

## Customer Care Key Questions to Ask Providers

### Company

1. Do you sell the technology and/or do you use it within your call centers?
2. Where are your call centers located?
3. What is the language proficiency of overseas operations?
4. How many clients have you sold? How many have you lost, and why?
5. What size or types of clients fall into your “sweet spot”? Do you specialize in customer support/service or sales? Any key verticals?
6. What peripheral or support services do you offer (e.g., integration, CRM, consulting services, training)?

### Products/Services

1. If you’re offering technology to improve my call center operations, is your solution offered as perpetual licensed software or on-demand SAAS solution?
2. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?
 

**If perpetual license:**

  - a. What are the hosting requirements?
  - b. What should I expect regarding upgrades (both timing and pain)?
  - c. Do you provide customization/implementation services?
  - d. Can a third party provide customization/implementation?

**If SAAS/ASP:**

  - a. Do all tiers include maintenance and support?
  - b. How often are new features introduced?
  - c. What do I do if I need a feature you don’t have or plan to have soon?
- d. What internal resources will I need to maximize the value of your product?
7. If you’re offering an outsourced call center to take over or supplement my customer care operations, how does your model work?
8. If providing call centers, do you provide the technology for your call centers or can you use our technology?
9. Can we validate your CSRs, on product knowledge, English proficiency, etc., prior to assigning them to our account?
10. How much time/effort will be required on our part to train your people?
11. How will our company institutionalize the knowledge that your CSRs gather during the support process?
12. How do you use technology to optimize your services?

### Features

1. What key features are included in your solution? What features are currently missing? What is the upgrade schedule?
2. What components of the acronym mix do you provide? IVR, CRM, ACD, VOIP, etc.
3. Does your platform publish and support APIs for integration with other systems (such as CRM, trouble ticketing, customer management), if I choose not to use your modules? If not, how do I integrate?

### Pricing

1. For technology providers: do you charge by the user/month or perpetual license?
2. How do you charge for annual support? What about maintenance?
3. For outsource partners; do you charge by the hour, by the dedicated CSR or some other model?
4. What are the setup/training fees? What happens if calls to the center exceed forecast? What “value-add” services do you offer?

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