

Business Process Outsourcing Lifecycle and Governance Training Course

27 September – 1 October 2027
San Diego

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Ref: 2090_253171 **Date:** 27 September – 1 October 2027 **Location:** San Diego **Fees:** 16000 Euro

Overview

Business Process Outsourcing Lifecycle and Governance Training Course is a one-week intermediate course for service owners and commercial teams who leave with a BPO Lifecycle Governance Pack. Participants apply business process outsourcing governance, outsourcing business case analysis, BPO service scope design, provider transition planning, and outsourcing performance and exit controls. The course uses ISO 37500:2014 guidance, process baselines, decision tools, service measures, risk registers, and operating reviews. Agile Leaders Training Center delivers this course in BPO lifecycle governance.

Who Should Attend

- Operations teams responsible for deciding whether processes should remain internal or move to a provider
- Procurement and commercial teams responsible for provider evaluation and contract controls
- Shared-services teams responsible for process baselines, service scope, and transition
- Finance and HR teams responsible for cost, people, and control impacts
- Vendor-management teams responsible for service performance, risk, and relationship governance

The course assumes experience with business processes, service requirements, or supplier management and leaves out legal advice, provider-specific system configuration, tender execution, certification, and function-specific regulatory interpretation.

Departments and Industries

The course supports functions that evaluate, mobilize, and govern outsourced processes across service sectors.

- Operations and shared services
- Procurement and commercial management
- Finance and human resources
- Banking and telecommunications operations
- Healthcare administration and public-facing services

Learning Objectives

By the end of this course, participants will be able to:

- Analyze process suitability and build an outsourcing decision baseline.
- Build a business case with costs, benefits, dependencies, and risks.
- Apply structured criteria to provider evaluation and commercial design.
- Use transition, governance, SLA, and KPI controls.
- Diagnose service, data, continuity, and relationship risks.
- Evaluate performance and prepare an orderly exit approach.

Course Agenda

Day 1: Assess Outsourcing Suitability

- ISO 37500:2014 Outsourcing Lifecycle Guidance Map
- Current-State Process Baseline Canvas
- Core and Non-Core Activity Decision Matrix
- Delivery Model Assessment Scorecard
- Outsourcing Stakeholder Responsibility Map

Day 2: Build the Case and Scope

- Outsourcing Business Case Structure
- Whole-Life Cost Driver Worksheet
- Benefit and Disbenefit Register
- Service Boundary and Dependency Map
- Outcome-Based Requirement Template

Day 3: Select and Contract the Provider

- Provider Due Diligence Evidence Checklist
- Weighted Provider Evaluation Model
- Service Level Agreement Design Grid
- KPI Definition and Baseline Sheet
- Commercial Risk Allocation Matrix

Day 4: Transition and Govern Delivery

- Process Transition Milestone Plan
- Knowledge and Data Transfer Checklist
- Retained Organization Role Model
- Joint Governance Meeting Architecture
- Service Continuity and Escalation Register

Day 5: Practice Performance and Exit Control

- Suggested Exercise: Review an Outsourcing Decision Case
- Suggested Exercise: Challenge an SLA and KPI Set
- Suggested Exercise: Diagnose a Transition Delay
- Suggested Exercise: Plan a Performance Recovery Review
- Capstone Exercise: Complete a BPO Lifecycle Governance Pack

Practical Exercises

The course uses suggested activities with fictional process, provider, and service-performance information.

- Suggested activity: compare internal, shared-service, and outsourced delivery options with a decision matrix.
- Suggested activity: evaluate provider evidence and record risks, assumptions, and clarification questions.
- Suggested activity: convert a service outcome into a measurable SLA and balanced KPI set.
- Suggested activity: build transition, continuity, and exit actions for an underperforming provider scenario.

FAQs

Who suits BPO lifecycle governance, and what does the course assume?

Professionals responsible for process, procurement, commercial, finance, HR, or vendor decisions suit BPO lifecycle governance. The course assumes experience with business processes, service requirements, or supplier oversight.

How does BPO lifecycle governance differ from general procurement training?

BPO lifecycle governance follows an outsourced process from suitability and business case through transition, operating control, performance, continuity, and exit, while general procurement training covers wider sourcing and purchasing activities.

What should a business process outsourcing business case include?

A business process outsourcing business case should compare delivery options, define the current baseline, identify whole-life costs and expected benefits, record dependencies and people impacts, test market capability, and document risks and decision assumptions.

How should BPO service levels and KPIs work together?

BPO service levels state the required service threshold and response, while KPIs show whether intended outcomes, quality, cost, timeliness, customer experience, and improvement are being achieved. Both should be measurable, proportionate, and linked to governance actions.

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Why does business process outsourcing need an exit plan?

Business process outsourcing needs an exit plan to protect service continuity, data, knowledge, assets, responsibilities, and transition readiness when a service returns in-house or moves to another provider.

Conclusion

Participants take back a BPO Lifecycle Governance Pack. It combines a decision baseline, business case, scope map, provider scorecard, SLA and KPI design, transition plan, governance structure, risk register, and exit checklist. The pack helps teams connect the outsourcing decision to operating evidence and maintain control from preparation through transition, performance review, and exit.