# 1. Introduction

## Background

[Company Name] is a leading global bio-pharma company that discovers, develops, manufactures, and markets human therapeutics based on advances in cellular and molecular biology. Current products include [product names with trademarks].

**1.2 Purpose**

[Company Name] is seeking to engage a supplier that can partner with Company in the provision of (Medical Information, Clinical Trial Inquiries, Adverse Event and Product Quality Complaint Intake, Managed Care Inquiries) call center services and other services for current products and potential future products.

We envision a partner that has extensive call center experience, has capabilities for handling a variety of caller types and fluctuations in call volume, and has significant experience handling biologic therapies.

**1.3 Legend and Service Description**

**MI** – Medical Information – Healthcare professional call center agents responding to unsolicited inquiries from healthcare professionals, patient, and other care givers. Unsolicited inquiries may on on-label or off-label, and may be about current or future products. All FDA regulations and guidances regarding handling Medical Inquiries would apply to the call center operations.

**CT** – Healthcare professional and non-healthcare professional call center agents responding to inquiries and managing discussion on the following topics.

* Compassionate Use or Early Access Programs
* Trial inquiry management
* Trial site location
* Trial inclusion and exclusion criteria
* Media campaign support
* Trial investigator assistance
* Advocacy group support

**AE/PQC** – Healthcare professional and non-healthcare professional call center agents handling the intake for Adverse Event and Product Quality Complaint reports from all customer types, Company employees and vendors.

**MC** – Managed Care – Healthcare professional and non-healthcare professional call center agents handling medical inquiries of a reimbursement nature from health plans, HMOs, PBMs, Medicare, Medicaid, compendia publishers, wholesalers or specialty pharmacies, P&T (Pharmacy and Therapeutic) committees.

**ALL** – All program types

# 2.1 Supplier Background and General Questions

1. Please provide a brief overview of your company, including year founded, number of clients, facilities, organizational structure, ownership (list principal owners) and key management histories, and legal status (Corporation, Partnership, Sole Proprietorship, etc) – ALL
2. What is the nature of your company’s principal business? If applicable, identify the name of the firm that is your parent, or that you are a subsidiary of, or wholly owned by. What is your parent company’s principal business? – ALL
3. Where is your company’s home office (Headquarters) located? – ALL
4. What are the total number of call centers you own and where are they located? Are there plans for additional call centers? Do you have a central location for operations management and quality management? – ALL
5. List your top five (5) corporate clients in terms of revenue and the services you have provided those clients in the past three years. List your pharmaceutical clients and their percentage of total revenue as well as the services you have provided each of them in the past three years – – ALL
6. Have you had any legal litigation brought against your company based on your services in providing call center support? If so, please provide detail. Have you ever, or are you currently, involved in litigation with a client involving services similar to those contemplated in this RFP? - – ALL
7. Do you currently have any clients that may represent a conflict of interest? How would such a conflict be handled? – ALL
8. List the professional associations related to customer service and customer call centers to which your company belongs. List any awards or accolades for your call center quality or service? – ALL

# 2.2 Capabilities and Industry Experience

## How many years has your company been involved in the operation of [SERVICE] call centers? – ALL

## List the methods by which your company has differentiated its practices in order to better respond to specific needs of the pharmaceutical industry. – ALL

## List major trends and best practices evolving in the pharmaceutical call center industry and explain how your company is in step with these trends. Please also include the methods and/or sources used to keep abreast of the pharmaceutical regulatory environment – ALL

## List and describe pricing methods your company has used to charge clients for services rendered (monthly or yearly contract, fixed rate with performance based bonus, contract with contingency, etc). Note: this is not a request for pricing, but rather it is a request for a description of your pricing methods – ALL

# 2.3 Compliance information

1. Please provide an overview of your Quality System, as defined by the FDA, which is in place to support your [SERVICE] call center operations - ALL
2. Has your call center(s) been audited by FDA/MHRA/EMEA or other regulatory/governmental agency in the 3 past years? If yes, please summarize the results of the inspection. - ALL
3. How are your representatives monitored for quality assurance, compliance, and customer service skills? - ALL
4. Please describe how your organization complies with the requirements of the HIPAA Privacy Rule. - ALL
5. Please describe how you have supported your clients in the management of the Sunshine Act requirements? – ALL
6. Please describe how your organization maintains compliance with the current regulations and guidances for [SERVICE]. – ALL

# 2.4 Process and Resources

1. What is your average lead-time to set up and implement a [SERVICE] call center supporting 10+ brands from start to finish? Please provide a high level implementation plan. – MI, MC, AE/PQC
2. Please explain the different degrees and advanced degrees (e.g., college-degree, RN, RPh, PharmD, MD/DO) you have deployed in your call centers. Please provide a numerical breakdown of the numbers of each of these degrees currently deployed. - ALL
3. Please provide your recruiting process for hiring and retaining healthcare professional agents (RN, RPh, PharmD). From where are your healthcare professional call center representatives recruited? What is your company’s average time to recruit and fill a new call center position? ALL
4. What is the turnover for healthcare professional agents and non-healthcare professional agents? Turnover for this RFP in accordance with the International Customer Management Institute (ICMI) would be defined as an agent leaving the company’s call center operations for any reason (poor performance, new position, advancement, etc.) in a given month divided by the total number of agents employed in the call center times 12 months. *Example – The Company has 100 agents. During January, 1 agent was promoted to supervisor, 1 left the company for poor performance, and 1 agent took a lateral move to sales. All three agents were replaced. 1 of the 3 has completed training and 2 are still in training. The turnover rate is 3 of 100 or 3% times 12 months – Turnover rate of 36%.* - ALL
5. Please describe your company's process for training new call center representatives. How long do candidates typically spend in classroom training? How much on floor training is received before going live? Describe your process for ongoing training updates [BY SERVICE] - ALL
6. Please describe your company's employee coaching and development process. What is your process in dealing with personnel/performance issues? What is your reward and recognition process? - ALL
7. What is your staffing ratio of employee to contractor? What percentage of your representatives has over 2-years of experience with the pharmaceutical field? What is the average tenure of your representatives? – ALL
8. Are the call center representatives dedicated or shared? Please explain how call overflow situations would be handled in a dedicated environment. – ALL
9. Please describe how your call center utilizes service level? How do you ensure that the service levels are maintained? How often do you report service level metrics to your client? Are there metrics other than service level that you use to monitor the operational performance of your call center? - ALL
10. Please describe your company’s problem resolution procedures from a call center operations perspective? What is your communication and escalation process as it relates to involving your client? - ALL
11. Explain the management and support staff structure of the call center. What is the ratio of supervisors to representatives? Managers/Directors to supervisors? Managers/Directors to representatives? - ALL
12. Are there any limitations/complications regarding remote monitoring by Company or their designee? Do you support unannounced customer monitoring? Please explain. - ALL
13. Please describe any portion of your services that your company outsources. Will there be partnerships with other companies in providing services? - ALL
14. Please explain any partnerships you have with other call center providers, technologies and services. - ALL

# 2.5 Technology

1. What technology do you deploy that demonstrates your organization is on the leading edge of call center operations? - ALL
2. Describe your ability to accept and transmit call files to and from your database to Company or a third party vender? How do you secure and encrypt the files? How do you ensure files are transmitted properly? Do you have experience in sharing data real time with other 3rd party suppliers? - ALL
3. How are operational reports developed and distributed? How frequent are reports generated? Please provide a summary of reports you offer and examples of each. What reporting tools are used? - ALL
4. How are customer insights reports developed and distributed? How frequent are reports generated? Please provide a summary of reports you offer and examples of each. What reporting tools are used? - ALL
5. Please describe your disaster recovery plan and longer term contingency plan? How often is the plan tested and tests documented? - ALL
6. Please describe your system architecture and capabilities. What is the scalability? Where is your system software and data stored? ALL
7. What medical information call center applications do you utilize? MI
8. What is your experience/willingness in accessing/using client software/databases/systems? ALL

# 2.6 Account Management

1. How do you structure account teams? Do you provide an account person to oversee the project? Is that account person dedicated full time to one account or used across various accounts? ALL
2. What is your contract negotiation process? Who is responsible for negotiating contracts and what is the decision-making process? - ALL

Add procurement information here.