

THE END-TO-END CONTACT CENTER SOLUTIONS BUYER'S GUIDE

Contact



Call



Web



MIKE HASLER

Vice President, Sales and Marketing
mhasler@blueocean.ca

PHONE

1.866.658.2969



BlueOcean.ca

WHY THE BUYER'S GUIDE

Our most popular blog posts over the past few years have been the ones that focused on “How To” procure contact center services – including posts on pricing, implementation, and RFPs.

From start to finish, we have created a guide for potential contact center buyers at every stage. Whether you are wondering if an outsourced solution is right for you, matching the right outsourced solutions to your business, or looking for the next steps in your new outsourcer partnership, we have plenty of

helpful advice for you. And we have it all in one place!

Instead of spending hours hunting down these resources, Blue Ocean's Buyer's Guide provides you with everything you'll need in one tight package. No extra sweat off of your brow. We promise.

Browse away. We hope you find it helpful. And when you're ready to go to RFP, **contact our sales team today**. They're waiting to help you out.

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HOW TO CALCULATE CALL CENTER OUTSOURCING COSTS

If you've been handed responsibility for investigating the benefits of potentially outsourcing your company's customer service for the first time, how do you

start to compare your in-house apples to those outsourced oranges? What math should go into the business case around call center outsourcing costs?

Let's break it down to the basics.



1

UNDERSTANDING AN “AGENT HOUR”

In-house, you are paying for 100% of an agent hour. In an outsourced model, typically, you are paying only for productive agent time.

You aren't paying for an agent to be waiting for a call. You aren't paying for coffee breaks or even coaching time. Generally speaking, you could expect a call center agent to be productive for 85% of an hour.

Let's take a real life example. A Level One Tech Support Agent working in Dallas, Texas will cost his employer about \$35USD per hour, loaded. As his employer, you pay 100% of that hour. With an outsourced call center model, using a productivity projection of 85%, that same agent will cost you \$29.75 per hour. A savings of 15% right off the top. Before we even get to the good stuff.



2

REALIZING A REDUCTION IN FTE.

Successful contact center outsourcers have deep expertise in forecasting, staffing, and managing for maximum efficiency. In addition, a great contact center partner will:

- Offer leading-edge **call center technology** for efficient call distribution,
- Manage time-shiftable tasks for maximum efficiency,
- Cross-train to maximize efficient staffing for peaks and valleys,
- Utilize shared pool options for lower volume hours of operations.

And the over-all result will be a reduction in FTE with no loss of service or quality. When calculating call center outsourcing costs for your business case, it is generally safe to assume, you will realize at least a 5% reduction in FTE.



3

UNDERSTANDING “ALL IN”

The per agent hour rate your contact partner charges typically includes associated management costs. In a Blue Ocean solution, for example, your coaches and project management costs are included in that agent hour or per minute rate.

On-going technology costs are also generally included. In fact, we often see companies choosing to outsource when the need arises to invest in a new or existing technology platform. Essentially, this represents risk mitigation. In a call center outsourcing model, your partner is shouldering the risks of managing both human and technology resources.

This table gives a quick snapshot of how to calculate costs when considering an outsourced customer service solution.

Basic Comparison Chart for Calculating Call Center Outsourcing Costs

	In-House Call Center	Outsourced Call Center
Productive Agent Time	100%	100%
Non-Productive Agent Time:		
Breaks	100%	0%
Coaching		
Wait Time		
Supervisor/Manager for Customer Service Agents	100%	Included in agent hourly rate
Quality Assurance	100%	Included in agent hourly rate
Infrastructure:		
Workstations/IT Support	100%	Included in agent hourly rate
Telephony		
Facilities		
HR Support including:		
Recruiting	100%	Included in agent hourly rate
Payroll		
Benefit Management		

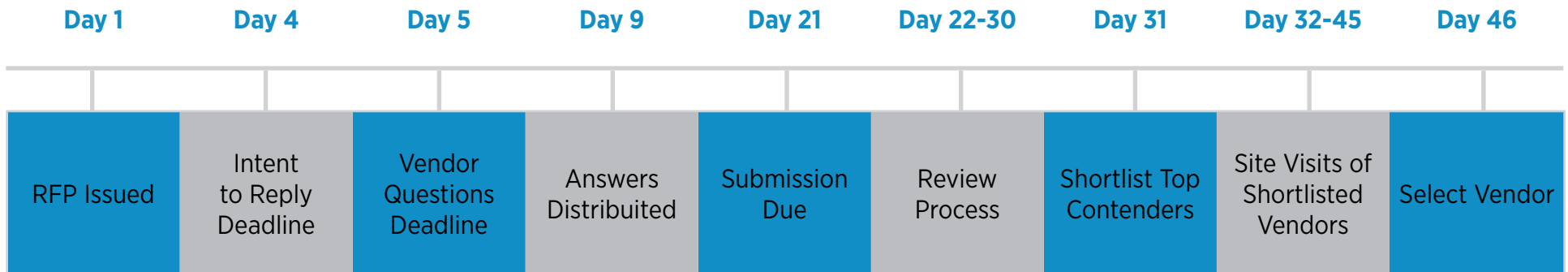
Using the basic calculation of call center outsourcing costs, you will have the foundation for a more rigid business case, but that's just the starting point in **how to choose the best outsourced contact center** for your business. A good contact center partner will be willing to include a risk/reward component in their contract – which can benefit your bottom line as well.

A SAMPLE CONTACT CENTER RFP TIMELINE

As you prepare to launch an RFP process to find the right partner for your customer care program, understanding the vendor side of the process can help you engineer a timeline that will help your potential partners

deliver carefully considered responses that address your specific needs. After all, you are ultimately entrusting your new partner with your most precious resource – your customers.

Contact Center RFP Timeline



In our industry, we have seen dozens of variations of a Contact Center RFP timeline. The range makes a difference. It will come as no surprise that when outsourcers receive an RFP with a deadline ten days out, they tend to submit a “cut and paste” basic, boilerplate response.

If you want a thoughtful, custom response, consider what happens on the vendor side: finance, business development, workforce management, and client services will consult and collaborate to come up with the necessary details for their response. With a manageable timeline, those functional areas will spend time crafting a solution that they believe gives them a competitive edge. This is good for you.

If you have a complex customer service process, you don't want to create a timeline too rigid, eliciting generic, vanilla answers. Also consider the time required to select your vendor, negotiate the contract, sign the deal, and implement the program to the production stage.

Determine when submissions are due and how you expect them to be delivered to you and clearly state this within the RFP. If you are having potential vendors email you their RFP responses (this provides more time for vendors to produce a quality response,) consider providing an option for large files to be delivered by a service like Dropbox.

Keep in mind that a vendor's real timetable begins once all information is available to them. An overall timeline of four weeks to distribute your RFP and collect responses from vendors is a good baseline to start with. Allow 4-5 days for vendors to come up with questions, and 3 days for your team to respond to those questions. Giving vendors more time may allow them to be more creative with their proposals, as well as allow them to customize their proposal to fit your specific needs.

51 CONTACT CENTER RFP QUESTIONS TO ASK VENDORS

To help get started on your procurement process, we have compiled 52 foundational questions for contact center RFPs. We split them into

six key sections – **Company Overview, Agent Hiring/Training, Contact Center Reporting, Project Management, Technology, and Pricing.**

COMPANY OVERVIEW

Get to know the history and organization of the vendor. You want to validate that they have the scope and stability to be a good long term partner.

List Company Facts

- 1.** How long have you been in business?
- 2.** How many full-time employees do you have?
- 3.** How many centers do you operate? (List address & number of employees for each location)
- 4.** What languages do you currently support?
- 5.** What awards or recognition has your company received in the past three years?

Client Service

- 6.** What is the average length of your client relationships?
- 7.** Name your five largest clients, and list how long they have been clients.
- 8.** Do you serve any clients who would be considered a competitor to our company?

Culture

- 9.** Describe your corporate culture including how it is differentiated from your competition.
- 10.** What is your mission statement?
- 11.** How does your corporate culture align with your understanding of our own company, values, and culture?

AGENT HIRING/TRAINING

An outsourcer's ability to attract and retain the right people for your brand and your service requirements is essential.

Labor Market

- 12.** Describe your labor market including post-secondary education rates and unemployment rates.
- 13.** Describe your company's competitive differentiators within your labor market.
- 14.** Outline your attraction and recruitment strategies and processes.

Agent Training

- 15.** Describe your training structure (team and facilities) and outline approach to new hire training.
- 16.** What is unique about your **agent training** regimen?
- 17.** What's your maximum class training size?
- 18.** What percentage of new hires graduate from training to production?
- 19.** What percentage of agents are still with the company six months after graduating from training?

Agent Engagement

- 20.** What is your annual agent attrition rate (list both voluntary and involuntary turn-over numbers)?
- 21.** Describe your employee engagement strategies and measurement processes?
- 22.** What percentage of your new hires comes from employee referrals?
- 23.** What is your average tenure of salaried staff? Hourly staff?

Agent Profile

- 24.** How do you profile your agents?
- 25.** How do you test for skills?
- 26.** What ongoing developmental or career development training do you offer?
- 27.** What percent of agents have some post secondary education?

REPORTING

Your contact center has access to a wealth of data about your business, your customers' behavior, your marketing results, and more. Use your RFP process to find out who in the competition can go beyond reporting just on standard call measures (AHT, ASA, first call resolution, and conversion rates) and provide business insight and analysis that will help you make informed business decisions.

Capabilities and Experience in Information Services

- 28.** Describe your information services team including number of personnel, specializations, hours of operation.
- 29.** Provide an example of how you have used reporting to positively impact a client's business.
- 30.** What is your system/process for alerting clients on issues beyond established tolerance (i.e., 150% over forecast in a certain interval)?
- 31.** What reports form the foundation of your quarterly business reviews?
- 32.** Who on your management team reviews client reports on a regular basis?

Reporting Customization and Client Access

- 33.** What **custom reporting** capabilities do you have?
- 34.** Is there a client portal for us to easily access reports?
- 35.** Can we access reports in real time or near real time?
- 36.** Provide examples of standard and customer reporting.

PROJECT MANAGEMENT

Your internal operations team will need to interface with the vendor if they are chosen. For your benefit, you want to make sure that you have access to the right makeup of vendor project management resources to ensure they sync up with your internal team.

Team Commitment

- 37.** What percentage of the project manager(s)'s time will be dedicated to our project?
- 38.** Provide an organization chart and bios of senior leadership and program managers.
- 39.** What senior management are located on the same site as the location proposed for our program?
- 40.** Describe your governance model including detail on senior management involvement on our account

Again, think about what's important to you. For example, if your incumbent vendor has poor service or project management, you'll want to make sure you're covered here. And on the flipside, if you're a first time outsourcer, you'll want to mirror your internal operations/project management with that of your outsourced vendor.

TECHNOLOGY

List out which technologies you are bringing to the table (especially your CRM or CTI platform) and be specific in how you'd like the vendor to integrate with those technologies. And be realistic about your risk tolerance. Dual redundancy might be ideal, but prepare to pay for it. If the vendor is expected to bolt onto your platform, indicate that in the contact center RFP.

Tech Compatibility

- 41.** Describe your telephony platform and your integration capabilities for our CRM/CTI systems.
- 42.** When was your last telephony upgrade?
- 43.** Detail your business continuity plans.
- 44.** What options do you provide to clients for program-specific redundancy or contingency plans. (Provide details on which options are included in your pricing model.)

PRICING

Keep in mind that every contact center prices their services differently. For this reason, you will benefit by providing specific scenarios (i.e. call volume) using the economic model you prefer, such as cost per call, cost per minute, cost per headcount, etc.

PRICING MODELS

- 45.** **What are the itemized startup costs and ongoing costs?** What is the estimated annual cost of the proposal and what's included with that?
- 46.** What services and features are included in this pricing?
- 47.** What performance guarantees are included in this pricing?

- 48.** Are there any volume discounts you can provide?
- 49.** Are long distance costs included, if no, please detail how direct costs are billed?
- 50.** Are you willing to put “some skin in the game” by investing in the startup costs (or share other costs) to achieve a performance bonus down the road? If so, please provide detail around that type of risk/reward scenario.
- 51.** If you were to suggest an alternative pricing model within the same volume parameters as the scenario provided, what would you suggest?

Being able to accurately compare one bidders offering to another is the key here – how the bidder reached the number they are presenting is as important as the number itself. Always ask for a breakdown of their pricing and note features and services that one vendor may offer over another. As much as possible, you want an “apples-to-apples” comparison so you can make an accurate, fair evaluation.

TOP 10 MISTAKES TO AVOID IN WRITING A CONTACT CENTER RFP

We know what it's like to be pulling your hair out over writing a call center RFP. When you're under pressure and your time is stretched thin, it can seem like an insurmountable task. And yet, it's vital to the health of your company to choose a contact center partner that is the right fit. Unlike other vendor relationships, this one represents the face of your brand and becomes an

extension of your team, so a strong RFP is key to successfully outsourcing your call center.

That said, when faced with a looming deadline, it's easy to make decisions in **writing the contact center RFP** that simply don't serve you well. The following are some of the biggest mistakes we've seen.

1

RELYING ON A LIMITED PROCUREMENT TOOL

Procurement software and tools are a genius way to save time and maintain consistency. However, they do risk limiting vendor creativity in RFP responses. This is probably good in some industries. But in the contact center world, cultural alignment plays a huge role in customer experience. A little creative license might differentiate the mediocre from the outstanding. Those who have a powerful procurement tool should provide an option to upload additional documents (with a generous file size limit). This will allow vendors to send you any “out of the box” information regarding the look and feel of their facilities, case studies, and more.

2

WRITING OPEN ENDED QUESTIONS WITHOUT IMPOSING A WORD LIMIT

Is your selection process only scheduled to take a couple of weeks? If so, we doubt your selection team wants to be reading 150 page RFPs from an armful of different contact centers. But that’s exactly what’ll happen if you neglect to impose a word limit on open ended questions. Likewise, the length of the entire document should align with the proposed length of the selection process.

3

NEGLECTING TO STREAMLINE QUESTIONS WRITTEN BY MULTIPLE STAKEHOLDERS

Different perspectives from multiple stakeholders in your organization can be highly valuable in your contact center RFP. It will help you capture the big picture. However, be aware of “question overlap.” Is the repetition of the same (or similar) question a strategic move to determine a vendor’s consistency in answering? Or is it simply redundant? Redundancy slows down the selection process. Be sure that the final version is edited by a single point of contact.

4

BEING TOO VAGUE ABOUT EMPLOYEE ENGAGEMENT

There is a strong correlation between **customer experience and employee experience**. Engaged contact center employees who feels valued and empowered to make a contribution will be more resourceful when a call comes into their headset. Find out about the call center’s commitment to employee experience and dig into the associated metrics.

5

ASKING QUESTIONS ABOUT METRICS THAT ARE TOO BROAD

Average speed of answer and other KPI-driven data are important. However, each client the contact center serves will have completely different metrics and service level agreements. A vendor-wide average will be deceptive at best. Instead, focus on project-based metrics and case studies that align with your industry and type of customer service. For example, are you looking for **roadside assistance** or outbound sales support? Different worlds have vastly different metrics. Ask your bidders to provide vendors on a project or program they currently serve that matches your own requirements.

6

OVERLOOKING THE BIG PICTURE WITH TECHNOLOGY

Contact center technology is a key feature of their service, so questions about their technical infrastructure are essential. But it doesn't stop there. How are they staying ahead of the technology curve? When was the last platform upgrade and when will be the next? For a successful long term relationship, you need to ensure your customers will be engaged right now, but also five or ten years from now.

7

DUPLICATING RFP TEMPLATES FROM OTHER INDUSTRIES

Too often, we've seen an operations person in charge of vendor relationships relying on the procurement department for their call center RFP. But even the most talented procurement team may be unfamiliar with nuanced contact center operations. Modifying a warehouse RFP simply doesn't work. Close collaboration between operations and procurement ensures the highest value customization.

8

FOCUSING ON THE WRONG PEOPLE WHO'LL BE DOING THE WORK

You want to verify that your outsourced team is qualified and competent, so it's common for RFPs to ask for the résumés or CVs of the people intended to do the work. However, investigating personnel too deeply during a process that takes months can be a waste; that is enough time for the person or people you're asking about to move on or move up in their career. Senior roles are more stable, so focus on management positions and the executive team.

9

BEING SHORT SIGHTED REGARDING METRICS AND REPORTING

It's commonsense to ask a potential contact center partner about reporting and metrics. Equally important is their vision for reporting five or ten years from now. The industry is evolving and the standard level of reporting is changing. Your call center RFP should ask how their reporting can help you make good, long-term decisions for your business. What feedback have they received from current clients about reporting? How do they act upon that?

10

NEGLECTING TO ASK ABOUT WORST CASE SCENARIO CUSTOMER SERVICE

How does a contact center outsourcer operate in worst case scenarios?

In eCommerce, that's during the rush of seasonal shopping. In roadside assistance, that's during the height of summer or the depths of winter when you're inundated with really **complex seasonality spikes**. Dig into customer service pain points to get an idea of what to expect.

BONUS TIP: ASK ABOUT MANAGEMENT TEAM TENURE

An insightful contact center RFP should touch on the average tenure of the outsourcer's management team. Compare tenure to the history of the company. This will tell you a lot about how they weather together in the storm. High turnover means turmoil for clients.

HOW TO CHOOSE THE BEST OUTSOURCED CONTACT CENTER (FOR YOU)

There are an estimated 4000 to 5000 outsourced contact centers in North America. Whittling that list down to a few “right fit” potential partners can be

perplexing and frustrating. Especially if you are unsure of what your ideal outsourced contact center looks like.

Of course, a center that is capable of operating your customer processes and meeting your expectations around key metrics is the minimum expectation. To achieve a truly strategic partnership, you also need to partner with a call center that meshes well with your culture and can deliver on your brand's customer service promise. To help you find the **best outsourced contact center**, we've outlined four selection criteria that will dig deeper than the surface-level marketing speak.

1

CULTURAL FIT:

Quantifying “cultural fit” is not always easy. This subjective criteria is best measured by firsthand observation: through a **contact center tour**. As you walk the floor of a potential partner’s center, observe agents, coaches, and managers interacting in their environment. Does the center feel like “home?” Are you getting that “gut feel” that you’re choosing the best fit for your organization? The contact center environment can tell you more about your cultural compatibility than any website or brochure.

2

KPIS:

In the outsourced contact center world, we measure it all. Average Handle Time, Speed to Answer, First Contact Resolution, various percentages on XYZ, and the list goes on.

Establishing measureable and reasonable KPIs is a prerequisite to any outsourced contact center partnership. Share your current metrics and open up a conversation about desired metrics and KPIs during the evaluation process. And get your potential partner to share their metrics or open up about **other call center measures** like Agent Attrition and Productivity. This open, honest discussion on KPIs is where trust is first established.

3

STRENGTH OF OPERATIONS:

Never neglect a potential partner's key organizational processes. Can you trust them to deliver **best practices in HR**? Are their facilities and their technology infrastructure management aligned with how you operate? How do potential partners tackle processes like **training agents**, scheduling agents, and integrating contact center technology? Your partner should demonstrate core competencies in managing people, facilities, and technology while delivering on your KPIs. If one of those foundational structures is weak, you may be exposing your own business to risk.

4

OUTSOURCED CONTACT CENTER AWARDS:

Want to speed up your vetting process? Organizations like **Contact Center World** reward companies who receive high reviews from peers and who are utilizing contact center best practices. You can develop a shortlist by searching for things like "Best Outsourced Contact Center" or by searching for specific categories like "Best Social Media Contact Center Outsourcer."

SO YOU FINALLY CHOSE A CONTACT CENTER OUTSOURCER. WHAT NEXT?

So you made it through the **contact center RFP process** and your selection team made their final choice. Is the headache over? Can you finally hand

over the metaphorical keys and let your new contact center outsourcer take the wheel?

That would be nice, wouldn't it? But we'll be the first to admit that unfortunately it doesn't work like that. At least, not if you want to maintain outstanding customer service performance. While we always want the transition to be as easy as possible, the moment the contract is signed is actually the moment the hard work begins. That period of time between the award of business and the go-live date is when intense collaboration will most likely result in a seamless implementation, a smooth transition, and effective execution that lasts for years.

INITIAL MEETING



Before that first phone call is ever fielded by your new team of contact center agents, there needs to be a detailed implementation plan. This requires an initial meeting, led by your outsourcing partner, to get everyone on the same page. Essential stakeholders from your own team will meet with your executive sponsor, your Program Manager, the Technical Lead, and leaders from Human Resources, Workforce Management, and Quality Assurance. This meeting sets the tone for the key milestones and deadlines that lay ahead.

TECHNICAL PLAN AND REQUIREMENTS



A successful long-term relationship with your contact center outsourcer requires careful coordination of all technical components. This is especially true if you intend to retain an in-house team in collaboration with the outsourced team. The two telephony platforms need to integrate flawlessly, to avoid any gaps in delivering a smooth and consistent customer experience.

Additionally, bear in mind that **contact center technology** is always evolving in an effort to engage more effectively with customers (and also to better measure that engagement). Your contact center partner should be prepared for the future of call center technology and understand how that may impact the project down the line.

CALL VOLUME FORECASTING PROCESS



Call volume forecasting is absolutely essential to the initial partnership. Taking shortcuts or glossing over this discussion is a recipe for disaster, and can significantly affect customer experience, satisfaction, and retention. Stakeholders on both sides will need to come to a thorough understanding of what arrival patterns and contact volume to expect the moment the phones go live. Your forecast will be an important factor in determining initial goals for KPIs and other vital metrics.

The forecasting process is the foundation of effective workforce management and productive agent scheduling. Accurate forecasts for both slow and busy seasons will help your partner staff appropriately so call volume is well managed. Understaffing can compound stress in your peak seasons. Overstaffing can lead to disengagement in your slower seasons. Both factors can impact your customer's experience.

AGENT PROFILING, RECRUITMENT, AND SCHEDULING STRATEGY



Your unique brand, the nature of your service offering, the complexity of your tools and systems, and your desired customer experience all dictate what kind of person is best suited to engage with your customers. For example, experience tells us that great tech support agents won't possess the same qualities and traits as effective roadside assistance agents. For this reason, **agent profiling** and the associated recruitment strategy is a vital step in building the contact center partnership. At Blue Ocean, we start with neurolinguistic profiling combined with behavioral interviewing and thorough skills assessment in our hiring process. In addition to recruitment, there must also be a discussion about office space requirements, furniture needs, desktop configurations and other workplace requirements that will contribute to the success of your project. This is also the beginning of building a training curriculum for the agents who will be interacting with your customers.

REPORTING REQUIREMENTS AND QUALITY ASSURANCE



Finally, both sides need to determine realistic reporting requirements and establish a governance model that ensures collaboration and accountability. Setting goals and expectations is essential groundwork for ensuring successful execution of the project. It also provides accountability and tangible points of references for establishing benchmarks and assessing progress and quality assurance. Workforce Management should have clear objectives regarding metrics and KPIs that measure efficiency and productivity, such as average hold times, incident rates, and average length of phone calls, as well as customer experience stats such as Net Promotor Scores and Customer Satisfaction Metrics. Clear reporting requirements will help deliver a clear vision of just how effectively the contact center is meeting volume.

Ultimately, building a successful, long-term relationship with your new contact center outsourcer is dependent upon constant communication. From the moment the contract is signed to the second the first call comes in, intelligent planning and goal setting is key to minimizing disruption to your customers.

HOW TO EXTEND YOUR CUSTOMER EXPERIENCE STRATEGY TO YOUR OUTSOURCING TEAM

It's like that old adage: how do you eat an elephant? One bite at a time. The same theory applies when taking the first steps to start off right with your

outsourced contact center partner. Here are three ways to extend your customer experience vision to your outsourced team.



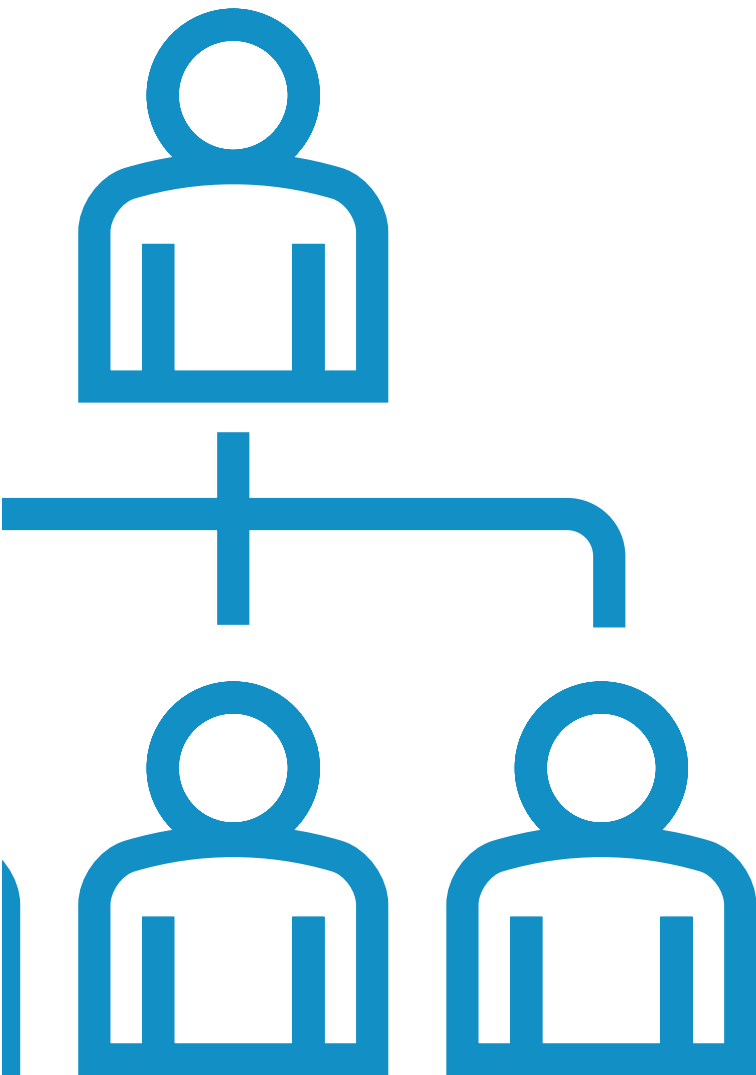
1

DEFINE THE MEASUREMENT SYSTEM

We've said it before, but success with an outsourced contact center partner boils down to carefully crafting your KPIs and critical standards to measure factors that truly impact experience.

Does measuring AHT as a KPI add stress to agents and detract from the customer experience? Are your hold times and procedures aligned with your customer satisfaction scores? Is First Call Resolution critical or do you want your agents to escalate quickly for delicate service scenarios?

The right partnership to deliver the best customer experience goes well beyond the grade of service. Make sure your contractual KPIs are well-designed to deliver on the right customer experience.



2

KEEP IN-HOUSE AND OUTSOURCED TEAM CONSISTENCY ACROSS ALL CUSTOMER TOUCH POINTS

An essential ingredient to a successful customer experience program is end-to-end consistency. If your outsourced partner is responsible for a set of customer touch points, you want the processes and measurements of those touch points to be comparable with your own efforts.

The answer your customer receives from your outsourced team should be indistinguishable from one coming from your own team.

If the priority goal is customer experience, and the right measures are in place, and your partner has a **strong workforce management solution** working toward staffing for customer experience, making the grade should happen naturally.



3

ASSIMILATE THE OUTSOURCED TEAM INTO YOUR CULTURE

This one is tricky, but critically important. Companies spend decades establishing a culture that ultimately weaves into their DNA – think Zappos, Ritz Carlton, Southwest Airlines, and Disney. The best outsourcers absorb and adopt each respective clients’ culture to deliver an experience that is on par with expectations.

Your outsourcer’s methodology for grasping your culture matters. At Blue Ocean, we employ various methods to assimilate, such as in-depth training, creating similar workplace environments to that of our clients, and sending team members to tour our clients’ in-house centers. And we ask our clients to invest in a regular cadence of visits to our center so their team can connect personally to the people they ultimately work for.

A decorative graphic at the top of the page consisting of a network of interconnected nodes and lines, resembling a molecular or digital structure, in shades of gray.

ADDITIONAL READING

THE ECONOMICS OF NEARSHORE VERSUS OFFSHORE CONTACT CENTERS

Nothing worthwhile comes cheap. If you've ever purchased no-name appliances or cheap, mass-produced electronics, you've probably learned that lesson firsthand. The same rule applies to an **outsourced contact center** partner. There is no denying that outsourcing makes great economic sense in many (if not most) situations, but you don't want to be caught in the neon glow of a low price point only to have it zap you.

We know that offshore solutions often offer lower transactional costs. The question to be asked is: what are you sacrificing to get that price point? Which then begs the question: Is that sacrifice going to be good for your business in the long run? Recent developments suggest that nearshoring, not offshoring, is the right to improve your customer service experience.

THE RETURN OF NORTH AMERICAN CONTACT CENTERS

In recent years, there have been several high profile instances of contact centers moving back to North American shores after a stint overseas. **General Motors, Delta Airlines**, and **CitiBank** are only a few name brand examples. Plenty of other companies have reconsidered their exodus from North America and the reason why comes as no surprise.

The service expectations of customers and the reality of most low cost, offshore solutions can lead to negative CSATs and a dip in lifetime customer loyalty. Even businesses that aren't making the full-blown shift are choosing nearshore providers for mission-critical clients. You want your highest touch, highest quality, "kid glove" clients to be handled by your A team.

And the cost of cultural compatibility is now being built into many offshore offerings. In other words, there is an added budget line in an RFP dedicated to training agents to be able to talk about North American pop culture, weather, and sports. That's an expensive process and it's a line item that doesn't exist for nearshore providers. That's why for big enterprise solutions, we expect to see even more conversions over to US and Canadian Call Centers.

THE ECONOMIC VALUE OF A CANADIAN CALL CENTER

Right now, your dollar will go further with a Canadian Call Center than one within the United States. As of this posting, one Canadian dollar is equal to about 77 cents American. Though that rate is bound to fluctuate, forecasts predict that the US will enjoy a financial advantage for the foreseeable future.

Predictions for 2017 suggest that the Canadian dollar will remain steady, despite political uncertainty. However, barring an unprecedented major upswing, it would still take the Canadian dollar at least two years to be on par with the US dollar.

The Canadian dollar has ridden below or at par with the US dollar for most of the **20 years**. That means, you can expect your Canadian Call Center to be cost competitive for the long haul. But price alone isn't what makes a Canadian Call Center a great extension of your business.

THE QUALITY COMPONENT OF A CANADIAN CALL CENTER

A Canadian call center partner represents more than just a discounted bill. It's an investment in the quality of your customer service operations. In the past, we've focused on what makes **nearshore Canadian Call Centers** an easy win for your business. All of those facts are still true today.

Canadians are consistently at the top of OECD countries for college education. More than 55% of Canadians who are age 25 to 34 have a **college education**. Canadian call centers on the whole enjoy lower attrition rates than those in India or the Philippines too, and the cultural gap... Well, what cultural gap? You can count on a Canadian call center agent to be able to fill any potential dead air with chat about the playoffs or the latest round of The Voice without any cultural training whatsoever.

HOW TO SUCCEED AS A CLIENT: HELPING YOUR OUTSOURCER'S WORKFORCE MANAGEMENT TEAM WIN

There will always be people who are ahead of the curve, and people who are behind the curve. But knowledge moves the curve.

– Bill James, Author, Statistician, Senior Advisor on Baseball Operations – Boston Red Sox

WHAT DO BASEBALL AND CALL CENTER SCHEDULING AND WORKFORCE MANAGEMENT HAVE IN COMMON?

Everyone on the Call Center Workforce Management (WFM) team at Blue Ocean Contact Centers shares a passion for baseball and statistics. You could ask the chicken or egg question: do we love baseball because we love statistics? Or do we love statistics because we love baseball? Either way, a talent for predictive pattern analysis works as well in managing outsourced call center resources to meet service level as it can in managing a ball team.

MANAGING THE CURVE IN THE CONTACT CENTER

Just like in baseball, (where empirical analysis known as Sabermetrics helped the small market Oakland A's compete successfully against large market teams with colossal budgets) your company will benefit from workforce planning that puts exactly the right resources in place at the right time doing the right thing to operate at peak performance with high efficiency. While the theory behind the A's amazing story captured in Michael Lewis' book (and subsequent movie) Moneyball focused on KPIs like "Runs Created," your team might be focused on reaching "average speed of answer" targets, for example.

When you work with an outsourced call center partner, you, as the client, can play a key role in getting your team in the best position for a big win. Look at it this way: you're the team owner. Your workforce guy is the "team manager." You can help him (or her) put together a winning season by empowering him with great data and clear goals.

FIVE WAYS TO BE A GREAT “OWNER” FOR YOUR “TEAM MANAGER”:

1. **Get deep and specific with your historical data.**

Building an accurate forecast is always going to begin with a look back. Insights into what happened last year can shed light on what’s likely going to happen this year. But dig in deep when you see exceptional blips in last year’s patterns. What was going on? Is it something that is likely to repeat itself or not? Let’s look at a couple of examples:

The Super Bowl in New Jersey created higher than average bookings for ground transportation in the greater New York area in 2014, for instance. Those exact conditions won’t be repeated next year when Phoenix hosts. While the Super Bowl always drives a spike in volume for our executive ground transportation clients, a Super Bowl in New Jersey produced a huge spike. It would be a mistake for us to forecast equal or greater volume for Super Bowl weekend 2015 based on what we saw in 2014.

And for folks in the online grocery business, 2013 was the year of Thanksgivukkah – an extraordinary coincidence that impacted holiday purchasing behavior in ways that won’t be repeated in 2014. (Or for the next thousand years, for that matter.)

These are big ticket items that will likely be easy to recall – but don’t forget to share with your WFM the dates that you experienced something like a website crash or a significant weather event. Knowing what to exclude is as important as knowing what to include.

We often hear the phrase “the numbers don’t lie.” But what you don’t hear quite so often is that the numbers don’t always tell the whole story. The biggest thing in our business is being able to make “reads.” Making a “read” is essentially deciding what can we use, what can’t we use, and what can we use at a different time? The reads we make build new footprints into future planning. All data is relevant – we just need to use it strategically.

2. Preach the importance of collaboration in forecasting.

In many ways the forecast is the most important factor in the success equation. If the forecast is off, it can have a domino effect. It is understandable that your marketing, sales, or technology teams may not fully appreciate the crucial relationship between their departmental plans and the call center's staffing requirements. By being an advocate who preaches the importance of an accurate forecast, you can help create collaboration and get the data flowing both ways. If your tech team knows they are doing an upgrade to your website or back office functions, that is information your WFM team can use in advance to help you get ahead of the curve.

Forecast is the most important first step and the whole plan starts with good collaboration. If we get it wrong here then your team will be off too a bad start and making judgment calls based off bad information. Your call center workforce team wants that forecast to be as close as possible to the actual – reality is: 100% accuracy is not always possible. Like they say in poker, every hand is a winner – it's how you use it and play with it. The same thinking applies to forecasts. As a workforce management professional, sure, I would prefer pocket aces, but if I don't have those, then I have to figure out a way strategically to make what I do have work.

3. Keep your eyes on the metrics that matter.

In the movie version of Moneyball, Oakland A's manager Billy Beane (played by Brad Pitt) sums up Bill James' philosophy quite simply by telling a player, "I pay you to get on first, not get thrown out at second." For Billy Beane, getting safely on first base is the fundamental first step in creating runs that add up to wins. Taking a gamble to steal second might run contrary to that established formula for winning games. Apply that same thinking to your formula. If a great customer experience builds brand loyalty and that loyalty in turn drives revenue, maybe your focus is on Average Speed of Answer and low Abandon rates and less on Average Handle Time for complex service scenarios. Good service level measurements will always tie back to specific service goals that match your brand promise.

4. Build the right parameters for your game.

In baseball, it's the score at the end of nine innings that counts. So those early innings are building to that moment. What does a win look like for you? If you have a monthly service level with your outsourced partner, they may not be ahead of the grade of service for every half hour interval of those 30 days, but your WFM team will do everything in their power to make sure you are exactly on the target at midnight on the 30th day. Be realistic. If you are buying a monthly service level, can you accept that there will be intervals and possibly even days when you won't make the grade? If the answer is no, you might want to reconsider and upgrade to a daily service level.

5. Give your team the freedom to focus on the future.

Don't fall into "paralysis by analysis." Your WFM team needs to learn from the data and make go-forward plans. Trying to explain why something happened is not always the best use of your partner's time. The next call still needs to be answered. The reality of the service level you choose in almost all cases does allow for error. If you contract your outsourcer to answer 80% of your calls in 30 seconds then that may also mean they will answer 20% or less over 30 seconds. Does it make sense to look into the 5% of calls that didn't work out or do you want your team focused on making the future moves that ensure that your customers are getting a consistent, high quality service experience?

When services levels are being met and everything is working smoothly, a ton of preparation was done in advance. In their quests to win championships, it's how the best teams also seem to make it "look easy."

ABOUT BLUE OCEAN

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With all of the above information, you should have the confidence to navigate the outsourced contact center buying process from your search to the signed service level agreement and beyond. But what if you want to narrow your search to a proven outsourced contact center partner from the start? Look no further than Blue Ocean.

For over 20 years, we have helped hundreds of prospects move through the RFP process, proving the value of our customized, high quality customer service solutions. We have built evergreen partnerships with clients who lead their markets and industries, providing seamless service that feel like a natural extension of their brands.

Contact us today to learn how our outsourced contact center services can fit your business, delivering metrics that guide your business and results that will wow your customers.

MIKE HASLER
Vice President, Sales and Marketing
mhasler@blueocean.ca

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