




# Seamless QA Improvements for Lasting Client Success

The client was a brokerage and investment banking company with limited outsourcing experience. They had just ended a relationship with a BPO provider due to subpar performance, making them hesitant at the outset.

## Challenges

-  **Quality Assurance (QA) inconsistency**, including inaccurate Quality Form and scoring methodology that failed to measure the client's specific needs
-  **Reporting inadequacies**, including a lack of consistent and actionable reporting necessary for continuous quality improvement
-  **General apprehension** that was exacerbated by prior negative outsourcing experiences; client expectations required not only addressing historical gaps, but exceeding expectations from Day One

## Solutions

-  **Understanding client needs** through an in-depth joint discovery session, and the development of a customized implementation plan and timeline, as well as a comprehensive Project Playbook detailing workflows, tools, templates, and performance measures for a smooth transition
-  **Customizing QA tools**, including a new Quality Form and scoring methodology, and a custom reporting dashboard to address gaps in transparency with real-time insights and analytics; a specialized team of on-the-job trainees helped ensure proficiency and readiness from the start
-  **Implementing a proprietary transition management framework**, ensured a seamless and efficient migration of processes with a comprehensive risk analysis, detailed SOPs, and proactive training
-  **Partnering closely with the client**, including constant communication throughout implementation, iterative reviews of playbooks, SOPs, and training materials to ensure alignment and continuous improvement; proactive feedback sessions helped the team adapt to changing needs and expectations

## Results



**Enhanced Quality Assurance** that exceeded client goals from Week One by a **weekly average of 2 pts.**



**Innovative reporting** through a customized client dashboard that provided actionable insights while improving operational transparency



**Improved client satisfaction** after making the transition easy and efficient, eclipsing prior negative vendor experience