

Top Questions to Ask a BPO Service

Instructions: Use this resource to take notes during interviews with prospective BPO services.

Company Name:

Top 6 Questions to Ask a BPO Service

1. What is your pricing structure?
2. What services do you offer?
3. Where are your agents located?
4. Do you provide a shared or dedicated team?
5. Are you compliant with HIPAA, PCI, and other regulations?
6. Will you provide a Business Associate Agreement (BAA)?

Must-have Features

Use this checklist to determine whether the BPO service you are considering offers all the tools and features your business requires.

Note: There may be features beyond this list that you require, so be sure to study it carefully and add any other services you need.

Must-Have Feature	Why It Matters	Is It Offered?
HIPAA/PCI compliance	Your BPO provider should have all of the necessary certifications for your industry, and be able to comply with HIPAA, PCI, and other regulations.	Y: [] N: []
A Business Associate Agreement	A BAA governs the use of Protected Health Information (PHI) and serves as a contract between you and your BPO provider.	Y: [] N: []
Industry expertise	Experience in your industry is a must, especially if your BPO service will be handling highly complex information, such as healthcare data.	Y: [] N: []
Transparent pricing	Outsourcing your operations should save you money over the long run – but it's important to do the math and make sure that you're getting a fair deal from your BPO provider.	Y: [] N: []
Multiple service lines	BPO services include everything from call center services to payroll. Ensure that your provider can offer one or more of the services you need.	Y: [] N: []
A suitable location and time zone	Some BPO services are performed by onshore agents, while others may be performed by an offshore or remote team. Ensure that their location and time zone align with your needs.	Y: [] N: []
Dedicated agents	Shared agents may be suitable if you have a low-ticket volume, but a team of dedicated agents may be able to provide a more consistent customer service experience as they become familiar with your product or brand.	Y: [] N: []