

Checklist for Selecting an Outsourced Call/Contact Center

Don't focus exclusively on price when hiring a contact/call center; it can be counter productive to increasing profits. The lowest cost provider isn't necessarily going to generate the most revenues. You may need to consider multiple centers to handle calls from different programs or different types of orders – for example, one center for TV orders and another for catalog orders, one center for basic programs and a another for a high-end technical product that requires significant rep training. Test call centers head-to-head to determine which truly does a better job for you.

I. Contact/Call Center Requirements

- Types of Contacts and volume expectations for each
 - Orders
 - DRTV and Radio Response
 - Continuity or Lead Generation
 - Catalog or generated from other printed promotions
 - Internet – Web Chat, Click to talk, etc.
 - Customer Service
 - Calls
 - Email Response
- Service Needs for Each Type of Contact
 - Order taking including upsells and downsells
 - System capability for
 - Identifying best sales agents and routing calls in priority order for calls, email, web chat, etc. as needed.
 - Customizing scripts and offers based on each callers actions
 - Ability to split-test different scripts or offers
 - Lead capture and accurate promotion code tracking
 - Non-English or other special requirements (e.g. routing calls to specialists)
 - Integration with other call or contact centers and your fulfillment center
- Response Requirement
 - Seconds or number of rings to answer
 - Abandon rate
 - Hours of operation

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II. Reporting Needs

Document what data you want to see, how frequently you want to see it, and in what form you prefer to receive it (hard copy or electronic, faxed, mailed, emailed, web access, etc.). Be sure their reports will allow you to look at trends and not just each day, week or month in isolation.

- Call and Contact Transaction Activity Reports – day, hour, etc.
- Upsell and Downsell Tracking
- Disposition of Service Calls

III. Account Support

- Regular account support and management -- who your contacts will be, and what happens when problems crop up and your regular support contact is out of town.
- What kind of call recording is done; what kind of call monitoring is available? Can you receive regular recordings of calls and copies of emails (as applicable)?

IV. Other Concerns and References

- Contact center rep training, incentives, and quality control
 - What kind of general training do reps receive?
 - What kind of training for your products will be done?
 - How are reps paid and what incentive programs are in place? Can you implement special incentives for your programs if desired?
 - What ongoing quality control measures are in place?
- Security Concerns
 - What kind of screening do employees go through to ensure the security of customer credit card and other data?
 - What kind of back up and security procedures are in place for your data?
 - What procedures are in place should the contact center phone or data lines go down?
- Clients
 - Determine what similar type of clients the prospective vendor has worked with, particularly if you are selling expensive or complicated products that require lots of rep knowledge or salesmanship
 - Obtain 3-5 references. Call each reference with a list of questions. Ensure that the client's programs and needs mirror yours, and then assess how well the vendor is meeting the needs of the client.

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V. Pricing

Ask the vendor to provide detailed and total pricing as well as a copy of their standard contract. Review the contractual terms. Determine how pricing will go up or down as your program grows or shrinks over time. Identify any minimums and start up fees. Make sure you completely understand what is included in the prices, and what services and tasks are considered extras. Ask to see a sample invoice, and ensure that the level of detail you are going to need will be provided.

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