

BPO Vendor Evaluation Checklist

24 questions to ask any outsourcing provider — including us. From Tribe Consulting · tc-bpo.com

Compliance & security

- Which certifications and audits can they document — PCI DSS, ISO/IEC 27001, SOC 2 Type II, HIPAA, GDPR — and will they share reports under NDA?
- How is client-system access controlled — least privilege, named accounts, audit trails?
- Where does your data physically live, and who can see it?
- Is there multi-site redundancy, or is one building a single point of failure?

Proof, not promises

- Can they name references you can actually call?
- Do they run real operations of their own, or only sell capacity?
- Ask for live metrics from a comparable program — and how those numbers are verified.
- How long have they operated, and what is their client retention story?

People & training

- How are agents recruited and screened — and what is annual attrition?
- Who trains agents on YOUR brand, and for how long before go-live?
- Will your team be dedicated or shared across clients?
- What is the agents-to-team-lead ratio, and who do you call by name?

Pricing transparency

- Is the quote all-inclusive — recruitment, training, management, QA, infrastructure, reporting — or will line items appear later?
- Which pricing models do they offer (per-agent, per-hour, per-interaction, outcome-based), and why is theirs the fit for you?
- What exactly triggers overage or extra charges?
- Can you pilot with defined success criteria before committing to scale?

Operations & quality

- Which SLAs will they sign — and how are misses reported and remedied?
- What does QA actually look like: how many interactions scored, against whose standards?
- What reporting do you get, how often, and can you see raw data?
- What is the escalation path when something goes wrong — with a named owner?

AI capability (2026 and beyond)

- Do they build AI capability or only resell it — and can they show it live?
- Are AI claims honest about status (deployed vs in development)?
- How does AI hand off to humans — and is every AI action auditable?
- Can the human/AI mix shift over time without re-tooling or re-contracting?

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