ETHICO

INCIDENT MANAGEMENT

LOOKING FOR A NEW VENDOR?

A **COMPREHENSIVE CHECKLIST**

- ◯ The vendor has experience working with your industry

- ◯ The vendor has a company mission or a brand promise

- ◯ Determine if the vendor owns and operates their own call center or if they outsource this to a 3rd party
  - ◯ Can the vendor verify robust security is used by the 3rd party to ensure your sensitive information is being protected?
  - ◯ Is the vendor familiar with the 3rd party's data protection protocols?

- ◯ The vendor's call abandonment rate is well below the industry standard of 10 to 20%

- ◯ Ask how the vendor's hotline answers the phone such as with a live greeting, automatic greeting, or call queue
  - ◯ Verify the manner of answering the phone conforms with your organization's level of emphasis to incident reporting. Live greetings representing a high emphasis while call queues represent a lower.

- ◯ Hotline operators are able to adapt to a caller's situation and ask unscripted follow-up questions

- ◯ Call scripts can provided as needed and customized for certain types of calls
  - ◯ Ask if there is any extra cost ofr doing this

- ◯ Hotline operators are dedicated and only take incident management calls
  - ◯ If not, ask what other sort of calls are operators taking

- ◯ Specialized incident management topics are covered in the training of hotline operators
  - ◯ Ask about training on regulations
    - ◯ On state and national laws
    - ◯ On crisis management

- ◯ Determine how many hours of training hotline operators receive before they begin taking calls

- ◯ Ask for the average tenure of hotline operators

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Looking for a New Vendor?

○ The vendor has a Quality Assurance program in place to ensure all call reports are being generated are checked and proofread to ensure a high standard of excellence

  ○ If not all reports are being subjected to a quality review, determine what percentage of reports taken are reviewed

○ The vendor will allow you to test your own hotline anonymously to see what a real caller's experience would be like

  ○ Verify how long it takes for the line to be answered

  ○ Verify how many buttons in a call tree you had to press to get to a live person

  ○ Verify the hotline operator's tone and questions were appropriate for the experience you want your calls to have

○ Incident reports can be segmented within the system based on criteria such as location, department, issue type, etc.

○ User access controls can be adjusted so only users from a certain department can have access to reports pertaining to that department

○ The vendor's case management can integrate with other software so you can continue to use the same programs you're used to

○ The vendor has a two tier client support service so you can always reach out to a known person

○ The vendor can provide more than just incident management services

○ The vendor can provide references from among their current clients. Ask any reference about their customer service experience with the vedor

○ The vendor is able to provide the total cost of ownership

  ○ Verify if there are any fees you could incur during the life of the agreement

  ○ Determine what the cost would be of making minor modifications to your call intake, webform, workflows, etc.

○ The vendor's contract contains termination for convenience clause allowing you to end service immediately if so needed

  ○ If not, ask how long would you potentially have to remain with a subpar vendor before finding a better alternative?