

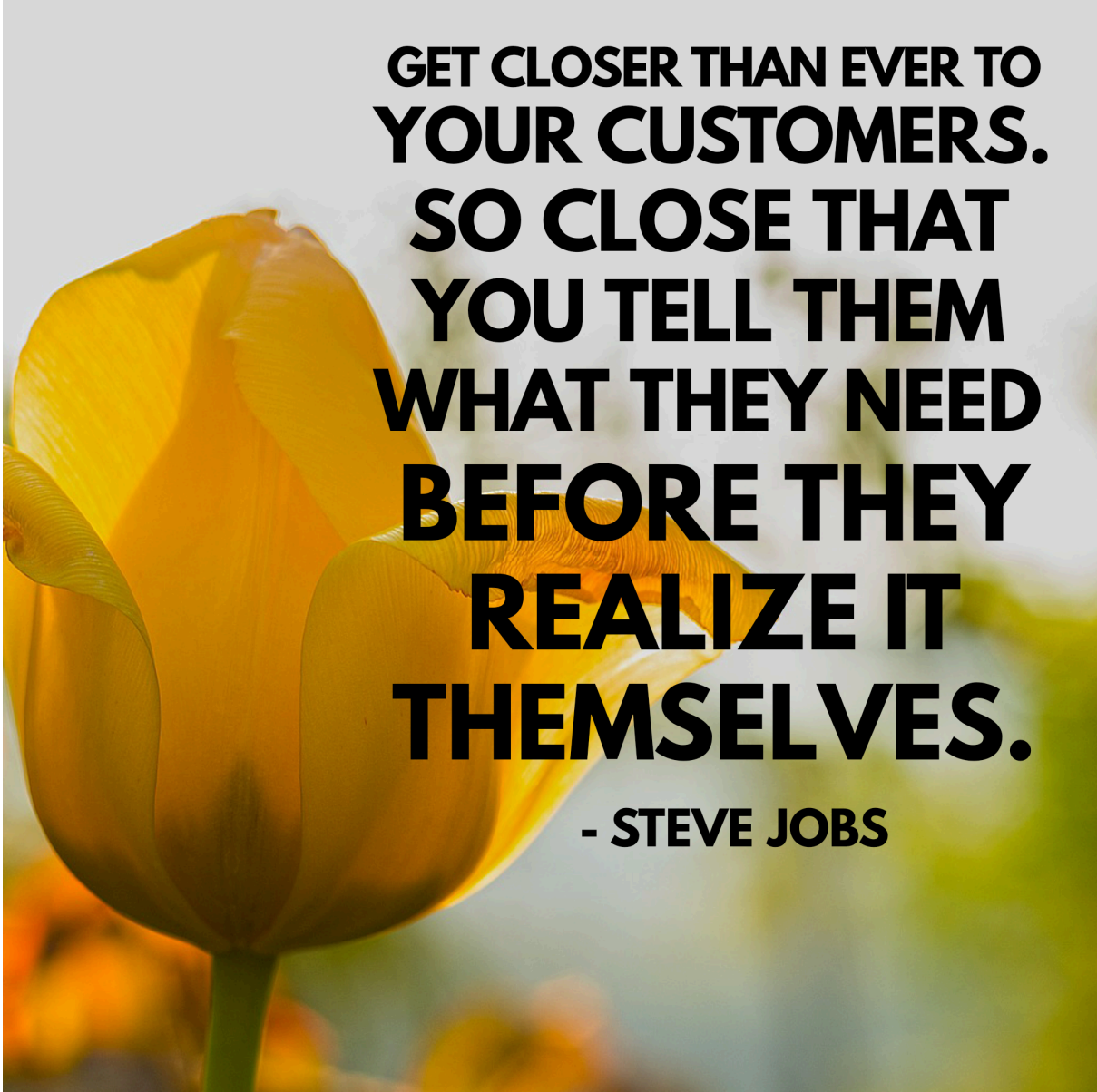
## 5 Tips to Help You Succeed with Your Customer Service Outsourcing Efforts

Most companies outsource their customer service to reduce costs and focus on their core business, but if you do it right, [your customer service can easily turn into a profit center \[link to "customer service to profit center" article\]](#) – because happy customers buy more, stay longer, and encourage their friends to follow in their footsteps.

Therefore, if you've decided to prioritize your customer service by outsourcing it to professionals who can give this aspect of your company all the attention it deserves, we recommend dedicating some time at the beginning of the process to make sure your outsourcing efforts are successful and drive business results.

### Study Your Top Customer Sectors

The deeper you understand your customers – their hopes, dreams and needs, as well as their challenges and fears – the easier it will be to design a more accurate customer experience for them.



**GET CLOSER THAN EVER TO  
YOUR CUSTOMERS.  
SO CLOSE THAT  
YOU TELL THEM  
WHAT THEY NEED  
BEFORE THEY  
REALIZE IT  
THEMSELVES.**

**- STEVE JOBS**

*Source: [HelpGrid's Instagram account](#)*

Because the deeper you go, the more layers you'll be able to convey to your customer service outsourcing partner, who's just meeting your customer base for the first time.

The more your partner and your team can understand who they're serving, the more they'll be able to create a customer experience that will feel like an extension of your company.

**Get Clear About Your Brand Personality**

When you outsource your customer service, you want to make sure that the transition from your in-house team to your outsourced team is seamless in customers' experience.

Understanding who they're talking to will help your outsourcing partner get closer to that, but if you really want to step it up for your customers, make sure you convey your brand personality and brand voice to your partner as well.



**TO ENSURE BRAND  
CONTINUITY WHEN  
OUTSOURCING  
CUSTOMER SERVICE,  
GET CLEAR ON WHAT'S  
YOUR  
TRUE  
BRAND  
IDENTITY.**

Source: [HelpGrid's Instagram account](#)

Do customers expect your agents to be formal and business savvy? Do they expect lighthearted jokes? Do they expect compassion and patience, tough love, timeliness, accuracy, or a sense of joy in every touchpoint?

Giving your outsourcing partner this information will help them know who from their current customer service agent pool to pick for your team, and what to look for when they recruit new agents to serve your customers.

## **Make a List of Everything Else Your Customer Service Outsourcing Provider Needs to Know**

Communicate as many policies, needs, requirements and preferences as you can to help your outsourcing partner succeed.

Is it an integral part of your brand to hire a multicultural team? What's the availability your customers are used to? Which channels matter to you most? What's your return or cancellation policy? What times of the year or the day do you need extra agents? [What kind of metrics does the leadership in your company expect your customer service outsourcing partner to track \[link to customer service metrics article\]?](#)

Every company is different, so don't expect your partner to know all this. Make a list of everything you can think of, and keep the lines of communication open in case additional things come up.

## **Make Time to Help Your Customer Service Outsourcing Provider Develop the Initial Training Curriculum for its Agents**

The longer you work with your outsourcing partner, the easier it will be for their team to operate additional aspects of the journey on their own, but at the beginning, you need to be present and make sure they have everything they need to succeed.

Therefore, consider making time to help your partner's team develop the initial training curriculum for their agents about your brand personality, core values, your products, your



industry, relevant policies and anything else you think is important that agents know when they interact with your customers.

## **Be Available for Quarterly Reviews & Strategizing Sessions**

We recommend getting together with your outsourcing partner's team once a quarter, whether you do it face to face or online, and discussing what's working, what's not, any challenges the team is facing, and any changes you want to see.

Take time to see how the team is doing with the metrics you set, track if there's growth, and understand what's helping that growth or keeping it from happening.

You can use these reviews to get data that will help you make smarter decisions in-house. For example, if there repetitive complaints from customers about the same feature, you can take that to your product team to make sure it gets fixed.

But also use these reviews to reaffirm or adjust the strategy with your partner, aligning it with everything else that's going on with your company at the time, and your goals for the next quarter, the next year or the next 10 years.

## **Make Sure You Get Customized and Scalable Customer Service Outsourcing Services, So You Can Gradually Scale Back Your Involvement**

Onboarding a new outsourcing partner might take some time investment at first, but the idea is that you can then gradually scale back your involvement and start focusing on your core business.

A tropical beach scene with a glass of orange juice in the foreground. The glass is filled with a vibrant orange juice and has a black straw. It sits on a light-colored, textured rock. In the background, there's a clear blue sky, a turquoise ocean, and a line of palm trees and beach umbrellas along the shore.

**FOCUS ON CORE BUSINESS  
IS THE SECOND MOST  
COMMON REASON  
COMPANIES  
OUTSOURCE.**

**THE #1 REASON IS  
COST SAVING.**

**- DELOITTE**

Source: [HelpGrid's Instagram account](#)

Here at HelpGrid, for example, we offer customer service outsourcing solutions that are tailored to your specific needs – and tailored to meet them fast.

We offer a pool of consistently growing, deeply evaluated talent, that's available 24/7. We offer the option to deploy reps quickly when you have operational disruptions and unplanned outages, so you always know you have a safety net.

If you're looking for a partner who will walk with you on your terms, drop us an email at [support@helpgrid.com](mailto:support@helpgrid.com), and get a free consultation.