The Comprehensive Call Center Outsourcing Checklist

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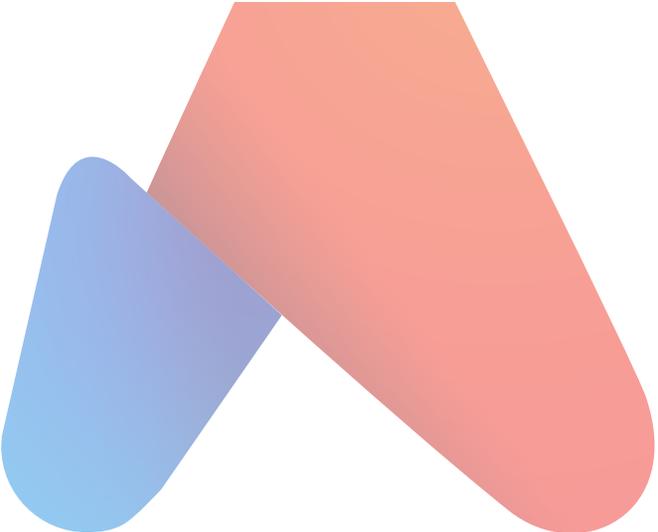A FUSION GROUP COMPANY

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Important Questions to Ask Before Choosing a Call Center Vendor

Finding a call center vendor that meets all your needs can be a complex process. First, there are a lot of vendors to choose from and an untenable amount of data about them and call centers in general. After all, a Google search for "call center vendors" brings up more than 218 million results.

With so many choices — and not all of them offering the kind of quality and trust-based relationship you want — you need a proven method to narrow the field and find out whether a potential call center will be a good partner. Use the checklist of questions below to find out what you need to know before making a choice.

Staffing and Training

It's critical to find out everything you can about who will be manning the phones, as these people will be the voice of your brand. Ask these questions about how the call center hires and trains their staff.

Where does the call center source employees from?

What sources are used to find candidates? What experience and education do they require of their candidates? What's their average age? Are they capable of scaling up on short notice, does the labor pool(s) they draw from offer that elasticity? Find out if the call center has a comprehensive staffing plan because their ability to scale up quickly, especially during busy seasons, makes a huge impact on their ability to service your customers effectively.

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Who makes the final hiring decision?

Does the vendor rely solely on a recruiting agency to make hiring calls, or is there a systematic process for evaluating candidates to ensure high quality? What is the actual interviewing and qualification process and how many qualified screeners need to approve a candidate before a job offer is extended?

How much reliance is there on temps?

Call centers often have to rely on temps to scale up quickly during holidays or other busy seasons. Some, like Ameridial, avoid temps unless absolutely necessary. If temps are employed find out what percentage of the staff are temps and if they offer "temp-to-hire" benefits for those who do a good job. The overall longevity of staff can impact call center service quality, and employees (or temps) who have a stake in or ownership over their processes tend to do a better job.

What types of screenings are conducted?

Does the call center conduct screens such as background checks, drug screening or skill tests (such as typing tests) before hiring candidates? Make sure hiring processes are, at a minimum, above board when it comes to legal requirements and any industry compliance standards you may be held to.

How is training handled?

Ask questions about how the vendor trains staff. Are employees provided with orientation training, allowed to shadow other staff members or practice answering phone calls before they're thrown into a live call situation? Who actually conducts the training sessions? Are clients allowed to participate in training? Who develops the training content and reference tools? Training is every bit as important as the representatives who are trained. Without the proper training, even the most skilled representative will struggle to succeed.

Quality and Compliance

Whether or not the call center can meet service level agreements or uphold compliance requirements is critical to a successful relationship. Here are some questions you might ask to determine if this is the case.

How does the call center vendor ensure quality?

Make sure the call center has a quality assurance department and find out what their quality assessment process is. Who does the grading? How qualified are the analysts to grade the calls? What are the grading criteria they employ? Can you customize the QA process to fit your program? And what sample size is drawn to effectively grade each representatives (make sure it's a valid sample size).

How is staff motivated to provide quality work?

It's not enough for the call center leadership to buy into delivering your SLAs. They won't be successful in doing so unless the front line staff, and all layers of management staff, are also committed to success. There are many ways to motivate employees, especially in a call center setting. Find out how the vendor plans to reward and motivate its staff to ensure quality work is performed at all levels.

What compliance certifications does the call center hold?

Healthcare, finance, retail and other industries maintain different compliance standards and you'll want to know which ones the call center is certified in, or at the minimum compliant with, before choosing a partner.

HIPAA compliance is mandatory for any entities that deal with personal health information, for example, and PCI-DSS compliance is required for anyone handling credit or debit card information. Ask call center vendors for a list of compliance certifications to ensure they meet the requirements of your industry.

What efforts are made to ensure ongoing compliance?

Don't stop asking questions just because a vendor assures you it's compliant. Ask about how it trains staff and maintains compliance to better ensure you're not putting yourself at risk for exposure to regulatory fines and sanctions via your relationship with this business partner. And ask what steps they take year over year to monitor changes to compliances standards and how they maintain their status.

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Disaster Recovery and Business Continuity

One of the benefits of a call center partner is that you can rely on them for backup when something happens in your home office. But that's only true if your vendor has a plan for business continuity if something happens to one of their offices.

Are there redundancies in place with regard to call center locations?

Does the vendor provide support from multiple locations and are they far enough apart so that a natural disaster isn't likely to impact both (or multiple) locations simultaneously? Will the call center agree to locate a portion of your delivery staff in each of the centers if you choose them? And can you load balance the staff so that your maximum exposure at one center only represents 50% of your outsourced staff?

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What type of backup is there for internet, phone and computer equipment?

Does the vendor have a plan in place to ensure data and networks are accessible and safe if a disaster or cyber breach occurs? It's often a good idea to look for vendors that work with off-site data providers and cloud based servers for this purpose.

Is there a disaster recovery plan, and what's the timeline?

Ask for the vendor's formal disaster recovery plan. If they can't provide a formal, written plan (updated within the past year), that's not a good sign and should be a red flag. Find out how the vendor plans to communicate (especially with you) during a disaster event and how quickly they expect to be "live" again in various types of scenarios.

Note that understanding the vendors disaster recovery plan is just as important as making a decision about whether or not to work with them. You'll also need to revise your own business continuity plan to account for theirs in the event that you're both impacted by the same circumstance — especially if you're working with a call center in the same region as your own offices.

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Call Center Service

If the call center doesn't provide the type of service you're looking for, it's obviously not the right choice. But many companies forget or don't realize that not all call centers are the same. These questions about service should be some of the first you ask.

What services are provided?

Review the call center vendor's brochure and website copy to learn about its services, and then ask questions to get a more specific overview of what the vendor provides. Some examples of the types of services you might be looking for but aren't provided by every call center include but aren't limited to:

- Appointment Setting
- Advanced Customer Service
- Technical Support

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What languages can be supported?

The ability to provide customer service in multiple languages is one of the many benefits of a call center. But if your vendor supports seven languages and none of them are the primary or secondary languages spoken by your customer base, it's not extremely beneficial.

Ask for a list of languages the vendor supports, how many speakers of each language there are and whether they are native speakers. If they aren't, ask how proficient they are; someone who has taken a year of Russian isn't going to be able to handle a complex customer service matter in the language.

What are the fees, what's included when you bill?

Ensure you know how you're being charged for all services. Is there an upcharge for bilingual, late shift or escalated calls, and how are those tracked and determined? Is the pricing all-inclusive that you've been quoted or will you receive a bill with a number of additional fees? How are you be billed, is it by the hour, by the minute, by the call? And what are the payment terms and frequency of billing? It's always important to get prices and any cost-related agreements in writing and ensure you understand them.

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Technology

The technology a call center uses is important. Make sure you understand what the technology backbone, and ACD is, that's employed by the call center. Make sure you know the features and functions of the solution(s), particularly those applicable to your program needs. Plus, you'll definitely want to ensure that the call center is capable of integrating with your own systems if you'll be running parallel or related processes in-house.

What systems does the call center currently use?

Ask for a list of programs and systems the call center uses to get an idea of how it manages workflow, data and calls. Ensure that any systems are compliant with industry regulations that are important to your company. You may also want to ask about the types of phone lines and other equipment the call center uses to ensure it's invested in high-quality resources.

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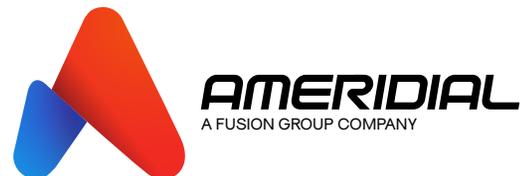
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Are integrations with your systems possible?

Find out if the call center is willing to put in the work to integrate its systems with yours. For example, if the call center will be taking orders on your behalf, how will those orders get into your warehousing or shipping systems? The same is true if the call center takes payments: How will that information be posted to customer accounts?

These questions can be answered in numerous ways. Some companies provide outsourced call center reps with VPN access into their own systems to handle workflow. In other cases, reps work within their own systems and information is ported into yours.

Some call center software is designed to integrate easily with popular solutions such as Salesforce. Asking questions ahead of time lets you understand the level of work that will be required to integrate outsourced processes into the daily business.

What type of security does the call center use?

Security should be a top concern for any vendor relationship, especially when your data, your customer's data and multiple systems cross each other. Find out what type of network security and IT protocols a vendor has, how it ensures log-in security and what type of training it provides to employees to help reduce data breaches associated with human error.

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Management

Finally, make sure you understand how the teams who will work on your calls will be run.

How are daily operations within the call center handled?

Who is responsible for the daily operations within the call center? In some cases, your managers and supervisors take on some responsibility, working jointly with supervisors in the call center to manage workflow. In other cases, all responsibility is handled by the outsource team, which reports to a manager directly or an executive in your company. Find out how reporting and communication will be handled and how often you should expect contacts to meet face-to-face, via video conference or on the phone.

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Who will be managing my program and what are their **qualifications?**

You'll be entrusting your most valued asset with another company. Make sure you understand who owns the company (are they publicly or privately owned), what the owner's background is and who the individuals are that will be managing your program and servicing your account. Ask to go on-site to the call center(s) service will be provided from within. Meet the team who will oversee your account. Understand the background of the individuals who will manage the front-line staff. Make sure you're comfortable with all levels of the company, they'll be a direct reflection of your company and brand with every call, email or chat they touch. If a call center won't provide you with access to these critical stakeholders, look elsewhere for another partner.

How will communication be handled between your company and the call center?

Ask a lot of questions about communication, as this is paramount to a long-term successful relationship with a vendor. Never assume that emails will be sent or calls made at what you deem appropriate times or moments. Work with the vendor to spell out what types of communications you expect and when; a call center vendor that isn't willing to communicate regularly may not be the right partner for you.

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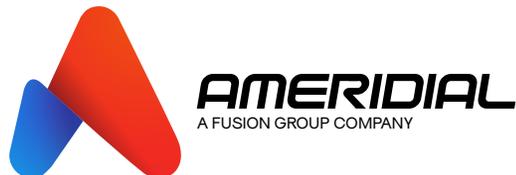# Does the call center use workforce management systems?

Find out if the call center vendor uses a workforce management system to automate or semi-automate rep schedules. Also understand the role of WFM in determining the size of the staff required to fulfill SLAs. This type of technology has become almost impossible to do without in call centers where there's a need to cover multiple shifts, staff up and down according to call volume and ensure staff is able to take appropriate breaks. In general, the use of workforce management systems helps ensure better call coverage at a lower cost because they rely on intense data analysis to ensure appropriate coverage at the right times.

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Conclusion

This list of questions will help you develop a comprehensive understanding of a call center vendor and whether it's a match for your company. But don't hesitate to add to it or ask questions that come up during the vetting process. Ultimately, you want to be comfortable that the vendor and its staff are going to treat your customers as their own and provide high-quality, compliant, timely services every day.

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