:ubiquity

The biggest
brand-breaking
CX pitfalls

& 5 strategies to avoid them

Watch your step

Running a scaleup is as messy as it is exciting.

You're busy building new products and services and focusing on projects that are business-critical. Yet this focus can conflict with your ability to offer the absolute best experience for your customers. And no wonder.

You're tap-dancing through a regulatory and reputational minefield. Market forces are in continual flux, straining your resources, and testing your ability to adapt. Better-resourced rivals are trying to poach your best people. All the while, you're trying to capture new business and give current customers the same level of care.

And now it's time to hire an outsourcing provider that can jump into the fray so you can focus on the many, many other balls you're juggling. You're in a pivotal moment—one that's easy to get wrong and hard to rectify.

We've been helping companies like yours navigate the choppy waters of scaleup life. In that time, we've seen the same pitfalls appear again and again.

Some are about people. Some are about processes. All are important not just to avoid, but to get right, so you can choose a provider to help you nurture your CX and grow with confidence.

Here are 5 things to look out for.

01

Seeking a vendor over a partner
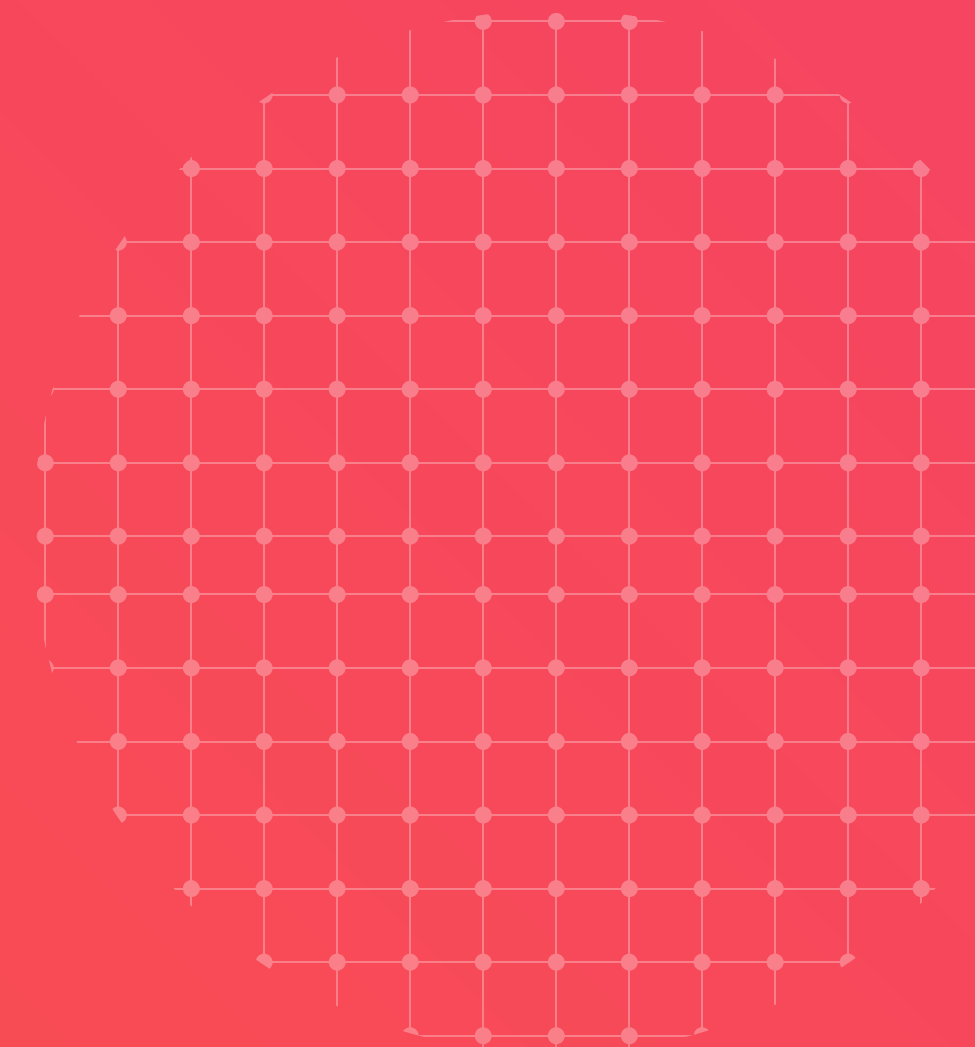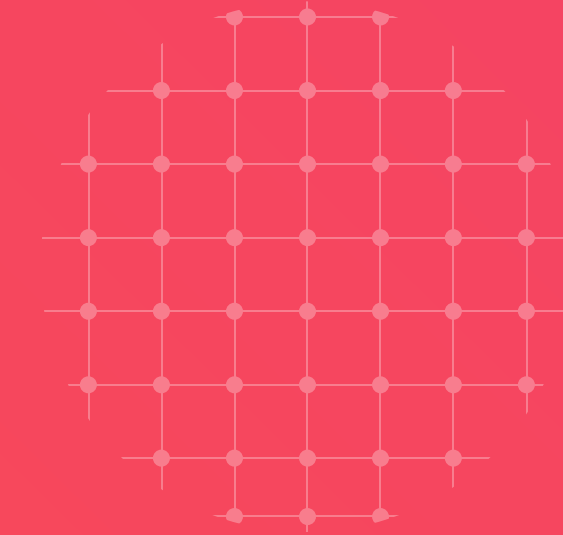
01 Seeking a vendor over a partner

A cursory search will show you how many BPO options are out there (short answer, a lot). Spend enough time combing through their websites, and you'll see the same messages repeated.

If you're short of BPO references from other companies like you, you can quickly find yourself going snow blind from the sheer volume and homogeneity of what's out there.

In this context, it's easy to see every BPO as a vendor, and to approach them as such: someone who can tick the essential boxes at minimal cost and maximum convenience. It's one of the core reasons CX outsourcing has, for many, become a race to the bottom.

But if you're a scaleup big on ambition and low on outsourcing experience, then a vendor relationship won't cut it. And neither will cookie-cutter solutions.

01 Seeking a vendor over a partner

You need to approach your CX BPO through the lens of acquiring a partner—one that can act as an extension and enabler of your operations.

Questions to ask...

? How do you get to know our needs vs our capabilities?

? How have you helped people like me before?

? What parts of our business urgently need attention?

? How should we measure success?

? What other parts of our operations affect our customer experiences? How can we optimize them?

How much does seamless CX matter? In the U.S., 73% of consumers expect consistent interactions across departments, and the same number say experience is as important as products and services.

And yet, an incredible 60% of customers say it generally feels like they're communicating with separate departments, not one company.

Source Salesforce State of the Connected Customer 2022

Find a BPO partner to help you deliver these customer experiences at scale, and you'll stand head and shoulders above the crowd.

Lies, damned lies, and statistics

02 Lies, damned lies, and statistics

A common saying among sports fans is that stats are deceiving. That they're almost never a reliable indicator of the wider picture—intangibles like performance, attitude, camaraderie, and other "soft" factors are never fully borne out by the numbers.

Outsourcing is no different from sports (kind of). You need qualitative as well as quantitative data to make the most informed decisions.

Scaleups often fall foul of this by starting their outsourcing relationships with a specific headcount in mind. While forecasting your resources is essential, staying wedded to a set number can prevent a holistic analysis of your needs.

An experienced BPO partner should help you understand the growth scenarios you're likely to face—and recommend hiring practices appropriately. Your partner should also have the tech, processes, and oversight in place to help you scale up and down seamlessly, depending on demand.

02 Lies, damned lies, and statistics

For example, online sales surge to around $1.12 trillion worldwide in November and December, presenting a huge opportunity for growth—if your BPO partner is able to adapt quickly.[1]

Seasonal surges in shopping activity stress-test your agent resources in two key ways. First, is your overall capacity. In short, seasonal surges require more agents—but keeping the same headcount year round is inefficient and expensive.

Rather than locking you into an ironclad number, your BPO should enable you to adapt your workforce according to your needs.

Second, these surges test your training programs to their limits. Because it's not only about how many new agents your BPO can provide (and unprovide), it's also about how quickly those agents are brought up to speed.

Again, the right BPO partner makes all the difference here. They will develop a curriculum and training plan that ensures new agents are just as good brand ambassadors as those agents who've been working on your brand for years.

[1] Salesforce – Shopping Insights HQ, September 2022

03

A loose grip on talent

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There's now an arsenal of tech available to support self-service customer experiences (chatbots, IVR, SMS notifications).

Used correctly, these are hugely valuable for creating smoother CX journeys. Effective self-service programs are optimized to customer needs. Directing basic inquiries to the IVR or chatbot lets agents focus on more complicated issues.

40% of consumers don't care if a chatbot or human helps them, as long as their problem is resolved.[2]

The trouble starts when your people become sidelined in the CX support cycle. There are normally two underlying causes here:

[2] HubSpot – The Robot Revolution

03 A loose grip on talent

Training

Putting less time and effort into optimizing training. Nobody, but nobody, looks forward to diving into training lectures and slides. The BPO industry can be formulaic—leading to uniform and often uninspiring training programs (and uninspired staff).

Your brand is unique. It's purposeful. Your agents should feel that, too—from the moment they begin. Swap static Powerpoint decks for interactive scenario-based learning and role-playing exercises. It'll help internalize learning and involve agents before they join the front lines.

More than 80% of employees who rated their onboarding experience highly, continue to hold their organizations in high regard, have higher role clarity, and feel strongly committed to their jobs, according to Harvard Business Review.[3]

Find a BPO that nurtures and embeds agents into your culture while building up customer-facing muscle memory. Then watch the customer interactions flourish.

[3] Harvard Business Review – Gen Z Employees Are Feeling Disconnected. Here's How Employers Can Help.

Hiring

First impressions matter—many potential agents' first interaction with your brand will be through your job ads. Defaulting to generic job descriptions with phrases like "ability to multitask" and "good communication skills" will likely attract generic talent.

Specificity is your ally for hiring agents best positioned to develop and execute your growth strategy. Get granular on the traits and skills that will make for a successful hire for your program. Have the boldness to say what traits don't matter—it's equally important to turn away inappropriate hires as it is to attract great ones.

This applies to customer-facing and leadership roles, too. Strong talent attracts better leaders, which in turn makes it easier to recruit more and better agents, all while reducing turnover and increasing agent engagement with your brand.

04

Blurry success

metrics

04 Blurry success metrics

Your CX solution lives and dies based on your objectives. Yet we've seen many first-timers not setting goals that define post-launch success, or target metrics that their own operations haven't come close to achieving.

There are many common metrics—Average Handle Time, Customer Satisfaction, Net Promoter Score, Customer Effort Score—that hold real value and should be included in your reporting.

But they shouldn't be your sole reference for success. Like hiring, specificity is the best way to sharpen your measures for success (and keep your provider accountable).

A BPO partner is an extension of your business. That means they:

- ✓ Are aware of and adapt to your growth plans
- ✓ Ease the back-office burden
- ✓ Stay on top of market changes
- ✓ Help you navigate disruptive events
- ✓ Bring proactive recommendations

Your reporting frameworks should account for all these factors. When you incorporate these considerations into your partnership agreement, you move from a generic vendor relationship, to a partnership constructed around your business.

05

Security and business continuity

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As we've seen, a true customer experience partner does far more than the name alone suggests. One of the lesser spotted, but equally important facets of BPO partnership is security and resilience.

Beneath every customer interaction, and behind every system that supports those interactions, is the need for rock-solid security and business continuity practices.

Despite the potentially devastating consequences, these two things aren't given enough attention. Security breaches are often the loudest and most potentially damaging types of customer-facing incidents.

The average cost of a data breach reached an all-time high of $4.35 million in 2022, according to a recent IBM study.[4] For established organizations with vast IT and security teams, these incidents can be hugely damaging. For scaleups, they can be fatal.

[4] 2022 Cost of a Data Breach Report

05 Security and business continuity

Your BPO should be held accountable to your IT, Ops, and Security teams. Facilitate early conversations between these stakeholders to ensure you have a robust and resilient security posture that can flex to your growth plans.

And when it comes to business continuity, the pandemic was a wakeup call. As Deloitte puts it, "many clients and outsourcing partners found that during the COVID-19 crisis there was no playbook, plan or rehearsal for what was happening."[5] But while many BPO-client partnerships were caught flat-footed, some were flexible enough to pivot. BPO providers with multiple geographical sites (and some creativity) were able to rapidly shift the focus of their operations around lockdown measures to ensure continuity of service.

Some deployed remote agents on a PCI-certified work-from-home platform to ensure that maintaining capacity went hand in hand with maintaining security.

When it comes to choosing your BPO provider, interrogate their business continuity strategy, and see how robust it is. We're not saying you have to choose a provider that won a most resilient partnership award over the pandemic—but it's a good yardstick.

[5] Deloitte COVID-19: A wake up call for the BPO industry

Step forward with confidence

When you're in growth mode, you can't forecast every curveball that will come your way—and neither can your BPO provider (despite what they may tell you).

But you can make smart BPO provider choices and put principles in place to fortify against them so you can continue your growth plans without fear.

This foundation will help you avoid the pitfalls so you can:

✅ Safeguard your customers' experiences (while continuing to elevate them).

✅ Keep your top talent, keep them improving—and give them great employee experiences along the way.

✅ Use success metrics in a way that's actually impactful.

✅ Build operations that are robust and resilient—in the face of seasonal (or giant, global) disruption.

→ **See our 5-step approach to scaling CX here**

→ **Or let's have a chat about what you need today**