



PARTNER  
*Hero*

| CX LAB

MASTERCLASS

# Mastering Peak Season Success:

## Strategies for Customer Loyalty & Efficiency

DIGITAL RESOURCE

# Contents

<b>Introduction</b>	<b>5</b>
<b>Understanding today's ecommerce shopping behavior</b>	<b>7</b>
The state of ecommerce	9
Cart abandonment rates	10
The rise of social commerce	11
<b>Predicting and preparing for high-volume customer support</b>	<b>12</b>
Understanding consumer behavior	14
WISMO tickets	15
Rise of social commerce	16
Staffing for high-volume periods	17
Implementing self-service automation and AI	17
<b>Leveraging social media for ecommerce</b>	<b>20</b>
The role of social media in customer support	21
Why social media customer service is different	22
Managing customer service publicly: best practices	23
<b>Using the right tools and tech</b>	<b>27</b>
Self-service options: knowledge bases, FAQs, and community forums	28
AI-driven support	30
Automation for customer empowerment	31
Workflow automation	32
Multi-channel strategies	32

<b>The power of outsourcing during peak season</b>	<b>34</b>
Benefits of outsourcing	35
Selecting the right BPO partner	36
Crafting your RFP	38
Questions to ask potential BPOs	39
Evaluating proposals	40
Getting the BPO onboarded	41
Co-employment considerations	43
<b>Workforce management: forecasting and staffing for peak season</b>	<b>44</b>
Forecasting for success	45
Real-time management: staying flexible during peak seasons	46
Balancing KPIs for optimal performance	47
<b>Consider us to be your copilot during peak season</b>	<b>48</b>

**Is your  
support  
strategy ready  
for *Black Friday*  
& *Cyber Monday*?**

## Introduction

In recent years, we've witnessed a shift in the way customers shop—they're becoming more and more savvy, exercising their right to shop around, compare prices, and read (and act on!) reviews.

This often leads them to switch from brands they've historically been loyal to in favor of lower prices.

**This trend shows no signs of slowing down, even during your most crucial peak seasons.**

While lower prices can threaten brand loyalty, it's not the only factor driving consumers away.

Studies show that while consumers do seek out better prices, they also highly value excellent customer service, personalized experiences, and a brand voice that resonates with them.

**As a CX professional, you may not have control over your product's price, but you absolutely have influence over these other crucial elements.**

As we gear up for busy shopping days like Black Friday and Cyber Monday, managing these factors while handling increased volumes can feel overwhelming.

However, if you start planning today, you'll be better equipped when the time comes.

I'm Raquel Rincon, a Partner Success Manager at PartnerHero. My role involves helping brands leverage our outsourcing services, technology, and in-house experts to maximize the effectiveness of their customer service teams.



Today, we'll guide you in strategizing and planning for your busiest seasons—and you can take this resource with you to revisit whenever needed (and share with others)!

We will:

- ✔ **Dive deeper into current shopping behaviors and discuss how to use these trends to staff, strategize, and adapt for peak seasons.**

---
- ✔ **Explore tools and services that can help you manage increased volumes while improving KPIs and saving money.**

---
- ✔ **Hopefully you can gain a better understanding of how a strong customer service team can drive sales, enhance brand reputation, and build lasting loyalty.**

*Let's go!*



PARTNER  
*Hero*

| CX LAB

CHAPTER 1:

# Understanding today's ecommerce shopping behavior

# Understanding today's ecommerce shopping behavior

Let's dive into current shopping behaviors and trends, and explore how they relate to your customer support strategy.

Recent studies underscore just how influential customer service can be on buying decisions and brand loyalty.

**A positive customer service experience can significantly boost brand loyalty—43% of customers are more likely to stick with a brand after a positive interaction (Kronos).**

**Among regular shoppers, 83% will feel even more attached to brands that handle complaints effectively.**

It's clear that excellent customer service is crucial, but when peak season hits and ticket volumes surge, maintaining that level of service can be challenging.

While you know volumes are high and your agents are stretched thin, your customers don't—and they still expect the same level of service they've received during quieter times.

A bad experience can drive customers away quickly, so it's essential to plan and staff accordingly for peak season.

**65% of people say a poor customer service experience is enough to make them switch brands.**

and 67% of those dissatisfied customers will share their negative experiences, potentially influencing others who might have considered

your brand. Given that 92% of consumers trust recommendations from friends and family, those negative reviews can be damaging.

So, how do customers define good customer service?

While it can be subjective, understanding current shopping trends can help us get closer to a universal standard.

## The state of ecommerce

First, let's talk about the current state of ecommerce. While consumer sentiment has improved in recent years, it hasn't returned to pre-COVID levels.

**However, e-commerce is still expected to grow by 8.8% in 2024, with 20.1% of all retail purchases occurring online.**

The shift toward online shopping continues, with consumers empowered to “shop around”—learning about products, reading reviews, and comparing prices—all from the comfort of their homes.

Millennials and Gen Z, who are the most frequent shoppers, prefer online shopping over in-store experiences.

Consumers are also increasingly shopping from their mobile devices.

**45%**

of e-commerce sales now happen on mobile, meaning customers are more likely to seek help online rather than visiting a store

**67%**

of customers prefer self-service options over talking to a representative

Automation—which we will discuss later—helps customers get what they need quickly—just what they want.

## Cart abandonment rates

Cart abandonment is a hot topic during peak season.

**In 2023, the average cart abandonment rate was a whopping 70%, with spikes during busy shopping days like Black Friday and Cyber Monday.**

**Common reasons for cart abandonment include hidden fees and shipping costs (47%) and mandatory account creation (25%) (Statista).**

**Additionally, 48% of consumers now expect faster shipping, with their expectations dropping from 2.36 days in 2022 to 2.15 days in 2023.**

Offering clear pricing, guest checkout options, and efficient processes can help reduce abandonment and boost customer satisfaction.

## The rise of social commerce

One of the most significant shifts in online shopping is the rise of social commerce.

**Social commerce is the practice of using social media platforms to facilitate online sales and purchases.**

**It's set to reach a 25% penetration rate in 2024, meaning one in four potential customers uses social media to shop. Tech-savvy generations, Millennials and Gen Z, account for 52% of social commerce purchases.**

Not only is e-commerce becoming more social, but customer support is as well. More customers are reaching out to brands via social media DMs and comments to get support.

For customers, it's an easy channel where they can get real-time support. Engaging with customers on these platforms can make them feel more connected to your brand.

At first glance, all of this might seem like a collection of numbers and facts. Stay with us—in the next chapter, we'll take these trends and turn them into predictions for peak seasonality.

CHAPTER 2:

# Predicting and preparing for high-volume customer support

# Predicting and preparing for high-volume customer support

Let's take a look at what we learned about current shopping behaviors and turn it into actionable strategies for managing customer support during peak seasons.

Our goal here is to predict the who, what, when, and how of incoming tickets, so we can optimize our support operations to handle the surge effectively.

Based on what we talked about earlier, here's what we want to address in our strategy planning:

- ✓ **Customers today want to help themselves quickly, without any hassle.**

But when they do need assistance, they're expecting a personalized and seamless experience. Anything less is subject to negative feedback, which is often shared with others.

- ✓ **Consumers are using social media platforms, not just for shopping but for customer support as well.**

This is all part of the social commerce movement, which is turning social media into a one-stop shop where people can research, purchase, and get help in one place.

- ✓ **Genuine reviews and word-of-mouth recommendations play a role in purchasing decisions.**

...and when it comes to making those purchases, customers are doing so online—often from their mobile devices.

But even after they've put items in their cart, it's not a done deal.

- ☑ **Many customers abandon their carts due to extra fees or a lengthy checkout process.**

Finally, we have to consider that consumer sentiment may continue to remain low, especially during the election year in a post-COVID landscape.

So, how do we use all of this information to anticipate common inquiries, staff our team appropriately, and implement self-service solutions?

## Understanding consumer behavior

Understanding consumer behavior is key to predicting the types of issues customers are likely to raise during high-volume seasons.

Here's how you can use this knowledge:

- ☑ First, **expect to see more tickets related to mobile website or app issues, checkout problems, and mobile payment failures.**

The easiest way to reduce these tickets is to make sure your website is mobile-friendly, bug-free, and stress-tested for forecasted volumes. Work with your web developer to ensure this is done.

- ☑ But even with all the testing, issues can still happen. **For any outages, let your customers know through email and social media.** Make sure your agents are familiar with your app and website, and have it accessible to confirm bugs when tech-related tickets come through.

- ☑ Now, with cart abandonment, there isn't much a customer service agent can do. But we know that **customers abandon carts due to things like unexpected costs or a lengthy checkout process.**

Customers reaching out about shipping costs or additional fees might have a few things sitting in their carts. When customers who aren't loyalty

program members reach out for help with their carts or clarifying unexpected costs, your agents can use this as an opportunity to share the benefits of joining your loyalty program.

We know customers also dislike lengthy checkout processes, **so we should consider incentivizing them to do so**. By signing up, customers could get discounts that might help reduce those costs, like 10% off your first purchase.

You want customers to sign up instead of checking out as guests because loyalty members typically buy more often and spend more than non-members.

## WISMO tickets

And then, there's WISMO tickets—which stands for Where Is My Order?

As the acronym implies, these tickets include popular phrases like:

**“Why haven't I received my order?”**

**“My item was marked as delivered but it's not here!”**

**“I ordered this item for a particular event and I need my order to arrive today.”**

Transparency is key here, so keep those expected delivery dates updated and visible at checkout.

**As we approach the holiday season, make sure to share when customers need to place their orders to receive them in time for Christmas.** This will help reduce the number of these questions that come through.

Still—tickets about delivery times, tracking information, and shipping policies are some of the most common questions you'll see. They can flood

inboxes fast during peak season, which means delayed first responses for all ticket types.

What's more, these tickets can be easily answered, but this already frustrated customer still needs to wait for their question to reach an agent.

I highly recommend using self-service automation for WISMO tickets. It's faster, accurate, and cost-effective.

Customer experience platforms like *Gorgias* have an add-on feature that costs just between \$0.18 and \$0.40 a ticket, and it leaves your associates free to answer more pressing concerns.

## Rise of social commerce

With the rise of social commerce, be ready for more customer inquiries coming through social media channels. These might include questions about product availability, order status, or returns.

**Ensure your social media support team is prepped and ready to handle these inquiries promptly.**

Have an associate who is dedicated to social media and knows how to embody your brand's voice, as some questions may be asked in your public comment section, **which means your response will be visible to your entire audience.**

**Side tip: if your business is running social media campaigns or influencer marketing campaigns around a particular product, have a plan in place to pivot and showcase a different product in case it sells out.**

If your product sells out before Christmas or even Black Friday, be transparent with your customers. Let them know on your website when, and if, the product will be back in stock.

Make sure your agents are informed too, so they can share that info with customers or suggest alternative products.

## Staffing for high-volume periods

When those high-volume periods hit, it's all hands on deck. I cannot stress enough the correlation between headcount and customer satisfaction.

**If agents need to take on this volume without extra help by working faster, quality will suffer, and questions won't get answered fully.**

Consider bringing in temporary staff or increasing shifts during peak periods. This can help you extend your service hours and staff more during higher intervals.

It's important to have a strategy in place to ensure new hires are quickly brought up to speed with your systems and processes. It's a lot of work and money to bring on a temporary team.

Here's a pro tip that might save you both time and money:

**Consider outsourcing your customer service for temporary teams. This can be a great cost-saving alternative.**

Outsourcing companies handle all the hiring and staffing for you, so you don't have to worry about it.

This way, you get the support you need during those critical times without the hassle of managing the process yourself.

## Implementing self-service automation and AI

At PartnerHero, we recognize how AI and automation have changed the way we build customer support programs. It's all about finding that perfect symbiosis between technology and human touch.

We recommend that behind any automation or chatbot solution you use, **there should always be a human available to take over the interaction when necessary.**

Self-service automation is a huge time-saver for your team and a win for your customers, too. People love being able to help themselves, especially when it's quick and easy—like in the case of WISMO tickets.

**Self-service starts when you develop a comprehensive knowledge base and FAQ section.**

These should cover common issues like shipping policies, return procedures, and troubleshooting tips for mobile apps.

Make sure it's easy to navigate and regularly updated so customers and agents can find what they need without having to contact support.

Keeping it updated and thorough will also be necessary when you start looking for chatbots or self-automation solutions that will need them to learn about your products and policies.

**The more your chatbots know, the better they can handle routine inquiries and provide instant responses, freeing up your agents for more complex issues and saving you money.**

They can assist with common concerns like tracking orders, retrieving abandoned carts, or answering general questions about your products and services.

- ✓ Don't forget about **automated emails**. Set these up for common scenarios like order confirmations, shipping updates, and ticket acknowledgments.  
Make sure these emails include relevant information and links to self-service resources so customers have everything they need at their fingertips.
- ✓ If you have a high volume of phone support, consider implementing an **Interactive Voice Response (IVR) system**. This can route calls efficiently based on customer needs, directing them to the appropriate department or providing self-service options.
- ✓ And, if you thought AI was reserved for chat and email, think again.

Companies like Crescendo are using **AI to create voice bots** that allow customers to self-service themselves over the phone.

- ☑ And finally—**social media automation**. Use automated responses and tools to manage social media inquiries efficiently. Set up automated replies for common questions and direct customers to appropriate self-service resources.

These are just quick examples of how we can take insights from current shopping behaviors to help us look toward our peak season strategies.

CHAPTER 3:

# Leveraging social media for ecommerce

# Leveraging social media for ecommerce

There was a time when social media was purely social. You'd add friends, share updates and photos, and leave fun comments on their content.

My teenage self on Myspace could never have imagined how it would evolve. Today, social media does more than just connect you with friends—it connects you to celebrities, influencers, musicians, and your favorite brands.

The role of social media in ecommerce is now massive.

**Your business's social media presence is not just a marketing tool—it's also a storefront and a channel for customer support.**

This intersection of social media and online shopping is known as social commerce—the practice of using social media platforms to facilitate online sales and purchases.

**As of 2024, social commerce is worth nearly \$1.7 trillion, marking a 30.81% increase from the previous year, and projections suggest it could reach \$2.9 trillion as early as 2026 (Statista).**

## The role of social media in customer support

Social media should be embedded into your customer support strategy, especially as we approach peak seasons when customer inquiries and transactions surge.

It's not uncommon for customer service (CS) teams to have someone solely dedicated to handling social media tickets. Consumer expectations are high when it comes to response times on social media.



Meeting these standards can be rewarding, as customers are known to spend 20% to 40% more with companies that respond to their questions on social media.

Let's explore how to effectively manage customer service on social media and how you can use these platforms to enhance your brand's reputation, create a community, and foster customer loyalty.

## Why social media customer service is different

Social media customer service differs from traditional channels like chat or email primarily because of its very public nature.

Many concerns and questions on social media stem from public comments. Unlike phone or email interactions, which are private, social media responses are visible to anyone who visits your page.

We've all seen the fallout when brands answer public comments incorrectly—or, arguably worse, don't answer at all.

**In fact, not responding to comments on social media can increase customer churn by 15% (M4 Communications).**

## Managing customer service publicly: best practices

Because your responses on social media are visible, it's essential to ensure they are not only professional but also consistent with your brand's voice.

Here are four tips for managing customer service on social platforms:

- ✓ **Respond as much as you can**

---
- ✓ **Maintain professionalism**

---
- ✓ **Align with your brand's voice**

---
- ✓ **Leverage direct messages for sensitive issues**

Let's look at these more closely.

### Respond as much as you can

Make sure you have enough team members to handle tickets and direct messages (DMs) from social media. Leveraging social media for customer service is not only good for reputation—it's also good for your budget.

**Studies have shown that resolving a ticket through social media can be six times cheaper than handling it through your call centers.**

Social media can get busy—90% of consumers have used social media in some way to communicate with a brand. Not all of this communication requires customer service—some are simply comments or messages sharing how much they love your product.

You might also get notifications that your product was tagged in a story or

post. While these don't always need a response, customers will feel valued when you do respond.

Leave a comment where they've tagged you, repost their stories, or tell them how much you appreciate their feedback. This fosters a sense of community.

Not only that, but users who have had their content about your brand shared are more likely to showcase your products in future posts, increasing your brand's visibility.

## **Maintain professionalism**

Customers are unafraid to leave negative comments on social media. It can feel like the Wild West, where anything goes.

No matter how negative or colorful the feedback is, it's crucial to remain professional. Your responses are visible to a wider audience, and once you say something, you can't take it back.

As the saying goes, "the Internet is forever," and someone, somewhere has a screenshot of your comment. This is your chance to turn a potentially negative situation into a positive brand moment.

## **Align with your brand's voice**

While professionalism is key, balance is important. Your responses should feel authentic and aligned with your brand's personality.

When your agents truly embody your brand's voice, these public interactions can be a great way to increase community engagement and enhance your brand's reputation.

One recommendation is to dedicate someone specifically to social media interactions and tickets. This person should be trained to understand your demographic, know your brand's voice, and feel empowered to get creative

with responses.

Customers appreciate a voice that matches their own.

**Whether your brand is known for being friendly, formal, or humorous, ensure that this tone carries through in your customer service interactions.**

If you need examples of what this balance looks like, check out Wendy's Twitter replies and Duolingo's TikTok comment responses.

They manage to respond to negative feedback and competitors in a way that feels cheeky and fun, yet still professional.

## **Leverage direct messages for sensitive issues**

While public responses are important, some issues are better handled privately. Encourage customers to take certain conversations to direct messages when appropriate, but always follow up publicly to show that the issue was addressed.

**For example, if a customer publicly comments:**

**"I've sent several emails and still haven't received a response. Where is my order?"**

**...you can respond with:**

**"We're sorry to hear your order hasn't arrived! Please DM us your order number and we can check on it for you."**

This shows your followers that you don't ignore concerns and that you take questions seriously. The key is to always respond to public comments with inquiries to help prevent churn.

## Embrace automation

Automation can be a powerful tool in managing social media customer service, freeing up agents to handle more escalated tickets. It can be used to:

- ☑ **detect and respond to frequently asked questions,**

---

- ☑ **track content engagement,**

---

- ☑ **and locate and respond to content where your business has been tagged or mentioned.**

If you're unsure where to start, consider using social media management platforms like *Hootsuite*, *Sprout Social*, or *Loomly*.

Great social media customer service isn't just about solving problems; it's about boosting your brand's reputation and expanding your reach.

**Positive interactions on social media can drive engagement, attract new followers, and convert them into loyal customers.**

By integrating social media into your customer support strategy, especially during peak times, you can enhance customer loyalty, drive sales, and ultimately grow your business.

Manage your social media interactions well, and you'll turn satisfied customers into your brand's biggest advocates.

CHAPTER 4:

# Using the right tools and tech

# Using the right tools and tech

Why do we consider **First Response Time (FRT)** and **Average Handling Time (AHT)** to be the most important metrics in customer service?

These metrics directly impact customer satisfaction. A ticket responded to promptly and handled quickly will almost certainly result in a **positive CSAT score**.

Operationally speaking, being able to get through tickets without the fear of backlog building up means your team is staffed, efficient, and not burned out—leaving them time to provide personalized responses to customers.

The holidays can be a stressful time for consumers. There are gifts to buy, trips to book, dishes to prep... and everything needs to be ready on time for festive plans.

If your support team isn't resolving tickets on time, the window for placing that order gets tighter. Customers are either choosing a competitor or flooding your inbox with frantic WISMO tickets.

Let's dive into how you can stay ahead of the game by using the right tools and tech—from self-service options to AI-driven support and automation.

## **Self-service options: knowledge bases, FAQs, and community forums**

Comprehensive knowledge bases and FAQs play a crucial role in empowering customers to resolve issues independently, particularly during peak seasons when customer service teams may be overwhelmed.

These tools give customers immediate access to information, without forcing them to wait for a support agent.

This means your team will be freed up to handle more complex questions and have more time to offer personalized touches to responses.

**During peak seasons, when support teams are at capacity, this reduction in volume can be the difference between missing service levels and maintaining them.**

If you don't know where to start, *Helpjuice* is a knowledge base software that helps you create help content, and it's search-optimized to help customers find answers quickly.

*Zendesk Guide* can help you create your own self-service portal with FAQs, and my favorite part is that you can have community forums built in.

**Community forums** reduce customer service ticket volumes by allowing customers to help each other with common issues.

In *Mozilla Forums*, for instance, users frequently share solutions and troubleshooting tips for *Firefox* and other *Mozilla* products, which not only empowers the community but also alleviates the load on *Mozilla's* support team.

Similarly, some companies have even used *Reddit* to create dedicated communities where users can discuss problems, share advice, and find answers—for free.

*Spotify's* presence on *Reddit* has helped create a community where users troubleshoot issues, share playlists, and discuss updates, reducing the need for direct support and building stronger brand loyalty through peer-to-peer interaction.

Questions answered on community forums often get indexed by search engines, meaning they appear in *Google* search results when users look for solutions to similar problems.

This greatly expands the reach of the forum content, allowing even those who aren't active forum members to benefit from the shared knowledge.

For example, solutions discussed in *Mozilla Forums* frequently show up in *Google* searches, enabling users to quickly find relevant answers to their *Firefox* issues without having to submit a support ticket.

## AI-driven support

AI chatbots have really grown in popularity. They provide instant responses to frequently asked questions, like order status, return policies, or troubleshooting steps.

They can greatly reduce First Response Time (FRT) down to mere seconds, which, of course, frees up your human agents to tackle more complex, nuanced issues that really need a personal touch.

***H&M* implemented an AI chatbot on their website, and it managed to handle 30% of all customer queries without any human intervention,**  
significantly reducing their Average Handling Time (AHT)  
and cutting down operational costs.

By automating these routine tasks, you not only boost efficiency but you also save on labor costs, making your support team more effective and your customers happier.

AI can also manage email inquiries during high seasons. By automatically sorting and responding to emails, AI can drastically cut down on the time it takes to get back to customers.

It can quickly analyze the content of each email, categorize it, and even draft personalized responses for common issues. Like chatbots, it speeds up First Response Time (FRT) and improves Average Handling Time (AHT).

***Lufthansa* implemented an AI-powered email management system that was able to handle 60% of customer emails without human intervention,**

leading to a 70% reduction in response times and a significant decrease in operational costs.

By leveraging AI in this way, you can ensure faster, more efficient service, all while keeping expenses in check.

## **Automation for customer empowerment**

Automation takes the manual work out of ticket routing, ensuring that every customer inquiry lands in the right hands from the start.

By automatically analyzing the content of each ticket and directing it to the most appropriate department, businesses can speed up the resolution process, significantly improving both First Response Time (FRT) and Average Handling Time (AHT).

This kind of smart routing minimizes delays and reduces the risk of tickets bouncing between departments.

A great example of this in action is *Zendesk*, which offers an automated ticket routing system that helped Uber streamline their support processes.

***Uber* was able to cut down ticket handling time by 25%, ensuring that customers got the help they needed faster while also keeping operational costs in check.**

With automation handling the routing, your team can focus on solving issues quickly and efficiently, leading to happier customers and a more cost-effective support operation.

## Workflow automation

Workflow automation is another great solution for teams looking to improve metrics.

By automating repetitive tasks like sending follow-up emails or providing status updates, businesses can shave precious minutes off their Average Handling Time (AHT).

***Atlassian* implemented automated workflows in their support system, which reduced manual task handling by 40%,**  
leading to faster ticket resolution and significant cost savings.

Automating these routine tasks keeps things moving smoothly, ensuring your team stays on top of customer inquiries without getting bogged down by the small stuff.

It's a win-win that boosts efficiency and cuts down on labor costs, all while keeping customers informed and happy.

## Multi-channel strategies

A multi-channel strategy is essential for meeting customers wherever they are, whether it's on social media, email, chat, or phone.

To get the most out of your channels, it's crucial to optimize them with automation and AI. For instance, AI-driven chatbots can instantly handle inquiries on social media, while automated email sorting ensures quick and accurate responses.

Meanwhile, smart IVR systems can route phone calls efficiently. But no matter the channel, the key is delivering a consistent experience.

Your customers should feel like they're getting the same level of service, whether they're chatting with a bot on Facebook or speaking to an agent over the phone.

It's also important to remember that while automation and AI are powerful tools, customers don't want to feel like it's impossible to reach a human agent.

**There should always be a human behind each solution, ready to step in for more complex issues.**

By integrating automation and AI across all channels, with human oversight and accessibility, you not only streamline operations but also ensure that every interaction feels seamless, reliable, and on-brand.

CHAPTER 5:

# The power of outsourcing during peak season

# The power of outsourcing during peak season

As we gear up for the busy season, the need for efficient and scalable customer support becomes crucial.

**Outsourcing has become a key strategy for many companies, offering the ability to quickly scale teams, control costs, and tap into specialized expertise that may not be available in-house.**

Let's explore the benefits of outsourcing, guide you through selecting the right outsourcing partners, and help you integrate outsourced services seamlessly into your existing operations.

## Benefits of outsourcing

A great BPO partner can quickly increase headcount, keeping things running smoothly when volumes increase—no more scrambling to hire or train new staff.

Not only that, it's incredibly cost-effective.

**With outsourcing, you pay for what you need, when you need it.**

It's a smart way to scale when you have budget constraints.

If you're a CX leader who hasn't outsourced, it might feel uncomfortable allowing a stranger to run your customer support. But these aren't strangers—they're experts and professionals.

BPOs are equipped with all the knowledge, the latest tools, and tech that can really level up your service. They know solutions that will get you faster response times, smoother processes, and happier customers.

Finally, flexibility. Outsourcing lets you adapt to unexpected spikes quickly.

Need more agents during a busy holiday rush? Done. Want to dial it back in the off-season? Easy.

You're not locked into anything, giving you the freedom to scale up or down as your business needs change.

## Selecting the right BPO partner

When it comes to picking a BPO, it's all about finding the right match for what matters to you, whether that's price, offerings, or how well they get your brand.

It's important to take the time to explore your options and choose the BPO that will meet all your needs.

The best way to ensure you match with the right BPO is by asking the right questions and sharing all your relevant information through a detailed **Request for Proposal (RFP)**.

If you've never done one, don't worry—we're about to walk you through the process.

Before you start reaching out to outsourcing companies, you'll want to do some research. Look for ones that have experience in your industry and check out their online reviews, case studies, and get referrals from other businesses.

**I suggest filling out an interest form to set up a meeting. In the request, give a quick overview of your business, mention that you're planning to send RFPs to a few BPOs, and outline what you need—like which channels you want covered and any other key details.**

Think of this meeting as your "get-to-know" session. It's your chance to share a little about your business, your customer service goals, and why you're considering outsourcing.

You'll chat with someone from their solutions team, who will tell you a little more about the BPO. Expect them to ask some follow-up questions to get a better grasp of your needs, details like:

- ☑ **Your tech stack**

---
  - ☑ **Call volume**

---
  - ☑ **Common ticket types**

---
  - ☑ **Team size**

---
  - ☑ **Language requirements**

---
  - ☑ **Operating hours**

---
- ...etc.**

Besides the technical details, this is also about getting a feel for their vibe and seeing if it clicks with your own.

The **initial call** is great for filtering out BPOs that might not be a good fit, either because they lack experience in your industry or their culture doesn't mesh with yours.

The RFP will dive deeper with more detailed questions, helping you get a clearer picture of the BPO's capabilities and whether they're the right match.

Once you've narrowed down your choices, it's time to send out a Request for Proposal (RFP) to your top candidates.

To help you out, we've put together a list of questions and a basic outline for crafting your RFP, especially if you're new to this.

The more detailed your RFP, the better your future BPO can tailor their proposal to fit your needs.

## Crafting your RFP

- ✓ First, the **company background**: start with a brief overview of your company, including its history, mission, and core services.

**For example:**

*“Acme Corp is a leading retailer specializing in eco-friendly home products. We are seeking a BPO partner to enhance our customer service operations.”*

- ✓ Next, **project scope**: define the services you need, including the scope of work and specific tasks.

**For example:**

*“We require comprehensive customer support including phone, email, and live chat services to handle inquiries related to our product line.”*

- ✓ Third, **service expectations**: clearly outline your expectations regarding service levels, response times, and performance metrics.

**For example:**

*“We expect a First Response Time (FRT) of under 30 minutes and a Customer Satisfaction Score (CSAT) of at least 85%.”*

- ✓ Then, **budget considerations**: Provide an overview of your budget, or at least an indication of your financial parameters.

**For example:**

*“Our budget for this contract is between \$500,000 and \$700,000 annually.”*

- ✓ And, **timeline**: Include key dates such as proposal submission deadlines and contract start dates.

**For example:**

*“Proposals are due by September 30th, with a contract start date of January 1st.”*

## Questions to ask potential BPOs

Included in your RFP should be a list of questions you'd like addressed.

We've been focusing on handling peak seasonality, so you'll want to know if they can handle that. Ask:

*"How do you handle scalability during peak seasons? Can you provide examples of past experiences where you successfully scaled operations?"*

You can also ask questions about how they intend on meeting your standards, like:

*"What measures do you have in place for quality control? How do you ensure consistent service quality across all channels?"*

Ease your mind that their associates can match the voice of your customer by asking:

*"How do you ensure alignment with our brand culture and values? Can you describe your approach to integrating with our brand identity?"*

References are always great to ask for, but make sure they're relevant to you. Be specific, and ask:

*"Can you provide case studies or references from clients in similar industries?"*

And share that you are particularly interested in experiences related to e-commerce and retail.

I also recommend asking about data security to make sure you and your customers are protected. You can ask:

*"What is your approach to data security and compliance? How do you ensure that customer data is protected in accordance with relevant regulations?"*

## Evaluating proposals

Once you've received all proposals, it's time to evaluate them. Here are some important things to consider when evaluating:

- ✓ **Cost:** compare the pricing structures from each BPO. Make sure costs are competitive and fit within your budget. For example, look at the cost per contact and any additional fees for scaling operations.
- ✓ **Expertise:** check the BPO's experience and capabilities. Review their case studies and client references to assess their experience with high-volume customer support.
- ✓ **Cultural fit:** determine how well the BPO's values and culture align with your company's. For instance: "Does your approach to customer service match your commitment to customer satisfaction?"
- ✓ **Service quality:** evaluate the proposed service levels and quality assurance measures. For example, look at their proposed SLAs and quality monitoring practices to ensure they meet your standards.
- ✓ **Flexibility:** assess the BPO's ability to adapt to changing needs and handle peak seasons. For instance, check their strategies for managing high-volume periods and their flexibility in scaling resources.

By focusing on these key components, questions, and evaluation criteria, you can create a thorough and effective RFP that helps you find a BPO partner well-suited to meet your needs.

## Getting the BPO onboarded

Once you've selected your BPO, you'll want to ensure a smooth integration. A good outsourcing company will walk you through it, being with you every step of the way.

- ☑ To ensure high-quality customer service, start by setting some clear **KPIs (Key Performance Indicators)** and **SLAs (Service Level Agreements)**.

SLAs outline what you expect, such as a maximum wait time for calls or a resolution timeframe for support tickets.

- ☑ Make sure you've established a way for your BPO to have visibility into their **performance**. Regularly monitoring these metrics helps keep everything on track and makes sure your customers are always getting the best service.
- ☑ Make sure to equip your BPO with all your knowledge and resources. Start by sharing your **training materials**—this could be anything from your customer service scripts to your brand guidelines.
- ☑ Also, provide a list of what you're looking for in new hires, such as **specific skills or experience levels**. Once the associates are hired, it will be your responsibility to make sure they have logins and access to any systems and tools they'll need to start their work.

Once your program is ready for launch, set up regular check-ins with the BPO's Operations Managers and Team Leads. Meeting with them at least weekly keeps the communication lines open and helps address any issues before they become big problems.

Ask them for weekly, monthly, and quarterly recaps. For example, a weekly recap might cover any immediate issues or performance highlights, while a monthly recap could look at trends and ongoing improvements. The quarterly recap should provide a broader view, evaluating overall performance and planning for future needs.

Working with a BPO should be a partnership—a friend once referred to outsourcing as co-sourcing, and I loved that. So, once your program is launched, keep your BPO in the loop of all your business's ongoing.

**Regularly updating training material is crucial for aligning the outsourced team with your service standards. Schedule regular training sessions to keep the team updated on new products, services, or changes in procedures.**

For instance, if you launch a new product, ensure the BPO team gets up-to-speed with training materials and FAQs. Implement feedback loops where both you and the BPO can share insights and make adjustments.

**Regular feedback helps everyone stay aligned with your expectations and keeps service quality high.**

If you notice a dip in customer satisfaction scores, provide constructive feedback and work with the BPO to address the issues promptly.

A good BPO will notice these things before you and provide an action plan as they come up.

By setting clear KPIs, maintaining regular communication, sharing comprehensive training materials, and implementing ongoing feedback, you ensure a smooth and successful integration with your BPO partner.

This collaborative approach helps keep everyone on the same page and drives high performance and customer satisfaction.

## **Co-employment considerations**

As a Partner Success Manager for a BPO, I would be remiss if I didn't quickly talk about co-employment.

When working with a BPO, you will be asked to avoid violating co-employment. This might include things like hiring or firing associates, directly providing any sort of pay, disciplining associates directly, and providing direct performance reviews.

That might feel a little scary, but understand that this isn't to protect the BPO—it's to protect you and your business.

Co-employment is essentially a partnership where both a BPO and a company share responsibilities related to managing the customer service team.

But here's the key part—it protects you from a lot of the legal and compliance headaches that come with directly hiring and managing employees.

At PartnerHero, we handle all the HR duties, like payroll, benefits, and compliance with labor laws, so you're not on the hook for employment liabilities.

This setup shields you from risks such as wrongful termination claims, compliance violations, and other legal issues because the BPO is the one managing those aspects of the workforce.

Plus, it allows you to focus on what you do best—running your business—while we handle the behind-the-scenes HR complexities.

**Co-employment isn't just about splitting responsibilities; it's about giving you peace of mind and protecting your company from potential risks.**

CHAPTER 6:

# Workforce management: forecasting and staffing for peak season

# Workforce management: forecasting and staffing for peak season

As we gear up for the busy season, it's crucial to have the right team and systems in place to hit your metrics and keep customers happy.

But how do you determine the right headcount? And once you've got your team, how do you ensure everyone is scheduled at the right time?

Let's walk through the key aspects of workforce management, including forecasting, scheduling, real-time management, and how KPIs come into play.

Accurate forecasting allows you to anticipate how many agents you'll need and when you'll need them, maintaining service levels and avoiding the chaos of understaffed queues and overworked teams. And—it all starts with good data.

## Forecasting for success

Understanding past trends is key to predicting future demand. Start by reviewing data from previous years during similar peak periods, analyzing call volumes, ticket inflows, and when your customers typically reach out.

Additionally, track customer interaction patterns to identify times when interactions spike, such as weekends or specific times of day.

This might sound like a lot of work and math, but forecasting doesn't have to be manual or guesswork.

We have excellent tools to help, including our own **staffing calculator**. This tool can help you plan your headcount and staffing schedule down to the hour, making forecasting and scheduling easy and accurate.

## Real-time management: staying flexible during peak seasons

You've done the forecasting, hired your team, and created the perfect schedules. But, as we all know, peak seasons are unpredictable, and real-time management is essential for keeping things running smoothly.

**Continuously monitoring call volumes and agent performance allows you to make necessary adjustments on the fly.**

For larger teams and operations with multiple channels, hiring a real-time analyst (RTA) could be a great addition to your customer support strategy.

**RTAs track metrics like call volume, agent availability, and performance to make quick, informed decisions, such as:**

☑ **Adjusting break times**

---

☑ **Reassigning agents**

---

☑ **Redistributing workload across different channels**

Tools like *Calabrio* and *Aspect* can help with intranet management by shifting break times or reassigning agents across various channels, allowing you to keep up with fluctuating demands.

Open communication is also critical to effective real-time management. Keep your team informed about any changes, unexpected spikes, or adjustments to their schedules.

A well-informed team can pivot quickly, helping maintain service levels even during the most chaotic peak seasons.

## Balancing KPIs for optimal performance

Key performance indicators (KPIs), such as average handling time (AHT) and first response time (FRT), aren't just numbers—they directly affect how you manage your team.

However, improving one metric can sometimes negatively impact another. For instance, reducing AHT can improve FRT, but rushing through interactions may lead to lower customer satisfaction scores.

**It's a delicate balancing act—improving one metric without harming another. Regularly reviewing your metrics and making adjustments can help fine-tune performance, ensuring overall customer satisfaction and efficient workforce management.**

Your team can provide valuable insight here. Ask for feedback if they're struggling to hit targets.

- ☑ **Are there gaps in training?**

---
- ☑ **Has there been an increase in time-consuming ticket types?**

---
- ☑ **Have customer behavior trends shifted, such as a decrease in phone calls but an uptick in chat volume?**

By combining data, feedback, and effective workforce management, you can find the balance needed to keep performance levels high.

# Consider us to be your copilot during peak season

As you begin your journey to finding a new BPO, I hope you'll consider us.

At **PartnerHero**, we transform customer service with custom-built teams of exceptional professionals who deliver support across any time zone and in any language.

We offer flexible, short-term contracts and multi-channel coverage, including email, chat, voice, social media, and SMS, all backed by 24/7 global availability.

We don't just provide support; we bring our partners access to in-house experts in AI & technology, workforce management, quality assurance, training, and SQA. This means you get cutting-edge solutions and unparalleled service without compromising quality.

**But we're more than just a BPO.**

**We're on a mission to redefine outsourcing.**

Our commitment to integrity, human rights, and DEI&B initiatives sets us apart.

We proudly offer higher wages, comprehensive benefits, and career development opportunities, making us a haven for talent and leadership.

**Our core values—be humble, care for others, embrace growth, take ownership, and manifest trust— drive our culture and business practices.**



PARTNER  
*hero*

| CX LAB

We've proven that what's good for people is good for business. PartnerHero isn't just about outsourcing—it's about leading a movement towards a more human-centric approach to business.

By choosing the right BPO partner, you can efficiently scale your team, maintain high service levels, and keep customers happy without burning out your in-house resources.

Whichever solution you choose to move forward with, remember:

**A well-matched outsourcing partnership is not just about meeting your immediate needs but also about building a resilient and adaptable support system for the future.**



## Need help tackling your busiest season, but don't have the resources or time?

Our teams are perfectly positioned to jump in and take the reins while you get back to doing the things you do best. Schedule a call with one of our solutions designers to ensure you're meeting the demand of your busy season with brand-centric help that does everything you need it to.

[GET A TEAM NOW →](#)



PARTNER  
*Hero*

| CX LAB