10 steps to selecting the right outsource partner



Outsourcing is a business practice that allows companies to flex their capabilities and explore new opportunities without pulling resources away from core business.

Did you know that 7 in 10 British businesses outsource key services?

A recent YouGov survey revealed that as many as 70% of B2B decision-makers outsource essential activities to external service providers. Popular reasons for outsourcing include accessing relevant and qualified staff; and driving better results.

Outsourcing may not make sense for every organisation; and the business case for outsourcing varies by company. However, there are some common advantages.

These include:

- Access to **skills and expertise** which may be limited or lacking in-house
- Increased **flexibility** to meet unpredictable or evolving business requirements
- The option to test and **benchmark new approaches** without major investment
- The ability to leverage up-to-date **knowledge and innovation**
- An opportunity to **decrease ongoing investment** in internal resources

Of course, there are also a range of risks associated with outsourcing – such as limited domain knowledge, language and cultural barriers, and lack of control. Fortunately, these issues can be resolved if you choose the right outsource partner.

In this article, we explore key points for consideration when it comes to selecting an outsource partner in the field of B2B marketing.

10 steps to selecting the right outsource partner

Before beginning your search for the perfect outsourcing partner, it's important to know exactly what you're looking for. Key factors to consider are your project's value, scope and timeframe. If you're outsourcing a sizeable, ongoing piece of work with the hope of finding a long-term partner you can trust, the selection process needs to reflect that. Don't rush. Be thorough, especially if you're going to be signing a contract with your new partner. On the other hand, if you're outsourcing a smaller project (a short-term graphic design campaign, for example), you can scale down the selection process accordingly.

Create a matrix of criteria that you seek from your marketing service provider, weight these by importance and define a scoring methodology. This will allow your team to rate each potential agency on a like-for-like basis – and reach an objective, clearly documented decision.

If you're planning a high-value or long-term project, you may want to establish a multi-disciplinary taskforce to drive the selection process. This way, all needs across your department or business will be understood and accounted for from the outset.

Here are 10 issues to consider when you're weighing up potential outsourcing partners:

1. **Type of agency**

One of the first questions to ask is whether you want an integrated agency that provides services across channels or a specialist agency. The answer here depends on whether you need a partner that offers broad marketing capabilities or one that brings in-depth knowledge and expertise in a specific B2B marketing field.

If you find one agency that can deal with multiple elements of your campaign, there's an advantage in having a single point of contact and a single account manager handling all the complexity on their side. However, there's also a risk that you may not benefit from market-leading expertise in every aspect of your campaign. You don't want an agency to be a jack of all trades and master of none.

The advantage of working with multiple agencies is that you can partner with several best-of-breed providers who are proven specialists in their fields. In this way, a multi-agency approach provides you with access to multiple viewpoints and insights that work together to create a strong, market-leading campaign.

2. **Cultural fit**

When you're vetting potential outsource partners, evaluate whether these organisations have attitudes and approaches that are aligned with the core culture of your organisation.

10 steps to selecting the right outsource partner

Ideally, you want to bring in a partner who understands and respects the issues that are important to your business. If you share the same values, it will be easier to work with this agency on a day-to-day basis and ultimately build a strong strategic partnership.

3. **Size and Agility**

Is the agency big enough to handle your requirement, yet small enough to view your needs as a priority? Preferably, you want to work with a partner organisation that values your business and gives you personalised service, while offering you a comprehensive solution that can be quickly scaled up to support changing business needs.

Aside from offering an agile resource, your agency needs to flex in their approach. Evaluate whether the agency you're considering is consultative and willing to tailor a solution to meet your unique and complex needs; or whether they will shoehorn you into their processes?

A flexible attitude is not just something you need at the outset, but also a quality that's valuable over the long-term. An agile agency is one that is continually open to your feedback – and able to incorporate this in a timely manner.

4. **Expertise**

An obvious – and critical – criterion is expertise. You need to be confident that the agency you select has the skills, knowledge and experience you're looking for. Ask for proof. This could come in the form of references and testimonials, or the accreditations and standards they hold. You can also look into their track record and search for independent reviews. You should, for example, explore Google Business Reviews and/or Glassdoor.com to see what their staff are saying about them.
If you work in a regulated industry, you want a partner that has relevant experience and can guarantee compliance with your internal policies and regulatory obligations.

Another thing to look out for is churn on previous clients and staff. If they don't have a strong track record of keeping customers and employees happy, they're likely to fall short of your expectations too.

5. **Pricing model**

What pricing models do your potential outsource partners offer? Are they fair and will they translate into a healthy ROI?

When it comes to demand generation, outsourcing contracts are often billed on a pay-per-lead or pay-per-hour basis – and it may seem difficult to choose between the two.

10 steps to selecting the right outsource partner

If you are a small business with a limited budget and you are trying a channel for the first time, you may need predictability and feel more secure knowing exactly what you will pay for each result. In this case, pay-per-lead may feel like the most affordable and risk-free model. However, it's important to understand that this approach can sometimes carry hidden costs further down the funnel. For example, it often encourages a focus on lead volume and quick wins at the expense of lead quality and long-term value. There's also a risk the agency will burn through valuable data to get as many quick successes as possible, rather than spending time on (potentially higher value) prospects who require more nurturing before they're sales ready.

The pay-per-hour model, on the other hand, fairly compensates the agency for the time it takes to build connections with prospects and gain insights that support a high-quality demand generation and lead qualification process. For this reason, the more experienced agencies tend to offer this pricing model.

6. **How will value be measured?**

Beyond the pricing model, you also need to ask how your potential outsourcing partners will add value to your business and augment the resources you already have in place. Will they be able to work synergistically with other functions – such as sales – for example? And what other services and skills can they bring to the table? It's often best to ask the agencies you've shortlisted to put together an ROI model for you. And ask how they will measure and report on performance.

7. **Contractual flexibility**

There's always a chance that, once the settling-in period has passed and the project is well underway, the outcomes will not meet your expectations. Certain agencies are willing to build some flexibility into their contracts, to guard against the client feeling 'locked in'. A more flexible agency may, for example, give the client the option of a fair notice period that kicks in after the first month or so. This way, you won't get tied to an outsource partner that is taking your money without delivering any value.

8. **What happens after the contract is signed?**

Ask each agency about their on-boarding process. You want to know that you will be welcomed into the partnership with a well-structured on-boarding programme. Also, confirm in advance who will be assigned to your account and how much time you can expect them to dedicate to your business. Sometimes, more senior people pitch and then disappear.

9. **Transparency**

Transparency is at the heart of any successful outsourcing relationship. This calls for clear and open communication between your business and the agency. Explore their communication policy. Are they open door (or floor)? Ideally, you want to work with people who are easy to reach and welcome your input.

You could also ask about their reporting approach. For example, some agencies have an online client portal, where you can easily monitor campaign performance in real-time. They may also be willing to share details on customer interactions, such as call recordings (in the case of voice contact campaigns), and other campaign analytics.

10. **Remove the guesswork**

Minimise risk and feel confident you're choosing the very best provider of a specific set of marketing services by benchmarking several agencies alongside each other. Alternatively, if you have an existing agency, you could run a Champion Challenger scenario, where you pitch your existing agency against a new agency (or several new agencies) and compare the outcomes. This type of approach allows you to analyse results and objectively determine the best team for the job.

In summary

Outsourcing a precious function can be a very scary step, especially for first timers, but the right potential partner should be able to reassure you quickly and guide you gently through the process. If an agency is too pushy, insists on you adapting your requirements to their process or fights shy of benchmarking their service against others, alarm bells should ring. If it doesn't feel right, stick to your guns and don't compromise on your standards and values. It should be as important to the agency, as it is to you, to find the right fit. A potential trusted partner should be confident that they can deliver value and be committed to supporting you in the longer term. **If they are neither of those things, an agency should qualify themselves out of the selection process before you do.**

We have worked with some of the world's leading organisations for the past 30 years and our business model is based on an agile approach that puts the customer at the heart of our process. With flexible contracts and an 'always on trial' approach, our success relies on our ability to continue to deliver value for our clients and we have a proven track record when benchmarked against other agencies, particularly with complex, compliance-based needs. If you are looking for a strategic partnership with an experienced, best in breed, voice specialist, speak to us today.

the telemarketing company

Hopefully this article will have inspired you to think a bit more about telemarketing and the value it can bring to your business. For more information on our services visit our website, or give us a call to discuss your requirements and how The Telemarketing Company can help support your sales and marketing strategy.

The Telemarketing Company

26-27 Regency Square
Brighton
East Sussex
BN1 2FH
United Kingdom

Tel: +44 (0)1273 765 000

www.ttmc.co.uk
info@ttmc.co.uk

Awards and Accreditations