

CALL CENTER RFP TEMPLATE

Critical Questions to Optimize Your Call Center Search



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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. This includes ensuring your BPO provider is leveraging AI and technology to improve customer experience.

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 or offshore markets served) and their language capabilities.



Technology

With the increasing integration of human labor and automation it is critical to understand the capabilities of a potential partner, so you should explore their AI and technological capabilities. Even if your approach is to acquire technology yourself and extend it to the BPO you'll want to avoid funding their learning curve.



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

Request for Proposal (RFP) Submission Schedule & Timeline	2
1. About Company	3
2. Statement of Purpose	3
3. Call Center Outsourcing Program Overview	3
4. Training Timeframe.....	3
5. Monthly Volume Estimates.....	3
6. Personnel Requirements	3
7. Key Call Center Vendor Requirements and Capabilities	4
7.1 Call Center Vendor Evaluation Criteria & Key Performance Indicators (KPIs) – Metrics.....	4
7.1.1 Customer Service Metrics	4
7.1.2 Telesales Metrics	4
Vendor Completes	5
7.2 Vendor Information.....	5
7.3 Company History	5
7.4 Relevant Experience	6
7.4.1 Customer Service Experience	6
7.4.2 Inbound/Outbound Telesales Conversion Experience	6
7.5 Program Management.....	6
7.6 Call Center Information	6
7.6.2 Training.....	6
7.6.3 Quality	7
7.6.4 Personnel	7
7.7 Reports	8
7.8 Systems and Other Questions	8
7.8.1 Disaster Recovery.....	8
7.8.2 Tools and Systems	9
7.9 Account Management.....	9
7.10 Scope of Work and Pricing Structure	10
7.11 References.....	11
7.12 Evaluation Process and Criteria.....	11

Request for Proposal (RFP) Submission Schedule & Timeline

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

Activity	Timeframe
Non-Disclosure Form must be signed, executed, and received by DATE and sent to RFP_PERSON@MY_COMPANY no later than XX PM .	DAY ##
RFP Release Date	DAY ##
Intent to Bid Email must be received by DATE and sent to RFP_PERSON@MY_COMPANY no later than XX PM .	DAY ##
Any follow up questions must be submitted by DATE and sent to RFP_PERSON@MY_COMPANY no later than XX PM . All vendor questions and responses will be shared with all responding vendors via email.	DAY ##
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 .	DAY ##
Finalist Review and Reference Checks	WEEK OF
Finalist Conference Calls	WEEK OF
Finalist Site Visits	WEEK OF
Selection Appointment	WEEK OF
Contract Finalization	WEEK OF
Implementation Process	WEEK OF
“Go Live” Soft Launch Date	DAY ##
Full Launch	DAY ##

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 & Key Performance Indicators (KPIs) – Metrics

7.1.1 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 reported at the end of each month.

Metric	Monthly Target
Abandon Rate	The target abandon rate is to be below X%.
Average Handle Time	Average call handle time is shorter than X minutes.
Average Answer Time	Average answer time is under X seconds.
Quality Scores	Expected average score for quality monitoring sessions
CSAT	Expected average customer satisfaction score

7.1.2 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.

Metric	Monthly Target
Conversion Rate	Monthly conversion rate target is to exceed X%.
Product Mix	X% monthly sales target.
1 st Month Retention	Target an average first month retention of X%.
Call Volume	Daily inbound call volume target of X calls per day.
Abandon rate	The target abandon rate is to be at or below X%.

Vendor Completes

7.2 Vendor Information

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

7.3 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 in?
- 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.](#)

7.4 Relevant Experience

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

7.4.1 Customer Service Experience

Please list any relevant customer service experience, industry specific and case studies.

7.4.2 Inbound/Outbound Telesales Conversion Experience

Please list any relevant inbound/outbound telesales experience and case studies.

7.5 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

7.6 Call Center Information

- Are you open 24x7? If not, what are your hours and days of operation?
- Do you have work-from-home or brick-and-mortar capabilities, if applicable?
- Are your seats shared vs dedicated? What is the percent share vs. dedicated?
- Is your facility shared or joint venture?
- Total number of seats and the percentage of business inbound vs. outbound.
- How many call center sites? Locations? Number of seats per location?

7.6.2 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 for similar programs?
- 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.

7.6.3 Quality

- Do you have remote monitoring capabilities? Can clients dial in at any time?
- Do you digitally record all calls? If so, what percentage?
- Describe your QA change management process and practices.
- Describe how you utilize quality assurance findings to impact the customer experience journey.
- Describe how you utilize AI, voice analytics, and trend reporting, if applicable.
- Describe the agent feedback process and how to validate that coaching is being implemented by agents.

7.6.4 Personnel

- What is the average tenure for Agents?
- Please describe all languages you can support by site or highlight those that meet specific client needs.
- What is your overall annual turnover rate for each site by comparable program type? Define your turnover calculation and how you factor agent turnover.
- How do you motivate your agents to increase sales conversions where applicable?
- What is your agent/supervisor ratio?
- Describe programs designed to facilitate employee retention 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.](#)

7.7 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.

7.8 Systems and Other Questions

7.8.1 Disaster Recovery

- 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?

7.8.2 Tools and Systems

EDITORIAL NOTE: *The goal is to uncover tools and systems that the partner is using and how they are evolving that technology to reduce customer friction and improve agent and customer experience.*

When asking about tools, also ask how the partner (BPO) has incorporated them to improve process, experience, etc.

- Describe your technology and systems as it relates to this project for the following:
 - CRM
 - Dialer
 - ACD, recording and reporting
 - Redundancy and failover of connectivity and systems
 - Data security approach and 3rd party audits
 - Web chat, email, and social media support via agents
 - Web chat, email, and social media support via automation/AI tools
 - Automated QA tools
 - How have you incorporated technology to improve QA?
 - How are you evolving from Quality Assurance to provide more value from the agent's interaction with customers?
 - Recruitment, training, and retention software
 - Self-service capabilities
 - Analytics tools
 - Natural language AI tools
 - Agent assist tools
- Long distance providers?
- Compliance and Certifications (PCI, HIPAA, SOC2, etc.)

7.9 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 the client to have on-site temporary visits?



When selecting a BPO provider, it is crucial to ask about **their technology stack** and ability to **leverage AI to enhance customer experience (CX)**.

With our deep industry knowledge, we'll connect you with a BPO partner specializing in AI-driven customer experiences.

[Get your FREE call center cost proposal.](#)

7.10 Scope of Work and Pricing Structure

Please provide pricing information including the following:

Item	Cost (USD)
Set up	\$XXX
Training	\$XXX
Attrition Training (if any)	\$XXX
Custom Programming/Custom Reporting	\$XXX
Supervisor Costs (hourly pricing)	
Requested Service 1	\$XX.XX/hour
Dedicated Agents (hourly pricing)	
Requested Service 1	\$XX.XX/hour
Requested Service 2	\$XX.XX/hour
Shared Agents (minute pricing)	
Requested Service 1	\$XX.XX/minute
Requested Service 2	\$XX.XX/minute

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



In general, you can **expect to pay the following prices** for a mid-market outsource call center:

United States	\$32 - \$36/hour
Nearshore	\$14 - \$18/hour
Offshore	\$9 - \$13/hour

Ready to explore outsource call center pricing options? [Get your FREE call center cost proposal.](#)

7.11 References

Please provide three (3) reference for which you have provided inbound telesales and customer service. Include length of relationship and a brief overview of services provided.

Company	Services Provided	Contact	Phone	Email

7.12 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.](#)

OUTSOURCE CONSULTANTS

150+	1,000+	500+	96%
Combined years of BPO industry experience	Heavily vetted call center locations	Heavily vetted AI + technology solutions	Average client CSAT score

Outsource Consultants is a CX advisory firm that excels in creating strong connections between organizations, outsource contact centers, and CX technology providers. We are committed to helping our clients simplify their customer experience strategies while delivering cost savings, improved performance, and targeted business outcomes.

Our unbiased, provider-agnostic approach sets us apart. With over a decade of outsourcing experience crafting expert BPO strategies for organizations, our team offers unparalleled expertise in CX and contact center operations.

We match your unique business needs with ideal outsourced contact centers and technology providers. From our extensive vendor database, we find the perfect partner for you, whether you aim to cut costs or boost customer service with advanced technology. We meet you where you are with a tailored solution.

If you're ready to book your CX strategy call, simply call 888-766-4482 or email info@outsource-consultants.com today and we'll help you find the call center solution that best fits your exact requirements, **at no charge to you!**

Our Call Center Search & Selection Process

01



Evaluation of Needs

We start the process with in-depth discussions to gain a complete understanding of your business, your culture, and what you need in an outsource call center.

02



Identification of
Key Requirements

We work with you to identify your key outsource call center requirements, including the number of agents, geographic location, languages, performance, and more.

03



Extensive Call Center
Vendor Search

We search our proprietary database of over 500 BPO vendors to find the ones that meet your exact requirements.

04



In-Depth Comparison
of Vendor Finalists

We provide a side-by-side comparative matrix of BPOs that meet your exact specifications so you can easily evaluate all your vendor options in a clear, concise fashion.

05



Call Center Site Visits
& Due Diligence

We coordinate conference calls, arrange site visits, and offer general advice on finalist vetting and contract negotiation tactics.

06



Final Selection

Armed with all the information you need, we intentionally take a step back to allow you to make your decision.

07



Ongoing Monitoring

We continue to monitor the ongoing performance of your BPO partner and maintain a position as your advocate for the length of your partnership.