

# NEARSHORE TO OFFSHORE: Pathway to Opportunities



OP360

**Transitioning from nearshore to offshore can bring its own set of challenges and opportunities. While navigating different time zones, languages, and even regulations may seem daunting, it can provide access to a more diverse talent pool, considerable cost savings, and substantial growth.**

However, if the process is not seamless and well-managed, risks can have a knock-on effect and cause disruptions in operations. Planning, execution, and deep expertise of this sector are of utmost importance.

In these success stories, we outline how we approach our nearshore to offshore work with our clients. Our gradual and strategic approach leaves no room for error, ensuring success and a seamless lift.







# Client: Healthcare

## Mastering Offshore Recruitment and Systemization

### The challenge

Our client, one of the largest online marketplaces in the U.S. healthcare sector, wanted to continue growing their business. However, rising labor costs coupled with skilled labor shortages made it impossible to do so at their nearshore support location. The client knew they needed to fully embrace offshoring in search of a vast talent pool that would unlock substantial cost savings.

However, like 50% of executives surveyed in the Global Outsourcing Survey 2022, they considered talent acquisition to be one of their top internal challenges. The client was not confident that they would be able to find the resources to build an offshore team that could preserve their well-honed productivity systems when not directly overseen by their management.

They needed an outsourcing partner with capabilities to seamlessly transfer knowledge and bolster their recruitment for their new offshore location. The key to success was high-caliber recruits who would connect deeply with their operational systems.

### How we addressed the challenge

First, we identified the critical roles needed to deliver Customer Care and Purchasing. We hand-picked specialists from our internal talent pool and then went on to run tailored recruitment campaigns.

Our Training and Quality Team gained a deep understanding of the client's operational processes, creating a robust training curriculum.

Before the launch, we appointed dedicated trainers, introducing them to a custom train-the-trainer process - designed to train individuals to become effective trainers themselves.

We then tackled the remaining challenges by establishing KPIs for each line of business, effectively utilizing them to assess agent and team opportunities. In addition, we crafted internal performance dashboards, complemented by weekly business reviews to address opportunities and enhance overall performance.

After formulating an extensive training curriculum, we implemented an active Learning Management System. We also created training materials and knowledge assessment forms, which our client's team still uses today across all their partners.

### The results

Within a year, our client achieved remarkable growth, tripling the output of their various channels and doubling the number of agents.

Our recruitment process exceeded the internal timeline, onboarding the required staff within 14 days of the initial program scoping.

Today, our client can quickly address staffing needs thanks to the streamlined recruitment process we've designed. They now benefit from a skilled workforce strategically located in various regions, which has improved their staff retention capabilities.



# Client: Meal Kit Company

## Gradual Offshoring Done Right

### The challenge

Our client, an industry leader in the food subscription service sector, expanded significantly nearshore during the pandemic, but the performance of their Colombian customer service support team plateaued, causing concern about the potential for future scaling at the location.

The client was at a key stage of the business where it was experiencing strong YoY growth and was equally focused on reducing unit costs. It had a strong brand and following with its customers. Maintaining high-quality support was non-negotiable.

The challenge was to provide better quality voice support at a lower cost.

### How we addressed the challenge

Next, we sent trainers and operations managers from the Philippines to attend training held by the Columbia team to learn best practices for their voice support channel. Once they obtained their trainer certifications issued by the headquarters, they returned to the Philippines.

We established a pilot offshore team in the Philippines of three support members, gradually

transitioning tasks of increasing complexity from the nearshore location to ensure uninterrupted business operations.

We used the Colombian KPIs as our benchmark levels and built-in step-up levels to all the measurements to drive up performance. This produced continuous improvement across all performance metrics.

### The results

In eight months, we expanded our pilot team in the Philippines to more than 200 independent contributors.

Meanwhile, the client gradually reduced the headcount in Colombia and eventually moved the entire operation to the Philippines.

By their second quarter, the newly established team in the Philippines team not only met but surpassed the performance metrics of our original headquarters, achieving a CSAT score of 94%. These results highlight the success of our partnership and show that a well-executed offshore transition can lead to exceptional performance and high customer satisfaction.



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**Learn more about how we can help you  
get started on your outsourcing journey**

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