FREE RESOURCE

How to Brief Your BPO Partner

The five-part brief that prevents launch-month chaos

Use this before kickoff. Share it across ops, IT, compliance, and finance.

Why a Written Brief Matters

Most BPO launches that miss their first month do so for the same reason: the buyer assumed shared context that was never written down. SLAs were verbal, escalation paths were ambiguous, and the vendor's training team made best guesses. A written brief locks the assumptions in place, gives both sides a single reference document during ramp, and shortens the loop on every issue that comes up in week one.

Use the five sections below. Aim for two to four pages total. Keep it specific, not aspirational.

1. Scope Definition

Define what the team is responsible for, and what it is explicitly not. Ambiguity here creates the most expensive miscommunications because it surfaces in week three when the vendor has already trained agents.

- **In-scope work types.** List call types, email queues, chat queues, back-office tasks. Be granular: 'inbound billing questions' not 'customer service.'
- **Out-of-scope work types.** Name them. Common examples: refunds over a threshold, retention saves, technical Tier 2, anything requiring access to systems you have not provisioned.
- **Hours and time-zone coverage.** Specify the schedule in the customer's local time, not the vendor's.
- **Volume forecast and seasonality.** Daily and monthly volume by channel, plus the months where you expect 1.5x or higher.
- **Languages and accent requirements.** If you need Spanish bilingual or near-native English, write it down with the proficiency level you will accept.

2. KPIs and SLAs

Pick five or six KPIs. More than that and nothing gets prioritized. For each metric: set the target, the measurement window, and what happens if the target is missed two periods in a row.

- **Service level.** Example: 80 percent of inbound answered in 30 seconds, measured per 15-minute interval, reviewed weekly.
- **Average handle time (AHT).** Set a range, not a hard ceiling, so quality does not collapse to chase the number.
- **First call resolution (FCR).** Define what counts as a resolution and how it is measured (CSAT survey, repeat-contact tag, or both).
- **Quality assurance score.** Decide who calibrates: the vendor, you, or a joint weekly call. Calibration is more important than the score.
- **CSAT or NPS.** Specify the survey tool, send window, and minimum response rate.
- **Schedule adherence.** Often forgotten. Without it, every other KPI degrades over time.

3. Escalation Paths

Three escalation tracks need to be written down. Mixing them creates noise; missing one creates outages.

- **Customer-issue escalations.** Agent to team lead to client-side ops manager. Define the triggers (refund threshold, complaint type, regulatory keyword) and the response SLA.
- **Operational escalations.** Vendor account manager to your program owner. Cover staffing gaps, system outages, or KPI misses two periods running.
- **Critical incident escalations.** Data breach, prolonged outage, or compliance violation. List names, phone numbers, response SLA in minutes, and a backup contact for each side.

Test the critical incident path during week one with a simulated event. If the call tree fails the test, fix it before go-live, not after.

4. Compliance Requirements

Compliance gaps are the most common reason a BPO contract gets terminated mid-year. Spell out every regulation that applies and how each one is verified.

- **Regulatory framework.** TCPA, HIPAA, GLBA, PCI-DSS, GDPR, CCPA. List the ones that touch this program and reference the specific clauses in the master service agreement.
- **Data residency and retention.** Where call recordings, transcripts, and PII are stored, for how long, and who has access.
- **Suppression and consent management.** Required for any outbound program. Specify how DNC lists are loaded, refreshed, and audited.
- **Background check standards.** Match what your industry requires (financial services, healthcare, and government work each have different baselines).
- **Audit cadence.** Quarterly internal review, annual external audit, ad-hoc spot checks. Put dates on the calendar before go-live.

5. Onboarding Milestones

Replace 'go live in 30 days' with a sequenced milestone list. Each milestone has an owner and an exit criterion. If a milestone slips, the launch slips. That is the deal.

Milestone	Exit Criteria
Week 0	Contract signed, NDAs in place, system access provisioning kicked off, dedicated channel created.
Week 1	Knowledge base shared, training curriculum approved, agents recruited and assigned.
Week 2	Agents complete client-specific training. Mock calls scored against your QA scorecard.
Week 3	Nesting period: live calls with side-by-side coaching, low-volume queue.
Week 4	Soft launch: full queue, daily QA calibration, daily standup with both ops teams.

Week 5	Full launch: SLAs in effect, weekly business review begins, escalation paths tested.
Week 8	First formal QBR. Adjust forecasts, KPIs, and staffing based on real data.

Want a Brief Reviewed?

Send your draft brief to **info@callforce.global** and we will mark it up the same way we would if you were briefing our ops team. No charge, no sales pitch attached.