From service provider to strategic partner:
How to differentiate your BPO with Slack
# Table of contents

**Introduction**  
3

**Chapter 1: Engage and retain agents**  
4  
Quickly onboard agents to new tools and processes  
5  
Improve performance by capturing coaching opportunities  
6  
Create a culture that combats turnover  
7

**Chapter 2: Optimize your service operations by streamlining collaboration**  
10  
Resolve issues in real time with Slack channels  
11  
Find answers faster with centralized knowledge and AI-powered search  
12  
Maximize productivity with simplified workflows  
14

**Chapter 3: Lead the market by becoming a strategic partner**  
16  
Highlight insights about your clients’ customers  
16  
Offer additional value with a service partner ecosystem  
17  
It’s time to work with your clients, not just for them  
19
Introduction

Business process outsourcing (BPO) companies used to be the go-to for scaling lower-skill knowledge work, such as tier-one customer service and other back-office tasks. But as digital transformation becomes table stakes, businesses need more from their BPO than reliable service—they need a partner in innovation and growth.

There’s currently a gap between companies’ need for strategic outsourcing partners and the number of BPOs that can actually deliver on this. According to Deloitte’s “2020 Global Outsourcing Survey,” “only a handful of client interviewees stated their service providers had attained the outsourcing ideal of strategic partner.”

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Source: 2020 Global Outsourcing Survey, Deloitte

The challenge is that most BPOs still struggle with cumbersome processes, tangled toolsets and poor employee retention. These factors make it difficult to offer clients the depth of insight and attention required to be a partner, not just a provider.

To solve this issue, you need to create a layer of standardization among the people, processes and data your BPO handles every day. In simpler terms: Your agents need a central place to share information and pull insights, and your clients need a fast way to connect with your BPO and derive more value from the relationship.

Slack makes that possible. Here’s how.
Chapter 1: Engage and retain agents

Your agents are your No. 1 opportunity to differentiate your business. Engaged, tenured agents have the knowledge and skills needed to offer superior service.

The problem? The majority of BPOs struggle to retain and develop their staff. The average attrition rate for contact centers is 30%—which means they’re losing roughly a third of their workforce on a regular basis.

That means a third of your staff is new to your internal processes, inexperienced with your clients and working at less than full productivity.

Attrition and turnover don’t just reduce the quality of your service. They also limit your ability to compete on price because 20% of staff turnover happens within the first 45 days. When agents leave this early, the costs of recruiting, onboarding and training go to waste before you get any return on your investment.

That investment isn’t small, either. According to research by Cornell University, replacing an agent costs 16% of their gross annual earnings. And if your employees are salaried, you’re looking at spending six to nine months’ worth of their salary to replace them.

16%
Replacing an agent costs 16% of their gross annual earnings.

Source: Research by Cornell University, Cornell University

Slack helps you reduce attrition and keep agents engaged by providing a central place for everyone to access the tools, resources and people they need to be successful. Teams that use Slack have been shown to be 24% faster in reaching full employee productivity.

Channels in Slack provide an organized space for everything (and everyone) related to a project, topic or team.

In channels, agents can access all the training and documentation related to their job or to a particular client. They can also easily reach out to supervisors, SMEs or training managers with their questions in real time.

The best part? These questions and answers are public to all agents in the channel, so new agents can grow their knowledge with little outside help.

For managers, Slack channels highlight challenges and coaching opportunities with their agents. This mentorship is critical for developing agents in a fast-paced environment.
Quickly onboard agents to new tools and processes

Agents who are new to your company (or even just new to a client) have to quickly learn your BPO’s tools and processes—but this knowledge-building often becomes scattered among several different systems and teams. Slack centralizes critical onboarding information, so it’s easily accessible to new agents.

**Influx** is the world’s first and largest on-demand support provider, so it’s essential that agents receive quick training on troubleshooting solutions for clients. Influx sees efficient training as a competitive advantage and uses Slack to help it achieve that goal.

Coaching a new hire to ramp up is a team effort—and according to Influx’s chief growth officer, Alex Holmes, Slack greatly simplifies the process.

“Slack makes it easy for everyone responsible for training that person to have all the knowledge, tools and processes they need to be successful in shared channels,” Holmes says.

Along with channels, Slack’s custom workflows empower BPOs to ramp up new agents with personalized learning experiences.

Instead of overwhelming agents with too much information at once, managers can create automated, interactive workflows (like the one pictured) that help agents find the right pace for their training. These workflows can also act as automated onboarding buddies to help new agents access the right HR and IT teammates, request PTO and find critical resources in your learning management system.

Anyone can use Slack’s **Workflow Builder**—no coding knowledge or developer resources required. Use this feature to quickly build interactive, automated workflows with our massive library of integrations.

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**Alex Holmes**  
*Chief growth officer, Influx*
The leading electronic-signature software company, DocuSign, uses Slack and Workflow Builder to create a faster, better onboarding experience.

“Before Slack, usually a new hire would ask around to find documentation during their onboarding phase, and you would spend around two weeks trying to figure it all out,” says Adonay Mello, a senior IT manager for DocuSign in São Paulo. “Some of it would be in one online storage solution, other files in another one, a few things on emails.”

Then its IT team consolidated all the documentation into a single location and set up a two-step onboarding workflow in Slack. Now onboarding new hires has gone from a winding two-week experience to a near-instantaneous download. On their very first day, people are provided with all the documentation they need to hit the ground running in their new roles.

**Improve performance by capturing coaching opportunities**

In a fast-paced organization, it’s difficult for agents to find time for the ongoing training that will make them excellent at their jobs. Too often, this means that development initiatives end up falling by the wayside—which hurts agents’ confidence and, ultimately, their performance.

At Intuit QuickBooks, they use their Slack ecosystem to increase customer-facing teaching moments. These learning opportunities happen amid day-to-day work, so managers don’t have to disrupt agents and pull them out of the queue for daylong training.

For example: Say an agent doesn’t ask a customer the right question to solve a case. Other team members have full context on the ticket thanks to Slack’s integrations with ticketing tools, so they’re equipped to help the struggling agent in real time.

“Hundreds and hundreds of questions come in every day and create these micro-coaching opportunities, which drives our skill set to a level we’ve never seen,” explains Omer Khan, former digital lead for customer success at QuickBooks.

By capturing coaching opportunities and developing agents on the job, Intuit QuickBooks increased agent confidence by 20%.

“After we implemented Slack, we saw a 12% increase in our NPS,” Khan says. “We’re effectively driving results for both agents and customers.”

Gamification—such as employee incentives and team leaderboards—is another emerging strategy that service teams are adopting to help improve agent engagement and performance. In Slack, you can leverage workflows (or even build a custom app) to display scoreboards and/or incentives in a channel.
Chapter 1: Engage and retain agents

Best of all, these learning opportunities and coaching moments are all connected to the workspace where your agent is already engaged. No more training invitations that get lost in their inboxes. No more one-on-one meetings that happen outside the context of the actual work. In Slack, you can seamlessly integrate training into the daily workflows of your teams.

Create a culture that combats turnover

The fast-paced, often stressful environment of a BPO makes it especially challenging for agents to feel connected to coworkers and the company at large. To lower attrition rates and improve engagement, reshaping your culture is key.

Slack helps you build a collaborative company culture by encouraging more connected, human communication. The transparency and informality of channels allow teammates to easily connect with one another and for leadership to communicate more openly with employees.

In a recent survey, 96% of Slack users said that the platform helps them forge better connections with their superiors than email. It also found that 95% of users have team-building Slack channels with their peers—something that was crucial to building culture at SurveyMonkey.

Employee engagement Slack channels are very popular at SurveyMonkey. In the #winning channel, for example, members can shout out sales team wins and offer words of appreciation and encouragement for a job well done. And the #newtothetroop channel

96%
of Slack users say that Slack helps them forge better connections with their superiors (versus email)

Source: The future is collaborative: How communication platforms are shaping the way we work

helps new hires easily ask questions in a small forum overseen by an HR representative.

Many of the most popular channels are ones that help build company culture and enhance
Chapter 1: Engage and retain agents

individuals’ sense of belonging. These include a variety of diversity and inclusion groups, along with ones for specific hobbies and interests like #fitness, #dogs, #coffee and even #hashtagdadjokes.

“From posting important product updates to celebrating positive customer interactions to sharing customer feedback via social channels, Slack is how we stay in sync,” says Dan Henig, the vice president of customer operations at SurveyMonkey.

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Channels also make it easy to gather and act on engagement data. Slack’s analytics suite allows you to proactively combat attrition by looking at communication trends across every team and location. For example, your Slack engagement report might show that one team member posts in your #dailyupdate channel only a few times a month.

By monitoring who’s engaged in your Slack workspace and how, leadership can catch disengaged agents more quickly and take steps to get ahead of the problem.

Don’t stop there, though—ask agents how they feel directly with pulse and engagement surveys via app integrations with your preferred survey tools. In Slack, it’s easy to share surveys, automate survey prompts and monitor responses.

If surveys aren’t your company’s thing, just check in with teams and get their feedback in Slack directly—you can learn a lot from the team discussions that may crop up as a result.

Companies that implement Slack see a 5.9% increase in employee satisfaction on average¹ by providing employees with a more connected, human way of communicating at work—and by providing managers with the tools and insights they need to continually improve their engagement efforts.

¹ The Total Economic Impact™ of Slack for Service Teams,” a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021
Chapter 2: Optimize your service operations by streamlining collaboration

On a daily basis, a BPO agent works across multiple systems and processes, which makes it hard to quickly solve problems for clients. Intercom found that 44% of support teams use between six and 10 tools just to do their daily work—and that’s for in-house teams. This large amount of tools often leads to slower resolution times—and more opportunity for error.

“Agents often work across multiple disconnected applications to get the information they need to resolve a single customer issue, leading to a drawn-out and inefficient resolution,” says Andrew Gillespie, senior regional manager of customer experience at Slack, at Slack Frontiers.

Despite having so many tools, many agents still don’t think the tools they have are sufficient to do their job well. According to the Taylor Reach Group, 60% of contact center agents don’t think their company consistently gives them the technology they need to help customers.

The issue is a lack of integration among so many tools, which leads to siloed communication. When tools are disconnected, it’s hard for agents to access the experts they need to solve more complex customer issues.

To offer better service to both your clients and their customers, bridge the gaps between teams and tool stacks with Slack channels. Your agents will have a single, standardized point of access where they can manage knowledge, data and workflows among systems.

44% of support teams use between six and 10 tools just to do their daily work

Source: “The future of support: 5 key trends that will shape customer care in 2021,” Intercom
Resolve issues in real time with Slack channels

In Slack channels, teams can quickly and efficiently swarm complicated issues. **Integrations with major ticketing platforms** allow you to link ticket info directly into Slack, where agents can ask for help from the team, or tag in supervisors and SMEs to help them resolve an issue. With **Slack Huddles**, teams can instantly hop into an audio discussion and share their screens in any channel or direct message to make collaboration even more immediate.

Take the CX team at accounting software company Xero. When an agent needs guidance, they mention @coreseniors in their dedicated channel, which notifies every senior member who’s online. Whoever picks up the issue reacts with an emoji to indicate that they’re on the case. Then they’ll start a thread to provide a resolution.

Collaboration in Slack happens in real time—agents can tackle issues with their team even while they’re on the phone with a customer, leading to much faster resolutions. In fact, support teams using Slack see a **9.3% average reduction in total resolution time**. Shorter resolution times mean your agents can handle more tickets, which translates into lower cost per ticket—teams using Slack see a corresponding **15.1% average reduction in cost per ticket**.

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1 The Total Economic Impact™ of Slack for Service Teams, a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021
At Oscar Health, a direct-to-consumer health insurance company, Slack is key to offering white-glove service in a complex industry.

For every 8,000 to 10,000 Oscar members, there’s a dedicated Concierge team of customer service representatives called Care Guides. These guides are supported by a regional team of clinical experts and case managers, including nurses and social workers. To keep up with the complex and ever-changing regulations in the health-care industry, the Concierge teams use tiered Slack channels to share knowledge and find answers fast. These include:

- **Care team channels (tier one)**, where Care Guides source fast responses to common problems and questions.
- **State and regional channels (tier two)**, for questions pertaining to state-specific rules and guidelines.
- **Expert channels (tier three)**, for complex or uncommon issues; these are segmented by topic, such as claims, providers and eligibility.
- **#ohh-timesroom (Care Guide communications channel)**, used to communicate high-level government updates, policy changes and member-friendly messaging to all Concierge team members. Every care team has a custom emoji, which is used as a “read receipt” on important announcements.

“In Slack, we can troubleshoot and identify the information needed to answer a question, and this enables us to be more succinct and efficient when responding to members. Slack allows us to solve issues in almost real time, often with the member on the phone.”

Sebastian Burzacchi  
VP of Service operations, Oscar Health

The tiered channels ensure that service representatives can quickly tap the right people for help.

“In Slack, we can troubleshoot and identify the information needed to answer a question, and this enables us to be more succinct and efficient when responding to members,” says Sebastian Burzacchi, vice president of service operations at Oscar Health. “Slack allows us to solve issues in almost real time, often with the member on the phone.”

**Find answers faster with centralized knowledge and AI-powered search**

Fast collaboration is essential for agents, but you also don’t want every issue to require a
conversation. To do their work efficiently and effectively, agents need to be able to find answers on their own—and that requires fast access to knowledge and documentation.

Slack helps reduce escalations by empowering agents to rapidly tap into their BPO’s collective knowledge. Slack’s AI-powered search delivers immediate answers to agents from any source—whether it be knowledge bases, documentation or previously answered tickets.

In Slack, collective knowledge builds quickly. Use integrations to centralize data from your ticketing tool, knowledge base and internal documentation in Slack. Agents can then use Slack’s powerful search functions to quickly find relevant documents, files, messages and previously resolved tickets—without wasting time digging through multiple systems.

And when your team swarms issues in Slack, all the triage history is right there. When a similar issue arises, it’s easy for new agents to see how things were resolved in the past, cutting down the time it takes to resolve a ticket. By giving tier-one agents more power to solve issues themselves, teams that use Slack see an average of 17.4% reduction in escalations¹.

Prior to using Slack, broker TD Ameritrade relied primarily on email to share information internally. This created a problem: Employees’ access to information depended on who they knew and how well they knew the organization.

When it implemented Slack, it moved communication to public channels. With this switch, it was better able to scale internal knowledge as needed.

“We needed a solution that facilitated communication and information sharing and would integrate with our other software systems. Slack provided that at an enterprise scale,” says Vijay Sankaran, the former chief information officer at TD Ameritrade.

¹ The Total Economic Impact™ of Slack for Service Teams, a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021
Maximize productivity with simplified workflows

When your agents don’t know what details they need from a customer, what information to include in an escalation or where to find help with approvals and exemptions, it drags down productivity of both the agent and the specialists helping them.

With Slack, anyone can create powerful workflows that simplify and standardize complex processes, so agents can spend more time servicing customers.

For example, you can create custom forms that ask for all the necessary information on an issue, then send that information to a channel where the next available specialist can pick up the ticket. This type of simple workflow cuts down on a lot of back-and-forth, freeing the specialist to support more agents and the agent to support more customers.
The Concierge team at Oscar Health uses Slack to automate help requests in its expert channels. The workflow prompts Care Guides to fill out a form with critical information, such as the state or policy involved.

“Before there was a lot of back-and-forth in the channel,” Burzacchi says. “The form gave us a standardized submission process so supervisors receive all the information necessary to solve the issue.”

$2.6 million
Service teams using Slack have cut the cost of customer service tickets by $2.6 million.

Source: “The Total Economic Impact™ of Slack for Service Teams,” a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021

All told, service teams using Slack have reduced the cost of customer service tickets by $2.6 million by leveraging fast collaboration, accessible knowledge and automated workflows. They see a 12.5% average increase in total number of tickets resolved per month, as well as an 11% average reduction in daily ticket backlog.

1 The Total Economic Impact™ of Slack for Service Teams, a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021
Chapter 3: Lead the market by becoming a strategic partner

Businesses want BPOs that are more partners than providers. But how do you actually become an ally to your clients?

The first and biggest way is by leveraging your closeness to your clients’ customers. In many cases, you have customer insights your clients just don’t have—after all, they pay you to directly take care of customers with frontline support. Set up tools and processes to make this data widely visible to clients.

You have a unique opportunity to offer your clients valuable customer insights and trends they can’t get anywhere else, but only if you have the tools and processes in place to make this data visible without racking up absurd Cost of Service to do so.

Offering a service partner ecosystem is another way to go above and beyond for clients. Many clients will use multiple vendors or “interchangeable service providers” to outsource their work. But in its “2020 Global Outsourcing Survey,” Deloitte found most businesses say they’re not doing enough to manage all their different service providers adequately and are looking for ways to improve the ways they integrate them. By offering your clients better access to their customers and vendors, you will cement yourself as an essential partner to your existing clients and build a more valuable and competitive service offering.

Slack helps you accomplish both objectives. BPO agents can quickly collaborate over tickets and gather knowledge to build insights. At the same time, your BPO can use Slack Connect to bring your core team, your clients and your clients’ service partners into a single workspace.

Highlight insights about your clients’ customers

With Slack, it’s easy to make customer insights accessible and actionable across your business. Use app integrations and custom workflows to pipe data from ticketing platforms, CRMs and other critical tools into Slack channels for observation. Here, stakeholders from across your company can create a thread and start a conversation about that data, so it’s easy to discuss and take action on customer insights.

Along with better access to quantitative data from a number of systems, you’ll get better qualitative data on customers. Agents can easily flag recurring issues and trends and
share customer sentiments with account executives, who can then turn these insights into tailored reports and recommendations for clients.

It’s all about access. When customer data is scattered among various systems and people, it’s difficult to identify the voice of your clients’ customers. Slack gives agents a centralized forum to share customer insights from across multiple systems, while custom apps help to analyze and surface actionable trends.

This deep visibility empowers BPOs to deliver trends reports and tailored proposals to clients.

For example, let’s say the team at Acme BPO has experienced a high volume of tickets that include the phrase “self-schedule service,” something that the client, Beta Co., does not currently offer.

Ordinarily, it’d take a supervisor noticing, monitoring and manually counting tickets in order to identify this trend. But with a custom Slack workflow, you can continually scan tickets, then notify the appropriate stakeholders that a high volume of tickets have come in with the same phrase in the last week.

This trend signifies demand for a new Beta Co. offering—and Acme is now in the position to present this valuable process insight to its client.

Increased insight into essential data means an increased ability to support clients strategically—a big reason that companies that adopt Slack see an average 5.4% increase in customer lifetime value¹ and a 9.2% increase in NPS¹.

Armed with unique insights and better customer service, you’ll be ready to serve as an essential strategic partner to your clients.

**Offer additional value with a service partner ecosystem**

Slack isn’t just an internal tool. **Slack Connect** lets you collaborate with people outside your company in a shared workspace that’s protected with enterprise-level security.

“Slack Connect enables us to work together with clients, problem-solve together,

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¹ The Total Economic Impact™ of Slack for Service Teams,” a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021
Chapter 3: Lead the market by becoming a strategic partner

troubleshoot together, make decisions together, all while building a consistently reliable support org,” says Holmes of his experience using Slack Connect at Influx.

Better yet, Slack Connect also gives your clients a secure, dedicated space to work with their other service providers—which benefits your own team too.

“In Slack, team members from your BPO, Amazon and ACME could all collaborate on the issue in a conversation thread that contains the original ticket—leading to a faster, more satisfying process for everyone involved.

Say your BPO provides support for Amazon customers. A customer gets an email saying a package is delivered, but it isn’t there. That customer calls your BPO, and an agent now needs to contact Amazon to get more information on the status of the package—which leads to Amazon looping in ACME Courier Company to connect with the contracted truck driver.

With traditional communication tools, this process becomes frustrating for all parties. It’s a game of telephone that leaves plenty of room for mistakes and delayed resolutions.

The delivery service provider Shipt takes advantage of Slack Connect. Its 18-person partner success team navigates joint business planning, quarterly reviews and more with over 120 retailers—including giants like Target, Costco, H-E-B, Petco and CVS. Some of these partners share a private Slack channel with Shipt using Slack Connect—which is especially essential when there’s ongoing software testing between partners.

“Our engineers collaborate directly with our external partners’ engineers using Slack to

**Alex Holmes**
*Chief growth officer, Influx*
troubleshoot in real time. This helps us solve issues faster and provide a better overall experience for our retailers,” explains Kit Naramore, vice president of partner success at Shipt.

When issues pop up for Shipt’s retail partners, Slack Connect sets the stage for success.

“We can be more collaborative and drive more impactful engagement with our partners using Slack Connect, especially when compared to the limitations of email silos,” says Naramore. “Teams across both organizations are able to rally, create that natural banter and make light of a situation that might otherwise be stressful.”

Slack isn’t just a platform for facilitating internal operations. It’s also a space for your BPO to gather and offer unique customer insights to your clients and connect with their service providers. With these features, Slack has helped companies across the board improve their customer service. Teams that use Slack see an average 15.7% increase in CES and an 11.4% increase in CSAT score.

**It’s time to work with your clients, not just for them**

Even in a world of digital transformation, human interaction and collaboration are becoming more important, not less. The BPOs that will lead tomorrow’s market are the organizations willing to do the necessary work to be a true partner for their clients.

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1 The Total Economic Impact™ of Slack for Service Teams,” a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021
About Slack

Slack makes work simpler, more pleasant and more productive. It’s a channel-based messaging platform for the enterprise that brings the right people, information and tools together to get work done.

From FTSE 100 companies to corner shops, millions of people around the world use Slack to connect their teams, unify their systems and drive their business forward.

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