**<YOUR COMPANY>Request for Proposal (RFP)**

(To use this template, find <YOUR COMPANY> and replace it with the name of your organization).

***(NOTE that sections A-E are examples; please adapt to your specific needs/information.)***

**A. Introduction**

<YOUR COMPANY> is focused on delivering sustainable growth – growing top and bottom lines over the long term while investing in quality, marketing, and innovation. <YOUR COMPANY> is focused on driving cost out of the business and concurrently maintaining or improving the quality of our customer experience as well as maintaining or improving our service levels.

<YOUR COMPANY> is launching this RFP process to gain an understanding of supplier capabilities.

The goal of the process is to identify the strategic supplier who will provide the best value proposition, balancing cost-quality-service.

**B. Contents of the RFP**

This document contains the following sections:

1. Company Profile
2. Capability
3. Bid Sheet
4. Key Contract Terms

**C. RFP Representative**

Please ensure that all discussion regarding this RFP initiative goes through the established channel.

Please also be aware that improper contact with any other personnel within <YOUR COMPANY> in reference to this RFP, may disqualify your company from further consideration.

**D. Rules of Engagement & Confidentiality Terms**

<YOUR COMPANY> is in no way obligated to award business based on the results of this Request for Proposal (RFP). Information contained in this RFP is confidential and proprietary to <YOUR COMPANY> and will not be shared with any other suppliers. All expenses for supplier's participation are entirely the responsibility of the supplier and will not be chargeable to <YOUR COMPANY>.

**E. Disclaimer**

Submitting a response to this RFP assumes that the supplier agrees to the following conditions:

1. The proposal does not in any way obligate <YOUR COMPANY> or commit <YOUR COMPANY> to award a contract to the supplier.
2. <YOUR COMPANY> is not liable for any supplier costs incurred in completing the RFP.
3. <YOUR COMPANY> reserves the right to withdraw or terminate the project at any time.
4. Business award is contingent upon the successful qualification and approval of the supplier by <YOUR COMPANY>.

**F. Customer support program details**

**[please include program overview including interval volume data by channel over a 12-month period, KPIs including AHT and Service Level per channel, types of contact interactions, platforms currently in use or expectations of platform if changing (telephony, CRM, ticketing, etc.), launch date, any relevant growth projections, languages, lines of business, and other relevant program details].**

**SECTION 1: Company Profile**

**INSTRUCTIONS:**

Please complete all sections below.

* 1. **Contact Information**

All correspondence or notifications involving contracts and/or financial matters shall be addressed as follows:

|  |  |
| --- | --- |
| Supplier Name: |  |
| Supplier Address (Corporate HQ): |  |
| Primary Contact Person: |  |
| Primary Contact Title: |  |
| Primary Contact Phone: |  |
| Primary Contact Email: |  |
| Parent Company Name (if applicable): |  |

* 1. **Company Details**

|  |  |
| --- | --- |
| DUNS Number |  |
| Website URL |  |
| Corporate Office Location |  |
| Year Company was Founded |  |
| Public or Privately Owned |  |
| Union or Non-Union |  |
| If Union, what is the length and expiration date of the current labor agreement(s)? Is any language present in the agreement(s) listed above which may prohibit you from efficiently executing the contract between our organizations? |  |
| Corporate Financials: Dollars In 000s (state preferred currency) |  |
| Revenue for the past three fiscal years |  |

1.2.1) Describe your company’s form of business (i.e., individual, sole proprietor, corporation, non-profit corporation, partnership, limited liability company) and business location (physical location or domicile).

1.2.2) Does you company have any special status as it pertains to supplier diversity (Woman-Owned, Minority-Owned, etc.)?

1.2.3) Has your company gone through an acquisition or alliance in the past 12 months? If yes, please provide details.

1.2.4) Declaration of Conflicts of Interest: Please declare any known or potential conflicts of interest.

1.2.5) Has your company, currently or in the past, conducted business with <YOUR COMPANY> or any of its affiliates? If so, please explain the previous relationship including, if applicable, a list of products/services you provided.

1.2.6) Describe your capability and experience to effectively manage a program with the scope of our requirements. Provide examples.

1.2.7) How has your company progressed/grown over the years?

1.2.8) Please provide the number of years your company has been in business.

1.2.9) Provide your company’s total number of employees. Please indicate full time, part time, and temporary.

1.2.10) Provide a description of your client base. Include client name, years as client, size of program and nature of support you are providing.

1.2.11) Please indicate the addresses of your offices.

1.2.12) What percentage of your workforce is Work at Home versus on prem?

1.2.13) Please list and explain any mergers, acquisitions, or change of control of your company within the last ten (10) years.

1.2.14) Provide a statement of whether, in the last ten (10) years, your company has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors.

1.2.15) Is there any pending legal litigation against your company that your company should reasonably believe could adversely affect its ability to meet contract requirements pursuant to this RFP or is likely to have a material adverse effect on your company’s financial condition?

* 1. **Business Operations**

1.3.1) Describe what distinguishes your company within your industry (e.g., awards, recognitions, innovative solutions, technology, etc.).

1.3.2) Geographically, where will the <YOUR COMPANY> account support team be based?

1.3.3) How will your company structure the team to provide customer service to <YOUR COMPANY>? Describe whether program management and support services will be dedicated or shared.

1.3.4) What is your customer renewal or repeat business rate, and why do customers renew their contracts with you?

1.3.5) Share an occasion where you successfully offered process improvement. What was the purpose, what was the result?

1.3.6) List your company's top three (3) accounts and the percentage of revenue that each account contributes.

1.

2.

3.

1.3.7) Has your company lost any major accounts within the past 12 months? If so, please name the account and provide a brief reason for losing the business.

1.3.8) How many clients do you serve that operate in the same or similar industry as <YOUR COMPANY>? What are the primary industries you serve?

1.3.9) What other organizations, similar in size and environment to <YOUR COMPANY>, are you servicing? Please provide a high-level overview of their program and how your service positively impacts it. If available, please provide a case study of a recent large-scale initiative (i.e., scope, timing, results, etc.) with one of these customers.

1.3.10) What languages do you currently support?

**SECTION 2: Capabilities**

**INSTRUCTIONS:**

Please complete all sections below.

**2.1 Capabilities and Continuous Improvement**

2.1.1) Provide an overview of your current capabilities. How do you expect to evolve over the next five years?

2.1.2) What is your system/process for alerting clients on issues beyond established tolerance (i.e., 150% over forecast in a certain interval)?

2.1.3) Describe your ongoing Quality Assurance and Continuous Improvement processes and provide examples where you have added efficiencies to your clients’ programs.

2.1.4) Describe how you would approach the collection and management customer satisfaction data for our program? Provide examples where CSAT data has impacted program changes.

**2.2 Culture and Labor Market**

2.2.1) Describe your corporate culture including how it is differentiated from your competition.

2.2.2) What is your mission statement?

2.2.3) How does your corporate culture align with your understanding of our own company, values, and culture?

2.2.4) Describe your primary labor market for agent working on prem, including post-secondary education rates and unemployment rates.

2.2.5) Describe your competitive position for hiring remote agents and what your primary markets are for hiring remotely.

2.2.6) Describe your company’s competitive differentiators within your labor market.

2.2.7) Outline your attraction and recruitment strategies and processes.

2.2.8) How do you ensure the agents will have the appropriate skills to be successful on <YOUR COMPANY>’s program? What skills are vetted prior to hiring? How do you test for skills?

2.2.9) What is your wage strategy as an employer in the outsourced customer care space?

2.2.10) Describe your talent acquisition team and process.

**2.3 Agent Training and Engagement**

2.3.1) Describe your training structure (team and facilities) and outline approach to new hire training.

2.3.2) What is unique about your agent training regimen?

2.3.3) What’s your maximum class training size?

2.3.4) What percentage of new hires graduate from training to production?

2.3.5) What percentage of agents are still with the company six months after graduating from training?

2.3.6) What is your annual agent attrition rate for the program most similar in size and scope to our requirements?

2.3.7) What recommendations would you have for incentive programs for agents on our program?

2.3.8) Describe your employee engagement strategies and measurement processes.

2.3.9) What percentage of your new hires come from employee referrals?

2.3.10) What is your average tenure of salaried staff? Hourly staff?

2.3.11) How are costs for attrition training divided between <YOUR COMPANY> and the vendor?

2.3.12) What ongoing developmental training do you offer?

2.3.13) Do you conduct employee engagement surveys? How often? What have been the results for the past three years?

2.3.14) How do you use employee engagement data to affect change within your organization? Provide examples.

2.3.15) Do you provide career pathing opportunities for your employees? Describe the benefits to your clients and to your organization.

**2.4 Reporting and Performance**

2.4.1) What are the standard reports you provide?

2.4.2) What custom reporting capabilities do you have?

2.4.3) Is there a client portal for us to easily access reports?

2.4.4) Can we access reports in real time or near real time?

2.4.5) Provide examples of standard and custom reporting for operational performance.

2.4.6) Provide an example of how you have used reporting to positively impact a client’s business.

2.4.7) What reports form the foundation of your quarterly business reviews? Please provide an example of a QBR template.

2.4.8) Who on your management team reviews client reports on a regular basis?

2.4.9) What reporting recommendations do you have for <<COMPANY>> based on the requirements outlined in the RFP?

2.4.10) Describe how you calibrate agent and KPI performance with your clients to ensure a clear understanding of expectations between both parties?

2.4.11) Describe how you monitor and coach agent performance to ensure they are meeting expectations?

**2.5 Workforce Management**

2.5.1) Describe your Workforce Management (WFM) team and the tools, platforms they utilize, and services they provide.

2.5.2) Describe your forecasting process.

2.5.3) What is the forecast to actual accuracy rate?

2.5.4) Describe how you manage staff when contacts volumes fluctuate outside of expectations and during seasonal peaks and lulls?

2.5.5) What types of reports are offered related to WFM?

2.5.6) Describe what factors are evaluated in your capacity planning process?

**2.6 Governance**

2.6.1) Provide an organization chart and bios of senior leadership and program managers.

2.6.2) Which members of senior management are located at the same site as the location proposed for our program?

2.6.3) Describe your governance model including detail on senior management involvement on our account.

2.6.4) Describe policy on gaps in performance and how concerns are managed through resolution.

**2.7 Solution**

2.7.1) Provide a description of your company’s ability to deliver the services as outlined in this RFP.

2.7.2) Provide a statement of whether your company intends to use subcontractors to meet <YOUR COMPANY>’s requirements of any contract awarded pursuant to this RFP. If you intend to use subcontractors, please also provide answers to a-c below.

1. the names of the subcontractors along with the contact person, mailing address, telephone number, and e-mail address for each
2. a description of the scope and portions of the goods each subcontractor involved in the delivery of goods or performance of the services each subcontractor will perform
3. a statement specifying that each proposed subcontractor has expressly assented to being proposed as a subcontractor in your company’s response to this RFP.

2.7.3) Please describe your proposed account team structure, with detail on specific roles, location of resources, and number of resources.

2.7.4) What is the average length of your client relationships?

2.7.5) Based on the information provided, how would you help standardize and/or improve <YOUR COMPANY>'s program?

2.7.6) Outline your company’s continuous improvement program and how it could benefit <YOUR COMPANY> when trying to optimize quality and reduce costs.

2.7.7) Describe your solution to supporting our requirements including team structure, WFM, and QA.

2.7.8) Provide three (3) customer references from customers for projects like the Service sought under this RFP.

**2.8 Implementation**

2.8.1) What is the standard timeframe to transition a new client?

2.8.2) Please provide a resource allocation matrix for implementation and for steady state. The matrix should indicate what resources will be required from the client side and vendor side during implementation as well as stead state; it should also include allocation of their time (%) during implementation and steady state.

2.8.3) Please provide a proposed implementation plan.

2.8.4) What do you believe the top three considerations are to ensure a successful implementation? Why?

**2.9 Technology**

2.9.1) Describe your technology approach to delivering our systems to agent desktops.

2.9.2) How do you foresee your agents using our tools and what challenges do you foresee in making that happen? How might you overcome those challenges?

2.9.3) What additional channels or approaches do you think will be applicable to our business?

2.9.4) What technologies do you use to manage the performance of your agents?

2.9.5) Describe your technology approach for current client programs similar in scope and requirements to ours.

2.9.6) What do you have in place to be able to deliver reliable service to our customers?

2.9.7) Describe some of the business continuity components that you have in place for programs similar to ours.

2.9.8) What is your general approach to developing a Business Continuity Plan for your clients?

2.9.9) How often are your client Business Continuity Plans updated?

2.9.10) How do you test your Business Continuity Plans for programs similar to ours?

2.9.11) 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)

2.9.12) Describe how emerging technologies such as artificial intelligence and machine learning might be applicable to our program.

**SECTION 3: Billing, Payment, and Pricing**

**3.1 Billing and Payment**

3.1.1) What manner of payments does your company accept?

|  |  |
| --- | --- |
| Electronic Funds Transfer |  |
| Purchasing Card |  |
| Check |  |
| Other (specify) |  |

3.1.2) Please indicate in what state/province (s) your company is incorporated in.

**3.2 Pricing**

**INSTRUCTIONS:**

Please populate the costs in the green column. **Please quote in** **<USD, CAD, Euro, Other> currency.**

|  |  |  |
| --- | --- | --- |
| **Item** | **Rate** | **Unit of Measure** |
| **Staffing Rates** | | |
| Agent (specify rate by language/tier, if required) |  | Hourly or per transaction |
| Training (initial and ongoing) |  | Hourly or per transaction |
| Management |  | Hourly or per transaction |
| Reporting |  | Hourly or per transaction |
| Coach(s) |  | Hourly or per transaction |
| Ad-Hoc Professional Services: |  | Hourly or per transaction |
| ·         Administrative |  | Hourly or per transaction |
| ·         Telecommunications |  | Hourly or per transaction |
| Overtime/holiday rate |  | on above rates |
| **Technology Rates** | | |
| Call Recording |  |  |
| Tele-interpreter (3rd Party Expense) |  |  |
| Interactive Voice Response |  | Min |
| **Ad-Hoc Direct Pass-Through Expenses** | | |
| Call Center Materials and/or Incentives |  |  |
| <YOUR COMPANY>-requested travel, outside of Account Management |  |  |
| Long Distance if required |  |  |
|  |  |  |
| **Implementation Costs** |  |  |
| **Item Description** | **Cost** |  |
| Program Implementation |  |  |
| Program Management |  |  |
| Technical Set Up and Programming |  |  |
| Report Development and Programming |  |  |
| Quality Program Design and Set Up |  |  |
| Post Call Survey Set Up |  |  |
|  |  |  |
| **Additional Costs** |  |  |
| **Item Description** | **Cost** |  |
| Training Curriculum Development (if required) |  |  |
| Travel During Implementation (if required) |  |  |
| Post Call Survey ongoing |  |  |
| Other |  |  |

**SECTION 4: Key Contract Terms**

**INSTRUCTIONS:**

Please respond to questions below. All cells highlighted in yellow require information. **[You provide numbers for "##" placeholders, unless you prefer a recommendation from the supplier]**

|  |  |  |  |
| --- | --- | --- | --- |
| **Service Level Category** | **Description** | **Expectation** | **(Y/N) Comments** |
| Account Representation | Assign a single point of contact to interact with our team on operational and business issues | A single point of contact must be provided that will act as a liaison with our team in the administration of the program. |  |
| Relationship | Supplier performance review | Supplier will schedule regular performance reviews and continuous improvement reporting over the course of the relationship. |  |
| Invoice Contents | Invoice data requirements | Supplier invoices will show the following information:  (1) Purchase order number (where applicable) (2) Invoice number (3) Date of service (4) Pricing details (labor hours and/or transaction, material cost, etc.) (5) Description of service performed |  |
| Invoice Delivery | Invoice delivery requirements | Supplier will invoice through the method most preferred by us. In most cases, preferred option will be submission of electronic invoices. |  |
| Payment Terms | Minimum Payment Terms Required | Net 30 days from date invoice is received |  |
| Service Levels | Phone | ##% of calls answered within timing |  |
| Abandon rate |  |
| Phone AHT ## |  |
| Email | ##% answered within X business days |  |
| Chat | ##% answered within X |  |
| CSAT | CSAT goal is +>##% |  |