



**Call Center Setup  
Proposal**

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### **Introduction:**

Thank you for allowing *Kathy Sisk Enterprises Inc.* the opportunity to present our company for your review. We offer a wide range of services such as; consulting, national recruiting, call center assessments-consolidation-setup and reengineering, motivational seminars, workshops, script development, outsourcing and project management services, and teleconference training.

*Kathy Sisk Enterprises Inc.* is able to offer call center solutions and customized training programs that directly benefit companies through increased productivity and improved call center efficiency. Often companies recruit the wrong person, or equip the right person with the wrong tools. *Kathy Sisk Enterprises Inc.* removes the guesswork by developing training programs using our unique “12 Step” scripting and training platform to handle Inbound and Outbound Sales and Telemarketing and Customer Service activities.

When it comes to call center solutions such as; Site Feasibility, Center Design, Reengineering, Human Resource Practices, Developing Productivity Incentives, Hardware and Software Selection or Ergonomic Furniture, *Kathy Sisk Enterprises Inc.* has invested many years in research and has the expertise to provide personal recommendations when selecting and dealing with the best vendors. Our objective is to help you receive quality products and services at the most cost-effective prices and in the time frame anticipated.

*Kathy Sisk Enterprises Inc.* can help with setting up a brand new call center, expanding or reengineering an existing center, or to guide our clients through the relocation and consolidation process. Should our clients ever have the need to outsource their inbound or outbound campaigns, we can assist them with the best service agency selection while managing the entire campaign; From project assessment, script development, orientation, training, remote monitoring, ongoing project assessments and consultations. *Kathy Sisk Enterprises Inc.* is the “Number One Resource” for all our client’s call center needs.

### **Objective:**

*Kathy Sisk*, founder and president, has more than 30 years experience in the Call Center Industry. Kathy has had the unique opportunity of stepping into some of the most challenging call centers in the industry. Many of our clients achieve 200%-500% increases in their overall production from Kathy’s knowledge and ability to assess, train and enhance the overall culture of a call center’s environment. Each recommendation, technique and solution provided has been tested, not only by Kathy Sisk personally, but by the experts within the Telemarketing, Customer Service and Sales industries. This has provided the solid foundation that has given our company the reputation of being one of the top training and consulting firms in the industry.

# Call Center Setup Outline

## Objectives:

*Kathy Sisk Enterprises Inc.* recognizes the demands and pressures placed upon every Telemarketing/Sales Staff in an effort to:

- Handle inbound and outbound activities efficiently, professionally and profitably
- Increase sales through the use of effective outbound selling techniques
- Minimize management tracking requirements and maximize your potential
- Ensure implementation of telemarketing principles

Our goal is to help remove the guesswork that comes with starting a new call center operation, and to make sure it's done correctly, efficiently, and productively from the "Get-Go".

## Overview:

At Kathy Sisk Enterprises Inc., we follow a 5-phase cycle when setting up a new call center operation. Each of the phases can be customized specific to each individual organization. The phases are as follows:

**PHASE 1: Center Set Up**

**PHASE 2: Project Development and Preliminary Set-Up**

**PHASE 3: Agent Orientation, Training Workshops and Implementation**

**PHASE 4: Project Status Assessment (off site)**

**PHASE 5: Train and Oversee The Call Center Manager (Train The Trainer)**

In essence, the cycle is: planning, recruiting, development, training, and implementation.

NOTE: The items noted as optional are services that can be performed at no added cost. Items noted as off site are services performed at the contracted consultant's/trainer's office. All other items not noted are services provided at client's facility.

# Call Center Setup Outline

## PHASE 1-- Center Set Up

### **-Identification and Determination of Hardware and Software Platforms**

- a. Conduct a site visit possibly together with the preferred hardware and software consultant (separate fee attached for third party consultants and or vendors).
- b. Meet with key people to discuss current processes and handling procedures.
- c. Evaluate preferred methods for customer service, retention, collection departments and best practices for internal procedures and call handling situations.
- d. Make specific hardware and software recommendations.
- e. Research best applications custom fit for client's specifications.
- f. Negotiate best pricing alternatives and associated applications.
- g. Installation and training of hardware and software (conducted by the vendor a separate fee attached for third party vendors).

### **-Setting Up Aesthetics of the Call Center**

- a. Design the room where calls are to be handled.
- b. Obtain bids on quality and best prices for furnishings (i.e. stations, headsets, ergonomic chairs. Refurbished and new).

### **-Development of Policies and Procedures**

- a. Call Center and company policies developed specifically for client's internal specifications.
- b. Procedures developed specifically for customer service, retention, collection agents (i.e. call handling processes, ordering, help desk, data management, collection, trouble shooting guide)

### **-Identification of Call Guides and Training Platforms(s)**

- a. Identify all Inbound and Outbound projects. (off site)
- b. Select and discuss the projects to conduct the initial stages of customization. (off site)

### **-Agent and Center Supervisor Job Descriptions**

- a. Evaluate specific job descriptions and hiring requirements.
- b. Draft specific descriptions and hiring methods. (off site)

### **-Salary and Incentive Plans**

- a. Discuss salaries, incentives and departmental budgets.
- b. Draft plans for consideration. (off site)
- c. Finalize plans for implementation. (off site)

# Call Center Setup Outline

## PHASE 2-- Project Development and Preliminary Set-Up

### **-Recruitment--Pre-Screening Call Center Agents, Floor Supervisors, and Call Center Manager Candidates and Design Orientation Packets (off site)**

- a. Place ads and or evaluate existing resumes and conduct search for ideal candidates.
- b. Pre-screen potential candidates.
- c. Promote the company and compensation plan.
- d. Reference checking.
- e. In-person interviews. (Handled by client or consultant)
- f. Final selection process. (Handled by client or consultant)
- g. Design and draft orientation packets for new employees.

### **-Script (Call Guide) Development (off site)**

- a. Review projects (specific campaigns).
- b. Customize and draft call guides including rebuttals.
- c. Client review of call guides, pre-approval and recommendations.
- d. Final customization including rebuttals.
- e. Client final approval.

### **-Training Workshop Customization (off site)**

- a. Review departmental goals.
- b. Customize workshops.
- c. Client review and recommendations.
- d. Final customization.
- e. Client final review and approval.

# Call Center Setup Outline

## PHASE 3--Agent Orientation, Training Workshops and Implementation

### **-Agent Orientation**

- a. Overview of HR forms and signatures (performed by consultant or HR dept.)
- b. Review policies and procedures (performed by consultant or HR dept.)
- c. Company orientation. (performed by consultant or HR dept.)
- d. Product training. (performed by client's in-house person)
- e. Computer hardware and software training. (performed by client's in-house person or vendor)
- f. Order Processing and Procedural training. (performed by client's in-house person)

### **-Introductory Call Center Agent and Customer Service Training Including Role Play Sessions**

- a. Overview of training manuals, assignments and expectations.
- b. 12 Step Platforms, training courses for customer service, collections, and retention.
- c. Individual and group role-plays and trainer's written evaluations.

### **-Coaching, Status and Performance Evaluations, Finalize Delivery**

- a. Live call handling training and individual assessments.
- b. Individual coaching and evaluations.
- c. Enhanced group instruction and role-plays.
- d. Individual performance reviews and recommendations.

### **-Project Activity Coaching and Hands-On Reinforcement**

- a. Individual monitoring and evaluations--on track performance.
- b. Evaluate supervisor's coaching and evaluation procedures.

### **-Supervisor Teleconferences - (off site)**

Training, coaching and on line remote monitoring.

# Call Center Setup Outline

## PHASE 4--Project Status Assessment (off site)

- Post Project Re-Assessment
- Call Center Re-Assessment
- Written Analysis and Final Recommendations.

## PHASE 5-- Train and Oversee The Call Center Manager (Train The Trainer)

### -Recruitment Training For The Call Center Manager

- a. Setting up and presenting a department tour.
- b. How to sell the company and the compensation plan.
- c. Placing Ads to attract quality, reliable and long-term employees.
- d. The Pre-Interview, the Second Interview and Final Interview process.
- e. Letter of hire and orientation packets.

### -Supervisor Training, Train the Trainer, Procedural Review

- a. Train the Trainer course (includes 12 Step platforms, scripting concepts, processes, motivation techniques and coaching procedures.)
- b. Role-plays and scripting development and reinforcement.
- c. Hands on coaching and monitoring procedures.
- d. Quality Management for both Inbound and Outbound Depts.

### -Project Acceleration

- a. Advanced Technique Development and Coaching, Project Management Status Evaluation and Coaching.
- b. Manager's Teleconferences. (off site)

### -Project Status Assessment

- a. Call Center and Project Assessment.
- b. Written Status Analysis.

# Next Steps

## **Retainer Fee Option:**

Many of our clients prefer a longer term commitment to training and follow up for their sales and /or customer service departments. Therefore ***Kathy Sisk Enterprises, Inc.*** offers a retainer fee option. Included in the retainer fee option are several on site visits, virtual training, weekly follow-ups and ongoing consulting, report analysis and assessments. Please request a more detailed proposal.

## **Moving Forward:**

Contact Kathy Sisk (President) in order to define the specific objectives for your center, and/or draft a customized proposal for your needs.



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