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# 10 STEPS TO CREATING GREAT OUTSOURCING PARTNERSHIPS

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Outsourcing your Contact Center can be a scary proposition. You feel like you're losing control. Whether you've been providing great service in-house or you're making outsourcing part of your initial business plan, you can't afford to let service slip. You're trusting somebody else with your customers? What are you thinking?

Don't panic. Your new outsourcer can be a true partner in your business and as invested in the satisfaction of your customers as you are. It's a question of setting them up for success.

**1) Make the right choice:** The first step, choose your new outsourcer carefully. Do they have experience in a business similar to your own? Ask for references, and check them carefully. Visit the center where your work will be done. Don't let the management staff keep you in a conference room suffering death by PowerPoint. Spend time on the floor, sitting among the front-line staff. Sit side-by-side with agents, and listen to the conversation around them. Join a training class and watch the interaction. Wander through the break room and out to the smoking area. You can learn more in 15 minutes in the smoking area than you can in a full day in the conference room. Immerse yourself in the center for a day, and you'll know if the culture is a good fit.

If your work will be done in several centers, visit as many as you can. There can be huge differences in centers within the same company, based on local leadership and available workforce. When the time comes, negotiate fairly on pricing. Bottom of the barrel pricing can lead to bottom of the barrel service. Remember, you want your outsourcer to be a partner, with both of you succeeding.

**2) Plan carefully:** Once the decision is made, it's time to begin planning. Assign a project manager to create a meticulously detailed timeline and to meet at least weekly with the appropriate partner managers. Timelines must be updated every time there's a change. Project plans must clearly show dependencies and must make it obvious when a deadline is in jeopardy. You and your senior team need a dashboard you can see at any time that shows whether the plan is on track.

**3) Provide resources:** Solid processes and a good knowledge management system are critical to the success of your new partner. If you're outsourcing work that's been done by experienced people, you may find that many processes are in their heads rather than in the system. That knowledge must be clearly documented before it can be transferred. Start by defining all the company jargon that everybody understands. This is a good time to take a close look at the processes

themselves. Are they streamlined? Do they make sense? Do they all have to be done at all? Are they all documented, into flow charts identifying the process owner and last review date? Is there an inventory of all processes? Approval systems, levels of credit authority, requiring returns of low-priced items, all these things and much more may have bureaucracy and waste built into them. Now's the time to map processes and ensure they're effective. A solid, searchable knowledge management system keeps everyone informed and allows regular updating. If you must use paper, you'll need to be vigilant about updates and create a fool-proof system for ensuring everyone discards the old information and replaces it with new.

**4) Training is the foundation:** The initial training must be done by your experienced trainers, with full participation of the partner trainers. The partner trainers then take over, with your trainers supervising. Only when your trainers certify their knowledge can the partners train on their own. You'll want regular updates each time new hires are brought into your program: how many start, how are their assessments, how many finish, and how are they doing in their initial time on the floor? Don't skimp on training; the price in customer satisfaction can be very high.

**5) Support in production:** Whether new hires are taking calls, chatting, handling emails and texts or making outbound contacts, they need support once they go live on your work. Your experienced agents or trainers are the best choice for this, rather than the partner's staff, as your people have lived through the odd contacts and once-in-a-blue-moon situations. Depending on the complexity of your work, this might continue for several weeks. In person, support is best, but a temporary virtual help desk can also be effective.

**6) Calibrate on quality:** You know what your customers need, and your quality system should reflect that knowledge. The partner's generic quality monitoring is not enough; they need to be following your specifications. Calibration calls help keep everyone aligned. Calibration can be done a number of ways. One of the best is to have everyone listen to a recent interaction and score it separately, then discuss and agree on the correct scoring in a conference call. Separate from calibration, the partner should be regularly monitoring each individual for quality, according to your standards. And you should be able to look or listen in whenever you like. The partner should provide you with a roster that is updated each time someone is added to or leaves the team. Make it a point to listen or look in on each person on the roster. You and the partner need an understanding of how quality concerns are handled, with progressive coaching that could culminate in a person being removed from your program if improvements are not made.

**7) Insist on stellar reporting:** You're entrusting your customers to your outsourcing partner, and you always need to know what level of success is being achieved. Wait times, first call resolution, quality, hold times, customer satisfaction scores, and many more key performance indicators may be available for measurement. Focus on those that matter to your customers and make sure you can monitor those in real time. Depending on their operating systems, ask for direct access to your data on the ACD or other systems so that you can do your own custom reports as needed.

**8) Create**

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