

FREE STARTER LIST

Key questions to ask every potential sales outsourcing provider

Sales Outsourcing Provider



The right sales outsourcing partner can help you perfect your sales pitch and sell to your sweet spot all day, every day.

Company Overview

Get to know the history and organization of potential outsourcers.

A. List Company Facts

12. How long have you been a sales outsourcer?
13. How many full-time employees do you have?
14. How many centers do you operate? (List address & number of employees for each location)
15. What languages do you currently support?
16. What sales awards or recognition has your company received in the past ten years?

B. Client Service

17. What industries do you currently do sales in?
18. Name your five largest clients, and list how long they have been clients.
19. Which part of the sales funnel do you excel in?

C. Culture

20. Describe your corporate core beliefs.
21. What is your mission statement?
22. How does your corporate culture align with your understanding of our own company, values, and culture?
23. Do you offer home-based associate positions or flexible remote schedules?

Agent Hiring/Training

An outsourcer's ability to attract and retain the right people for your brand and your service requirements is essential.

D. Agent Hiring

24. What is the agent profile assessment process to find the right people for your brand?
25. Describe your company's competitive differentiators for sales professionals.
26. Do you use AI to enhance recruiting and onboarding?

E. Agent Training

27. Describe your training structure (team and facilities) and outline approach to new hire training.
28. What is unique about your agent training regimen? Is your training customized and self-paced?
29. Does training include how to use omnichannel strategies to optimize sales efforts?
30. Does the curriculum include sales certification?
31. Does the training include sandbox environments?

F. Agent Engagement

32. Do you provide hands-on learning?
33. Describe your employee engagement strategies and measurement processes. Do you offer gamification to increase engagement?
34. Do you use speech analytics as part of training?
35. Do you compel your sales agents to give proactive solutions to the client?

G. Agent Profile

36. How do you profile your agents?
37. How do you test for skills?
38. What ongoing developmental or career development training do you offer?
39. How do you measure employee experience?

Data

Your sales center has a wealth of data about your business, which can go beyond reporting and provide business insight and analysis to drive results. It's important to understand what the outsourcer's strategy is for uncovering and leveraging those insights.

H. Data Sources

40. How do you focus efforts on the client's ideal customer profile?
41. Provide an example of how you have used data to increase conversion rates.
42. Do you use predictive modeling and surge data to prioritize leads?
43. How often do you conduct business reviews?
44. Provide case studies on how data drives sales results throughout the sales funnel.

I. Customization and Client Access

45. What custom reporting capabilities do you have? Do you have subject matter experts in different data visualization platforms, i.e. Tableau, Power BI, Azure, SFDC Dashboards, SSRS, etc.?
46. Is there a client portal for us to easily access reports?
47. Can we access reports in real time or near real time?
48. Are data scientists and/or statisticians available for custom predictive modeling and deep analytics?
49. Provide examples of standard customer reporting and business reviews.

Technology

List which technologies you are bringing to the table (especially your CRM or CTI platform) and be specific in how you'd like the outsourcer to integrate with those technologies. And be realistic about your risk tolerance.

J. Tech Compatibility

50. Describe your omnichannel/telephony platform and your integration capabilities for our CRM/CTI systems.
51. State infosec guidelines and data security certifications.
52. Detail your business continuity plans.
53. Provide a roadmap of data security.

Project Management

Your internal operations team will need to interface with the vendor that's selected. For your company's benefit, you want to know what is needed from your team.

K. Team Commitment

54. What percentage of the project manager(s)'s time will be dedicated to our project?
55. Provide an organization chart and bios of senior leadership and program managers.
56. What senior management are located on the same site as the location proposed for our program?
57. Describe your governance model including detail on senior management involvement on our account.
58. Is there additional support dedicated to providing program feedback, deep analytics, thought leadership, and business strategy recommendations?

ROI

Lowest price does not always equal the highest Return on Investment (ROI). Make sure you and the vendor agree on what defines success.

L. ROI Models

59. How would you summarize our business goals and objectives? Do you offer an initial business assessment? If yes, then how are business and operational recommendations provided?
60. What martech tools are available and how are they included in the pricing model?
61. What is a realistic outcome to expect?
62. Will this lower the cost of sale?
63. Are you willing to put "some skin in the game" by investing in the startup costs (or share other costs) to achieve a performance bonus down the road? If so, please provide detail around that type of risk/reward scenario.
64. How long will it take to stand up the program?