

The **insanely** honest guide to outsourced CX

:ubiquity





Agile and scalable CX programs nurture passionate, empowered agents that go the extra mile to make customers happy.

You can test if your outsourcer is able to meet your expectations by requiring them to answer all 26 questions outlined here—and answer them to your complete satisfaction.



1

Honesty is
the best
policy

Let's get clear about who this is for. This Guide is for challenger brands ... ambitious, young and hungry businesses who believe outsourced CX doesn't need to suck.

Challengers like you are trying to carve out a new piece of a competitive market with a new approach. And once you get there, you're planning to own it. And you need to get there first, fast, and do it better than anyone else.

Many challenger brands have discovered that customer experience (CX) is key to making this happen—and the need for consistently great CX became all the more pressing during the COVID-19 pandemic.



In fact, CX has become one of the key battlegrounds for businesses today. It's as important—if not more important—than the actual service you provide.

And to be brutally honest, delivering consistently great CX is hard. Really hard.

- ✓ It takes commitment.
- ✓ It takes adaptability.
- ✓ It takes technology.

Most of all, it takes effort – day in and day out.

Customers have never been closer to businesses—the number of channels customers and businesses can interact within has exploded. This is a double-edged sword. First, you've got more avenues to sell into. But at the same time, you've got to meet customer expectations across every single channel, again and again.



We'll guide you through the basics, and what you need to succeed, honestly. We'll tell you what you should demand from any CX program, what you should steer clear of, and what that elusive, consistently great CX can deliver.



CX as a differentiator. **Honesty** vs. **Opportunity**

Honesty for most

- ✔ Focus on complaints
- ✔ High-stress
- ✔ Defensive attitude
- ✔ Eternal on-hold
- ✔ Transfer hell
- ✔ Faceless response
- ✔ Rigid scripts

Opportunity for the few

- ✔ Turn the conversation
- ✔ Empathy first
- ✔ Solutions-driven
- ✔ Anticipate needs
- ✔ First call resolution
- ✔ Personalized service
- ✔ Empowered agents

2

The CX challenges for challengers

As a challenger brand, you face a unique set of obstacles. You're likely encountering some success—and it feels good.

You're ready for the next phase of your development. But development always equals growing pains. And that's because you're trying to figure out a bunch of new and different things as you go, while at the same time:

- Growth is outpacing capacity
- You lack regulatory and compliance expertise
- Priorities are constantly splintering, and CX is on the back burner
- It's hard to cede control of functions to folks who aren't part of your company
- Your reputation is still embryonic—and vulnerable
- You're not prepared to scale up when business takes off

More often than not, companies like yours are started by brilliant industry experts—people who are skilled navigators in their field. However, these brilliant folks often have limited exposure to other aspects of running a business.

Suddenly you realize that you need to staff up and add a broader range of expertise to your wheelhouse. And if you're honest with yourself, you likely don't have the full gamut of expertise in managing customer experiences, training agents, and maintaining the highest standards.

There are just too many unknown unknowns. But one thing you know for sure is that most outsourced CX doesn't work anywhere near as well as it should.

Your biggest worry, as it should be, is that your growing group of hard-won customers won't get the service and attention they deserve. And you're worried that if you don't get it right, this phase of development could be your last.

The good news is we can tell you everything you don't know. Honestly. Everything.

3

TBH, not all
CX is made
equal

Truth be told, outsourcing doesn't have to suck. In fact, outsourcing can be great.

Think about the possibilities:

It turns out that when you combine all this, strange, new, and abnormal outsourcing-y things start to happen:



- What happens when customers reach agents quickly, through the channel that works best for them?
- What happens when AI and ML are used to fill the gaps in overly manual processes—so they augment the customer and agent experience, rather than dominate it?
- What happens when those indifferent, disengaged, and script-bashing staff with no autonomy are replaced by industry-savvy, customer-obsessed, and authoritative service agents?

- The burden's alleviated from your internal resources—so you can focus on your service or product.
- Staff turnover moves from “revolving door” to “settled and secure”.
- You breed industry expertise and smarter, more creative problem-solving.
- Key CX metrics like Net Promoter Score and Customer Satisfaction start trending upward.
- Customers gladly recommend you to prospects.

This isn't CX as a box-ticking exercise. It's a people-driven dynamo that redefines how your business operates internally and externally. It's a CX-first approach that delivers a better return on outsourcing.

242% Boost in NPS for digital bank

4

Transparency
turns CX into a
growth driver

Done well, **exceptional business process outsourcing** treads a balance between **efficiency**—a focus on greater productivity, streamlined operations, and lower costs...

...and **effectiveness**, where the goal is to add value through business insight, partnership-led innovation, industry expertise, and personalized support.

With an agile, flexible, responsive, and scalable CX service provider, one doesn't trump the other. Efficiency and effectiveness reach an ideal balance. And responsiveness delivers better outcomes — not just more efficient transactions.

Up to **84%**

Call containment through IVR redesign

Key components of great CX & questions to ask

1

Smarts

Outsourcers that consistently add value have deep domain and industry knowledge. They understand how businesses like yours can evolve and succeed because they've been there, adapted, and got it done. Plus, they use that experience to analyze and develop the efficiency of your current functions and processes.

Key questions	<p>How long have you specialized in our industry?</p> <p>How much training do you give agents?</p> <p>What do you think about the current state of our market?</p> <p>What are the key challenges our customers will face?</p>
----------------------	--

2

Bespoke

Experience often comes with the caveat of being productized, or off the shelf. While there are some familiarities between companies, your business is unique. That's why you need a consultative approach to creating processes and procedures that match your customer service to your customer needs.

Key questions	<p>What are most customers dissatisfied with in this vertical?</p> <p>How deeply do you analyze satisfaction scores?</p> <p>How do you identify pain points? Why do they happen and how do you solve them?</p> <p>What do we need to start doing first to turn CX into a growth opportunity?</p> <p>How will our CX needs evolve as we grow as a business?</p>
----------------------	--



18%
Greater ticket size for food-ordering platform

Key components of great CX & questions to ask

3 Cuckoo for complexity

An outsourcing partner should go deep into the guts of your company to understand how it works internally and externally. Agents with only a superficial understanding of your business can only resolve basic issues. Agents that are embedded into your world—your customers’ big picture concerns, regulatory needs, and your unique processes—can add value. Outsourcing partners with frontline intelligence and experience can feed into improving your internal processes. The difference this makes to your CX is vast.

Key questions	How would you train agents to represent our business? How long does training take? Is there continuous learning and development? How do agents adapt to changing customer needs?
----------------------	---

4 Transparent

The best outsourcers have a burning desire to drive the customer’s business forward and hold themselves to account. Ultimately, not every customer interaction goes smoothly. You need to figure out if your CX provider has the capacity to react appropriately to difficult moments.

Key questions	What value can you add beyond basic CX KPIs? Do you provide transparent analytics into agent performance? How do you handle failure to meet quality standards? Can you provide insights into how to improve our processes?
----------------------	---



Key components of great CX & questions to ask

5 Quality Control

Finally, the quality of agent interactions—empathy, familiarity with regular call types, and the autonomy, freedom, and confidence to work without being tethered to a script – are just as important as the basics of call resolution.

Key questions	Do you have a standardized onboarding process? How flexible is it? What role do scripts play? Are they revised frequently? Are IVR and AI technologies being used to their full potential? How empowered are agents to solve problems on-the-fly?
----------------------	--

6 Passionate

Yeah we know, everyone says this. But here's how you can tell if it's true: First, culture is why employees stay for years and years. Outsourcers with passionate agents have low churn because they do work that's meaningful. When staff are part of a business that actively does the things mentioned above, they tend to stick around.

Key questions	What's your annual staff turnover? (The average is 30-40% in the U.S., but some call centers have up to 100% churn.) Why do staff stay? And why do they leave? Are there opportunities for agents to learn and grow? Are frontline agents empowered to give feedback on ways to improve CX? Is your CX designed to adapt and respond to shifting business goals?
----------------------	--

Agile and scalable CX programs nurture passionate, empowered agents that go the extra mile to make customers happy. They obsess over pre-assignment team-building and devise processes for onboarding, agent training, problem resolution, and process improvements that fit your business.

If your outsourcer can answer these questions and satisfy these expectations, you may well have found the right fit. This will be a partner that can help you hit your business goals while delivering better, more seamless experiences to customers across all channels.

90%

CSAT for ecommerce giant
(even during peak season)

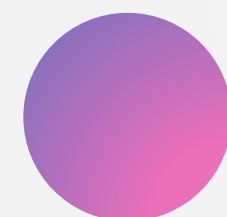
5

Time to
differentiate,
honestly

We wrote this guide for a reason. It's not just that businesses like yours deserve the best shot at success. It's also that your customers do, too.

We believe this passionately. It's why we spend so much time with our clients thinking about how they can simultaneously better serve their customers and better establish a foundation for the wider business to adapt and scale.

In fact, CX-first outsourcing has unlocked strategic growth, delivered awesome CX acceleration, and exceeded critical KPIs across a ton of businesses like yours. We've made a living by turning CX from a headache into a growth engine.



Honestly, every day we see exceptional CX programs as the key differentiator in businesses of all kinds. The folks who work with us agree.

If you do too, let's talk.

:ubiquity

