# Quality White Paper
## The BPA Quality Builder™ – RFP's

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# BPA Quality Monitoring White Paper

## "Building an Effective RFP Document for Quality Monitoring"

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In this White Paper we look to provide a guideline for an effective Request for Proposal document and process. Building your RFP for these services properly will save you time, money and help you identify the best company to work with. BPA offers this guide as a free service to customers and prospects.

## What is a RFP (Request for Proposal)?

A Request for Proposal (RFP) or Request for Quote (RFQ) is a formal process that companies use to put out outsourced work for bid amongst competing providers. RFP's and RFQ's are common practice in the contact center industry. Typically, an organization will release a RFP or RFQ requesting prospective suppliers to submit their bids for potential business as described in the Request's scope of work (examples include handling incoming service calls or quality monitoring). The Requests will typically have a standard set of questions that will be used to compare the prospective vendors. The organizations then collect the bids and compare them based on this predetermined criteria, ultimately choosing a partner or partners that best suit their needs.

## What are some of the benefits to RFP's?
## What are some of the problems?

RFP's are a structured and organized way to assess and compare several vendors for the same outsourced work. Most companies have many unique ways of doing business that make them hard to compare in a typical sales situation. By producing an RFP, a company can compare "apples to apples" by forcing the prospective vendor to answer specific questions and bid on the business in a similar manner.

This process also does have some drawbacks. While the RFP process is organized and structured, it tends to lose much of the human element of choosing a partner for services provided. When choosing an outsourced partner, the people you work with are as important as the pricing and product you are getting for your investment. We have seen many RFP's that are awarded without ever meeting the managers and team members they would be working with. Choosing the correct partner only begins with product and price…the service, dedication and flexibility of that partner is what makes for the ideal outsourced provider.

## How can your company make sure they are conducting their RFP process correctly?

The first thing to do is to throw away the cookie cutter set of questions you have used for the last RFP. We have come across several RFP's that contain entire sections of questions that have no relevance to the business for bid. Next step is to get people involved who are experienced and understand the business that you are looking to bid out. At BPA we have specific services for companies who wish to publish a RFP for one of our offerings. We will help their company construct the proper RFP document, ask the right questions and compare them properly...even if we don't end up being the vendor of choice.

The basic foundation of a good RFP will start with establishing the goal of the project. Are you looking to cut costs? Improve service levels? Increase problem resolution? Tell the bidders exactly what you want them to do. Next, you will need to ask several specific and clear questions. Find out exactly how the bidder will achieve your goal, identify exactly what the costs will be, find out what your obligations are as the contractor and make sure you get solid timelines for delivery of service. Next, and this goes without saying, get references. Talk to existing and former customers of the companies you are considering and find out what it is like to work with that company. Finally, the devil is in the details; this comes from experience and is why we recommend engaging someone like BPA when preparing your RFP document. Things such as IT, data security, employee dedication, account management structure, billing, etc are all details you need to know about before you make your choice and regret that decision.

When you are all done with creating the document, before making a decision, we also recommend arranging demonstrations, meet and greets or site visits. Your investment could be large, and its well worth the time to fully research the company you will be working with...as the old adage goes, cut once, measure twice!

## What information should I provide to the prospective vendors?

You will need to provide your prospective vendors with as much detail as possible about the environment in which you want your program to exist. While there may be some small detailed things that you may miss, below is a comprehensive list of items a vendor would need to produce a proposal for you:

- Number of agents
- Number of different types of calls, and categories (i.e sales, tech support, etc.)
- Avg. call time, overall and by type
- Number of monitors wanted
- Number of Centers
- Locations of sites (countries)
- Languages Monitored (and volume of each)
- Recording Available (i.e. NICE or Witness), if not, what kind of switch and does it have remote observe capabilities
- If recordings are provided, file size, i.e. how big is a 10 minute call in mb
- Security Requirements to access calls
- New Agent Training, how long? Recursive Training, what % of time do agents attend?
- Trainers available for site visit, or is new hire training session at your site?
- Supervisor to Agent ratio at centers?
- Number of Login's to reporting tools needed
- Any Screen Captures required, or remote database to review for accuracy or event tickets?
- Stage of Request – Discovery, Pilot, Budgeted
- Monitoring Currently Done? By Who? Internal or External? If being done external, why are you looking elsewhere?
- Outsourcing environment?
- Quality Legend, number of individual variables that have to be tracked...provide a sample
- Identify if sample calls are available
- Goals of Monitoring? Specific success factors of program –such as increased sales, improved customer satisfaction or reduced costs?

- Current cost per evaluation

- Extent of support required – Do you want support to help them improve or do you just need evaluated calls?

- Are the metrics supplied set in stone or do you need advice to develop a new set of metrics?

- Decision Makers, Decision Process

- Contact information, Technical, Management, Billing

- Timeline for submission including:

  - Notice of Participation

  - Release of RFP Document

  - Question Submission

- Question Responses

- Final Responses Due

- Review Date

- Final Award Date

- Non Disclosure and Security Agreements Sample

- Services Agreement and Statement of Work

- Language for any mandatory contractual requirements for working with your company

- List of insurances required, with coverage minimums clearly listed

- Any other specific requirement to work with your company (EOE, PCI Certified, etc.)

# What information should you collect to compare vendors?

Not so long ago, RFP's were very difficult to win. At the end of the process, the winning bidder typically had the lowest price. However, in recent years, that process has changed. While price is still important, the overall package, the level and quality of service, and the total return on the investment are driving the RFP decisions. Below is a list of mandatory items you should get from each and every vendor to compare them

Name, Address and Contact Information – Have the vendor clearly identify who they are, where they are and who is responsible for the response to your RFP.

Auditing Cost – Cost per unit, per hour or per person? We have seen companies do them in all of these forms, but make sure you get the same form from everyone. Vendors will typically calculate the number of hours required to conduct your requested work in, the overall anticipated cost should be the same with all three methods. However, in the delivery of each method, there are cost advantages and disadvantages of each:

Cost Per Unit – This quote will guarantee that you will always pay no more or less than the quoted price for the production level you are asking for. If you are asking for 1000 audits per month, you will know they will cost you the same amount each month. However, this method typically only includes the audit. If you want the analysts to do something else it usually is at an additional cost or at the sacrifice of the number of audits they do.

Cost Per Hour – This quote guarantees you a rate per hour, and you can contract for a certain number of hours without limitation to the activities that you can request your vendor to conduct…they are your hours to spend. However, your "per audit" cost can fluctuate with efficiency or inefficiency of each one of those hours. This method has the greatest flexibility, but the widest variation

Cost Per Person – This method you are essentially paying for the full time equivalent of a person's productivity. You will pay a set rate per person and have control over what they do on a daily basis. However, like cost per hour, you end up paying for any inefficiency. If you use this model, make sure to set minimum expectations on productivity.

Training Cost – What is the vendors charge for training…per hour, per person? Also, make sure you identify costs for recursive or turnover training, if any. It is also wise to identify how the training is intended to be carried out and over what timeline.

**Set Up Fees** – every vendor will have an upfront cost of setting you up as a client, and sometimes this means there is an upfront set up fee involved. Usually, these fees are fair and required; however make sure you identify exactly what you are paying for in the set up charge so you can avoid future charges for costs that pop up after the fact.

**Management Fees** – Identify what level of management support you need vs. what is being proposed. If you require a dedicated manager, ask for one and find out the cost. Some vendors will include this in their auditing cost, others will separate it. Either way, find out where it is and how much it is.

**Technology Fees** – Identify if there are any costs for the use of technology from the vendor, the set up and management of connections to call recording systems, the storage of data and or audio files or any other technical aspect to your business request. Some companies have flat fees, others are a pay as you go model.

**Other Fees** – make sure you ask an open ended question such as "are there any other fees for services or activities not explicitly stated in this RFP?" This will open up the discussion for how to handle those activities when they come up after award and during implementation. Nobody likes to come back and ask for more money when it wasn't anticipated, so proper identification of those fees up front is important.

**What is included and What is not?** – Make sure you ask for a documented list of items of what is included in the charges and what is not included. For example, if you require calibration sessions once per week, is that included fee, or extra? What is the charge if you want to move to two calls per week? Clarifying these small details will avoid future conflict and keep your vendor relationship healthy and honest.

**Experience and History** – have the vendor describe to you their experience and history as a provider of these services. Tenure in the industry and experience with projects similar to yours can be important factors in choosing the right vendor.

**Client Profile** – while many client identities are confidential, ask the vendor to provide a profile of the types of clients and services they have provided. Ideal vendors either have a wide array of experience in multiple industries, or long standing presence in the industry you are currently in. Also look for the vendor to identify companies or clients that they no longer do business with and identify the reasons why.

**Services and Capabilities** – sometimes there are services and capabilities available that you didn't know about and would be helpful to achieve your goals. Have the vendor provide you with a comprehensive list of their services and special capabilities (i.e. language, programming, call recording, etc.)

**Financials and Legal** – not required for all RFP's, but it is good to do business with a vendor who is financially stable. You want to see long standing profitability, ownership breakdown, growth rates, location of the business, hours of operation and perhaps most importantly, you'd like to do business with a company who has a wide array of clients and does not depend on one large contract. Additionally, you will need to know their status on all the majors, i.e. EOE or minority owned business, and you will need to know if this company is involved with any current litigation that could impact the business.

**References** – get references from as many existing or past customers of the vendor as possible, and call them. Ask those references what they like and do not like about the vendor and their opinion of them as a whole. Ask them if they would use the vendor on a project such as yours.

**Technology** – have the vendors clearly outline and demonstrate their technology, the advantages, and the process and make sure they outline how it would work to meet your goals. Make sure you get a full capability demonstration and if allowed, access to a demonstration version of their tools.

**Reporting and Data Analysis** – have the vendors provide to you the scope of reporting they will provide. More importantly, have them identify how this reporting would be used to improve your contact center. Finally, identify what other Data Analysis the vendor intends to do...will they simply produce the reports, or will they analyze the data and find things for you?

**Business Process** – have the vendors clearly outline how they do business, what makes them different and how they would achieve your goals. Make sure they address the goals you laid out in your RFP goal statement. Ask them to describe how their services would benefit your organization and the intended effect.

**Management Qualifications** – don't be afraid to ask for the experience and background of the key people in the vendor organization. Make sure you are dealing with seasoned professionals for the work you are contracting and get the vendor to identify who those people are. If the vendor needs to hire people to meet your RFP requirements, have them establish a template for qualifications for those people.

**Analyst Profile** – find out who the people are that will be doing the work...their qualifications, their location, how they are trained and managed on a day to day basis. If the vendor does not currently have analysts that meet your requirements, that doesn't mean they can't hire appropriately...establish the requirement and have the vendor identify how they would get them trained.

**Meet the People** – ask the vendors to meet and greet with the people you will be working with. This business is a relationship driven business and if your Quality teams can't work together well then you are throwing money out the window.

**Timelines** – ask how long it will take the vendor to ramp up and deliver. Identify the IT setup time, the training time and the amount of time needed until the analysts are up to full speed in production.

It is normal for a new vendor to adjust to your business, so make sure you agree to an acceptable time line.

**Security and Legal** – have the vendors outline their security of information features. Identify if they have achieved any certifications, such as PCI (Payment Card Industry) specifications for the management and storage of personal or audit data. If available, have your IT team provide an outline of requirements for access to your network to make sure the vendor knows what is expected of them. Many companies have specific requirements that certain vendors are not capable of meeting based on the operational model used. Based on that outline, the vendor can provide you with the cost of establishing and meeting those requirements.

**Disaster Recovery** – while not always relevant it's important to choose a vendor who is not at risk of losing all of your data or who may be subject to extended periods of downtime due to natural disasters. While any event is unpredictable, choose a vendor that has a thought out plan and redundancy in critical areas of operations.

**Insurances** – if required, have the vendor provide copies of insurance coverage's and or the names and policy numbers of those coverage's to meet your needs.

## About BPA

With over 20 years experience, over 100 different clients, and millions of observations made worldwide, BPA International has the experience, knowledge and ingenuity to help you achieve the highest possible Call Center Quality Customer Experience. BPA is the most experienced and qualified provider of Contact Center Quality Services worldwide.

Visit us today at www.bpaquality.com or contact us at 516.295.3620 in North or South America, or +44 (0) 1404 44004 in the UK, Europe, Asia, Africa or Australia.