



# Overview of Workshop Offering: Market Practice Workshop

Outsourcing Support Services (OSS)

# Market Practices Workshop | Overview



**Purpose:** Review and discuss market practices to identify implications for improving outsourcing results and managing risks

## Agenda

- Introductions and background
- Outsourcing for Outcomes
- Service Provider Selection
- Governance
- Identify open issues and action items

5-6 hours of market overview and insight

Additional details and timing on following page

## Objectives

- Develop an understanding of the outsourcing process
- Identify best practices
- Define milestones in the outsourcing process

## Typical participants

- Core team leader
- Potential/current governance management team
- Sourcing lead
- Project lead
- Legal
- HR

## Everest inputs

- Review with client market outsourcing process
- Identify “hot buttons” or areas for client to pay specific attention to
- Assess client’s current issues
- Facilitate workshop

## Client preparation

- Identify potential or existing issues associated with the current sourcing engagements

Agenda item	Time allocation
<b>Introductions and background</b> <ul style="list-style-type: none"> <li>■ Objectives of initiative</li> <li>■ Scope of initiative</li> </ul>	0.5 hour
<b>Outsourcing for Outcomes</b> <ul style="list-style-type: none"> <li>■ Differentiate between <u>contracting</u> and <u>outsourcing</u></li> <li>■ Expand the definition of “<u>value</u>” beyond simple cost savings</li> <li>■ Demonstrate how to determine true <u>business outcomes</u> prior to outsourcing</li> <li>■ Introduce <u>Service Levels and Key Performance Indicators (KPIs)</u> as a means to focus the service delivery on specific outcomes</li> </ul>	1.5 hours
<b>Service Provider Selection</b> <ul style="list-style-type: none"> <li>■ Review a step-by-step, analytical process for selecting an outsourcing supplier</li> <li>■ Discuss how relationships develop over the course of an outsourcing transaction’s life-cycle</li> <li>■ Discuss best practices in outsourcing supplier evaluations</li> </ul>	1.5 hours
<b>Governance</b> <ul style="list-style-type: none"> <li>■ Understand key components of an outsourcing governance model</li> <li>■ Recognize how an effective governance model can create value in a relationship</li> <li>■ Shift from “police the supplier” to “partnership” mentality</li> </ul>	1 hour
<b>Identify open issues and action items</b> <ul style="list-style-type: none"> <li>■ Assign action items</li> <li>■ Determine target dates</li> </ul>	0.5 hour

## Client

- Bring following items to the workshop
  - Current sourcing/outsourcing process (if available)
  - Questions about the outsourcing process
  - Unique requirements in the environment that may impact the sourcing process
- Invite appropriate meeting participants
- Secure logistics for meeting (room, audio-visual, etc.)

## Everest

- Provide and discuss in advance of workshop
  - Structure for the workshop
  - Draft project responsibility matrix
- Confirm logistics of workshop
- Bring following items to the workshop
  - Market practices research and best practices

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