     e. Duration of All Calls in Call Disposition by category
     f. Average Call Duration for Category in Call Disposition
     g. Grand Totals for all above information
  2) Statistics w/interval filter reports can be sorted also by city, date or date and city together.
  3) Sending calls with questions (elevated calls) to a specified email address allowing Client to pick up those calls requiring follow-up.
  4) Report with detailed information on Escalated Calls.
7.9. Systems and Other Questions

- Please explain your Disaster Recovery/Systems Redundancy
- How much downtime has your agency experienced in the past 12 months due to systems, electrical and weather-related incidents?
- What hours is your IT center staffed?
- How many people do you have in your systems department?
- Describe your technology as it relates to this project for the following:
  - CRM
  - Dialer
  - ACD
  - Cloud software
  - Email
  - Live web chat
  - Social media
  - Digital recording
  - Workforce management
- Describe your back-up and storage processes.
- Long distance providers?
- Compliance and Certifications (PCI, HIPAA, SOC.2, etc.). PCI is a requirement.

7.10. Account Management

- Describe the account management process that would be utilized for Client.
- Do you have an account manager that would be a good fit for Client? Can you provide a brief bio on this person?
- Do you allow and provide space for Client to have on-site temporary visits?

7.11. References

Please provide three (3) references for which you have provided inbound telesales and customer service. Include length of relationship and a brief overview of services provided.
7.12. Scope of Work and Pricing Structure
Please provide pricing information including the following:

<table>
<thead>
<tr>
<th>ITEM</th>
<th>COST (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up</td>
<td>$XXX</td>
</tr>
<tr>
<td>Training</td>
<td>$XXX</td>
</tr>
<tr>
<td>Attrition Training (if any)</td>
<td>$XXX</td>
</tr>
<tr>
<td>Custom Programming/Custom Reporting</td>
<td>$XXX</td>
</tr>
<tr>
<td>Dedicated Agents (hourly pricing)</td>
<td>$XX.XX/hour</td>
</tr>
<tr>
<td>Requested Service 1</td>
<td>$XX.XX/hour</td>
</tr>
<tr>
<td>Requested Service 2</td>
<td>$XX.XX/hour</td>
</tr>
<tr>
<td>Shared Agents (minute pricing)</td>
<td>$XX.XX/hour</td>
</tr>
<tr>
<td>Requested Service 1</td>
<td>$XX.XX/hour</td>
</tr>
<tr>
<td>Requested Service 2</td>
<td>$XX.XX/hour</td>
</tr>
</tbody>
</table>

Please provide any additional charges which may be incurred during our relationship.

7.13.1 Evaluation Process and Criteria
Client will evaluate the proposals and select the best option for the company. The group will review the proposals received in accordance with the evaluation criteria. They may also ask additional questions to clarify the proposal submitted and request site visits for the finalist in the proposal process.

After the group has selected a call center partner, contract negotiations will begin. If contract agreement cannot be reached with the selected call center, Client shall negotiate with their next selection until agreement is reached. At any time during the negotiations, Client may choose to modify the choice of a selected call center if the group determines that such a change is in the best interest of Client. Client reserves the right to reject any or all proposals submitted. Client further reserves the right to inspect the facilities, organization, and financial condition or take any other action necessary to determine the ability to perform in accordance with specifications, terms and conditions.

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We are call center experts with over 20 years of outsourcing industry experience. We have spent thousands of hours vetting and analyzing the strengths and specializations of the industry leading call centers in the United States and around the world. Let us help you find the outsource call center that best fits your requirements at NO charge!

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