



ARENACX TEMPLATE

The ArenaCX BPO RFP Template

A practical framework for defining requirements, comparing BPO responses, and running a more structured provider-selection process.

Build a decision, not just a questionnaire.

Use this working template to define the requirement before release, standardize bidder responses, make assumptions visible, and create a cleaner record for evaluation, diligence, commercials, and implementation.

DEFINE

Clarify objectives, scope, constraints, demand, technology, and decision priorities.

COMPARE

Ask each provider to respond to the same operating, commercial, and risk questions.

SELECT

Use evidence, diligence, exceptions, and normalized commercials to support the decision.

SECTION 00

Instructions & response conventions

This template is designed to create a consistent record of the buyer requirement and a comparable set of provider responses. Adapt it to the size, risk, regulatory context, and complexity of the program.

BUYER VS. PROVIDER

Buyer fields define the requirement and should be completed before release. Provider-response fields should be answered by each bidder without changing the question order unless the buyer explicitly allows it.

- Replace bracketed placeholders and example values before release.
- State whether the process is an RFI, RFP, benchmark, replacement search, new geography search, first outsourcing decision, or other sourcing event.
- Define how questions will be submitted and how answers will be shared with bidders.
- Tell bidders how to identify assumptions, dependencies, exceptions, optional alternatives, and pricing exclusions.
- Use one currency and a consistent unit of measure for the primary commercial comparison; allow clearly labeled alternatives where useful.
- Establish evaluation priorities before proposals are opened. Do not let the response format dictate the scoring model.
- Request only diligence evidence appropriate to the program, deal size, dependency, risk profile, and buyer policy.

Template map

1 Buyer project brief	2 RFP process & timeline
3 Provider profile & stability	4 Relevant experience & solution fit
5 Delivery model, workforce & capacity	6 Training, knowledge & quality
7 Workforce management & performance	8 Technology, data, security & AI
9 Implementation & change management	10 Business continuity & resilience
11 Governance & account management	12 Commercial response
13 References & diligence	14 Exceptions, assumptions & certification

SECTION 01

Buyer project brief

Complete this section before issuing the RFP. Give every provider the same operating context, constraints, demand profile, and target outcomes.

Buyer field	Buyer input / requirement
Organization / business unit	<i>[BUYER NAME / BUSINESS UNIT]</i>
Sourcing event	<i>[RFP / RFI / benchmark / replacement / first outsourcing / new capability / other]</i>
Business objective	<i>[What outcome is the buyer trying to achieve?]</i>
Why go to market now?	<i>[Trigger, problem, renewal, growth, performance, cost, geography, resilience, capability, etc.]</i>
Current operating model	<i>[In-house / outsourced / hybrid / multi-provider / new program]</i>
Scope summary	<i>[Processes and customer journeys in scope]</i>
Channels	<i>[Voice / email / chat / messaging / social / back office / other]</i>
Geographies served	<i>[Markets / countries / regions]</i>
Languages	<i>[Required languages and proficiency expectations]</i>
Operating hours	<i>[Hours, days, holidays, follow-the-sun needs]</i>
Target launch / transition timing	<i>[Target date and any immovable milestones]</i>
BEFORE RELEASE	Complete buyer-owned fields before the RFP goes to market. Avoid allowing bidders to infer missing scope, demand, or launch assumptions.

SECTION 01

Demand profile & decision priorities

Quantify the operating reality and make the decision logic visible before proposals are opened.

Demand / performance field	Buyer input
Historical contact / transaction volume	<i>[Monthly / weekly volumes by channel; attach source file if needed]</i>
Forecast volume	<i>[Expected steady-state and ramp profile]</i>
Seasonality / peaks	<i>[Peak periods, launch events, enrollment, promotions, incident-driven surges, etc.]</i>
Concurrency / backlog characteristics	<i>[Where relevant]</i>
Average handling / processing assumptions	<i>[By channel or work type where relevant]</i>
Service levels / response targets	<i>[Current or target SLAs / SLOs]</i>
Quality / outcome targets	<i>[Customer, accuracy, resolution, conversion, compliance, or other outcome measures]</i>

Key constraints and evaluation priorities

Decision area	Buyer definition
Must-have / knockout requirements	<i>[List requirements that must be met to remain in the process]</i>
Weighted decision priorities	<i>[List buyer-specific priorities; weights may be managed in a separate scorecard]</i>
Regulatory / privacy constraints	<i>[Applicable regimes, buyer policies, data residency, restricted access, etc.]</i>
Technology constraints	<i>[Required customer-owned systems, integration boundaries, prohibited tools, etc.]</i>
Commercial constraints	<i>[Budget envelope, pricing model preference, term, minimum commitments, etc.]</i>
Transition constraints	<i>[Incumbent dependencies, knowledge-transfer limits, hiring restrictions, timing, etc.]</i>

Buyer decision-framework notes

Working note	Buyer input
Knockout rationale	<i>[Why each knockout is necessary]</i>
Priority trade-offs	<i>[Where the buyer is willing to trade cost, speed, location, flexibility, technology, or other factors]</i>
Known decision risks	<i>[Key uncertainties that evaluation and diligence must resolve]</i>
Open questions before release	<i>[Items to close before bidder responses are requested]</i>

SECTION 02

RFP process & timeline

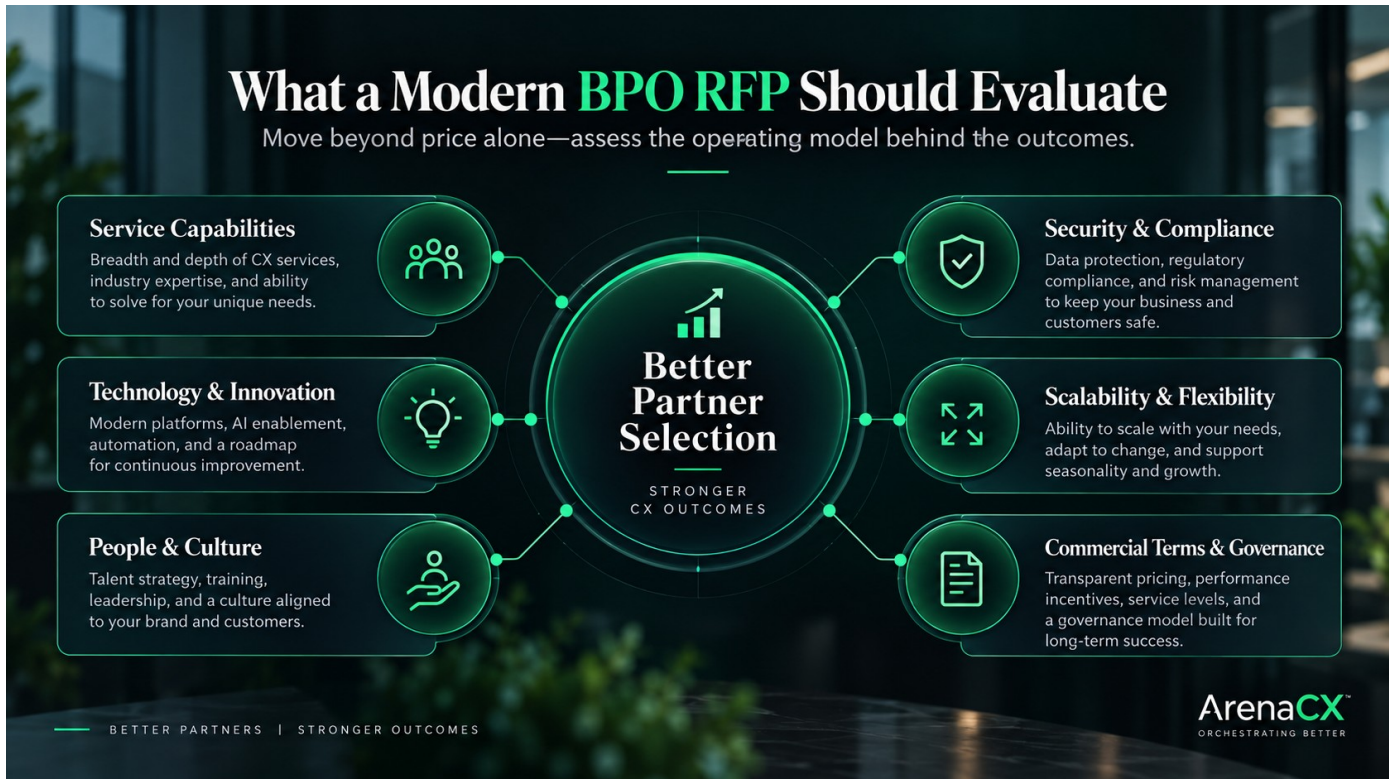
Define one process calendar and one communication path for all bidders. Adjust milestones to match the complexity of the sourcing event.

NDA / confidentiality agreement due [DATE / TIME / CONTACT]	RFP release [DATE]
Intent to bid due [DATE / TIME / CONTACT]	Bidder questions due [DATE / TIME / PROCESS]
Buyer answers released [DATE / METHOD]	Proposal due [DATE / TIME / SUBMISSION METHOD]
Initial evaluation period [DATES]	Finalist notification [DATE]
Finalist presentations [DATES / FORMAT]	Site or virtual delivery review [DATES / FORMAT, if applicable]
Reference / diligence checks [DATES]	Commercial clarification / BAFO if used [DATES / RULES]
Selection target [DATE]	Contracting target [DATE RANGE]
Implementation / transition start [DATE]	Target go-live [DATE]
PROCESS INTEGRITY	State whether bidder questions and buyer answers will be shared with all participants, how late changes will be handled, and whether alternative proposals are permitted in addition to a compliant base response.

FRAMEWORK

What a modern BPO RFP should evaluate

Move beyond price alone. Assess the operating model, risk profile, people system, technology, flexibility, and commercial governance behind the outcome.



USE THIS FRAMEWORK

Use these dimensions as prompts, not universal weights. The buyer should establish its own decision framework during DEFINE, before provider responses influence the criteria.

SECTION 03

Provider profile & stability

Collect enough information to understand who is making the proposal, the scale and structure behind it, and material risk factors relevant to this engagement.

Requirement / question	Provider response
Legal entity and contracting entity	_____
Ownership / parent company	_____
Headquarters and principal operating countries	_____
Years in business	_____
Executive leadership relevant to the proposed engagement	_____
Organization / operating structure relevant to this engagement	[Describe the business unit, reporting structure, and delivery organization supporting the proposed program]
Approximate workforce scale	_____
Approximate customer-operations / BPO delivery scale	_____
Delivery footprint	[Countries, cities, remote/distributed models, major delivery centers]
Revenue / scale band, if relevant	[Provide buyer-requested evidence appropriate to this engagement]
Financial-risk evidence	[Describe available evidence appropriate to deal size, term, dependency, and buyer policy]
Material ownership, restructuring, or litigation risks	[Disclose if relevant to delivery continuity]
Insurance coverage relevant to the engagement	[If requested by buyer]
REVIEW LENS	Look for evidence that scale, ownership, operating footprint, and financial stability fit the dependency being created.

SECTION 04

Relevant experience & solution fit

Focus on evidence comparable to the proposed work: similar customer journeys, channels, complexity, operating conditions, geographies, languages, or regulated requirements.

Requirement / question	Provider response
Comparable programs	Describe 3-5 programs most relevant to this requirement.
Industry / use-case experience	
Channels and work types	
Geographies and languages	
Regulated or high-compliance experience	
Program scale and complexity	
Examples of measurable outcomes	<i>[Use buyer-approved measures; identify methodology and time period]</i>
Proposed operating model	<i>[Dedicated / shared / hybrid / distributed / multi-site / partner ecosystem, etc.]</i>
Why this model fits the buyer requirement	
Key differentiators	
Material assumptions underlying the solution	
Optional alternative solution	<i>[If permitted, clearly distinguish from the compliant base response]</i>
REVIEW LENS	Ask for comparable evidence, not generic credentials. Favor examples that match complexity, channels, markets, and risk profile.

SECTION 05

Delivery model, workforce & capacity

Describe where and how the work will be delivered, how the workforce will be built and managed, and how the provider will respond to variability and growth.

Requirement / question	Provider response
Proposed delivery locations / model	<i>[Site-based / remote / hybrid / distributed; identify each proposed location]</i>
Employment model	<i>[Employee / contractor / mixed, subject to buyer policy]</i>
Dedicated vs. shared staffing	_____
Recruiting approach and labor-market availability	_____
Screening / background-check approach	<i>[As applicable]</i>
Typical time to recruit and onboard	_____
Ramp speed / maximum practical growth rate	_____
Capacity currently available	<i>[Define what “available” means and timing assumptions]</i>
Seasonal / surge flexibility	_____
Cross-training / flex-pool approach	_____
Agent / associate tenure	<i>[Define calculation method]</i>
Attrition / turnover	<i>[Provide rate and definition; distinguish voluntary/involuntary if available]</i>
Supervisor / team-lead span	_____
Management / support-function span	_____
Languages and proficiency validation	_____
REVIEW LENS	Make the provider define what capacity is truly available, how fast it can ramp, and what assumptions limit flexibility.

SECTION 05A

Location & delivery detail

Use this page to compare delivery locations, capacity, operating coverage, remote-work posture, and resilience assumptions on a consistent basis.

Location diligence item	Provider response
Delivery location / model	
Proposed share of program	
Operating hours / 24x7 capability	
Time-zone coverage	
Current headcount / seat capacity	
Planned ramp capacity / timing	
Remote-work percentage / policy	
Shared-service capability	
Power / connectivity resilience	
Primary continuity dependency	
Customer visit / audit capability	
Relevant labor-market considerations	
TIP	If multiple locations are proposed, duplicate this page for each location so the comparison remains clean.

SECTION 06

Training, knowledge & quality

Explain how people become ready for the work, how knowledge stays current, how quality is assessed, and how performance improves over time.

Requirement / question	Provider response
Training design and ownership	
New-hire training duration and structure	
Trainer qualifications / ratio	
Train-the-trainer approach	
Nesting / supported production	
Readiness / certification method	
Knowledge-management approach	
Content change / version-control process	
Quality-assurance framework	
Sampling methodology	
QA analyst / evaluator ratio	
Calibration cadence	
Coaching / feedback process	
Performance-improvement process	
Continuous-improvement approach	
Reporting and client visibility	
REVIEW LENS	Look for operating mechanisms, ownership, cadence, and evidence - not just tool names or high-level claims.

SECTION 07

Workforce management & performance

Describe how demand becomes a staffing plan, how execution is controlled intraday, and how performance exceptions are identified and corrected.

Requirement / question	Provider response
Forecasting process and forecast horizon	
Inputs used in forecasting	
Scheduling methodology	
Intraday / real-time management	
Adherence definition and management	
Shrinkage definition and planning	
Capacity planning and hiring triggers	
Peak / surge planning	
Backlog management, if relevant	
Core SLA / KPI definitions	
Reporting frequency and latency	
Root-cause / corrective-action process	
Governance for persistent misses	
Example performance-report package	<i>[Attach redacted sample if permitted]</i>
REVIEW LENS	Require definitions for adherence, shrinkage, forecast accuracy, service level, and performance metrics so comparisons are apples-to-apples.

SECTION 08

Technology, data, security & AI

Describe the systems architecture for the proposed solution, the integration boundary with buyer systems, and the controls that govern data, access, automation, and AI.

Architecture & integration

Requirement / question	Provider response
Proposed technology architecture	<i>[Identify customer-owned vs. provider-owned components]</i>
CRM / case / ticketing integration	_____
CCaaS / telephony / messaging integration	_____
WFM / QA / knowledge integration	_____
Reporting / analytics / observability	_____

Security & data controls

Requirement / question	Provider response
Identity and access management	_____
Least-privilege / role-based access controls	_____
Data encryption	<i>[At rest / in transit as applicable]</i>
Data residency / processing locations	_____
Security monitoring and incident response	_____
Business / customer data retention	_____
Applicable security / privacy certifications or attestations	<i>[Only those relevant to the program]</i>
Vulnerability / patch management	_____
Third-party / subprocessor governance	_____
REVIEW LENS	Make system ownership, integration boundaries, identity controls, data handling, security monitoring, certifications, and third-party dependencies explicit.

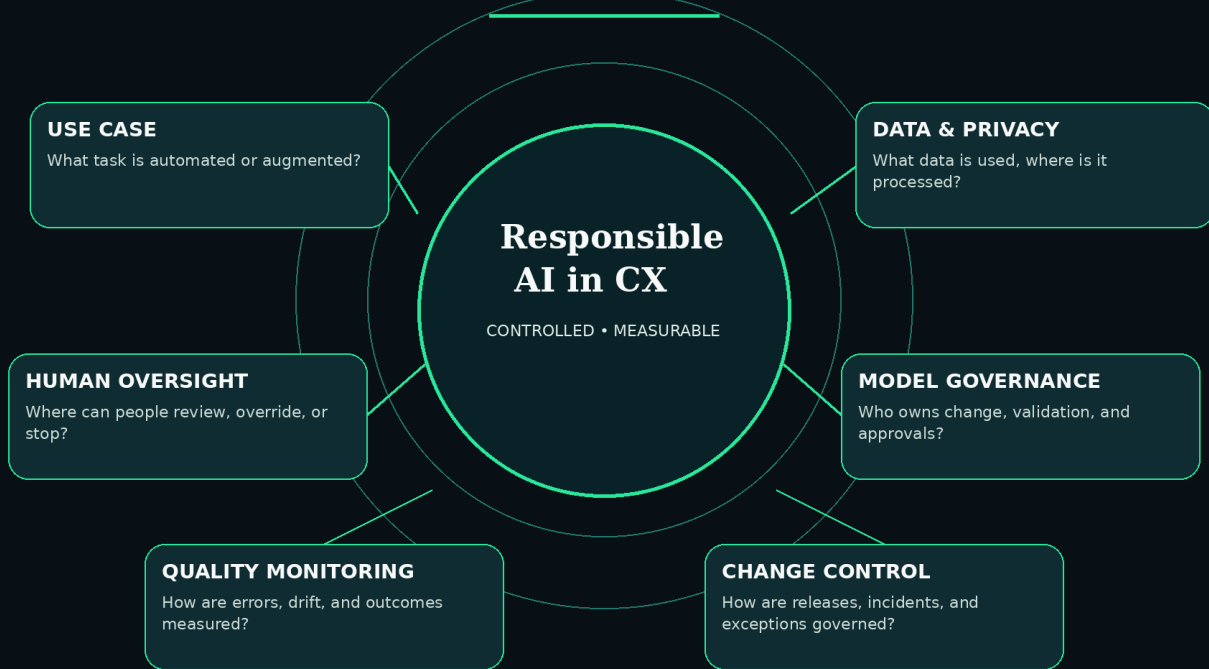
SECTION 08A.1

AI & automation evaluation framework

Evaluate AI and automation as operating capabilities, not product-name checkboxes. Require clarity on intended use, human oversight, data controls, governance, monitoring, and measurable outcomes.

Evaluate AI as an operating capability

Require clarity on the task, data, human decision rights, governance, monitoring, and value.



AI RESPONSE EXPECTATION

Do not answer only with product names. For each proposed AI or automation use case, explain what task it performs, what data it uses, how humans oversee exceptions, and what controls apply to security, privacy, accuracy, and change management.

SECTION 08A.2

AI & automation response worksheet

Use this worksheet for each material AI or automation capability proposed. Require the provider to state the task, data involved, human decision rights, governance, monitoring, and assumptions clearly enough to evaluate operating risk and value.

Requirement / question	Provider response
AI / automation use cases proposed	<i>[Identify purpose, system, and data involved]</i>
Human oversight and escalation	_____
Model / data governance	<i>[Where AI is used]</i>
Use of buyer data for model training	<i>[State policy explicitly]</i>
AI output monitoring / quality controls	_____
Technology assumptions / dependencies	_____
REVIEW LENS	Require concrete operating controls and evidence. A product name, vendor logo, or generic AI claim is not a sufficient response.

SECTION 09

Implementation & change management

Show how the proposed solution moves from selection to production, including dependencies, governance, testing, readiness, and cutover risk.

Requirement / question	Provider response
Implementation lead and core team	
Discovery / requirements validation	
Solution design deliverables	
Detailed implementation plan	<i>[Attach example timeline if available]</i>
Buyer dependencies / decision deadlines	
Recruiting and staffing plan	
Training and knowledge-transfer plan	
Systems / integration plan	
Testing approach	<i>[UAT, connectivity, workflow, security, reporting, etc.]</i>
Operational readiness criteria	
Go-live / cutover approach	
Hypercare / stabilization period	
Risk register and mitigation process	
Change-control process	
Status reporting / governance cadence	
Critical path / major implementation risks	
REVIEW LENS	Ask providers to make buyer dependencies, decision deadlines, critical path, and go-live risks explicit.

SECTION 10

Business continuity & resilience

Explain how service continuity is designed, tested, activated, and restored across the delivery model proposed for this program.

Requirement / question	Provider response
Business continuity / disaster recovery framework	
Critical process / system dependencies	
Recovery objectives	<i>[RTO / RPO where applicable]</i>
Geographic redundancy	
Carrier / network redundancy	
Power resilience for physical sites	
Remote-work contingency	
Alternate-site / workforce contingency	
Cyber / security incident continuity	
Incident communications	
Escalation and command structure	
Testing frequency and evidence	
Most recent material disruption relevant to delivery	<i>[Describe impact, response, and lessons learned where appropriate]</i>
Buyer participation in resilience testing	
REVIEW LENS	Distinguish documented continuity plans from proven operating resilience. Ask for test evidence and relevant lessons learned.

SECTION 11

Governance & account management

Describe the operating cadence and accountability model after launch, including issue resolution, change management, reporting, and continuous improvement.

Requirement / question	Provider response
Executive sponsor	
Proposed account / program leader	
Core governance team	
Account-manager span / competing responsibilities	
Daily / weekly operating cadence	
Monthly business review cadence	
Quarterly / executive review cadence	
Issue and escalation management	
Change-request governance	
Commercial / scope governance	
Reporting package and distribution	
Continuous-improvement ownership	
Innovation / transformation governance	
Provider-subcontractor governance, if applicable	
REVIEW LENS	Clarify who owns outcomes after go-live, how issues escalate, and how continuous improvement is governed and funded.

SECTION 12

Commercial response

Provide a transparent base commercial response and identify every material assumption, minimum, one-time charge, pass-through, indexation mechanism, and optional item.

COMMERCIAL COMPARABILITY		Complete the base pricing table using the buyer's requested unit(s). If proposing an alternative model, provide it separately and show how it compares to the compliant base case.
Commercial item	Provider response	
Primary pricing unit	[Hourly / productive hour / staffed hour / FTE / transaction / outcome / hybrid / other]	
Currency		
Implementation / setup fees		
Training / nesting fees		
Frontline delivery rate(s)		
Team lead / supervisor rate(s)		
Management / account-management rate(s)		
QA / WFM / reporting / support-function charges		
Technology / license charges		
Minimum volume / minimum commitment		
Volume tiers / bands		
Overtime / premium / holiday pricing		
After-hours / language premiums		
Travel / onsite costs		
Pass-through expenses		
FX / indexation / annual adjustment mechanism		
Payment terms		
Price validity period		
Termination / wind-down commercial assumptions		
Other charges or exclusions		

SECTION 12

Commercial normalization & comparison

Normalize the economics so different staffing, billing, technology, and commercial assumptions can be compared on a common basis.

Illustrative service-line pricing schedule

Line item	Pricing response
[Service / work type 1]	[Unit / rate / included assumptions]
[Service / work type 2]	[Unit / rate / included assumptions]
[Service / work type 3]	[Unit / rate / included assumptions]
[Optional service / surge capacity]	[Unit / rate / activation assumptions]
[Implementation workstream]	[One-time / milestone fee]

Commercial comparison assumptions

Normalization item	Buyer / provider assumption
Comparison volume / demand scenario	[Buyer-defined common scenario]
Billable-time basis	[Productive / staffed / scheduled / other]
Shrinkage / occupancy assumptions	[If applicable to the pricing model]
Leadership / support inclusion	[State what is included vs. separately charged]
Technology inclusion	[State included licenses / tools and buyer-provided systems]
Taxes / duties / pass-through treatment	[State treatment and exclusions]
Alternative commercial model	[Describe only after the compliant base response]
TIP	Separate the compliant base case from optional alternatives. Normalize against one common demand scenario before comparing headline rates.

SECTION 13

References & diligence

Provide references relevant to the requested work where available. The buyer may conduct additional diligence beyond the references supplied.

Reference 1

Reference field	Provider response
Company / organization	
Services provided	
Program scope / scale	
Relationship start date	
Current relationship status	
Contact name / title	
Contact email / phone	
Permission for buyer follow-up	<i>[Yes / No / conditions]</i>

Reference 2

Reference field	Provider response
Company / organization	
Services provided	
Program scope / scale	
Relationship start date	
Current relationship status	
Contact name / title	
Contact email / phone	
Permission for buyer follow-up	<i>[Yes / No / conditions]</i>

SECTION 13

Finalist diligence

Use evidence from references, leadership interviews, delivery reviews, security diligence, implementation validation, and commercial clarification to resolve material decision risks.

Reference 3

Reference field	Provider response
Company / organization	
Services provided	
Program scope / scale	
Relationship start date	
Current relationship status	
Contact name / title	
Contact email / phone	
Permission for buyer follow-up	[Yes / No / conditions]

Additional finalist diligence

Diligence item	Buyer instruction / provider response
Requested exhibit / evidence	[Buyer-defined]
Site / virtual delivery review	[Scope / date / attendees]
Leadership interview	[Topics / participants]
Security / privacy diligence	[Process / evidence]
Implementation validation	[Plan / staffing / dependencies]
Commercial clarification	[Open items / BAFO process if used]
DECISION RULE	Use diligence to test the claims that matter most to the decision - not simply to complete a checklist.

SECTION 14

Exceptions, assumptions & certification

Use this final section to make deviations visible. A compliant proposal should not hide material exceptions in footnotes, pricing tabs, or attachments.

Certification item	Provider response
Exceptions to buyer requirements	<i>[List each requirement, exception, proposed alternative, and impact]</i>
Provider assumptions	<i>[List every material assumption on which solution or pricing depends]</i>
Buyer dependencies / obligations	_____
Subcontractors / affiliates used	<i>[Identify role and location where applicable]</i>
Proposal validity period	_____
Conflicts between proposal sections	<i>[State which document / section controls]</i>
Authorized respondent	<i>[Name / title]</i>
Certification	We certify that the information and pricing submitted are accurate to the best of our knowledge as of the proposal date, subject to the assumptions and exceptions expressly stated in this response.
Signature / date	_____
VISIBILITY MATTERS	Require every material exception, assumption, buyer dependency, subcontractor, and commercial caveat to be stated here - even if it appears elsewhere in the proposal.

SECTION A

Buyer evaluation design - optional companion framework

Keep the provider-facing response template neutral. Before proposals are opened, create a separate evaluation worksheet that distinguishes knockout requirements, weighted preferences, commercial comparison, diligence judgments, and risk.

Evaluation component	Buyer design note
Knockout requirements	Pass / fail requirements that determine whether a response remains eligible.
Weighted criteria	Buyer-specific priorities such as solution fit, delivery model, experience, workforce, technology, implementation, governance, resilience, and commercials.
Commercial normalization	A common scenario or demand profile used to compare otherwise different pricing models.
Diligence findings	Evidence from references, leadership interviews, site / virtual reviews, security review, implementation validation, and open issues.
Risk / exceptions	Material dependencies, noncompliance, commercial caveats, transition risks, or concentration concerns.
Evaluator notes	Evidence-based rationale, not just numeric scores.
SCORING PRINCIPLE	Weights are buyer-specific. Do not treat a generic scoring model as universal best practice. Establish the decision framework during DEFINE, before provider responses influence the criteria.

A complete evaluation typically combines:

Eligibility Pass/fail knockout requirements.	Weighted fit Buyer-specific criteria and trade-offs.	Commercials Normalized economics using a common scenario.
Diligence Evidence from references, reviews, security, and implementation.	Risk & exceptions Dependencies, caveats, and transition concerns.	Evaluator rationale Evidence-based notes, not just numeric scores.



A structured RFP is most useful when it begins with a clear requirement and ends with a defensible decision. Use this template as a practical starting point, then adapt it to the operating, commercial, security, and transition realities of your program.

ARENACX BPO SOURCING & RFP MANAGEMENT

ArenaCX can help define the requirement, identify qualified BPOs, manage a structured RFP/RFI process, compare operating and commercial approaches, support finalist diligence, and help the customer move from selection into contracting or launch when broader support is useful.

Discuss a sourcing requirement • arenacx.com/discuss-a-program

Explore BPO Sourcing & RFP Management • arenacx.com/solutions/bpo-sourcing-rfp