

# 42<sup>TM</sup> Rules

*for Outsourcing  
Your Call Center*

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# **“42 Rules for Outsourcing Your Call Center” Book Excerpt**

Best Practices for Outsourcing Call  
Center Planning, Operations and  
Management

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"The number 42 is referred to as revealing the answer to life, the universe, and everything."<sup>1</sup>  
Douglas Adams, *The Hitchhiker's Guide to the Galaxy*

## Introduction

*42 Rules for Outsourcing Your Call Center* is a compilation of real-life problems, lessons learned, pitfalls found, and practical approaches I have experienced during my career. Rather than providing just a tutorial on best practices, I looked at ways to share the knowledge of the many talented people I have known in my career in a manner that is easy to digest by novices and experts alike. While novices may see the book as an introduction to call center outsourcing, I hope that experts will enjoy the book and recognize their own experiences that are similar to mine.

I use the term "call center" as a generic term for any organization that is serving customers. The functions of the traditional call center are expanding. Agents that once only worked with the telephone now use instant messaging, Short Message System (SMS), social media engines, and email. Some people in the industry are beginning to refer to call centers as contact centers where agents use these multiple media forms to communicate with the public. My rules are common to all organizations that interact with their customers. Thus, I use the traditional term, call center, unless specifically referring to those capabilities that require contact center functionality.

### Why 42 rules?

In *The Hitchhiker's Guide to The Galaxy*, the number 42 is referred to as revealing the answer to life, the universe, and everything. I cannot attest to navigating the universe, but I am sure if you are reading this book it is because you are looking for a simple and concise way to understand what is involved in the complex task of outsourcing. Perhaps you have already been involved in outsourcing a call center. If you have, then navigating the universe may seem simple in

comparison. After all, when navigating the universe, you do not have to convince management of your ideas, deal with changing requirements, or manage a multitude of tasks that need to converge on a single date to go live.

Having a galaxy of options may seem advantageous when first looking at entering the stream of sequential decisions necessary for outsourcing your call center. The reality is that too many options sometimes may result in choosing the wrong path. Once chosen, that path may lead to unexpected directions with unseen "pitfalls" that may ultimately affect your business's reputation for customer care.

Industry success with customer service is becoming more and more difficult to attain. Everyone has a story about poor customer service and more often than not, the story involves a call center. In austere times, customer service becomes even more important as companies learn the hard way that answering the phone is not enough.

*In Search of Excellence* by Thomas J. Peters and Robert H. Waterman Jr. was written in 1982 when times were hard for America. The national unemployment rate was above 10 percent, inflation was running at about 14 percent per annum, and the Federal Reserve Board had increased interest rates. The country was in recession.<sup>2</sup> Yet, this book tells of companies that did well during this economic downturn because they focused on customer satisfaction being better than their competitors. Economic times are not always hard, but providing excellent customer service always pays for itself in increased sales and customer loyalty.

How to outsource your call center and still achieve excellence in customer care is what I have tried to capture in these rules. *42 Rules for Outsourcing Your Call Center* places a heavy emphasis on planning every aspect of your project, obtaining technical and executive commitments, validating and re-validating your assumptions, and executing your deployment with a methodology. Each rule offers you recommendations (that can limit risk and help

avoid failure) and a road map that deals with the large number of options you will confront when outsourcing a call center.

## 2

## Ask "Why Outsource?"

**Understanding industry trends versus internal workloads, costs, and schedules.**

Asking the question "Why Outsource?" would seem to be counter to general economic movements and run against prevailing industry beliefs. Many companies are outsourcing as standard procedure, following industry trends. Yet, the question needs to be asked. After all, call centers have been supporting the needs of customers since the telephone was offered to the public, and cost has always been a factor in the history of call centers.

Even from the beginning, Alexander Graham Bell at the Boston Telephone Dispatch company hired the first female telephone operator, Emma Nutt, on September 1, 1878 for two reasons: lower costs and higher customer satisfaction.<sup>4</sup>

Bell determined that women were better behaved than young men. Women had pleasant voices that customers—most of whom were men—preferred. They could also be paid less and supervised more strictly than their male counterparts.<sup>5</sup> Since then, women have obtained equal treatment and equal pay, but the ability to calmly handle customers with courtesy and patience has set standards that have lasted for more than 100 years.

Businesses are still challenged to find ways of minimizing costs and maximizing profits while retaining their customer through service excellence. So when making the decision to outsource, businesses are seeking outsourcers with abilities to deliver high customer satisfaction plus cross-sell/up-sell revenue instead of being just a low-cost provider.

Many businesses also realize they are not that good at running their own call centers and are looking for an outsourcer with core capabilities in call center operations and customer service. The top outsourcers have tens of thousands of agents in call centers around the world with the best technology available and the ability to leverage their scale and efficiency in ways your company cannot duplicate.<sup>6</sup>

Still, you need to know how to project the load for inbound and outbound calls, the life cycle of the product or services, and the level of service to be maintained. This may vary between outsourcing inbound services and outbound services. For outbound call centers, planning the workload is relatively easy. The number of agents will be dependent on the number of calls to be dialed.

In contrast, the rate that inbound calls will be received is harder to predict. You may not get any calls for minutes, and then receive a rush of calls at one time. Thus, forecasting your call patterns is critical to determining whether to outsource or not. If the staffing model is too high, the cost benefits are minimized. If the staffing model is too low, customer service will suffer.

Businesses operating internal call centers should have historical reports with how many calls are received in late August versus those received during the holidays between Thanksgiving and Christmas. The same reports should tell you how many calls are received Monday versus Thursday, or even for specific times of the day. Analyzing the data should reveal patterns that can be used for forecasting, as long as factors that could alter the patterns are taken into consideration.

Your forecasting may improve over time, but it is impossible to accurately predict how many calls you will receive at specific times, days, or seasons. The only fact you can count on is that call flow will not be even. From time to time, agents will be idle. At other times, callers will be waiting for the next available agent.

So why ask if you should outsource? The answer depends on establishing the expectations of how an outsourcer will handle your calls. There are many variations on outsourcing with no off-the-shelf solutions. Each solution depends on your business expectations, goals, and objectives. Moreover, you need to be sure your unique needs will be met and your outsourcer is capable of meeting your expectations for cost and customer service.

## 4

**Know Your Customer Expectations**

**Knowing what your customer expectations are is easy. They are high.**

Knowing your customer expectations is easy. They are high and they expect you to meet them. Your customers are calling your call center because they need help to purchase a product, resolve an account issue, maintain a product, or ask any number of questions that they believe your call center can assist them with. It may seem odd that your customer's expectations are high because many callers may be anxious, frustrated, or even short-tempered. However, if their expectations were not high, then they would probably not be a customer of your business or products. They would be someone else's.

This is a very advantageous position, but one that needs to be considered when outsourcing your call center. Even if the customer has received an error in billing or the product/service is deficient, customers will still have a high expectation that when they call, the issue will be remedied. If their expectations are not high, the odds are that this is because the customer has not been able to obtain the assistance they expected, and you are in jeopardy of losing them.

One would think that if customer expectations are high to begin with, it should be easy to provide the caller with an experience that maintains them as a good customer. Conversely, the disadvantage to this assumption is that any call center can only *meet* the expectation of their customers. Agents can rarely exceed them. Worse yet, there is a high potential that call center agents may fail unless proper planning and training are in place.

The primary objective of meeting customer expectations is **First Call Resolution (FCR)**. FCR means exactly what it says, and it is what customers expect. Customers call with the expectation that whatever problem they may have, the agent will be able to remedy it in a single call.

To help meet these expectations, agents should have:

- Access to systems with a single view of the customer data
- Training in how to engage the customer, build a relationship, and meet the customer needs
- Authority to solve the customer issues, including setting aside the rules to meet customer expectations
- An awards program that encourages First Call Resolution

Agents who are not able to service the caller during their first interaction may mean customer dissatisfaction. Moreover, if the customer requires multiple contacts, your company is at a higher risk of losing the customer relationship.

A second objective of meeting customer expectations is for the agent to build a relationship with the customer. This unique interchange between customer and agent occurs almost instantaneously with the initial salutation. It continues for the next six to ten minutes, or longer, to maintain that relationship. In that small amount of time, the agent has to gain the customer's trust, overcome any previous issues, and remedy the current problem.

To establish this relationship, agents need to present themselves as people the caller can immediately identify with. This may start with a simple greeting that sets the tone for the rest of the call. It may be an introduction from the agent having immediate access from a customer database that lets the caller know the agent understands the relationship between the caller and your company. For example, if a customer calls a bank and the agent knows the type of accounts the caller maintains, an immediate relationship is formed based on the customer feeling he is valued—which is what the customer expects.

More often than not in this era of outsourcing, this relationship is not established. What is more, there are few ways to know that the relationship has not met customer expectations.

I am sure you have experienced a customer service call in which an agent asked if you were satisfied with the services you received. If you were, you agree. Like most callers, if you were not satisfied, you say simply yes just to end the call. This may be a false signal to the company that their agents are meeting customer expectation, when in fact their agents have faltered. Moreover, your opinion of the company as one providing quality customer services may have changed without the company knowing why.

## 25

**Establish Security Guidelines**

**Security comes with a price, but without it, you risk an even higher cost.**

Security can be complex. It deals with user access to systems, data storage, Internet access, email retention, and many other operational processes. Yet, to a large extent, security for your call center work will be dependent on the network and operating systems established by your outsourcer. Hence, the need for guidelines.<sup>18</sup>

Guidelines should define the topics used in a basic checklist. The checklist should define physical and technical safeguards that protect the confidentiality, integrity, and availability of the electronic information that the outsourcer creates, receives, maintains, and transmits on behalf of your company from any anticipated threats, hazards, or improper access or use.

Guidelines need to reflect your own security goals and, likewise, used to evaluate the security of any prospective outsourcer. Keep in mind that you are already obligated to protect the confidentiality and integrity of your customers. Your outsourcer should honor the same commitment. Not providing guidelines may inadvertently violate contracts, expose confidential data, reduce market credibility, or result in government imposed penalties.

Security goals may vary, but at a minimum, your guidelines should incorporate policies to maintain the confidentiality of data, protection of data being modified by unauthorized sources, levels of access for applications and associated data, and accountability to verify compliance with security policies.

Outline enforceable security requirements in any contractual or other form of agreement. Remember these requirements have a lifecycle through which policies will be generated, applied, audited, and revised.

Validate your outsourcer has a **Chief Security Officer (CSO)**, or equivalent executive, that oversees security across their organization and periodically report on all aspects of security at his site.

Ensure your outsourcer has an organizational hierarchy that identifies who will have access to sensitive data or critical applications. Be sure you have established your own internal process for classifying data, and appropriate levels of security for each data class.

While your prospective outsourcer may independently submit the details of their security department in an RFP or other due diligence request, you should establish the security guidelines you expect to be followed. After all, it is your business.

As an example of what happens when guidelines are not enforced, consider the breach that Sony experienced between April 17 and April 19, 2011. After the breach, Sony informed the public that the names, addresses, and credit card numbers of 77 million of its users had been compromised.

Reuters later reported that Michael Pachter, Wedbush Securities Analyst, said "Sony probably did not pay enough attention to security when it was developing the software that runs its network. In the rush to get out innovative new products, security can sometimes take a back seat."<sup>19</sup>

Guidelines need to define the process of any new technologies, products, or data uses and identify the potential security impact, whether recommended by you or your outsourcer. Guidelines should also include the process for your outsourcer to respond to security "alerts" released by software vendors.

When security breaches are discovered, guidelines should set forth penalties and the procedures to correct the breach as promptly as possible.

Guidelines should stipulate an incident recovery/back-up plan, including backup software and a secondary site to maintain data, in case of any breaches in your information security systems. The guidelines should also mandate a process to eradicate data from equipment prior to disposal.

For the desktop, guidelines should mandate the use of virus protection programs and the regular updates of virus and software patches.

When guidelines are not followed, you will need to identify how to handle and resolve disputes. Thus, your guidelines need to include a plan for resolution of disputes arising out of security breaches or alleged misuse of customer identifiable information.

## 32

**Know If the Outsourcer Is Outsourcing**

**Does it matter if an outsourcer is subcontracting their proposed functionality?**

Outsourcing is a competitive business and providing services with aggressive pricing is always a critical factor in winning business. All companies look for methods to reduce their costs and outsourcers are no exception. To maintain their aggressive stance, outsourcers are following trends in the computer industry and using services in the cloud.

Cloud services are a by-product of the dot-com era. These services started as simple applications that could be shared over the Internet and have matured to challenge traditional client-server applications. An example is **Customer Relationship Management (CRM)** software. CRM is now offered in the cloud and referred to as **Software as a Service (SaaS)**. SaaS CRM has also spawned a number of companies that are adjuncts or directly interface with their solution.

**Infrastructure as a Service (IaaS)** is such as adjunct. IaaS offers in-cloud infrastructures such as ACDs (telephone switches), intelligently routing calls, outbound dialers, and voice and screen recordings. As a result, complete solutions for outsourcing inbound or outbound calls are available for a monthly fee.

Thus, it is essential to know if your potential outsourcer is outsourcing their technology. If they are, you will need to know to how to evaluate their capabilities. A vital question is, "If your outsourcer is using SaaS or IaaS, what value do they provide?"

The answer is dependent on how each outsourcing company integrates cloud computing into the services being offered to you. As in any approach, there are benefits and deficiencies of this technology. Your evaluation must determine if they meet your operational and technological goals and objectives. Here are some items to consider.

First, can the outsourcer demonstrate the effectiveness and reliability of the cloud computing solution being offered to you? The methods of the outsourcer may be presented as transparent to their operation and, indeed, your focus should be how your customers are treated and the effectiveness of the call center. Still, it is important to understand the technologies being used to fully evaluate the potential outsourcer.

Second, has the outsourcer added value to their cloud computing solution? **Platform as a Service (PaaS)** enables creation of value-added software to the solutions IaaS and SaaS offer. For example, using PaaS, the IaaS may log their transactions in the SaaS database. Another PaaS example is the integration of an IaaS user interfaces with a SaaS user interface. Hence, entering data to one user interface seamlessly enters the data into both solution databases.

SaaS and IaaS are typically offered over the Internet. Thus it is dependent on factors outside the control of the outsourcer. To overcome that issue, outsourcers with longstanding SaaS and IaaS vendor relationships may have implemented their own private network cloud. The private cloud ensures connectivity is being properly managed, especially when voice over internet protocols (VoIP) or session Internet protocols (SIP) has been integrated.

Third, if the potential outsourcer is using both SaaS and IaaS, what is the relationship between the companies? Many SaaS CRM vendors have developed a PaaS application-programming interface (API).

Fourth, is there a level of redundancy from the SaaS and IaaS vendors? Your potential outsourcer will be dependent on an infrastructure framework outside their control. Be sure your potential outsourcer can provide the details of the SaaS and IaaS vendor's business continuity plan.

Finally, if your outsourcer is using SaaS CRM or an IaaS vendor with your data or access to your data, stipulate who is responsible for the integrity and security of the data.

While these issues may appear as negative aspects of using cloud computing, there are also advantages. Data and business processes are not the domains of any outsourcer. As a result, outsourcing functions can easily move from one vendor to another. This inherent ability to easily change vendors may provide a significant advantage to your outsourcer strategy.

## 41

**Disasters Happen**

**What to do  
when the lights  
go out.**

It doesn't matter where your outsourcer site is located; it is at risk of a disaster. That disaster may be from a utility outage, storm, flood, fire, quake, volcano, or act of violence. Moreover, disasters usually don't happen as a single event. They involve multiple facets. For example, storms may involve flooding or heavy snow with the loss of electricity and/or communications

No matter what the disaster, you and your outsourcer need to have a plan for business continuity and disaster recovery. The plan should pre-define what personnel will do to reestablish operations during an emergency at your outsourcer facilities.

Even as you plan, these pre-defined procedures should not to be interpreted as the only course of action. In most cases, they should be overshadowed by common sense or modified by the conditions of the particular emergency. Also recognize your planning will not remain static. You will need to amend your planning to reflect changes in your operations and that of your outsourcer.

As you plan, recognize that disasters have different levels of severity: minimal loss, partial loss, and complete loss.

**Minimal loss** can be a temporary loss of a utility such as water, electrical, or communications. It may also be a weather-related closure without damage to facilities or loss of staff. In a minimal loss scenario, there may be little to do but work with the utilities or wait for the weather. If the loss

impacts operations for more than a day, you need to have a plan for an alternative site with the ability to take the calls for the stricken site.

Planning should be part of your outsourcer selection. Pick one site in a warm southern climate and another in the northern climate, because hurricanes and snowstorms rarely happen at the same time.

If your outsourcer is offshore, be sure their site has alternative power supplies such as an uninterruptable power supply and generators. An alternative water supply is also good planning since facilities without water can be just as disruptive as a lack of electricity.

Minimal loss planning should include the impact of pandemics such as the avian flu, SARS, and other unpublicized diseases. For example, in 2009, The World Health Organization estimated the global H1N1 (swine flu) outbreak could infect 2 billion over the course of the pandemic.<sup>27</sup> The flu may not be destructive to your outsourcer's call center, IT systems, or facilities, but they can have a severe impact on your workforce.

Planning for pandemic emergencies should provide the option for agents to work at home to prevent the spread of infection. You will need to plan for the shift in network loads for agents who remotely login and an alternate means of voice communications to continue normal call flow.

**Partial loss** of a physical location requires planning to reorganize the work. Planning for a partial loss is similar to a minimal loss scenario except that you need to deal with damage to facilities. Recovering from a partial loss may mean moving agents to an undamaged portion of the building, but emphasis should be to the safety and well-being of personnel.

**Complete loss** denotes the full destruction of a call center site and equipment. Planning for a complete loss requires the relocation of operations for an indefinite period of time while reconstruction of the facility is performed.

Detailing the action for each of these levels is sufficient for planning. However, to ensure that plans can be invoked when actual disasters happen requires testing. Disaster recovery testing determines how well you have planned and requires a heavy investment in time and manpower. If the test doesn't work, your teams must find the flaw and retest. Thus, you and your outsourcer should recognize the resource commitment to configure networks and communications for the test and to return the configuration to its normal state.

## H

## End Notes

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## About the Author



Geoffrey A. Best started in the computer industry in the 1970's and has worked with call centers for over 20 years. His career has taken him from computer aided mapping and 911 emergency dispatch systems, to computer telephony applications and today's call center systems. Geoffrey has worked and consulted around the world with utilities, communications, manufacturing, banking, and insurance companies. His experience has provided him with insight into the systems and methods that companies use to operate their call centers and service their customers. This experience has given Geoffrey a unique perspective of how customer expectations have changed over the past decades and how call center solutions have evolved to satisfy them.

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"Geoffrey has written the comprehensive resource for understanding the complexities of modern day contact center management. From customer experience design to the fundamentals of IT infrastructure, this book provides the not only the right topics, but also the deeper insights required to maximize the effectiveness of a contact center operation. I highly recommend this book whether you're an experienced contact center leader or someone that needs to quickly learn the intricacies of outsourcing."

**Scott McIntyre, Chief Instigator, Infinite Green Consulting**

"42 Rules is a real-world, practical guide that helps anyone from the newly indoctrinated contact center manager to the seasoned veteran navigate the difficult terrain in outsourcing their call center operations. I've worked side-by-side with Geoffrey during a recent outsourcing engagement and he follows his own advice to deliver success and ensure that both parties achieve an optimized outcome. This book is a must read for all contact center professionals."

**Ron Becht, Director Ecommerce Operations, Advance Auto Parts**

"Geoffrey has captured the fundamentals for how to outsource a call center in a logical step-by-step process that exposes the reader to real-life scenarios. 42 Rules for Outsourcing Your Call Center provides an encompassing view into what is necessary to plan and deploy a call center using a BPO and I recommend it for anyone that is contemplating this challenging task."

**Nick Jiwa, Managing Director of CustomerServ, LTD**



**Geoffrey A. Best** has worked and consulted in call centers around the world for over 20 years with utilities, communications, manufacturing, banking, and insurance companies. His experience has given him a unique perspective into the methods and technologies used by the call center industry to service their customers.

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