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**SELECTING THE RIGHT SOURCING  
PROVIDER FOR LONG-TERM SUCCESS**  
A White Paper on Finding Balance  
Between Business Growth and  
Effective Customer Contact Management

It's the perpetual Catch-22 of the growing, customer-centric organization. With success and growth come increased customer interactions – and the need for more personnel and contact center operations to handle heightened customer service demands. Yet, contact center operations are not the organization's core competency. Management fears decreased customer service levels, increased costs and potential impact to customer loyalty and brand image.

Customer service and engagement is a challenge for many organizations. In the quest to contain costs and maximize operational efficiencies, few can afford to wholly insource their customer contact services. While an Econsultancy study reveals only 26 percent of companies have a well-developed strategy to improve customer service, many executives admit to being keenly aware of the promises they've made for remarkable customer service to reach, convert and maintain a profitable customer base. Few want to risk failure.

For good reason. The costs of poor customer service are

undeniable. Each customer relationship abandoned or lost to a competitor costs companies almost \$300 annually – and costs the U.S. economy \$83 billion a year, notes Genesys.

Many know the solution is to outsource customer contact solutions and voice- and data-related services. Yet they fear the mismatch. They realize success comes from finding a partner that brings the necessary tools and competency along with the right cultural fit.

The question becomes: How can you perfect the engagement selection process?

This position paper provides an executive-level summary of best practices in securing contact center services. Whether this is the first time for a prospective buyer, or the organization is hoping to improve upon its current offerings, it's important to know key attributes to look for in an outsourcing partner.

This document will not discuss key performance indicators or long-term measures of project success. It will review the experience and intangibles – subject matter expertise, deep executive involvement, an awareness of the buyer's industry and brand, and synergy between corporate cultures. Partners must share these to help determine if buyer and provider are suited to maximizing outcomes through a solution-oriented engagement that applies the ideal solution to the unique customer engagement.

## **Why Organizations Consider Outsourcing**

Many successful companies can claim sales, marketing, manufacturing or delivery of a key service among their strengths. Few, though, consider relationship management of thousands of customers – or multiples thereof – among their core competencies. Without such expertise, maximizing efficiencies, improving costs, and heightening return on investment may be lost.

Moreover, companies considering outsourcing typically are burdened by growth-related issues. Current staffing or contact center levels cannot handle existing call or contact volume. Spikes in customer contacts further challenge the organization. Personnel or center performance degrades. Inefficiencies grow. Metrics fall.

At the same time, executives realize the need to tap into new and growing communication channels, such as social media and automated notifications, to facilitate ongoing customer engagement. These solutions add new levels of complexities and infrastructure costs.

The key becomes identifying your needs and desired outcomes to find the right solution from the right partner.

## **Finding Prospective Partners – And Knowing What to Ask**

Before the search begins, executive management should huddle to identify their unique needs. Maybe the organization needs greater automation, streamlined customer relationship management, or the implementation of an entire customer contact solution.

Whether new to outsourcing – or in a bad relationship and hoping not to repeat the same

mistakes—the company must find prospective partners experienced to meet those needs.

To find prospective partners, search the Internet, attend industry events and tradeshow, read your industry media, and seek out recommendations via word-of-mouth referrals. Find those experienced in your industry or sector. Seek out those with a track record of success in your category.

Next, open of a frank dialogue – first among the buyer's executive management, and then with prospective providers. Examine why the organization is outsourcing, and how the right provider can help. For example, at West Corporation, partners discuss in depth both the situation and the solution. Their proprietary Outcome Maximization Process explores the prospective partner's current condition, then crafts a unique solution to best achieve the intended goals. Every facet of a solution, including location, agent profiles and training curriculum is customized to ensure agents become an extension of the company.

Once several prospective partners have been identified, among the key questions to ask are whether the organizations you're considering have...

- **Facilities and Staffing.** Having sufficient staffing and facilities to meet the customer organization's near- and longer-term requirements can help launch the program quickly, and ensure capacity requirements exist should needs arise.

- **Vertical Subject Matter Expertise.** Not all partners are versed in all industries. Some provide deep experience in such categories as healthcare / pharmaceutical, insurance, utilities, financial services, communications and retail. Those unskilled in your vertical must learn on the run. Ideally, any partner should be prepared to hit the ground running.
- **Right-Shoring Capabilities.** Deploying a combination of call or operation centers to meet customer needs can include offshoring to international service centers, near-shoring to centers in Mexico or Canada, onshoring to domestic U.S. facilities, or “home shoring” to home-office solutions. Such blended solutions improve performance-based scheduling and deliver the best possible experience at the ideal cost structure.
- **Proven Technology.** What has the respondent accomplished in the realm of transforming client business through communications? How has it helped clients solve business problems by empowering new

forms of communications and collaboration. Does it utilize world-class technologies, including automated notifications or hosted and managed IVR solutions? These questions are essential to knowing how your prospective partner's toolbox can serve your needs.

- **Multi-Channel Communications, Preference Management and Contextual Awareness.** Does the partner support leading communication channels beyond voice - text, SMS, social media, mobile, for example – to interact with customers where they exist? Can the partner deploy contextual awareness to match support to customer preference and better align your service with customer needs? Can the partner maximize the relationship with agents who can tie it all together?
- **A like-minded culture to your own** – with a single-minded focus needed to turn your expectations into guaranteed deliverables.

When winnowing the list, issues borne of cost or location should not be the only – or even the most – relevant determining factors. Assuming they're bidding on the same contract – apples to apples, so to speak – most providers should come in relatively close in fee. Instead, consider more deeply each vendor's “value proposition” – its focus on process and outcome maximization, the presence of an engaged and satisfied workforce, and its guarantees of outcome accountability.

The cost of outsourcing customer relationship management rarely is insignificant. Yet, the ability to derive the most value from the engagement, working hand-in-glove with the provider in a creative way to form a blended solution that drives value delivery, will improve customer satisfaction, reduce costs and heighten bottom line performance.

Today's top-tier sourcing partners can deliver end-to-end solutions custom-suited to any customer need. Or customers can tap individual solutions on an as-needed basis. Both scenarios reflect strengths in the partner. Providing full solution sets alleviates the need to divide elements among multiple partners and lose control or responsibility for the overall engagement. Utilizing selected services allows the customer to start with a limited engagement, and grow as needs present themselves.

### **Balancing a "Big" Vendor vs. a "Niche" Player**

The market is replete with "big" vendors. They're well-known veterans with solid reputations. Yet what level of attention do their clients receive from executive management? How involved are top-level leaders with agents on the front-lines, helping build the connection between client, agent and customer? Moreover, are agents empowered with the information, tools and technology necessary to engage customers in an actionable way? If that first connection between agent and customer fails, the relationship could be lost. And that connection often begins with involved executive management taking a personal interest in the client account.

On the other hand, niche / boutique partners are right-sized and –minded for customer needs. "Niche" doesn't translate to limited in skills or scope. A niche player in the industry often is a large player ideally suited to handle a client's growing work. Yet it approaches the engagement as a closely-held relationship. They're wholly involved, not consulting from afar. They actively provide insight, expertise and solutions that heighten the value proposition. This makes them a "niche" vendor in a "big" player's skin.

### **'Culture' and Trust in the Contact Center Relationship**

You've determined your needs. You've sought out several partner organizations seemingly suitable to deliver to your expectations. Yet, the intangible unwritten in the contract is culture. Culture, chemistry and trust determines team cohesion, management symbiosis, and organizational trust.

Do your suitors value how well their people will work with yours? Has the partner promised high-level executive involvement? Are their subject matter experts truly versed in your vertical, which can catapult client brand, message and solutions further? Is theirs a tenured, congenial and engaged workforce delivering high levels of measurable customer service?

Do you trust what they're telling you? Do you want them in the foxhole with you? An organization utilizing an Outcome Maximization Process, and which has met these criteria, will determine the value of the relationship's culture.

## **CONCLUSION**

Finding the balance between growth and effective customer contact management can indeed present a Catch-22. When honest questions are asked between trusted partners, the search for a sourcing partner will deliver an ally that values solutions over service, outcomes over expectations, and the long-term view of a long-lasting relationship.

## **About West Corporation**

West Corporation ([www.west.com](http://www.west.com)) is a leading provider of technology-driven voice and data solutions. West offers its clients a broad range of communications and network infrastructure solutions that help them manage or support critical communications. West's customer contact solutions and conferencing services are designed to improve its clients' cost structure and provide reliable, high-quality services. West also provides mission-critical services, such as public safety and emergency communications. Founded in 1986 and headquartered in Omaha,

Nebraska, West serves Fortune 1000 companies and other clients in a variety of industries, including telecommunications, banking, retail, financial, technology and healthcare. West has sales and operations in the United States, Canada, Europe, the Middle East, Asia Pacific and Latin America.

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