

# Integrating and Managing an Outsourced Customer Support Team





# Introduction

For decades, savvy companies worldwide have taken advantage of outsourcing customer support. Whether you need to control costs, improve customer satisfaction, get more efficient, scale your support hours and team or simply diversify your operation, outsourcing with a great partner can help.

At GlowTouch, we've helped clients worldwide navigate this process countless times since we began in 2002. We've compiled this guide as an actionable checklist you can follow to seamlessly add an outsourced team.

This guide is for you if you're considering outsourcing and want to understand the process or if you've decided to outsource and need a gameplan.

# 1

## Before You Outsource

To get the most from your outsourced team, set a strong outsourcing strategy. Know what support you need and which key elements of support you want to keep in-house. To help you nail down your strategy, here's a checklist of key questions to answer and steps to take before you outsource support.

1. Why are you outsourcing?
  - Growing capacity
  - Controlling costs
  - Improving quality of service
  - Expanding time zone or hours of coverage
2. What are your customer's needs?
  - What days and time will they need support?
  - What kinds of support will they need at various stages of the customer lifecycle?
  - What are their expectations and tolerances for waiting?
  - Can they be upsold?
3. What do you want to outsource?
  - Are you outsourcing frontline support?
  - Are you going to staff internally during business day shifts and only outsource after hours or overflow?
  - Will you have multiple outsourced support partners who need to be integrated?
4. What technology requirements are necessary for your partner to support your customers?
5. Which channels do you use to engage your customers?
  - Are you looking to outsource a specific channel?
  - Are you looking to add a new channel?
6. Once you know your needs, create your support requirements, which should include:
  - Support channels, e.g. phone, chat, email, social media
  - Required team skills, e.g. technical or account support
  - Any cross-selling and upselling components
  - Hours of operation
  - Anticipated volume and seasonal volume fluctuations
  - Language or localization requirements

## 2

## Engaging a Partner

The key to a good outsourcing engagement is building a Statement of Work (SoW) and Project Scope that clearly define what's expected of all parties. Here's what your SoW and Project Scope should cover:

1. Statement of Work:
  - Definitions — it's amazing how many ways there are to describe the parts of a customer support operation. For example, how is response time defined? Don't allow any ambiguity in the definitions.
  - Metrics and Service Level Agreements (SLAs)
  - Pre-set times to renegotiate agreed SLAs at regular intervals
  - Defined processes for managing unknown requirements
  - Roles and responsibilities to be filled by your outsourced partner and within your internal team
2. Project Scope:
  - Schedules for regular reporting and business reviews
  - Dispute management and root cause analysis processes
  - Customer satisfaction reporting
  - Quality management and reporting
  - Skills and qualifications for staff
  - Training requirements
  - Staffing requirements
  - Forecasting and scheduling process and responsibilities
  - Escalation procedures
  - Knowledgebase responsibilities
  - Intellectual property requirements
  - Privacy or regulatory requirements, if any
  - Mitigate co-employment issues
  - Technology requirements — e.g. technology platforms, access to systems and applications, licenses for software

## 3

## Integrating Your Outsourced Team

**Integrating and motivating your team falls squarely on your shoulders. Here's what you need to do to properly onboard your outsourced team:**

1. Instill your company culture into your outsourced team.
  - Define what your company culture is; cover your core values.
  - Tell the stories behind your company culture.
  - Continue to reinforce that culture throughout the life of your engagement.
2. Make your team feel like part of your company — pass along the “swag,” like company t-shirts, banners and mugs.
  - Pro tips: if you can, have the swag made in your outsourced partner's country — e.g. if your team is in India — e.g. if your team is in India, have the swag produced and shipped from a local supplier.
  - Ask your outsourced teams what they want — winter hats are relevant in Canada; umbrellas are great in India during the wet season.
3. Treat your outsourced team the same as you treat your in-house team(s).
  - If you make them feel like members of your team, they'll treat you and your customers better. But if you make them feel like 2nd class citizens, that will show up in the way they serve your customers.
4. Go to your outsourced contact center and introduce yourself.
  - It's a demonstration of commitment and engagement. Make sure to follow up with regular trips.
5. Participate in training.
  - Your role in training your team will vary by engagement, but make sure training isn't left just to the outsourcer. Ensure your team, even outsourced, has the key skills to support your customers.
6. Select a great CRM that puts all relevant customer information at all of your support teams' fingertips.
7. Set up a strong internal communications channel and make it different from what you use with customers — at GlowTouch, we love Slack.
8. Create an internal management structure.
  - If you have an experienced in-house team that is at expert level, incorporate them into managing your outsourced team.

## 4

## Managing Your Outsourced Support Team

One of the most important aspects of successful, outsourced customer support teams is nailing the roles and responsibilities that you, the client, must provide. Here are the key things you'll need to do:

1. Know the SoW in and out, and hold the outsourcer accountable for the terms.
2. Review and manage to the daily, weekly and monthly metric reports and dashboards.
3. Ensure reports accurately reflect the actual performance.
4. Work with the outsourcer to adjust the program as needed.
  - A good SoW will enable adjustments. If yours doesn't, your SoW needs to be amended.
5. Participate in quality assurance calibrations, which are essential to a good support experience. Don't miss this opportunity to ensure quality.
6. Provide the best forecasting information available.
  - This means actively working with your company's marketing and operations to ensure support isn't caught by surprise when there's a new software release, known bug or marketing campaign.
7. Be an available escalation point.
  - The outsourcer should notify you anytime there's a problem, whether it's a staffing problem or a bad customer interaction.
8. Actively participate in quarterly and other business reviews.
9. Clear roadblocks for support and resolving conflicts.
10. Advocate for the support operation, and don't let disrespect or scapegoating hinder the outsourced team members.
  - This also means taking responsibility, fixing problems and celebrating victories.
11. Visit the outsourcer's place of operations regularly.
  - It's not unusual for a vendor manager to spend a significant amount of time onsite with the outsourcer throughout the engagement. This interaction is essential. A lot can be done remotely for small engagements, but significant engagements deserve the attention that being onsite affords.
12. Actively manage the knowledgebase. A stale or bloated knowledgebase will hinder proper support.
13. Never lose touch with your customer, so you can always give good direction to your team.

## On Your Way to Success

If you follow the steps in this guide, you'll be well on your way to successfully outsourcing customer support and reaping the many rewards of doing so. One of the biggest decisions is to select the right partner. If you're considering outsourcing, we may be a fit.

## More About GlowTouch

GlowTouch LLC provides personalized contact center, business processing, and technology outsourcing solutions to clients around the world. Founded in 2002, its 2,300+ employees deliver operational excellence with high-touch engagement. A certified Woman-Owned Business and six-time Inc. 5000 honoree, GlowTouch is headquartered in Louisville, KY, with additional locations in Mangalore, Bangalore, & Mysore, India, and Santo Domingo, Dominican Republic.

To learn more about GlowTouch, visit [www.GlowTouch.com](http://www.GlowTouch.com).