



# **Beyond Innovation** **Why Tech Companies** **Are Outsourcing User** **Support and Onboarding** **to Accelerate Growth**



Select  VoiceCom

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Customers often require guidance during setup and ongoing support as they navigate new workflows, technical questions, or product updates.

This white paper reviews how technology companies can improve customer operations and assesses whether to include external capacity in their service model.



# Introduction



## Why Operational Excellence Matters After Product Launch

Product development creates the potential for customer value. Onboarding and support help users receive that value. Customers need to understand how the product fits their requirements and where to seek assistance if an issue arises.

Clear onboarding can help shorten the path to initial use, and responsive support can address obstacles that may delay adoption. Outsourcing these functions also reduces routine demands on product and engineering teams.

## The Adoption Gap: Why Great Products Still Lose Customers

Even a capable product can be difficult to adopt. Product changes create ongoing learning requirements, especially when releases alter familiar workflows. Customers also expect timely, effective assistance when they cannot complete a task independently.

The adoption gap can widen if setup is complicated or guidance is slow to arrive. Inconsistent answers will also create additional friction. Addressing these issues can provide customers with a clearer path from setup to continued use.



# The Business Impact of User Support and Onboarding



## Defining User Support and Onboarding

Onboarding guides customers through setup and initial use. After activation, user support resolves product questions and technical issues. Education and customer success assistance then help users deepen their knowledge and pursue the outcomes they expect from the product.

These functions connect product access with practical use. Each has a distinct role, but customers benefit when information and responsibilities are transferred efficiently between them.



## How Support Can Contribute to Customer and Business Outcomes

The product itself and how well it fits the market remain central to the customer relationship. Support contributes by helping users overcome problems that prevent them from realizing the product's full value.

Effective support can help restore progress, and structured onboarding introduces relevant workflows early in the process. When both functions align with the broader customer strategy, they positively impact customer satisfaction and ongoing product use. Outcomes will depend on product quality, customer needs, and execution.



## From First Login to Long-Term Product Use

Customer needs change throughout the product lifecycle. Onboarding focuses on setup and activation. Later, technical support resolves interruptions while education addresses knowledge gaps. Customer success teams step in when an account needs more targeted guidance.

Teams can preserve context through shared records and clearly assigned ownership. Documented handoffs help reduce repetition and help each team respond appropriately without adding customer frustration.

# A More Flexible Blueprint for Customer Operations



## Why Technology Companies Are Rethinking Customer Operations

Growth can increase inquiry volumes and broaden the knowledge required of support teams. Serving customers in additional regions may also create demand outside existing operating hours. Expanding an internal support team to match growth can take time and draw product specialists into recurring support work.

Companies can respond by identifying which activities require internal expertise and which they can manage through documented processes. [Gartner](#) reports that service leaders use customer service outsourcing to expand capabilities, manage costs, and support automation and AI adoption.

An external team may handle defined onboarding activities and Tier 1 and Tier 2 support, including recurring questions. Internal specialists often retain complex responsibilities requiring additional training or technical aptitude, though some external BPOs offer the same competence. This model relies on a well-defined scope, effective training, controlled system access, and reliable escalation.

## Why Traditional Support Models Can Become Difficult to Scale

Internal teams provide close product access and direct oversight, but increased demand brings an elevated workload and often requires additional skills for effective troubleshooting.

[Salesforce's](#) State of Service research found that 79% of surveyed agents supported more products or services than in the previous year, 77% managed heavier workloads, and 65% handled more complex cases. In the same research, 69% of service decision-makers identified agent attrition as a major or moderate challenge.

New releases may require additional training, and business growth can affect support capacity. Companies have several options, including increased internal hiring, automating certain tasks, reallocating work, or engaging external support. The best approach depends on demand, task complexity, internal resources, and service expectations.

# Signs That Additional Support Capacity May Be Needed

Key indicators of strained support capacity include:

- Growing ticket backlogs
- Long first-response or resolution times
- Inconsistent onboarding experiences
- Limited coverage across time zones or service hours
- Product specialists spending more time on routine support than core duties
- Difficulty maintaining service levels during launches or periods of high demand

Tracking these indicators against established targets can help leaders distinguish between a temporary deficiency and a persistent capacity gap.

## Choosing the Right Scaling Model

Tech companies can keep support fully internal, assign defined functions to a provider, or divide responsibilities between the two. Each structure creates different requirements for oversight and workforce management.

Leaders should first consider product complexity and the risks associated with each support activity. Customer expectations, demand patterns, available resources, and the required level of control also influence the decision. Reassess the structure as these conditions change.





# The Building Blocks of Effective User Experiences

## Supporting Product Adoption Through Structured Onboarding

Structured onboarding helps customers navigate setup and initial product use. Companies should focus guidance on essential steps that support user outcomes and provide targeted follow-up when needed.

Monitor completion rates and activation times to track user progress. Review early support requests to help identify where instructions or product steps may cause friction.

## Encouraging Product Engagement Through Customer Education

Customer education expands understanding beyond setup. Use formats best suited to your audience and product, from self-service guides to live sessions.

A dedicated external team can make educational support more accessible by answering usage questions and guiding customers toward resources suited to their needs. Internal product owners remain responsible for reviewing and updating those materials, helping ensure users receive accurate guidance as the product changes.



## Resolving Product Issues Through Technical Support

Technical support identifies product issues and guides users to documented solutions. The team records and classifies the issue, then applies approved troubleshooting steps. If frontline support cannot resolve the case or requires advanced expertise, the team escalates it to the appropriate support tier with a complete case record. The receiving specialist continues the troubleshooting process and conveys knowledge and instructions to customers until resolution is achieved.

Response times and backlog trends can indicate how efficiently cases move through this process. Repeat contacts may reveal unresolved concerns, while quality reviews and customer feedback can help assess whether the guidance was accurate and useful.

## Supporting Customer Relationships Through Customer Success Assistance

Assign external teams to specific account tasks, such as routine check-ins, renewals, and documenting feedback or issues for escalation.

This structure allows internal customer success managers to focus on complex accounts and conversations that require business or product expertise. Define which activities external teams own, which require approval, and what situations should be transferred back to internal staff.

## Extending Support Across Channels and Service Hours

Support customers through preferred channels and extend service beyond core hours when demand supports additional coverage.

Base channel and scheduling decisions on actual customer behavior rather than default assumptions. Analyze contact volumes, response expectations, issue types, and regional needs to determine where additional coverage is required.



# Designing Customer Operations That Scale With Innovation

## Connecting Onboarding, Support, Education, and Customer Success

Customers experience one relationship with a company even when several teams contribute to it. Fragmented systems and unclear handoffs can force customers to repeat information or receive conflicting guidance.

Shared records preserve continuity, while documented workflows clarify who owns the next action. This coordination also helps recurring issues to escalate naturally where they belong, in the interest of timely, successful resolution.

## Establishing a Customer Feedback Loop

Support interactions provide direct evidence of where customers struggle. A pattern of similar questions may point to unclear instructions or a workflow obstacle; in other cases, it may reveal a defect or missing parts, distribution, or shipping problems.

Teams should categorize interactions and report meaningful patterns to stakeholders who can address them. Leaders should weigh this evidence alongside product analytics, customer research, commercial priorities, and technical constraints.

## Match AI and Human Expertise to the Work

AI can handle selected information-based and repetitive service tasks. Salesforce's State of Service research indicates that organizations expect AI to manage a larger share of cases as its capabilities advance. Companies still need to determine which tasks suit automation and which require human expertise.



## AI supports some functions well, including:



Self-service and routine inquiries



Ticket classification and routing



Knowledge retrieval



Conversation summaries and agent assistance

## Human teams are essential for:



Complex technical troubleshooting



Situations where customer context affects the appropriate response



Issues requiring judgment or interpretation



Escalations requiring specialized training or advanced product knowledge



Sensitive customer concerns

A blended model assigns work based on complexity and potential risk. Customer context also determines whether a case should remain with a person.

As automation expands, companies should monitor answer accuracy and escalation patterns as well as customer outcomes and data controls.

## Evidence in Practice

A growing U.S. consumer financial software company partnered with Select VoiceCom to add Philippine-based professionals to its customer training and support functions.

The engagement expanded service capacity and supported a more stable workforce. According to the SVC case study, the client recorded lower employee turnover and higher customer satisfaction as the business grew. These results apply to one engagement and should be considered in light of its scope and operating conditions, including how the client measured performance.

## Measure Results Against Defined Priorities

Outsourcing should address a defined part of the operating model, not simply move work elsewhere. Before implementation, the company and provider should document current performance and assign responsibilities. They should then agree on targets and reporting methods.

Relevant measures include:

- Onboarding timeframe and date of first support
- First-response and resolution times
- Backlog volume and aging
- Escalation and repeat-contact rates
- Quality and customer satisfaction scores
- Coverage during launches or demand peaks
- Cost per supported interaction or account

No single metric defines success. Leaders should interpret service quality and customer outcomes alongside changes in capacity and cost, and investigate the reasons behind material differences.

## Choosing the Right Outsourcing Partner

Selecting a provider involves more than comparing staffing costs. The outsourced team will represent your company during customer interactions, and its work may require controlled access to systems, customer data, and confidential product information.

AICPA & CIMA note that organizations must identify, assess, and manage risks associated with third-party service relationships. A SOC 2 report can provide information about controls relevant to security, availability, processing integrity, confidentiality, and privacy, but it should be considered as only one part of due diligence.

# What to Evaluate Before Signing an Agreement

Evaluate whether the provider can meet current needs and adapt to changing demand.

Focus on the following areas:

- **Product training:** How agents learn, demonstrate proficiency, and stay updated as features evolve.
- **Workforce planning:** The process employed by the provider for recruiting and adjusting staff size.
- **Knowledge management:** How documentation and resources remain accurate and accessible.
- **Quality assurance:** Which interactions are audited and which outcomes drive remedial agent training or workflow modifications.
- **Escalation management:** When the outsourced team escalates issues to internal specialists.
- **Reporting:** Which metrics are tracked and how performance is reviewed.
- **Technology and security:** How the provider accesses systems and manages data and controls.
- **Business continuity:** A thorough review of documented business continuity plans.

NIST guidance recommends documenting recovery strategies and testing them regularly. Organizations must also maintain the plan as operating conditions change.

Scrutiny should align with the scope and risk of the outsourced work. General inquiries may require less control than technical support involving sensitive data or production access.



# The First 90 Days: What a Smooth Transition Looks Like

A successful transition begins with a defined scope. Both parties must understand who owns each responsibility and what services the provider will deliver.

The plans should also confirm system access, escalation paths, and performance measures before shifting customer interactions to the outsourced team.

A typical implementation proceeds through these stages:

## 1 Discovery and planning



Map workflows, support volumes, responsibilities, and requirements.

## 2 Knowledge transfer



Provide documentation and process guidance covering tools, communication standards, and escalation procedures.

## 3 Training



Train agents and management on tools, communication standards, and escalation procedures based on validated workflows.

## 4 Testing and readiness



Validate knowledge, system access, workflows, and escalation before launch.

## 5 Controlled go-live



Begin with the agreed scope and closely monitor quality and escalations.

## 6 Stabilization and review



Use early performance data to address gaps before adjusting staffing or expanding responsibilities.

Product complexity and team size influence the pace. System access and security reviews may require additional time. The first 90 days offer a framework for implementation rather than a fixed timeline.

## Red Flags to Avoid

Provider selection should flag weaknesses that could cause service or governance issues. Warning signs include:

- Limited or generic product training
- Unclear ownership of escalations
- Weak quality assurance processes
- Limited visibility into performance
- Poorly defined security and access controls
- Inadequate knowledge-management practices
- No clear business continuity plan
- Aggressive implementation timelines without sufficient discovery or training
- Unclear division of responsibilities between the provider and client

A suitable partner can explain how the engagement will operate in practice and who owns each responsibility. Its proposal should also define performance expectations, escalation procedures, security requirements, and the process for adapting to changing needs.

## Preparing Customer Operations for the Next Stage of Growth

An effective service model assigns work according to customer need and complexity while accounting for risk. Automation can process suitable routine tasks, and external teams can manage clearly defined activities or extend service hours.

Internal specialists retain decisions requiring deeper product authority. Companies should review this mix as their products and customer base change, particularly when entering new markets.

Capacity alone is not the objective. The goal is to provide accurate, timely assistance while directing internal expertise where it creates the most value.



# Select VoiceCom: Expand Support Capacity Around Your Operating Model

Select VoiceCom (SVC) provides dedicated outsourced teams for customer-facing and back-office functions. Depending on the scope, these teams can support onboarding, customer service, technical support, education programs, or customer success operations.

SVC aligns each engagement with the client's workflows and systems. The operating plan also defines knowledge resources, service standards, and escalation requirements. Programs may include role-specific training and quality monitoring, supported by performance reporting and scheduled reviews.

This model allows technology companies to add defined capacity while retaining product strategy and critical decisions internally. Specialized work remains with those who hold the required expertise.







# Glossary

## **Customer success**

A function that ensures customers achieve their goals with a product. It emphasizes adoption, account health, and long-term value over case resolution.

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## **Escalation path**

A documented process for transferring issues to staff with the necessary authority, access, or expertise.

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## **Hybrid support model**

A structure that allocates customer support responsibilities between internal staff and an outsourced provider based on complexity, risk, or expertise.

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## **Knowledge management**

The process of managing information support teams use to answer questions consistently and accurately.

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## **Quality assurance**

A process for evaluating support interactions, identifying performance gaps, and guiding corrective action.

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## **Service-level agreement**

A formal agreement that sets service expectations, responsibilities, and performance targets between a company and its provider.

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## **SOC 2**

An independent framework that evaluates a service organization's controls for security, availability, integrity, confidentiality, and privacy.

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## **Tier 1 support**

The initial level of support for common product questions and technical issues. Complex cases escalate to higher tiers or specialists.

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## **User onboarding**

The process of guiding new customers through setup and initial product use to help them achieve their goals.

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# Resources

## Why Technology Companies Are Rethinking Customer Operations

**Source:**

Gartner. April 30, 2026. Market Guide for Customer Service and Support Outsourcing Providers.  
<https://www.gartner.com/en/documents/7794053>

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## Why Traditional Support Models Can Become Difficult to Scale

**Source:**

Why Traditional Support Models Can Become Difficult to Scale  
<https://www.salesforce.com/resources/research-reports/state-of-service/>

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## Evidence in Practice

**Source:**

Select VoiceCom. August 9, 2024. Enhancing Customer Training and Support for a Consumer Financial Software Company  
<https://selectvoicecom.com/case-studies/enhancing-customer-training-and-support-for-a-consumer-financial-software-company>

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## Choosing the Right Outsourcing Partner

**Source:**

AICPA & CIMA. April 3, 2026. SOC for Service Organizations Engagements—Overview.  
<https://www.aicpa-cima.com/resources/download/soc-for-service-organizations-engagements-overview>

Deloitte. (n.d.). Global Outsourcing Survey 2024.  
<https://www.deloitte.com/global/en/issues/work/global-outsourcing-survey.html>



# Align Support Capacity With Growth

Rising service demand does not always justify increasing internal headcount. Companies should identify which responsibilities require product expertise and which trained external professionals can handle.

Outsourced teams can take on customer-facing or back-office work during periods of high ticket volume, expanded service hours, or increased routine inquiries. That noted, many companies' strategy is to retain at least some of their tenured, internal specialists who maintain oversight and handle complex issues that require technical expertise or decision authority.

This approach increases capacity without outsourcing all responsibilities. It reduces routine demands on specialists, maintains service coverage during change, and helps keep support responsive to customer needs.



## CONTACT US

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Select VoiceCom develops dedicated teams around each client's operating requirements. SVC can manage defined onboarding, technical support, customer education, or back-office responsibilities within the client's service standards and performance priorities.

**Discuss where additional capacity could improve your customer operations.**

### Contact our Sales Team



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**Learn more about Select VoiceCom's tech support solutions.**

