

Outsourcing Support Services (OSS) – Menu of Offerings



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Data Collection Toolkit

Start with a rigorous tool set for collecting baseline information and other critical data required for outsourcing initiatives.

Note: In addition to a data collection spreadsheet template, each toolkit includes a user guide.

Stakeholder Interview Toolkit

- A proven approach and structure for conducting stakeholder interviews
- Includes a list of essential interview questions for sub-functions in the function
- Each interview guide covers multiple types of stakeholders and topics

Note: In addition to a detailed interview guide, each toolkit includes a user guide and a sourcing readiness questionnaire.

Risk Analysis Toolkit

- Provides a proven structure to identify the risks to the success of each option being considered and outlines a plan to manage the risk
- The analysis assesses a solution option via a combination of the likelihood, impact, and manageability of each potential risk

Tools

Data Collection Toolkits

Product ID	Title	Price
EG-10-200	Contact Center	US\$249
EG-10-300	Finance & Accounting	US\$249
EG-10-400	Procurement	US\$249
EG-10-500	Human Resources	US\$249
EG-10-600	Application Development & Maintenance (ADM)	US\$249
EG-10-700	IT Infrastructure	US\$249

Stakeholder Interview Toolkits

Product ID	Title	Price
EG-15-200	Contact Center	US\$99
EG-15-300	Finance & Accounting	US\$99
EG-15-400	Procurement	US\$99
EG-15-500	Human Resources	US\$99
EG-15-600	Applications Development & Maintenance (ADM)	US\$99
EG-15-700	IT Infrastructure	US\$99

Risk Analysis Toolkit

Product ID	Title	Price
EG-20-000	Risk Analysis Toolkit Includes the following items: <ul style="list-style-type: none"> ■ Risk analysis scorecard ■ Risk analysis approach 	US\$249

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Pricing Approach Toolkit

- Utilize a structured spreadsheet tool for collecting pricing information from potential outsourcing suppliers
- Helps ensure comparability of proposed pricing

Note: In addition to a pricing template, each toolkit includes a user guide.

Statement of Work & Service Level Specifications Toolkit

- Begin developing the desired scope and service level performance using these tools
- Exceptionally helpful for establishing scope and clarifying required performance
- Each toolkit includes the statement of work plus typical service levels

Note: In addition to a SOW & Service Level Specifications, each toolkit includes a user guide and a glossary of key concepts for service level design.

Pricing Approach Toolkits

Product ID	Title	Price
EG-30-200	Contact Center	US\$249
EG-30-300	Finance & Accounting	US\$249
EG-30-400	Procurement	US\$249
EG-30-500	Human Resources	US\$249
EG-30-600	Applications Development & Maintenance (ADM)	US\$249
EG-30-700	IT Infrastructure	US\$249

Statement of Work (SOW) & Service Level Toolkits

Product ID	Title	Price
EG-40-200	Contact Center	US\$99
EG-40-300	Finance & Accounting – Billing	US\$99
EG-40-301	Finance & Accounting – General Ledger	US\$99
EG-40-302	Finance & Accounting – Fix Assets	US\$99
EG-40-303	Finance & Accounting – Payroll	US\$99
EG-40-304	Finance & Accounting – Reporting	US\$99
EG-40-305	Finance & Accounting – Accounts Payable, T&E	US\$99
EG-40-306	Finance & Accounting – Cash, Banking	US\$99
EG-40-307	Finance & Accounting – Electronic Scanning	US\$99
EG-40-308	Finance & Accounting – Accounts Receivable	US\$99
EG-40-309	Finance & Accounting – Payroll Tax	US\$99
EG-40-310	Finance & Accounting – Compliance Unit	US\$99
EG-40-400	Procurement	US\$99
EG-40-500	Human Resources – Benefits Administration	US\$99
EG-40-501	Human Resources – Compensation	US\$99
EG-40-502	Human Resources – Contact center	US\$99
EG-40-503	Human Resources – Defined benefits	US\$99
EG-40-504	Human Resources – Defined contribution	US\$99
EG-40-505	Human Resources – Relocation	US\$99
EG-40-506	Human Resources – Employee Data Management	US\$99
EG-40-507	Human Resources – Global Mobility	US\$99
EG-40-508	Human Resources – HRIT	US\$99

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Statement of Work (SOW) & Service Level Toolkits

Continued

Product ID	Title	Price
EG-40-509	Human Resources – Learning and Development	US\$99
EG-40-510	Human Resources – Payroll	US\$99
EG-40-511	Human Resources – Performance Management	US\$99
EG-40-512	Human Resources – Recruiting	US\$99
EG-40-600	Application Development	US\$99
EG-40-601	Application Maintenance	US\$99
EG-40-700	IT Infrastructure – Mainframe	US\$99
EG-40-701	IT Infrastructure – Midrange	US\$99
EG-40-702	IT Infrastructure – Data Network	US\$99
EG-40-703	IT Infrastructure – Voice Network	US\$99
EG-40-704	IT Infrastructure – Helpdesk	US\$99
EG-40-705	IT Infrastructure – Desktop	US\$99
EG-40-706	IT Infrastructure – Common IT Services	US\$99
EG-40-707	IT Infrastructure – SAP Hosting	US\$99
EG-40-708	IT Infrastructure – Web Hosting	US\$99
EG-40-709	IT Infrastructure – Datacenter	US\$99
EG-40-710	IT Infrastructure – Messaging	US\$99
EG-40-711	IT Infrastructure – Disaster Recovery	US\$99

RFP Toolkit

- Provides a starting point for developing and evaluating Requests for Proposal (RFPs)
- Also includes templates for conducting workshops to review supplier proposals, evaluating supplier proposals, and conducting reference calls and site visits

RFP Toolkit

Product ID	Title	Price
EG-50-100	RFP template	US\$499
	Includes the following items:	
	<ul style="list-style-type: none"> ■ RFP overview ■ Workshop preparation training ■ Workshop evaluation matrix and summary ■ Proposal evaluation matrix and summary ■ Supplier reference call template ■ Site visit evaluation template 	

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Negotiation Toolkit

- Helps organizations prepare for and execute their third-party negotiations
- Provides teams with an overview and benefits of interest-based negotiations
- Establishes the appropriate team structure, negotiation processes, and logistics
- Provides teams with the appropriate forms and frameworks to track and respond to circumstances arising from the negotiations process

Negotiation Toolkit

Product ID	Title	Price
EG-60-000	<p>Negotiations Toolkit</p> <p>Includes the following items:</p> <ul style="list-style-type: none"> ■ <i>Negotiations Toolkit user guide</i> ■ <i>Negotiation team contact list & responsibilities form</i> ■ <i>Negotiation calendar</i> ■ <i>Negotiation document & data tracker form</i> ■ <i>Overall negotiation strategy form</i> ■ <i>Negotiations issues planning form</i> ■ <i>Negotiations issues tracking form-word version</i> ■ <i>Negotiations issues tracking form-excel version</i> ■ <i>Negotiations issues priority matrix tool</i> ■ <i>Organizing for negotiations-executive discussion</i> ■ <i>Negotiations training</i> ■ <i>Supplier negotiations kickoff</i> ■ <i>Negotiation orientation for tower teams</i> 	\$499

Contract Evaluation Tool

Helps companies evaluate third-party contracts by providing:

- A summary of key contract terms and conditions
- A framework for scoring the relative bias associated with each term – buyer vs. supplier
- Suggestions for new positions to better balance interests within the contract

Contract Terms and Conditions Evaluation Tool

Product ID	Title	Price
EG-80-000	Contract terms and conditions evaluation tool	US\$999

Governance Toolkit

The governance design toolkit serves as a starting point for organizations looking to initiate or improve the governance of their outsourcing relationships.

- Helps organizations understand what is governance in an outsourcing deal
- Facilitates the design process of the governance structure for a Buyer's organization
- Provides sample documents that can be leveraged as the starting point to implement a governance model

Governance Toolkit

Product ID	Title	Price
EG-90-000	<p>Governance Toolkit</p> <p>Includes the following items:</p> <ul style="list-style-type: none"> ■ <i>Governance Toolkit user guide</i> ■ <i>Governance design</i> ■ <i>Governance job descriptions</i> ■ <i>Governance process maps</i> 	US\$499

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Decision Support

Access expert analyses and data to support critical decisions in the outsourcing life cycle. A flexible way of improving decision-making, which is tailored to meet your specific needs.

Pricing

Each Decision Support effort is priced based upon the specific scope and requirements. Please contact us to discuss your specific requirements.

- info@everestresearchinstitute.com
- +1-214-451-3111

Decision Support

Title	Description
Competitive & Market Intelligence	<ul style="list-style-type: none"> ● Understand the sourcing strategies of other organizations in your industry and the lessons learned from offshoring, supplier portfolio management, and service delivery models ● Maximize sourcing strategies by avoiding pitfalls and learning from the experiences of others
Offshore Leverage Diagnostic	<ul style="list-style-type: none"> ● Analyze what scope can be offshored and project the associated cost savings for multiple offshore locations, including different risk profiles for BPO/ITO ● Based upon extensive market data and insights
Location Analysis	<ul style="list-style-type: none"> ● Assess alternative locations for a better understanding of key location characteristics (e.g., costs, labor pool size, risks) ● Assist in evaluating business cases and supplier pricing
Pricing Model Analysis	<ul style="list-style-type: none"> ● Analyze alternative pricing models, including recent trends and alternatives for pricing deals (input based, output based, outcome based, fixed, variable, etc.) ● Understand impact of pricing models on costs relative to volume fluctuations, incentives, and other factors
Price Benchmarking	<ul style="list-style-type: none"> ● Attain price benchmarks for services to help assess potential savings and alignment with market trends ● Use to inform price negotiations and potential changes that could be used to impact cost drivers of your outsourcing supplier
Supplier Short-listing	<ul style="list-style-type: none"> ● Analyze the fit of supplier capabilities to meet your service requirements ● Develop a short-list of potential suppliers through fact-based analysis that helps generate organizational alignment and avoids missteps ● Also utilize to monitor and manage a portfolio of suppliers as their capabilities and your needs evolve
Proposal Review	<ul style="list-style-type: none"> ● A seasoned review of proposals submitted by outsourcing suppliers to identify key differentiators ● Use an experienced eye to cut through the marketing messages and identify the key issues to evaluate
Contract Review	<ul style="list-style-type: none"> ● Ensure that the proposed contract meets your needs and protects your business interests ● Provides a seasoned view on scope, service levels, and other key issues to ensure alignment with common market practices

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Workshops

Access to analysts to help jointly problem-solve key issues and share market practices. In addition to the standard workshops described here, workshops can be customized to meet your specific needs.

For each workshop, our analysts:

- Assist your team in preparing for the workshop, including providing any required tools and templates
- Conduct the workshop, including leading issue identification and resolution
- Identify next steps and an action plan for your team

Workshops

Title	Description	Price ¹
Project Planning Workshop	<ul style="list-style-type: none"> ● Review, discuss, and refine the project plan to ensure a smooth process ● Understand Everest's experience with managing to milestones, potential pitfalls, and lessons learned ● If requested, standard project plan available to be refined during workshop 	US\$12,500
Market Practices Workshop	<ul style="list-style-type: none"> ● Based on 17 years of experience, learn what makes outsourcing successful – and undermines the potential for success ● Helpful for new teams or experienced organizations wanting a refresher 	US\$12,500
Supplier Selection Workshop	<ul style="list-style-type: none"> ● Add an seasoned eye and analysis to your supplier selection process ● Ask the right questions, address critical issues, and bring clarity to choosing the best suppliers to consider for your needs 	US\$17,500
Pricing Model Workshop	<ul style="list-style-type: none"> ● Review potential pricing models (fixed, variable, outcome, etc.) and implications ● Provides a sound starting point for new and renewal contracting 	US\$12,500
Supplier Workshops	<ul style="list-style-type: none"> ● Work closely with an Everest analyst to help review supplier approaches for solution design ● If desired, workshop can be an interactive session to assist you and a potential supplier in addressing key issues 	US\$17,500
Governance Workshop	<ul style="list-style-type: none"> ● Review governance market practices, interactively refine the organization model, and conduct general problem-solving to improve results from governance 	US\$12,500
Negotiation Planning Workshop	<ul style="list-style-type: none"> ● Start negotiations armed with a strategy that defines issues, positions, and roles to negotiate a win-win agreement 	US\$12,500

¹ Typical workshop is a face-to-face working session lasting six hours
Travel and expenses are extra and will be billed at actual cost
Workshops can be combined and customized for an additional fee, please call
Custom workshops can be designed around a wide variety of sourcing-related topics and/or functions (IT, ADM, HR, F&A, etc.)

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Title	Description	Price ¹
SOW/SLA Review Workshop	<ul style="list-style-type: none"> Ensure that the scope and performance standards meet your needs Interactively refine draft statements of work (SOW) and service levels 	US\$17,500
SOW/SLA "How To Structure" Workshop	<ul style="list-style-type: none"> Review market practices for structuring the scope and performance standards for an outsourcing agreement Understand how different components of the contract relate to each 	US\$12,500

¹ Typical workshop is a face-to-face working session lasting six hours
 Travel and expenses are extra and will be billed at actual cost
 Workshops can be combined and customized for an additional fee, please call
 Custom workshops can be designed around a wide variety of sourcing-related topics and/or functions (IT, ADM, HR, F&A, etc.)

Order today to ensure you capture more value for your current or upcoming outsourcing initiative.

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About Everest Research Institute

[Everest Research Institute](http://www.everestresearchinstitute.com) serves as a central source of independent and objective strategic intelligence, analysis, and actionable insight for leading corporations, suppliers, technology providers, and investors in the global outsourcing and offshoring marketplace. As the research arm of Everest Group (www.everestgrp.com), the Institute addresses both business process and information technology sourcing topics, providing the global outsourcing and offshoring community with information that empowers highly productive, sustainable sourcing strategies and relationships. The Institute's wealth of knowledge and experience provides unique perspectives into today's marketplace and the competitive edge required to take advantage of emerging opportunities.

Please visit www.everestresearchinstitute.com for more information.