

FREE RESOURCE

# Call Center Outsourcing RFP Template

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25 vendor questions, scoring rubric, and red flags

Built from the vendor side of the table. Adapt freely.

## How to Use This Template

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This template gives you a complete RFP structure, 25 evaluation questions organized by category, a weighted scoring rubric, and red flags to watch for in vendor proposals. Drop it into your procurement process, customize the nine sections to your specific volumes and compliance needs, then send to 3 to 5 qualified vendors. Plan for a 4 to 6 week evaluation window.

**Pro tip:** *Weight pricing at no more than 25 to 30 percent of total score. The cheapest bid almost never delivers the best outcome.*

## RFP Document Structure (9 Sections)

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- **1. Company Overview.** Industry, size, products, customer demographics, reason for outsourcing.
- **2. Scope of Work.** Service types, channels, hours, languages, typical interactions.
- **3. Volume and Staffing.** Monthly contact volume by channel, 12-month projection, seasonality, AHT, ramp schedule.
- **4. Technology Requirements.** CRM and telephony, integrations, encryption standards, remote work infrastructure, reporting.
- **5. Compliance and Certifications.** SOC 2, ISO 27001, PCI-DSS, HIPAA, TCPA, do-not-call, data residency.
- **6. Pricing.** All-in hourly rate, training, supervision, technology fees, performance pricing, minimum commitments.
- **7. SLAs and KPIs.** Service level, AHT, FCR, CSAT, QA score, utilization, abandonment, schedule adherence, ramp.
- **8. References.** Three to five current client references in your industry. Specify you will contact directly.
- **9. Timeline and Process.** Release date, Q&A deadline, submission deadline, finalist round, target go-live date.

## 25 Vendor Questions

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Each question is designed to surface specific, verifiable information rather than marketing language. Use them verbatim or adapt the phrasing.

### Operations and Quality (Q1-7)

**Q1. What percentage of customer interactions do you review for quality, and how are reviews distributed across agents?**

**Q2. Describe your QA scorecard categories and how scores translate to agent coaching actions.**

**Q3. What is your average agent attrition rate over the past 12 months, and what retention programs are in place?**

**Q4. How do you handle volume spikes that exceed forecasted levels by 20% or more?**

**Q5. What is your agent-to-supervisor ratio, and what does real-time floor support look like?**

**Q6. Describe your agent training program for new client launches, including duration, methodology, and nesting period.**

**Q7. How do you measure and improve first call resolution, and what is your current average across similar programs?**

### Technology and Security (Q8-13)

**Q8. What telephony platform do you use, and what is your guaranteed uptime SLA?**

**Q9. Describe your business continuity and disaster recovery plan, including failover time.**

**Q10. How do you secure customer data at rest and in transit, and what encryption standards do you use?**

**Q11. Can agents work directly in our CRM and ticketing systems, or does your process require data synchronization?**

**Q12. What workforce management platform do you use for scheduling, forecasting, and real-time adherence?**

**Q13. Describe your call recording infrastructure, including storage duration, access controls, and retrieval process.**

### Compliance (Q14-17)

**Q14. List all current certifications (SOC 2, PCI-DSS, HIPAA, ISO 27001) with audit dates and certifying bodies.**

**Q15. How do you ensure TCPA compliance across outbound programs, and what suppression list management process do you follow?**

**Q16. Describe your data breach notification process, including timelines and escalation paths.**

**Q17. What background check process do you use for agents, and do you conduct ongoing screening?**

### Pricing and Contracts (Q18-21)

**Q18. Provide a fully loaded hourly rate that includes supervision, QA, training, facilities, and technology.**

**Q19. What costs are excluded from the hourly rate, and under what circumstances would additional charges apply?**

**Q20. What are your minimum volume commitments and early termination terms?**

**Q21. Do you offer performance-based pricing components, and if so, how are they structured?**

### **Account Management and Reporting (Q22-25)**

**Q22. Who will be our dedicated account manager, what is their span of control, and can we meet them before signing?**

**Q23. Provide a sample of your standard reporting package, including frequency, delivery format, and customization options.**

**Q24. How do you handle escalations outside business hours, and what is your guaranteed response time for critical issues?**

**Q25. Describe your client communication cadence, including regular business reviews, performance summaries, and strategic planning sessions.**

## Weighted Scoring Rubric

Score every vendor 1 to 5 in each category, multiply by the weight, sum for a total out of 5.0. Have at least three evaluators score independently before discussing as a group.

Category	Weight	What to Score	1-5
<b>Operational Track Record</b>	<b>25%</b>	References, client tenure, program examples, attrition data	_____
<b>Quality Assurance Process</b>	<b>20%</b>	QA methodology, scorecard sophistication, coaching workflows	_____
<b>Technology and Security</b>	<b>15%</b>	Platform reliability, integrations, compliance certifications	_____
<b>Staffing and Training</b>	<b>15%</b>	Recruitment pipeline, training methodology, ramp timeline	_____
<b>Pricing</b>	<b>15%</b>	Total cost, transparency, flexibility of pricing model	_____
<b>Cultural Fit and Communication</b>	<b>10%</b>	Responsiveness during RFP, proposal quality, account team	_____

## Vendor Comparison Worksheet

Category	Weight	Vendor A	Vendor B	Vendor C
Operational Track Record	25%	_____	_____	_____
Quality Assurance Process	20%	_____	_____	_____
Technology and Security	15%	_____	_____	_____
Staffing and Training	15%	_____	_____	_____
Pricing	15%	_____	_____	_____
Cultural Fit and Communication	10%	_____	_____	_____
<b>Total</b>	<b>100%</b>	_____	_____	_____

## Red Flags in Vendor Proposals

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After hundreds of RFPs from the vendor side, these are the warning signs that predict trouble down the road.

**[FLAG] Vague operational details**

QA described as 'industry-leading' with no scorecard sample, review percentage, or coaching workflow.

**[FLAG] Pricing 30%+ below market**

Common tactics: excluding supervision, QA, or training from the quoted rate and adding them later.

**[FLAG] No named references**

An established vendor should provide 3-5 current client references within a week.

**[FLAG] Generic, copy-paste responses**

If the proposal mirrors your RFP language word for word with no specifics, it is sales theater.

**[FLAG] Reluctance to introduce the operations team**

You should meet your account manager, team lead, and QA analyst before signing.

**[FLAG] Unrealistic ramp timelines**

Production-ready agents in under a week for a complex program means underprepared agents on your phones.

**[FLAG] Long lockups with punitive exit terms**

Reasonable terms: 60-90 day ramp with exit option, then 30-60 day rolling notice.

## Next Step

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When you are ready to send the RFP, consider including Call Force Global on your shortlist. We respond in 24 hours, run customer support and outbound campaigns from the Caribbean and Latin America (same-timezone, native-English), and can scope a 10-seat pilot without lengthy minimums. Reach out at [info@callforce.global](mailto:info@callforce.global) or visit [callforce.global/contact](https://callforce.global/contact).