

Physician Referral & Telephone Triage **TIMES**

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Table of Contents

Let's Remember Our History	Cover Story
When do Kaiser Northern California Members Call Nurse Advice and for What	Cover Story
Sidebar: My Story	page 6
"The Voice" Comes to This Call Center	page 7
Yellow Page Placements Still Strong	page 8
Talking About AD/HD	page 10
Safe Harbors Once Again in the News	page 12
Tightening Your RFP's and Contracts for Technology Vendors	page 13
Presenting Education Programs for Physician Practice Nurses About Telephone Triage	page 14
The Seventeenth Annual Conference of Physician Referral and Health Information Call Centers	page 15

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Tightening Your RFP's and Contracts for Technology

CHICAGO, IL—Many call centers in a number of different industry segments do not move through the formal RFP process when seeking a new piece of technology, says Mitch Lieber, President of the Chicago-based independent call center consulting firm Lieber & Associates. Rather, they move through the purchase decision more informally and thus don't guarantee that what they're buying will indeed meet their needs in exactly the way they desire.

Instead, Lieber advocates a tight RFP process that first begins with the call center setting down precisely what needs to get done and then turning this language into an RFP. That is, there can be an opening statement saying "what you need to do and then you turn this into questions in the body of the RFP," he says.

Or alternatively, you take that opening statement and send it out to vendors as a RFI, (request for information) asking them if they can do this and, if so, sending along an RFP for them to complete.

Within the RFP itself, Lieber argues that call centers should be very specific in what they're looking for. "You should say what you need the technology to do and then ask them if they can do that and how they do it," he says.

For example, if the call center wants to know from a prospective vendor if their software connects



with an enterprise wide Oracle database, there may be more details needed than a simple yes or no. "If it does, is it in real time or does it export/import data?" Lieber says. "The devil is in the details."

Also part of the RFP should be a request for a sample contract and references from other clients.

Then, most importantly, when a vendor is selected for the technology, the responses to the RFP should be referenced in the contract itself. That way if there is a disconnect at any point between what the vendor said will be done and how it turns out in reality, then there is some muscle in existence that can come to bear on the situation, he says.

Rather than duplicating the

RFP questions and answers in the document itself, he recommends simply attaching the RFP and responses and a brochure for the technology. In the contract itself should be language that acknowledges that the RFP and responses are part of the actual contract.

A key element of this process is making sure that there is a shared set of expectations between the call center and vendor. The last thing either side wants is for there to be any misunderstanding going into the contract. For example, he says, what if the response time for service is left vague, with only a statement that the vendor will respond

quickly if there's a problem. "The call center may think within two hours is quickly and the vendor may think it's within four hours," he says.

There should be appropriate penalties for failing to meet service expectations spelled out in the contract. Plus, product performance guidelines should also be specified. Therefore, if these are not being met then there should be a timeline scheduled for satisfactorily getting the technology to correctly work, Lieber says. And, then, if it doesn't get corrected after several cycles of this, there should be a final option to have the product returned and monies refunded. ■