



PEAK SUPPORT

# How to Outsource Customer Support

**A Guide for  
Software Companies**

Key strategies that can help you successfully outsource customer support for your SaaS

## How to Outsource Customer Support: A Guide for Software Companies

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# The New Era Of Outsourcing in SaaS

If you sell software, post-sales support is critical. Customers may choose your product based on the promises made by your sales team. But if the product doesn't work as expected, they'll quickly churn.

So many Software-as-a-Service (SaaS) companies are understandably concerned about outsourcing. SaaS CX leaders often worry that their product is too complex to give up control over support.

When customer lifetime value is high, as it often is in SaaS, every customer counts. And a few bad experiences with a customer support team may drive a big customer away.

The good news is: SaaS companies CAN outsource customer support. A BPO relationship may look different in SaaS than it does in ecommerce or other industries. But it can work - and you can leverage both the financial and operational benefits of outsourcing.

# Outsourcing has changed

Since the 1990s, businesses have recognized the [financial and operational benefits](#) of shifting customer support to [business process outsourcing \(BPO\) providers](#).

In its early days, companies typically outsourced only to save money, and quality suffered as a result.



Thankfully, the outsourcing landscape has changed dramatically over the past decade. Software companies of all sizes – from large corporations to mid-sized enterprises and startups – have learned to outsource while still delivering top-notch support.

Outsourcing to a BPO can reduce costs, but it can also improve processes, boost quality, and make it easier to scale efficiently. If you're a tech support leader or a software founder thinking about outsourcing, this guide will help you determine whether it's the right move.

We'll explore the benefits of outsourcing SaaS support and the challenges you may face, as well as provide a four-step process for building and launching your outsourced support team.

## Why should you listen to us?

Founded in 2015, [Peak Support](#) is a boutique outsourcing company with enterprise capabilities. We have 2,000 employees working remotely across the globe, including the Philippines, the U.S.A., Colombia, Eastern Europe, and India. We deliver incredible tech support outsourcing for the most innovative brands on the planet. We do it all by finding the best people, wherever they're located, and empowering them to do what they do best.

We have a proven track record of building and scaling support teams for high-growth companies in the U.S. and abroad, and our expertise has been recognized by major media outlets and CX companies, including [Zendesk, Inc.](#), and [Forbes](#). We were named [Best Outsourcing Provider by ICMI](#) and we were a finalist for Customer Contact Week's Best Outsourcer award.

Perhaps more importantly (to us, at least!), we have the [highest Glassdoor rating in the industry](#) and a 96% CEO approval rating from our employees. That's why we only accept 1 in 100 applicants and we have an average quality score of 95%. We also serve a wide array of clients – from early-stage SaaS companies to high-growth established brands to Fortune 500 companies – so wherever you sit, we've probably launched a similar team.

# Why we specialize in SaaS

We've developed a specialty in serving SaaS companies, because we provide custom, white-glove solutions. Every SaaS company is different, and every client engagement at Peak Support is different.

Sometimes we handle all support; other times, we handle only Tier 1 or triage. Sometimes we handle the back-office aspects of onboarding a new client to a SaaS solution. We work closely with our customers to build a solution that works for them. We also have the lowest attrition in the industry - critical for SaaS companies, who often have long training times and can't afford to have a revolving door of tech support agents.

We hope this ebook will give you the information and confidence you need to select the perfect BPO for your SaaS company.

Need other resources? [Check out Crafting an RFP to Outsource Customer Support](#) - a complete guide to BPO RFPs. It includes an Excel template with dozens of questions you can ask potential partners - so you don't have to start your RFP from scratch.

## The Benefits of Outsourcing SaaS Support

When people think about outsourcing support for their SaaS product, they often focus solely on cutting labor costs. And while reducing expenses is a significant benefit, it's far from the only advantage you gain from partnering with a BPO provider to support your users.

### 1. Improved flexibility and scalability

With recruiting operations focused on sourcing customer care talent, along with proven onboarding and quality assurance processes, BPO providers can onboard new agents much faster than your in-house processes would allow. Outsourced teams can also support various schedules, including 24/7 coverage, and handle spikes in demand, seasonal variations, major product launches, and other high-variance factors.

For instance, at Peak Support, we can launch a new team for a startup in as little as one week.

We can cover any shift and quickly add additional agents – up to 150 per week. Although B2B SaaS isn't usually as seasonal as ecommerce, we can easily scale up and down to meet spikes or valleys in demand.

Of course, the more technical your product, the longer the onboarding process will take. However, increased volume often involves repetitive queries, where new agents can be highly effective.

This flexibility makes it much easier for companies to manage the challenges of rapidly changing demand.

## 2. Better customer service quality

[50% of customers](#) switch to a competitor after a single poor support experience. Having a team of proven experts ready to deliver exceptional service is a competitive advantage. This is especially important when you work with enterprise accounts. Many B2B SaaS brands have high average customer lifetime value, and you don't want subpar support cutting into that number.



BPO providers can integrate into your team, adopting your brand voice and handling multi-channel requests just like your in-house agents. While that might feel like a difficult task, established outsourcing partners have literally done this dozens or hundreds of times, and that experience makes it easier than you'd think.

On top of that, their extensive experience in support operations enables them to set up streamlined processes and [manage team performance effectively](#) – leading to improved response times, higher customer satisfaction, and more efficient scaling.

For instance, at Peak Support, our teams maintain impressive KPI levels even when growing rapidly. For example, we worked with a Healthtech SaaS company to implement their first QA program and achieve a 92% quality score, while also reducing headcount by 50% through introducing process and productivity improvements.

Because of their wide range of experiences, BPOs are also often adept at finding opportunities to improve your customer experience – including opportunities that you may have missed or been too busy to realistically tackle.

### 3. Optimized costs

Outsourcing customer support to countries with a wealth of specialized talent, like the Philippines, can reduce labor costs. With a relatively low cost of living, it's a cost-effective place to build an outsourced team.

You can pay top-of-market for the best talent in the country – and there's loads of talent because companies have outsourced there for decades – yet still see significant cost savings.

In addition, you'll save on all the costs of managing and scaling your support team. At 5 or 10 agents, you may be able to get by with a CX Manager overseeing support or even just a Team Lead managing the entire support function. But larger teams require recruiting, training, quality assurance, HR, workforce management, and more. An experienced BPO will bring all that support with them, typically wrapping it up into one hourly price.

#### And salaries are just the tip of the iceberg.

Office space, equipment, benefits, and performance management all bring additional substantial costs. These expenses can exceed [\\$7,000 per agent](#) annually (before salaries) in major metro areas. Working with a BPO provider allows you to reduce these costs and allocate your budget to other strategic initiatives, like innovation, technical infrastructure, customer success programs, and product development.

### 4. Technological expertise

With the rise of AI, the customer experience tech stack is also more complex than ever. An experienced BPO partner can help you navigate the CX tech universe, choose the right technology for your business, and optimize it to improve efficiency and performance.

This expertise is paramount for SaaS brands, as they typically have complicated tech stacks and rely heavily on integrations and connected systems to deliver seamless customer experiences.

Vast networks of skilled agents also enable BPOs to bring in talented workers with skills tailored to your [specific technical support needs](#) – whether you require expertise in a specific programming language or troubleshooting APIs and network issues.

# 5 Key Strategies for Outsourcing SaaS Support

Outsourcing SaaS support comes with unique challenges, largely due to the complexity of support requests. While SaaS companies manage plenty of high-volume, repetitive tickets – such as password resets – simple queries are increasingly handled by [generative AI tools](#).

This automation leaves a bulk of the support volume with very few “easy” tickets that you can answer with a macro. Most of the remaining tickets are complex technical issues and bugs. And bugs cannot be resolved with standard responses or macros.

Given these realities, SaaS support teams need highly skilled agents with advanced technical abilities and extensive training. Agents must possess deep product knowledge and adapt to the specific support processes that vary significantly between companies. That’s why SaaS companies require custom solutions to deliver high-quality support.

## Here are five key strategies to successfully outsource customer support for your SaaS product:

- 1. Outsource Tier 1 support.** By outsourcing basic customer questions to a BPO team, your in-house team can focus entirely on complex problems that require in-depth product knowledge and handling escalations
- 2. Fully outsource your customer-facing support.** For some SaaS businesses, it makes sense to fully outsource customer-facing support work. At one of our clients, we manage all customer communication and project-manage tickets that are handled by in-house support engineers.
- 3. Outsourcing customer operations and back-office work.** Tasks such as data entry, account configuration, and training sessions for new users can be outsourced to free up your in-house team. This allows them to focus on core product development and strategic customer experience initiatives. At [BloomNation](#), for instance, we handle several ad-hoc tasks, as well as graphic design and video editing.
- 4. Outsourcing customer operations and back-office work.** Tasks such as data entry, account configuration, and training sessions for new users can be outsourced to free up your in-house team. This allows them to focus on the most complex tickets. At BloomNation, for instance, we handle a number of ad-hoc tasks, as well as graphic design and video editing.



- 5. Begin with outsourced agents only.** Outsourcers typically bring in team leads, trainers, and Quality Assurance Analysts in addition to agents. But that may not make sense if you have a highly complex product, and your supervisors and trainers have a year or more of product experience.

If that's the case, start with agents only. The outsourced agents can report to your supervisors. Over time, some of those outsourced agents will turn into team leads, trainers, and QA analysts with deep product knowledge.

You could blend two of these strategies together; you can also change your approach over time. For example, you could start with Tier 1 and gradually increase the BPO's responsibility until they handle all your support.

Regardless of the approach you choose, partnering with the right BPO provider can make your support operations better. Our SaaS clients typically see improved CSAT ratings, faster response times, and significant cost savings.

Take [Advent eModal](#) as an example. Facing growing support volume but lacking the budget to expand their USA-based staff, they partnered with Peak Support. Starting with Tier 1 support, we gradually earned the client's trust, leading to their recent decision to outsource Tier 2 support as well. As a result, they've seen remarkable improvements in core KPIs:

- Response time decreased from up to 45 hours to approximately 15 minutes
- Average CSAT scores went from 50% to 90%

While CSAT scores and response times are crucial, it's only part of the story. Outsourcing SaaS support can also significantly impact revenue metrics and reduce churn – a critical KPI for any subscription-based business. For instance, BloomNation, where the Peak Support team takes care of the entire support function, has achieved an impressive [97% retention rate](#).

By addressing the complexities of SaaS support with a strategic outsourcing approach, you can ensure high-quality customer service, optimize operations, and drive business growth.

# A 4-Step Process to Outsourcing SaaS Support

With hundreds, if not thousands, of options available, how do you find the right BPO partner to ensure your users are in good hands?

Let's break down the process of outsourcing your customer support team and choosing the right vendor.

## 1. Determine if outsourcing is the best strategy for you.

Outsourcing can be a tempting solution for scaling customer support, but it may not always be the best fit for your company (or not the best fit right now).

Here are two key questions to help you determine if outsourcing is the right move for your support team.

### **Do you have enough ticket volume to justify a full-time agent?**

If your customer support volume is low, say a few inquiries per day, outsourcing might not be practical at this stage. Someone in-house is probably able to handle those requests. We often recommend a founder or CEO handle requests when the volume is this low, as it's a great opportunity to interact with and learn from customers and find the best product-market fit.

Outsourcing may also not be cost-effective with low volume.

Most outsourcing firms have a minimum requirement, and typically, it's at least one full-time agent. A dedicated agent can handle from 15 to over 100 tickets per day (depending on the complexity of your support requests), so if your volume is below that, outsourcing may be a waste of money.

Some outsourcing firms charge per ticket, which could be an option for you. However, this means your outsourced team will be supporting multiple products and switching between accounts. While this approach is more cost-effective, it can negatively impact response times and overall support quality, ultimately hurting your business's bottom line in the long run.

### **Do you have a good foundation in place?**

Outsourcing is great when you already have standard operating procedures (SOPs) set up and ready to be delegated. Otherwise, it may be too early for some BPO providers – many outsourcers don't even offer the option of building a customer service team from scratch.

At Peak Support, we can assist with choosing and implementing a ticketing system, building macros, and establishing other processes. However, this typically makes sense only when your workflow is fairly standard—for example, in e-commerce, where operations are often repeatable across companies.

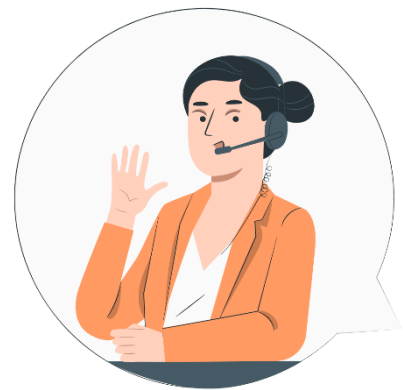
For SaaS teams, we recommend developing the core processes and infrastructure in-house to make sure they fit your internal needs. Once you have established your common support workflows, you can start with outsourcing Tier 1 tickets and take it from there.

## 2. Explore what the market has to offer.

Before talking to potential BPO partners, consider what type of outsourcer you need.

### International vs. domestic

Building an international customer service team is typically more cost-efficient than hiring domestically. Most companies see at least a [10% cost reduction](#) when outsourcing overseas, but international outsourcing can save much more. Additionally, tapping into overseas markets can provide access to a larger talent pool of technical support specialists. For example, the [Philippines is brimming with millions of customer service professionals](#).



Peak Support's Philippines-based agents have excellent English skills, college degrees, and an average of 7+ years of support experience serving major multinational brands. Many have also held leadership roles at large outsourcing firms.

Domestic outsourcing is more expensive, but sometimes it's the best path forward. If you're in a highly regulated industry, it may be required. Depending on the product nature, your customers may feel better knowing that your entire operation is based in the same country.

A blended team of domestic and international agents can offer the best of both worlds. Your international team can handle Tier 1 tickets, while domestic agents take on more complex issues and customer calls.

## Dedicated vs. shared teams

Ideally, you'd want to hire full-time agents who work only for you. Dedicated agents are fully immersed in your company's processes and better prepared to resolve questions with nuanced answers (rather than boilerplate responses).

This is especially crucial in SaaS, where onboarding typically takes longer, and quality responses require a deep understanding of the product and internal operations.

Some outsourcers, however, offer shared teams that work across multiple accounts. This may be a suitable solution when you have a lower volume of tickets or can't afford to commit to full-time agents yet.

If you're working with shared agents, they can focus on easier tickets – such as FAQ responses and password resets – while escalating difficult issues to a dedicated team to minimize the risk of incorrect answers sent to customers. With that said, [today's generative AI platforms](#) can resolve simple FAQ-type questions without requiring a human agent – which brings us to the next point.

## Outsourced agents vs. full operations

Running a support team involves more than just hiring, onboarding, and managing agents.

## As you're exploring vendors, consider if each BPO provider offers:

- **Leadership** such as Team Leads, Operations Managers, and Operations Directors
- **Trainers** (dedicated or shared, depending on team size)
- **Quality Assurance Analysts and Managers**
- **Reporting & analytics**, including productivity reports, real-time dashboards, voice of the customer analytics, customer satisfaction deep dives, and more
- **Tech & AI services** to help you implement and optimize new tech
- **Support Engineers** to assist with bug fixing and customer chores, such as data recovery

Leveraging their experience and expertise, BPO providers offering a complete solution can take care of your entire support organization or at least a large portion of it. This is hugely beneficial if you want to offer a quality support experience without dedicating significant internal resources to managing it.

Some BPO providers only offer outsourced agents without full operations management — leaving that work on your plate. While it may seem cheaper, you'll want to think about all the work that you'll have to do internally — and factor that into the cost.

## Multi-language support

While many outsourcers primarily offer English-language support, some provide additional language options.

- For example, nearshore options in Mexico or [Colombia](#) often supply both English and Spanish support.
- In the [Philippines](#), many agents are bilingual, fluently speaking English and some other popular languages, such as Spanish and French.
- Similarly, [Eastern Europe](#) is a great region to consider for other European languages, as many customer service workers in this region are fluent in multiple languages — including English, German, French, and Italian.

However, with the [development of AI tools](#), AI-powered translations are often as good as, or even better than, those provided by non-native speakers. Platforms like [Intercom](#), [Help Scout](#), and [Zendesk](#) now come with built-in translation services (if you're on the right product tier). If you're only providing email support, solutions like this may be sufficient to enable your English-speaking agents to translate inquiries and respond in each user's preferred language.

## 3. Find a partner that fits your needs.

To find the perfect outsourcing partner, start by building a list of questions that cover everything from culture to technology, to scaling capacity, to training methods. Here are ten key questions to include:

- 1. What support channels and coverage options do you offer?** Do they offer day, night, weekend, and 24/7 support? As you grow, robust around-the-clock support may become necessary, especially if your users are based in different time zones.
- 2. How do you manage remote teams and handle performance issues?** How do they ensure productivity and uptime? While you don't need to be involved in day-to-day operations, your outsourcing partner should meet your performance standards and work collaboratively to address any issues.
- 3. Are the agents and team leads dedicated to my team or shared with other clients?** At Peak Support, all our agents and team leads are fully dedicated to one client to ensure optimal quality. Consider whether this is the case with other providers.

3. **What is your average team size? Do they have teams similar in size to yours?** Some outsourcers specialize in large teams, while others manage smaller groups with just a few agents each. At Peak Support, our minimum team size is 1 full-time employee, but we specialize in building teams ranging from 5 to 50 agents. Our largest client includes over 500 agents across twenty-five lines of business.
4. **What is your turnover? Technical support training typically takes longer, so BPOs with high employee turnover won't be a good fit.** When training is 1-2 weeks, it's easy to replace attrited agents. However, if it takes months for a new agent to get fully up-to-speed – as it does for many enterprise tech support teams – you want to make sure your agents will stick around.
5. **What is your experience handling complex technical support?** Do they have experience managing support operations for products with frequent releases and light documentation, which is often the case with agile B2B products? How do they handle training for new features, when there are no troubleshooting guides or runbooks yet?

Peak Support tech support agents have an average of 8 years of experience, compared with 1 to 3 years at most BPOs, which makes a world of difference in building and scaling technical support teams.

6. **Do they have a minimum monthly commitment and the flexibility to scale up or down?** Contracts with rigid terms can be challenging for a growing company. Some BPOs may require you to hire 25 agents or more, at minimum. Others, like Peak Support, set a more manageable baseline because they're targeting smaller companies and brands.

You also need a BPO that can quickly adjust to your needs, scaling the team up and down as you need. Consider how much notice they require and any fees you may need to pay upfront if you need to reduce team size.

8. **What tech platforms do you work with, and how do they keep your data secure?** At Peak Support, we typically use our clients' existing systems, though we can bring a tech stack as well. We have experience working with almost every CX platform out there, including Zendesk, Intercom, Help Scout, and more. Some other outsourcers require you to use their proprietary technology platforms, making it harder to launch and then switch providers.

9. **How will you keep my data secure?** Whether they use your existing tools or pull data into their systems, ensure that your provider follows data privacy regulations like GDPR and has robust data security measures in place. Ask for certifications like PCI, HIPAA, and SOC 2.
10. **Do you offer agents only, or do you provide a fully managed operation?** Consider if the BPO provider can provide you with support services like training, QA, workforce management, and reporting.
11. **What level of support will I receive?** Who is your main point of contact? How often can you communicate with them? What will happen if you have issues, or the team isn't performing as you expect?

For more questions to ask, check out [Crafting an RFP to Outsource Customer Support](#) - a complete guide to BPO RFPs. It includes an Excel template with dozens of questions you can ask potential partners.

While these practical questions can help you choose the right partner, you should also pay attention to the BPO's [company culture and core values](#). They should align with your company culture to ensure seamless integration and avoid friction between BPO agents, your in-house team, and customers. A strong and healthy company culture means lower turnover among agents, leading to a more consistent experience for you and your customers.

Another thing you may want to consider is whether your potential BPO partner offers [back-office services](#) like data entry, billing support, and content review. This can be helpful if your ticket volume fluctuates, as it allows agents to assist with tasks outside the support queue when the volume is low. Here's a short example highlighting [how this played out at health-tech startup Wally Health](#).

## Request for Proposals (RFP)

In some cases, it makes sense to create a Request for Proposals (RFP) with the questions that you want each potential BPO partner to answer. It helps objectively compare their offers and can even get you a lower price as vendors compete for your business.



An RFP should include information about your company profile, ticket types, ticket volume, channels, tech stack, hours of operation, contract terms and conditions, and criteria you use to make the decision.

Building an RFP from scratch can be time-consuming, so feel free to take advantage of this full guide and template for [Crafting an RFP to Outsource Customer Support](#).



## 4. Set up your partnership for long-term success.

Signing a contract might be the end of the sales process, but it's only the start of your BPO partnership. Here are the key steps to ensure a smooth integration and long-term success of your partnership:

- 1. Appoint a vendor manager to oversee your relationship with the BPO.** This person should be aligned with senior management's priorities to avoid sending conflicting messages from different levels of your organization to the BPO partner. In smaller companies, this is often a customer support manager.
- 2. Create a comprehensive contract, including target KPIs and SLAs.** It's important to clearly communicate the quality standards you expect and the benchmarks you'll use to measure the progress of your partnership.
- 3. Align technology and configure tools.** Just like with remote in-house workers, ensure that your BPO team has access to the necessary technology for remote meetings, communication, and data sharing. This might include Slack, Trello, Zoom, Google apps, your internal applications, and other tools to facilitate seamless collaboration.
- 4. Provide training on your product and processes.** Training is usually faster if you have existing training materials. If not, your BPO partner may help you create them, but you'll still need to verify the accuracy of the information before the training begins. Typically, you only need to train a BPO representative once, and then they'll handle the onboarding of other agents going forward.



- 4. Set up recurring sync meetings to share updates and address ongoing issues quickly.** Clear communication lines prevent delays and misalignment, allowing for swift action when concerns come up. It helps you stay up-to-date on customer issues while sharing the latest product developments and plans with the outsourced team. Such meetings help your BPO agents better understand and become passionate about your product, mission, and culture, all of which improve the quality of the support they can provide.

## Grow your support team smoothly through outsourcing

Whether you outsource just Tier 1 tickets or the entire support function, the goal is always the same – to use your company resources more effectively. When done right, outsourcing can be a strategic advantage, allowing your company to thrive in the competitive SaaS market.

But the success of your outsourcing efforts hinges on choosing the right BPO partner.

If you're ready to take the next step, [book a free consultation with our team today](#) to learn more about how Peak Support might be able to help optimize your support operations for the best customer experience.