

Effective  
Transition  
Processes



A White Paper for  
Call Center Professionals

## Overview

Outsourcing provides companies with a tremendous opportunity to reduce costs, streamline processes and focus on core business objectives. Moving from a support solution populated by your own personnel, or even from one outsourcer to another, can be a tumultuous event. One of the best ways to mitigate this uncertainty is to engage an experienced team who will work to develop and implement a clear and customized solution.

The most successful transitions occur not in reacting to changes being imposed on your environment, but in proactively designing a solution uniquely tailored for the company. Yoh IT Support has developed and implemented many such solutions for a wide variety of companies, including one of our most recent engagements at a company by the name of Intelsat.

Yoh IT Support is part of Yoh, one of the largest technology staffing firms in the United States. Yoh IT Support provides full service help desk solutions, including management, service level monitoring and maintenance, process documentation, and staff augmentation. Intelsat, a global communications leader, contracted Yoh IT Support to manage its help desk operation. In a short period of time, Yoh IT Support was able to successfully transition the existing help desk from another outsourcer, resulting in minimal impact to Intelsat's ongoing daily functions.

The three most important factors that contributed to this success were: flexibility, talent, and communication – key themes that ran through every phase of the transition.

## Flexibility

To ensure a smooth transition, the planning process should be initiated as far back as the initial Request for Proposal (RFP). Most RFPs allow bidding vendors to ask questions – typically to gain a better understanding of the technologies and scope of work involved with the project they are bidding.

An experienced outsourcer will also utilize this process to learn about the company's existing culture and environment in order to propose a customized solution that will truly address the company's needs. The better the proposed solution fits into the company's philosophy, the higher the chance for success.

Even after the project scope is defined and the opportunity is awarded, the outsourcing company must remain flexible with its proposed solution. Often the discovery phase will uncover additional information about the customer that will have an effect on the initial plan. Interactive communication, however, is just one part of the learning phase. Actually visiting the customer environment and witnessing day-to-day activities imparts a deeper understanding of how they operate and what their priorities are. The outsourcer must be attentive to subtle cues and the overall tone of the environment in order to fine-tune the final proposed solution.

While the outsourcer must tailor the solution to meet the customer's needs, they must also remain focused on the larger purpose of the support solution within the customer's overall organization. The outsourcer's goal should always be to deliver the solution that best fits customer needs, allowing them to concentrate on their core business.

A communications company should focus on communications as its primary concern, not service level management, or other matters intrinsic to the support operation.

The outsourcer should continue to maintain a flexible posture even after implementing the solution. It is critical to watch for glitches and inefficiencies in the process and make adjustments as required to meet customer needs. This is also a good time to look for opportunities to make process improvements that will further add value to the customer's support operation.

Yoh IT Support's initial interaction with Intelsat began with the RFP process. Yoh used the information provided in the RFP document to generate questions about Intelsat's environment, as well as to create a preliminary sketch of our proposed support model. Once our follow-up questions were answered, Yoh personnel participated in a bidder's conference that allowed us to visit Intelsat's site and ask additional questions. These opportunities enabled us to formulate a solution that was based not only on our previous experience in support environments, but also on the existing Intelsat environment.

Throughout the negotiating process, Yoh IT Support had a chance to work with Intelsat to further hone our solution into a solid working model. Intelsat's input, based on their existing support environment, became invaluable as it provided us with a realistic barometer for how well the proposed solution would integrate into the organization. Our collaboration successfully combined Yoh IT Support's experience with various support models and the overall help desk industry, with Intelsat's knowledge of their own environment and support needs.

As mentioned earlier, flexibility is a critical component in the implementation of an outsourced solution. In this case, Yoh IT Support's original support model contained clearly defined roles for our technicians. On the first days of the transition, however, temporary changes were required to allow the team to balance the workload. This adjustment to the original plan resulted in a better fit for the team and became the new standard for the project. Our willingness to change the plan in order to improve service allowed Yoh IT Support to further develop our partnership with the customer and improve their level of satisfaction.

## Talent

To ensure a smooth transition with minimal disruption to ongoing customer operations, a dedicated team should be put in place to manage the process from beginning to end. This team should ideally be comprised of those who designed the solution, those experienced in similar implementations, and the management representatives who will ultimately lead the new operation. This team should be assembled prior to contract award and should visit the customer as early as possible to establish a level of familiarity and trust.

Once in place, the team will quickly assess the pros and cons of the existing model and analyze it against the proposed solution. They will also work with the customer to determine to what extent their existing personnel can fit into the proposed model. Even if existing staff will not participate in the new support operations, they should be engaged during the planning stages so that the outsourcer can benefit from their knowledge and experience supporting this particular customer.

The dedicated team will then quickly assess processes, tools and personnel to make timely decisions regarding the specific transition phases that will be implemented, as well as the corresponding timeline. Their experience in similar support environments and with similar transition scenarios will allow the team to proactively address issues and set the stage for incoming personnel.

The incoming personnel should be as unique and tailored to the customer environment as the actual support solution. The talent behind the support operation is by far the most critical element that will signal the difference between a mediocre solution and an exceptional support model. The new team, composed of both new recruits and existing qualified personnel, should represent a blend of both high-level technicians and less experienced staff with exceptional potential. The support operation should lend itself easily to career progression for its staff, in order to reduce turnover and ensure consistent service for the customer.

Once the solution is comfortably in place, the operational leads should remain to manage the customer's daily requirements and drive the team toward meeting and achieving the goals set out for the support operation. The balance of the transition team will stay involved with the customer on an as needed basis to lend support to the operational leads.

The transition team Yoh IT Support put in place for Intelsat consisted of four team members. Always sensitive to the fact that executive commitment from both the customer and the outsourcer are crucial to the success of the transition, the team was lead by a Yoh IT Support executive. This executive acted as the primary point of contact for Intelsat and oversaw the transition process from beginning to end.

The remaining three members of the team had actually designed the support solution for Intelsat. These help desk professionals had worked through similar implementations for other Yoh IT Support customers and had both help desk and desk side support management experience. One of the team members was also designated to become the support operations manager once the transition phase was complete, managing the support staff and handling any escalated issues. The other members of the transition team continue to provide support as required and periodically meet with Intelsat management to monitor Yoh IT Support's performance and ensure that the solution continues to meet all of the customer's support needs.

One of the transition team's critical objectives was identifying the talent necessary to effectively execute the new support solution. The first step in this process was interviewing the customer's existing staff to learn as much about their current environment as possible. These interviews allowed Yoh IT Support to understand the changes existing personnel felt must occur, including the areas they believed required immediate attention. This process also provided the transition team with an opportunity to evaluate each staff member and determine how, or if, they could fit into the new support operation.

The next step involving talent included interviewing candidates for the new support organization. Yoh IT Support's transition team maintains considerable experience in sourcing exceptional help desk talent for customer engagements and was able to quickly pull together a team that was not only diverse in technology and skills, but also team focused and compatible on an interpersonal level.

## Communication

One of the most dangerous things that can impact a company preparing to outsource is the proliferation of misinformation throughout the existing organization. Rumors spread, personnel begin to panic and they start to look for other opportunities and/or stop providing the level of support they had delivered previously. This fear, though natural, is generally unnecessary. The best way to keep false information from spreading is through open and effective channels of communication implemented on day one. All successful support solutions should include a communication plan – an important feature of all Yoh IT Support proposals. This plan outlines best practices for informing existing personnel about the change, including key communication timeframes.

Clear and open communication between the outsourcer and the customer is imperative. Continued customer trust hinges on constant communication regarding progress made, milestones achieved and stumbling blocks encountered. Effective customer communications extend beyond management to include the overall user community. Up-front notification of the new partnership will minimize any uncertainty surrounding the change. It also allows the staff to air any concerns about the proposed support operation.

In the Intelsat scenario there was an existing outsourcer that provided the help desk support team. Yoh IT Support, sensitive to this environment, worked with Intelsat to develop a proactive communication plan. We approached the existing outsourcer to discuss opportunities to convert incumbent team members with desired skills and experience to the new support model and informed them of the transition process we had proposed to minimize impact on Intelsat. Another important communication, developed by both the transition team and Intelsat, allowed our customer to inform their user community of the new help desk partner.

Yoh's transition team met regularly with Intelsat to keep them up to speed with the current status of the transition. They were provided with a transition map detailing when project milestones were scheduled to occur, as well as any anticipated obstacles to meeting these target dates. Issues that arose during the transition process were addressed quickly and effectively.

Another key step in the transition process was the training and orientation Yoh IT Support provided to our support team, allowing them to handle nearly any situation that might arise on the Intelsat help desk. The transition team created scripts for the support staff, preparing them for questions related to the change, including details on Yoh IT Support and why we were selected to succeed the previous outsourcer. Role playing sessions were also conducted with the new personnel to address a variety of technical scenarios and issues.

In order to ensure long-term impact on the customer community, a marketing plan was put in place for the support operation. This marketing plan established proactive tactics that would elevate the overall image and awareness of the help desk within the customer organization, and provide opportunities for users to meet their new help desk and ask questions. All of these communications helped to smooth the transition process and maintain a sense of comfort and trust between the two organizations.

## Summary

The Intelsat transition is a remarkable example of the results a strong transition process can produce. The Yoh IT Support team successfully completed a transition that normally takes 90 days in only three weeks. The flexibility of our support model allowed us to provide Intelsat with a unique solution tailored to their environment. The solution was molded to meet their needs and was updated, as required, to add value to the support operation.

The team compiled to shepherd our client from their existing model to the new model, worked diligently to ensure all phases of the process were helpful and seamless for the users. The talent hired to provide ongoing, high-level support further enhanced customer satisfaction and eased any resistance to the change.

Cooperative communication between Yoh IT Support and the incumbent vendor also allowed for an orderly transition. Actively engaging Intelsat management throughout the project allowed them to ask questions and gain a level of comfort and confidence with the new support structure. The user community also gained a sense of assurance that the changes would be beneficial.

By managing the three core components of an effective transition, the new, efficient technical support team at Intelsat quickly made a positive impact on the customer environment. Applying the same model to this and other customers has proven the success of Yoh IT Support's dynamic transition process.

## About Yoh

**Yoh** is one of the largest providers of talent and outsourcing services to customers in the United States. With over 374 million USD in total sales, Yoh operates from more than 75 locations and provides long- and short-term temporary and direct placement of technology and professional personnel, as well as managed staffing services, for the information technology, scientific, engineering, health care and telecommunications communities. For more information, visit [yoh.com](http://yoh.com). Yoh is part of Yoh Services LLC, a Day & Zimmermann Company.

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