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COURSE BROCHURE

# Business Process Outsourcing Transition and Governance Training Course

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Registered in the United Kingdom and Saudi Arabia

# Business Process Outsourcing Transition and Governance Training Course

**Ref:** 2779_106398 **Date:** 8 – 12 March 2027 **Location:** New York **Fees:** 7900 GBP

Business Process Outsourcing Transition and Governance is a 1-week training course for outsourcing and sourcing managers who decide which back-office processes move to an external provider, and it ends with an outsourcing business case and transition plan. Finance, people services and transaction work are now often run by third parties, so hand-over and oversight decide whether savings appear. Jupiter Prime Training runs this course.

## Why Business Process Outsourcing Transition and Governance Matters Now

Three forces shape outsourced back-office work today. Automation in provider centres moves pricing from headcount towards transactions and outcomes. Business units expect unchanged service quality after the move and judge the sourcing team by the first months. Boards and auditors want evidence that risk, data protection and continuity stay controlled once a process leaves the building. An organisation that handles transition and oversight well gains capacity and predictable cost; one that handles them badly inherits service failures, hidden retained costs and disputes over scope.

## Who Gains Most from Business Process Outsourcing Transition and Governance

- Sourcing leads who shape the outsource-or-retain decision and the provider shortlist
- Vendor managers who run service reviews, credits and change requests with providers
- Process owners in finance, people services or customer operations whose work is moving out
- Transition coordinators who plan knowledge transfer, parallel running and cut-over
- Commercial analysts who build the cost baseline and the retained-organisation budget

A shared services centre that sends its sourcing lead, a process owner and a vendor manager together gains most, as all three then work from one set of assumptions.

## Business Process Outsourcing Transition and Governance Capabilities

Participants carry an outsourced process from cost baseline to steady-state oversight.

- Assess which processes suit an external provider using a retain-or-release scoring grid — the sourcing steering group
- Calculate a fully loaded cost baseline and the retained-organisation cost — the finance sponsor
- Weigh provider proposals on delivery model, pricing basis and exit terms — the evaluation panel
- Design a transition plan with knowledge transfer, parallel running and cut-over gates — the process owner
- Specify service levels, service credits and an earn-back mechanism — the contract owner

- Build a tiered oversight calendar with escalation routes — the provider relationship board

## Key Business Process Outsourcing Transition and Governance Terms

- Retained organisation — roles kept in-house to manage the provider and stay accountable for the process.
- Service credit — a reduction in charges when the provider misses an agreed service level.
- Knowledge transfer — the hand-over of procedures, exceptions and system know-how to the provider's team.
- Parallel running — both teams perform the process so outputs can be compared before cut-over.
- Steady state — the point when the provider meets service levels without extra client support.
- Exit plan — the agreed steps, data and assets needed to move the process elsewhere at contract end.

## Business Process Outsourcing Transition and Governance Day by Day

### Day 1: The Outsourcing Decision in Context

- Process Inventory and Criticality Mapping — Which Back-Office Activities Are Candidates
- Retain-or-Release Scoring Grid — Strategic Value Versus Commodity Work
- Fully Loaded Cost Baseline — Comparing In-House Cost Fairly With Bids
- Delivery Location and Shared Centre Options — Captive, Hybrid or Third Party
- Risk and Data Protection Screening — Processes That Need Extra Safeguards

### Day 2: Selecting the Provider

- Requirements and Volume Pack — Giving Bidders Comparable Information
- Pricing Bases per Transaction, Seat or Outcome — Matching Incentives to Goals
- Weighted Evaluation and Site Visits — Choosing Between Shortlisted Providers
- Due Diligence on Controls and Continuity — Confidence Before Award
- Exit Terms and Asset Ownership — Protecting Future Options at Signature

### Day 3: Planning the Transition

- Transition Phases and Cut-Over Gates — When Work Formally Moves
- Knowledge Transfer Logs and Shadowing — Capturing Exceptions and Tacit Steps
- Parallel Running Comparison Sheet — Readiness Evidence for Go-Live
- Staff Consultation and Communication Plan — Handling Affected Employees Fairly
- Hypercare Period Design — Extra Support in the First Weeks

## Day 4: Service Levels and Oversight

- Service Level Catalogue and Measurement Rules — What Counts as a Miss
- Service Credit and Earn-Back Formula — Balancing Pressure and Partnership
- Tiered Oversight Calendar — Operational, Commercial and Executive Reviews
- Change Request and Scope Control Log — Avoiding Silent Cost Growth
- Retained Organisation Sizing — Roles Needed to Manage the Provider

## Day 5: Practising the Outsourcing Business Case and Transition Plan

- Applying the Scoring Grid to a Banking Back-Office Scenario — Release Decision
- Rebuilding the Cost Baseline for a Hospital Billing Process — Savings Case
- Stress-Testing Service Credits Against Missed Months — Contract Robustness
- Peer Challenge of Transition Gates and Hypercare — Readiness Confidence
- Completing the Outsourcing Business Case and Transition Plan — Sponsor Approval

## Applying Business Process Outsourcing Transition and Governance After the Course

- Score one candidate process on the retain-or-release grid with its owner.
- Test an existing contract against the service credit and earn-back formula.

## Business Process Outsourcing Transition and Governance Questions FAQ

### What is Business Process Outsourcing Transition and Governance and why does it matter now?

It is the discipline of deciding which back-office processes move to a provider, moving them safely and overseeing the provider afterwards. It matters now because automation is changing provider pricing and service expectations.

### Which roles gain most from Business Process Outsourcing Transition and Governance?

Sourcing leads, vendor managers, process owners, transition coordinators and commercial analysts gain most. You benefit most when colleagues from these roles attend together.

### How does Business Process Outsourcing Transition and Governance differ from a business process management course?

It focuses on moving a process to an external provider and overseeing that provider. A process management course improves internal processes; here you work on cost baselines, transition gates and service credits.

## What do you bring back from Business Process Outsourcing Transition and Governance?

You bring back a draft outsourcing business case and transition plan for a process of your choice. It holds a scoring result, cost baseline, cut-over gates and service credits ready for sponsor review.

## Business Process Outsourcing Transition and Governance: The Way Forward

The outsourcing business case and transition plan first informs the release decision for one process, and it is used by the sponsor, the process owner and the vendor manager. After go-live, revisit the service credit thresholds and the size of the retained organisation, because real volumes and early provider performance usually show where the first assumptions were too cautious or too generous.