

# Looking for an Incident Management 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?
- 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.
- The vendor's call abandonment rate is well below the industry standard of 10 to 20%.
- Hotline operators are able to adapt to a caller's situation and ask unscripted follow-up questions.
- Call scripts can be provided as needed and customized for certain types of calls.
  - Ask if there is any extra cost for 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.

# COMPLIANCELINE

- The vendor has a Quality Assurance program in place to ensure all call reports 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 a live person.
  - Verify the hotline's 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 references about their customer service experience with the vendor.
  
- The vendor is able to provide the total cost of ownership.
  - Verify if there are fees could you 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 a 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?