Template

Call Center RFP Template

Critical Questions to Optimize Your Outsource Call Center Search
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, high quality, reliable, and cost effective.

Choosing 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 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.
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, nearshore, offshore or at-home agents 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 & Certification**
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.
Call Center RFP Template

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## Request for Proposal (RFP) Submission Schedule & Timeline

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

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

Client reserves the right to accept or reject any or all proposals, waive any nonmaterial 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.
1. About Company

(PROVIDE COMPANY BACKGROUND INFORMATION HERE)

2. Statement of Purpose

(GOALS AND OBJECTIVES OF RFP. WHY ARE YOU OUTSOURCING? INTERNAL ISSUES/CURRENT OUTSOURCE PARTNER ISSUES? SCALE DUE TO GROWTH?)

3. Call Center Outsourcing Program Overview

(OUTSOURCING OVERVIEW AND GOALS - DESCRIBE THE CURRENT PROCESS OF HOW THE CONTACTS ARE BEING HANDLED. DESCRIBE THE KEY PERFORMANCE METRICS (KPI’S) THAT YOU ARE MEASURING TO DETERMINE SUCCESS)

4. Training Timeframe

(DESCRIBE THE TRAINING TIMEFRAME)

5. Monthly Volume Estimates

(PROVIDE DAILY, WEEKLY AND MONTHLY CONTACT VOLUME (CALLS, EMAILS & CHAT) WITH AS MUCH DETAIL AS POSSIBLE. PROVIDE THE EXPECTED NUMBER OF DESIRED FTE’S)

6. Personnel Requirements

(DESCRIBE THE PROFILE OF THE AGENT THAT WILL PROVIDE OPTIMAL PERFORMANCE)
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) ADD ALL OF YOUR KEY CUSTOMER SERVICE PERFORMANCE METRICS HERE. BELOW IS A SAMPLE LIST.

The following metrics will be carefully monitored and reporting 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 Handle Time</td>
<td>Average call handle time is shorter than $X$ minutes.</td>
</tr>
<tr>
<td>Average Answer Time</td>
<td>Average answer time is under $X$ seconds.</td>
</tr>
<tr>
<td>Quality Scores</td>
<td>Expected average score for quality monitoring sessions</td>
</tr>
<tr>
<td>CSAT</td>
<td>Expected average customer satisfaction score</td>
</tr>
</tbody>
</table>

7.2.2 Telesales Metrics

(OMIT IF NOT TELESALES) ADD ALL OF YOUR KEY INBOUND/OUTBOUND TELESALES PERFORMANCE METRICS HERE. BELOW IS A SAMPLE LIST.

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
- Primary Contact
- Phone Number
- Website
- Years in Business
- Site Location(s)
- Number of Employees

7.4 Company History

Please provide general information on the company history and brief biographies on key personnel and employees who will be involved with our business. Along with:

- Top 3 industry specializations and percent of business for each
- Top 3 services provided and percent of business for each
- Organization chart
- Describe general company culture
- What languages do you have capabilities?
- Revenue for the last 3 years.

When evaluating a call center’s company history and culture, it’s important to consider the company’s ability to hire agents who will be aligned with your desired customer experience.

Finding a contact center with a company culture and history that aligns with your values and requirements will greatly improve the success of your program. Get your FREE call center cost proposal.
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, industry specific and case studies.

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

7.6 Program Management
- Please describe the implementation process and typical implementation timeline
- Please describe your forecasting process.
- Which staffing and/or scheduling systems 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/Remote Agent Capabilities
- Are you open 24x7? If not, what are your hours and days of operation?
- Do you have blended seats capability?
- Total number of seats and the percentage of business inbound vs. outbound.
- How many call center sites? Locations? Number of seats per location?
- Do they offer remote agent capabilities? What percent of their business is remote agents?

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 or 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.
- What percentage of calls are monitored on a monthly basis?
- Ratio of Quality Assurance Analysts to Agents?

7.7.4 Personnel

- What is the average tenure for Agents?
- Please describe all languages you can support.
- What is your overall annual turnover rate and by each site? Define your turnover calculation how you factor agent turnover.
- How do you motivate your Agents to increase sales conversions?
- What is your Agent/Supervisor ratio?
- Are your Agents dedicated or shared? What is the percent share vs. dedicated?
- Describe programs designed to facilitate employee retention inclusive or employee morale, recognition and overall management of turnover.

Knowing the impact geography and competition can have on a call center’s hourly pricing and agent attrition rates is a major factor in **successfully selecting** the right call center.

Our extensive industry experience has given us a unique perspective on evaluating agent performance to determine how well they will perform on a campaign. Get your FREE call center cost proposal.
7.8 Reports

- Please provide a sample of your:
  - Standard call reports
  - Do you have real-time reporting dashboards your clients can view?
- 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:
  - Call Statistics Detail and Summary Reports which include information on:
    - Statistics
    - End of Call Disposition
    - Call Counts (daily, weekly, monthly and annual)
    - Reason for call (Call Disposition)
    - Duration of All Calls in Call Disposition by category
    - Average Call Duration for Category in Call Disposition
    - Grand Totals for all above information
  - Statistics with interval filter reports can be sorted also by city, date or date and city together.
  - Sending calls with questions (elevated calls) to a specified email address allowing Client to pick up those calls requiring follow-up.
7.9 Systems and Other Questions

- Please explain your Disaster Recovery/Systems Redundancy
- Describe your back-up and redundancy. Do you have a backup generator at each site and the proposed location to handle this business?
- Do you have redundant internet and telecom providers?
- 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 and systems as it relates to this project for the following:
  - CRM
  - Dialer
  - ACD
  - Email
  - Live web chat
  - Social media
  - Digital recording
  - Workforce management
  - Chatbots
  - Artificial Intelligence
- Long distance providers?
- Compliance and Certifications (PCI, HIPAA, SOC2, etc.) PCI is a requirement.
- All technology used to support your remote agent capabilities.

7.10 Account Management

- Describe the account management process that would be utilized for this business
- Do you have an account manager in mind that would be a good fit for this business? 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 that are similar to the services requested within this RFP. Include length of relationship and a brief overview of services provided.

<table>
<thead>
<tr>
<th>Company</th>
<th>Services Provided</th>
<th>Contact</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

When speaking to your prospective call center’s reference, be sure to ask about relevant industry and call type experience, how long they have been working together, and how well the call center adheres to at least 3 KPIs that are relevant to your business.

We continually collect feedback on call center performance to ensure our partners are providing top quality service. Get your FREE call center cost proposal.
### 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></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></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.

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In general, you can expect to pay the following prices depending on the call center’s location:

<table>
<thead>
<tr>
<th>Location</th>
<th>Hourly Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>$26 - $31/hour</td>
</tr>
<tr>
<td>Nearshore</td>
<td>$10 - $16/hour</td>
</tr>
<tr>
<td>Offshore</td>
<td>$6 - $13/hour</td>
</tr>
</tbody>
</table>

Want to be sure you’re getting the best deal? We can provide a side by side pricing comparison of call centers that fit your key requirements – at no cost to you! [Get your FREE call center cost proposal.](mailto:info@outsource-consultants.com)
7.13 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.

Your outsource call center is your company’s direct link to your customers. Choosing the right partner can have a major impact on how your brand is perceived. Comparing multiple providers from different market tiers offers your best chance of getting it right the first time.

The call center experts at Outsource Consultants have over 25 years of industry experience and can simplify your selection process by providing a heavily vetted list of call centers that meet your exact specifications. We don't charge you for our services and there's no obligation or risk! Get your FREE call center cost proposal.
Our proven process takes the guesswork out of outsource call center selection and **simplifies the search process**.

We’ll do the heavy lifting, so all you need to do is select a partner from a **highly vetted list of top performing BPO vendors**.

1. **Discovery Call**
   We work with you to gain a complete understanding of your company’s key outsourcing requirements, including number of agents, scalability, budget, industry experience, languages, desired geographic location (domestic, nearshore, offshore) and service type.

2. **Call Center Search**
   We leverage our proprietary BPO database of over 500 partners to compare over 50 data points to create a shortlist of vendors that match every one of your requirements.

3. **Side by Side Comparison**
   We present your key requirements and vendor pricing to you in a side by side comparative analysis, so you can easily evaluate all your vendor options in a clear, concise fashion.

4. **Assist in the Final Selection**
   We help simplify the selection process by navigating and coordinating phone calls, site visits and contract negotiations.
Outsource Consultants is a call center referral and advisory firm that helps companies find outsource call centers that are a perfect fit. Our experts have over 25 years of BPO and call center outsourcing industry experience and have vetted and screened over 500 top-performing nearshore, offshore, US-based, and at-home call centers.

We lay the groundwork and perform research for companies to match them with the best outsource call center providers that meet their exact requirements. This adds value for companies by saving them time, reducing their costs, and ensuring they find a high quality, top-performing outsource call center that best fits their needs.

We don’t recommend the top 10 BPO call centers; we find the hidden gems that aren’t otherwise on our clients’ radar. These call centers provide our clients with high-level performance, quality English speaking agents, and highly competitive pricing - and we do it at no cost!

<table>
<thead>
<tr>
<th>25+</th>
<th>500+</th>
<th>100+</th>
<th>96%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Years of call center industry experience</td>
<td>Heavily vetted call centers in our database</td>
<td>Vendor searches performed in the last year</td>
<td>Average CSAT score</td>
</tr>
</tbody>
</table>

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