

*An Insight-to-Action Report*

# Questions, Myths & Strategy: Choosing the Right Call Center Outsourcing Partner



## Increasingly, organizations are looking at an outsourced call center as an opportunity to deliver strategic, experience-based customer care.

But how do you choose the right partner? How do you set the stage for success? How do you address concerns of cost, culture, control, and continuity? Whether you're actively looking for an outsourcing partner, making a change from an existing provider, or considering a move from an internal to external team, this paper includes three sections to support your decision.

- ***The 8 Questions to Ask Before You Choose an Outsourcing Partner*** helps you navigate the decision-making process to find the right solution for your organization. As a result, you can move forward with the confidence that you've selected the partner that's right for you and paved the way for a strong, ongoing relationship.
- ***The Golden Triangle for Outsourcing Success*** introduces the gold standard for change management. This proven framework helps organizations establish and maintain the appropriate balance of people, process, and technology (PPT) for operational efficiency.
- ***Dispelling the 4 Myths of Outsourcing*** presents a clear business perspective that puts to rest four common concerns that arise when organizations consider an internal vs. external call center.

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**Outsourcing provides services that support your mission-critical activities, delivering essential expertise outside of your core business competencies.**

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The key to outsourcing success is finding a dedicated team that gets to know your members and customers, understands your mission, and believes in the value of your organization to its constituents. **Questions, Myths & Strategy** provides a goal-driven guide to help you find that partner, by making your evaluation process as objective as possible.

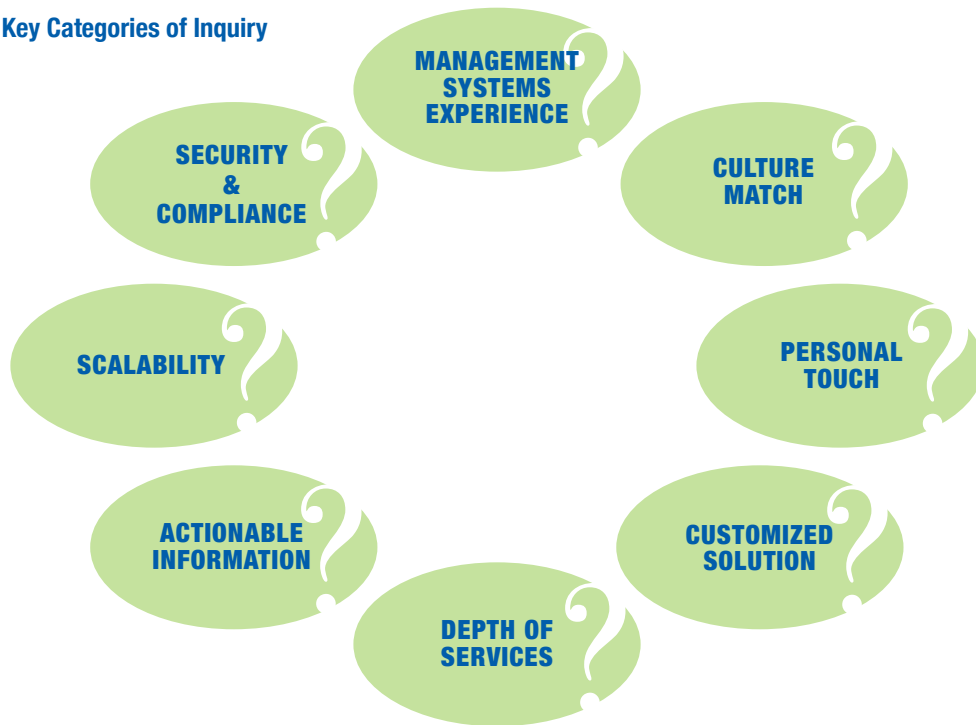
### **Why (and what) to outsource?**

Outsourcing provides services that *support* your mission-critical activities, delivering essential expertise outside of your core business competencies. These external services allow you to focus on the internal functions directly related to your mission.

Working with the right outsourcing partner enables your organization to maintain control by setting specific goals and evaluation criteria without directly managing a call center staff. Specific examples of outsourced call center responsibilities include customer service, sales and renewals, registration, collections, outbound telemarketing, warehousing and fulfillment, mail digitization, and other administrative functions.

FIGURE 1

Key Categories of Inquiry



## The 8 Questions to Ask Before You Choose An Outsourcing Partner

From AMS expertise and PCI compliance, to values, training, and customized reporting, there are a myriad of questions to ask your prospective outsourcing partners. This section organizes these questions into eight categories for an apples-to-apples comparison.

### 1. Management Systems Experience: What AMS/CRM systems do they support?

Of course you want to see if the company can provide a team experienced in your particular AMS or CRM system, but it's even more important that they demonstrate a breadth of experience with multiple systems, including proprietary ones.

**Implementation process:** Ask the outsourced partner to demonstrate a plan for hitting the ground running. That way, the team will have a strong baseline for understanding the workings of your specific AMS/CRM system. You want a partner that has a track record for starting strong with expertise that increases over time.

**Support for updates and system transitions:** Look for a call center partner with the ability to see you through software version updates as seamlessly as possible. And, if you're considering switching to a new system, they should be able to help you through the evaluation process and support your transition to a new system if and when you're ready to convert. A good call center partner should have an IT department that can coordinate with yours.

**Stability and growth:** You want to work with a well-established company, which not only gives you the benefit of their years of experience but also instills the confidence

that they'll be around moving forward. The commitment from you to hire an outsourcing partner should be matched by your partner's ability to demonstrate financial stability and ongoing growth.

## 2. Culture Match: Does their team mesh well with yours?

One thing that can't be learned and is non-negotiable: company values and personality. Make sure the company has a clear mission and a commitment to a values system that meshes with yours. If they have a strong values focus, then they'll value yours. This culture fit is a go-with-your-gut feeling, impossible to quantify and dangerous to ignore. The partner team, after all, will serve as the front line to your customers and members.

**The right personality:** Does the prospective partner have a diverse enough client base to demonstrate that they can match customer service representatives (CSRs) to the personality of your constituents? Ask for examples of ways their CSRs have gotten to know the customers of other client organizations and how they've learned what's important to them. The outsourcing partner does not have to have direct experience with your organization's subject matter, but they do need to have a culture in line with yours and a commitment to build that trusted relationship.

**Transparency & accountability:** These two qualities go hand in hand. When issues arise—and they always do—you need to know about them before they become big problems. You don't want wishful thinking or finger-pointing; you want to identify a problem, work together on a solution, and put new systems in place to make sure it doesn't happen again. Does your prospective partner have the commitment and processes to anticipate problems and bring missteps or glitches to your attention at the earliest possible moment? The best outsourcing relationship is one in which you trust that you'll have full transparency into how things are going.

Your partner should welcome your organization's team to visit and listen to live calls, make suggestions, point out what's working, and what can be improved. They should invest in team time for learning sessions with your staff, not just at the start but any time there's a new product, service, or need for a course correction.

## 3. Personal Touch: Do they have strong customer service?

You want to meet your customers and members where they are—in level of knowledge, in communication style, and channel preference. Sometimes, a customer wants to ask a specific question or talk through a problem; they should reach a live person answering the phone or have the opportunity to chat online. If they send an email, they should receive an email reply, or a text for a text. Your partner should live by the rule of thumb to respond to a customer contact using the channel they prefer.

**Prompt, personalized service every time:** Expect a partner that supports the full range of communication options: phone, online chat, email, text, and mail. Whoever initiates the communication also establishes the response vehicle. Ask your outsourcing prospect about their typical service level agreements (SLAs); in that way, you'll understand their commitment to providing the level of service you require. Consider, for instance, phones answered in no more than three rings, and email responses within eight business hours. Your SLAs will dictate your team set-up.

**Real person answering every call:** Associations and other nonprofits are organizations in which every constituent counts. The preferred call center partner understands that just because it's possible to automate something, doesn't mean you should automate everything. We've all experienced the frustration of the automated answering system. You don't want your customer struggling to navigate a telephone tree only to find that their question doesn't fit the available information categories or to have to leave a voicemail for callback.

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**“In a digital age, live voice contacts matter even more in providing a high-quality customer experience.”**

— McKinsey & Company,

“From speech to insights: The value of the Human Voice,” January 21, 2022

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Look for a call center partner ready to talk to your members when they're ready to talk, and one that knows when to forward a call to get the right answer. You want each call center team member to “own the call” and serve as a problem solver. More important than having an immediate response is the willingness to find the answer.

Nothing can beat the value of the human voice; great customer service is a priceless asset. When your customer calls, it's because they perceive it to be the best way to ask a more complicated question. With live contact you have the opportunity to solve problems on the spot, and gain the ability to get to the real problem. Give them a conversation, and they get service they'll remember and the personal attention they deserve.

#### 4. Tailored Solution: Do they go “beyond the boiler plate”?

What's the extent to which the prospective outsourcing partner demonstrates that their existing experience and expertise will become the launch pad for your organization's customized solution? When you ask about their implementation process, you'll discover a lot about their flexibility. You want to see a demonstrated interest in understanding your organization's market space, current business issues, and goals.

**Asking the right questions:** From the outset, do they ask the right questions and seem to understand your answers? Do their questions reflect that they reviewed your website? Do they request a glossary of industry-specific terms? Do they include speaking to subject member experts or the membership department as part of their orientation process? Do they ask for direct training with your internal subject matter teams?

**Offering a solutions approach:** Don't settle for a cookie-cutter solution. You want an experienced company that not only has a proven structure with clear processes and standard reports, but also leaves room for adjusting those processes and reports to meet your specific goals and needs. You should feel that they look at your organization as a unique entity that will benefit from their past and current experience...and they are willing to tailor the services to match your requirements and specific constituent base.

## 5. Depth of Services: Do they offer a turnkey solution?

The call center, of course, is job one. A company that handles a complete menu of onsite “à la carte” support services, however, can streamline customer service, improve efficiency, and save you time and money. Whether it’s on a one-off basis or an ongoing program, you gain a one-stop-shop for supporting organization-wide programs, including conferences, special events, renewals, time-sensitive

announcements, and more. Can your prospective partner provide supplemental support? A full-service outsourcing partner can provide valuable support services where and when you need them. For example:

- On-site printing & mailing invoices or renewals
- Outbound telemarketing to boost last-minute conference attendance
- Digitization of mail or documents
- Document storage for legal or tax reasons
- Customized kit collation for meetings or new members
- Storage and shipping of conference materials

Having an “all hands on deck” attitude and the services to support that philosophy can not only save you time and money—but also give you the confidence that you have a partner you can count on to turn around an order fast or rectify a hot customer service issue. Especially when you have a lot going on at the same time, it can be good to have a full-service option and a single point of contact.

### Inbound vs. Outbound Calls: Two jobs, two teams.

When you need outbound telemarketing, make sure that the call center has a separate team in place that works in tandem with your core team. Inbound and outbound representatives have polar opposite skillsets and personalities. An inbound team member is a problem-solver, accepting the challenge of taking a variety of calls in which the customer is in charge. The outbound professional prefers the control of being in the driver seat, with a script that includes specific calls to action, whether it’s for renewals, new product sales, registration, or collections.

## 6. Actionable Information: Do they deliver relevant insights?

Your call center team should systematically collect the backup data you require to support invoices and deliver standard reports that demonstrate whether or not they’re meeting contractual SLAs. Also consider the ways that your prospective partner goes beyond the baseline reports to keep you informed about anomalies they notice.

**Delivering actionable reports:** Will they develop reports that highlight meaningful data, presented to you as actionable information? You want reports that capture trends that could require course correction or allow you to take advantage of new opportunities.

**Serving as your front line:** Your outsourced call center partner is not only your voice but also your ears to the marketplace. They should know what’s report-worthy or important to bring to your attention. Their presentations and reports should provide you with insights into your constituents’ perception of benefits and anecdotal information that help you tell your story to board members and funders.

**Providing a reality check:** A call center partner with a strong client base can help you understand your numbers in relation to those of your peer organizations (without disclosing confidential information of course). They should help you understand ways in which your organization is either excelling, in line, or falling short in areas such as renewals or conference registrations. How will they help you stay on top of industry trends?

## 7. Scalability: Does the company have the ability to flex?

A key benefit of an outsourced call center is your partner's ability to provide consistent service throughout the year. A reliable outsourcing partner can be a lifesaver if you're committed to maintaining responsiveness when volumes fluctuate dramatically during conferences, product updates, annual membership renewals, new product and service releases, and unanticipated events. And that partner can also be a money-saver during quieter periods when your staffing needs decrease.

What's their formula for determining the optimum number of team members for your organization's needs? Do they ask you about time-sensitive events and activities over the course of the year for their advance planning? Can they demonstrate clear pathways for scaling up when the need arises? Ask for success stories when the unexpected happened.

**Maintaining a strong core team:** If your requirements vary over the course of a year, look for a call center that establishes a dedicated team that becomes expert in your processes, products, services, and constituent profile. These customer service representatives can then bring supplemental team members up to date quickly when the need arises.

**Cross-training for quality service:** The key to success during busy periods is a partner with multiple clients that have similar needs and systems. In that way, teams will have developed the same basic skill sets and can get up to speed quickly in times of increased call volumes—whether it's scheduled in advance or last minute.

## 8. Security & Compliance: Does the company meet rigorous IT and data standards?

Do they provide state-of-the-art security that meets the requirements of your IT department, with backup and an emergency plan in the event of a cyberattack or other data breach? Do they comply with national and international protocols for privacy and credit card information?

You will be entrusting your outsourcing partner with sensitive data, intellectual property, and critical business processes. Any security or data protection compromise can lead to financial loss, reputation damage, or legal consequences. Data governance and privacy policies must manage the secure handling and transfer of data.

**Compliance:** You want someone knowledgeable and compliant with the new and evolving requirements of PCI DSS (Payment Card Industry Data Security Standards) and GDPR (General Data Protection Regulation) to avoid inadvertent fines, forensic audits, customer service issues, and damage to your reputation. PCI DSS covers your handling of payment and credit card information, and GPDR protects the privacy of your members and customers by regulating use and storage of personal information. Make sure they have PCI DSS certification, along with SOC1 and SOC2.

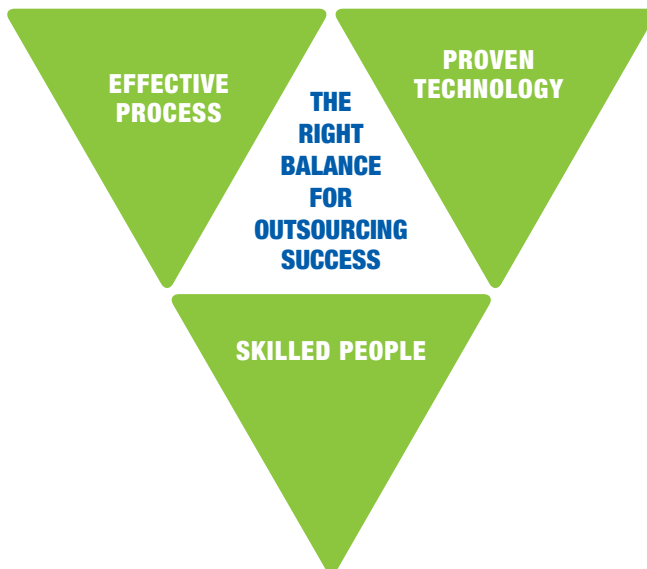
**Security:** Look for a partner that implements a multi-layered approach to security. They should be able to demonstrate adherence to protocols that include physical security, network infrastructure, access controls, and encryption mechanisms. Their ongoing monitoring should incorporate security assessments, along with vulnerability and penetration testing. You need a partner that demonstrates accountability and transparency through internal audits, third-party auditors, and a well-documented incident response plan.

**Training:** Beyond having the right hardware, software, and processes in place, it's critical for your partner to have ongoing training to keep team members up to date on the latest security threats, evolving compliance standards, and effective practices.

## The 3 Components of Balanced Change Management

FIGURE 2

### The Golden Triangle Management Framework



In the 1960s, organizational behavior pioneer Harold Leavitt laid the foundation for what would later become the People, Process, Technology (PPT) framework for change management. And it's a business construct that has stood the test of time.

Strategists have long held up PPT—also known as the Golden Triangle—as the gold standard for organizational effectiveness. You need to strike the right balance among these three elements; when one shifts, the other two must adjust to maintain that balance.

Close attention to the Golden Triangle is critical to the implementation and ongoing operations of your call center outsourcing solution. Success requires *skilled* people using *effective* processes with *proven* technology. When evaluating a call center, make sure that all the pieces will fit and support each other.



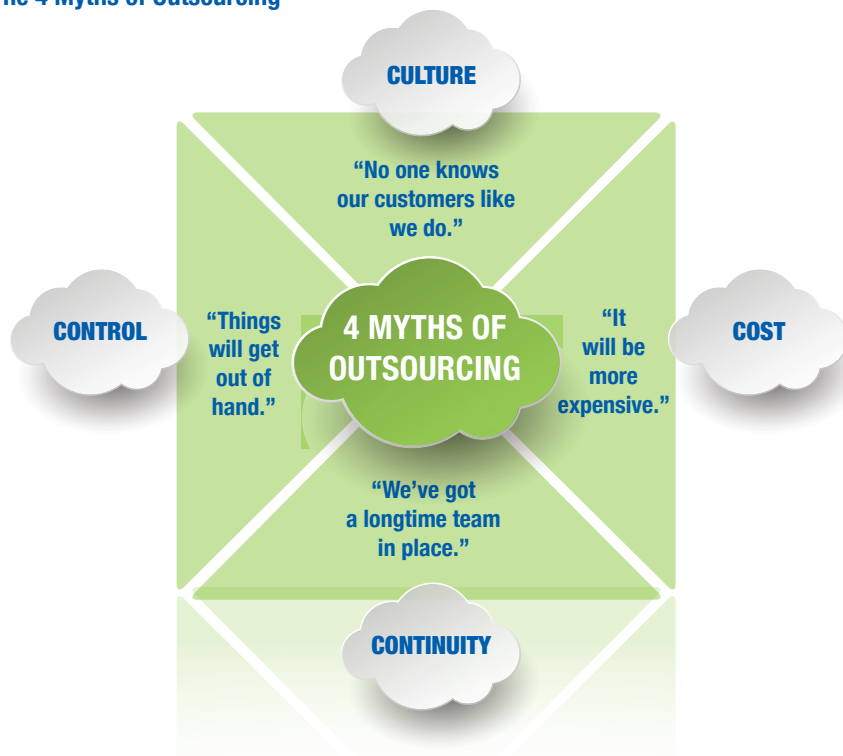
**Skilled People** form the foundation for success. Your team must be armed with clear, repeatable processes, and supported by advanced technology that’s accessible and reliable. Without an experienced call center team in place, the best process and slickest technology are worthless. *Look for a proficient team supported by ongoing training and a commitment to continuous learning.*

**Effective Process** calls for a strong structure and clear, repeatable tasks—the ordered workflows required to achieve your goals—based on experience and modified to support specific client requirements. *Look for proven processes and the flexibility to adapt to your specific needs.*

**Proven Technology** avoids the lure of the latest and greatest, it calls for up-to-date technology platforms and applications that streamline processes with a track record for increasing efficiency and accuracy. *Look for “just right” technology with specific applicability to your call center needs.*

FIGURE 3

### The 4 Myths of Outsourcing



## Dispelling the 4 Myths of Outsourcing

When organizations with an internal call center realize they need to consider making a change, four common objections generally arise. We call them the four Cs: Control, Culture, Cost, Continuity. The following section takes these concerns head on to explain the ways that the right outsourcing partner can put those worries to rest.

## CONTROL

**“Things will get out of hand.”**

Loss of control is a valid concern, but the right outsourcing partner can actually strengthen your impact and ability to manage the team through the application of consistent, proven processes. Upfront contractual agreement on service level agreements (SLAs), and timely reporting on metrics through Key Performance Indicators (KPIs) can deliver the management control you need. Once you have these agreements in place, you'll actually gain objective oversight for maintaining control as your organization grows.

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The right partner can provide you with reliable customer and member feedback, since you can count on the consistency of reported responses, rather than anecdotal information or opinion. Remember that customer service can be a highly emotion-driven business; you need a partner that sticks to the facts, identifies trends, and has a process for separating the exceptions from the trends.

A key to maintaining control is looking for a partner that lets you see behind the curtain, completely open and transparent about their team and processes. A good call monitoring system will allow you to listen in on live calls and make course corrections early in the process. If

something goes wrong, you can swiftly make a change or adjustment without worrying about your internal politics.

## CULTURE

**“No one knows our customers like we do.”**

Knowledge of your customers and members is a skill that grows with time, and an experienced call center partner has established onboarding processes that allow them to reach a foundational understanding quickly. In fact, you could flip the “culture objection” logic around and say that no one knows the call center business like a call center does.

Here's where the teamwork between your two organizations comes into play. The call center team leadership will start with your current processes and requirements—learning what's working, what's not. They'll want to understand your goals and concerns, along with those of your various constituent groups.

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You can trust the new outside team to handle the day-to-day calls, reserving internal staff for a hot complaint, complex subject matter query, or something requiring an exception to established policy. And if your call center partner is a learning organization, they will be able to handle more detailed, complex customer service issues over time.

## COST

**“It will be more expensive.”**

With an objective cost-benefit analysis, you’ll likely discover that the reverse is true: outsourcing enables your organization to take full advantage of the efficiencies and know-how of a large-volume provider. A good call center partner can help you evaluate the true value of the service—often bringing up considerations that you would not think to put in the mix.

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**Technology:** In-house call center operations require a significant investment in technology, security, and compliance. Beyond your initial investment, you have the ongoing challenge of staying current on advancements, industry requirements, and data security threats. And, with the increasing speed of technology advances and security threats, the internal cost will likely climb.

**Staffing:** You gain the efficiencies and consistency of “just-in-time” service, paying only for the hours that the staff actually performs call center duties. During busy times, an outsourced team can scale up to meet your needs, and you don’t pay for downtime. In short, you only pay for what you use. When staff members go on vacation, extended leave, or leave the company, you have no gap in service quality (or the expense of paid leave).

## CONTINUITY

**“We have a longtime team in place.”**

Sometimes organizations hesitate and even postpone making the transition to an outsourced solution because of loyalty to a team in place, even when the internal team is under-performing or resistant to supervision. This reticence actually points to the added benefit of making the change: you gain new efficiencies, objectivity, and the ability to make personnel adjustments immediately if necessary.

An experienced outsourced services company will assist with the transition and help to mitigate any potential negative impact, addressing the maintenance of staff morale and the fears that jobs are at risk. The right partner can suggest proven communication and management strategies, including repurposing staff to take care of core-mission functions.

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**Valued members of your internal call center staff can become partners in the transition and then move to other roles within the organization.**

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In the best case scenario, valued members of your internal call center staff can become partners in the transition and then move to other roles within the organization that build on their front-line member experience and customer knowledge.

## Choosing the Right Partner

Selecting an outsourced call center partner can be a daunting business decision. The stakes are high, because you entrust the partner you choose with the responsibility of representing your organization to your most valued asset—your members, customers, and partners. Not only are you looking for experience, industry knowledge, solid reputation, security, and flexibility, but you also want a values-driven partner with the corporate culture, personality, and customer service professionals to provide a seamless service experience.

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**A good decision leads to a partner with the best experience and culture for your organization, along with a framework to build a strong, ongoing relationship.**

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This paper delineates the key factors and considerations for selecting a call center partner, so that you enter the evaluation process knowing the questions to ask and the answers you want to hear. You get a framework for establishing and maintaining the right balance of people, process, and technology. And you learn how to overcome common internal objections to outsourcing. At the end of the day, success depends on putting the right people in place. A good decision leads to a partner with the best experience and culture for your organization, along with a framework to build a strong, ongoing relationship.

Outsourcing the call center can help nonprofits reduce the costs of hiring, training, purchasing new technology and equipment, and staying up to date in a rapidly changing IT environment. Putting the right outsourcing partner in place means that your team can focus attention on your organization's core competencies and other mission-critical responsibilities.

As your eyes and ears to the marketplace, your partner will help you understand what your constituents are thinking, the benefits they value most, and opportunities for improvement. The right partner will become a true extension of your organization; they'll think of your customers as their customers—respecting their importance, understanding their needs, and seeing them as deserving the very best service on every customer contact.

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