



# FULLY OUTSOURCED CONTACT CENTER

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Focused on delivering  
genuine customer experiences  
that provide powerful data &  
business intelligence

[COMPANY OVERVIEW](#)



Genuine customer service  
on behalf of industry leaders  
with data-driven insights and  
an expert workforce.



From general customer care to custom outsourced business processing, we are experts in everything customer satisfaction. Our quality monitoring process tracks every touchpoint to ensure excellence and allows us to evolve the way we serve your customers, down to the second.



# Who We Are

## COMPANY PROFILE

A privately held company, founded in 1997, Customer Direct has been developing and enhancing Customer Interaction Software and Contact Center Services for 20 years. Headquartered in St. Ann, Missouri, our team of 350+ provides Customer Care Solutions, Outsourced Business Processes, Powerful Business Intelligence and Communication Technology Consulting. Our centralized location and accent-agnostic workforce ensure that we can serve companies nationwide in a timely and accurate manner.

Customer Direct's highly trained agents provide 24x7x365 Phone, Email, Chat, Mail, and Social Media interaction support. Each workflow and interaction is specifically and uniquely tailored around the needs of our clients. Our distinct experience, attention to detail, desire to serve, and ability to scale make Customer Direct an excellent partner.

## OUR VALUES



**Deliver what you promise.**  
Pick up the phone.



**Respect each individual.**  
Say "Hi."



**Live a balanced life.**  
Be happy & healthy.



**Take pride in what you do.**  
Own it.

# What Drives Us



## **STRONGER PROCESSES**

From our call quality measurements and extensive sales training to our client-driven key performance indicators, our proprietary workflow management tools are built to deliver consistent, quality results.



## **INCREASED PRODUCTIVITY**

Whether your customers contact you by email, phone, or chat, Customer Direct will be there to represent your brand. With 24 / 7 fully-outsourced, overflow, after-hours, and seasonal peak staffing, we allow you to turn customer interaction costs into variable expenses that are matched with actual demand.



## **MORE RESPONSIVE**

We listen to our clients and understand their needs. Every contact center specialist understands that genuinely helping others is the worthwhile nature of our work. That is why we are in business -- to help you and your valued customers.



## **DEEPER INSIGHTS**

Imagine the power of data that digs deeply into what your customers want and how they think. Our contact center specialists are able to document every customer interaction in our system. By tailoring our workflow to your exact needs, our systems deliver detailed reporting about every aspect of customer engagement.



# Build Brand Equity



## CUSTOMER CARE

At Customer Direct, we understand that every interaction has an impact on the way customers perceive your brand. A single customer interaction can mean the difference between a one time customer and lifelong brand advocate. Our expert agents work hard to learn and understand your brand's unique voice and offerings. This ensures we deliver genuine brand experiences with the same passion and expertise as your own team.

**Customer Care**

**Central Reservations**

**Tech Support**

**Sales Order Processing**

**Lead Tracking Management**

**Subscription Services**

**Customer Surveys & Analytics**

**Appointment Scheduling**

**Guest Relations**













**Loyalty Programs**

**Upsell Opportunities**

**Backorder>Returns**



# Focus On What Matters

TASK	DURATION	START	...
			
			
			

**TASK LIST**



**TIMELINE**

## **BUSINESS PROCESS OUTSOURCING**

Scale your business with ease or streamline your internal process by taking advantage of our expert workforce. Add real growth to your business without increasing your human resources headcount, building new systems, or buying expensive solutions. We work with your team to build custom workflows that will save your company time and money, so you can focus on the more important aspects of your business.

**P.O. Box Management**

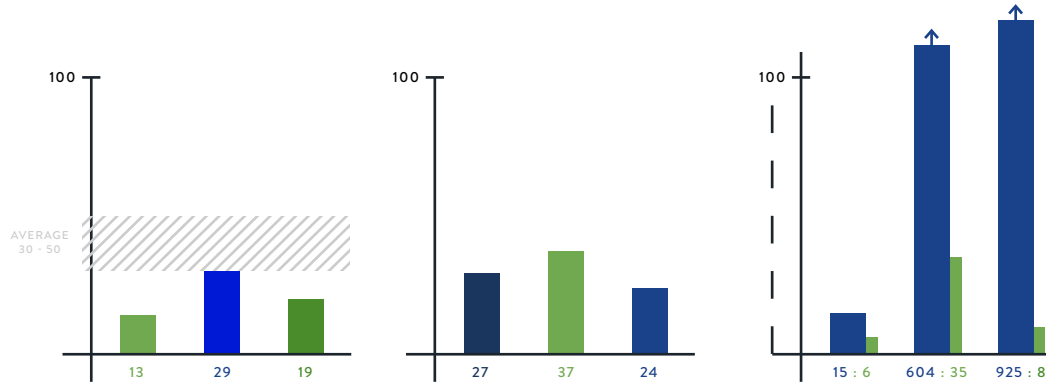
**Banking Services**

**Business Reply Mail**

**Back Office Support**



# Make Informed Decisions



## BUSINESS INTELLIGENCE

All Customer interactions are managed within Customer Direct's proprietary interaction workflow tool, which allows for real-time reporting on agent activity and KPI measurements. In addition to measuring performance benchmarks, Customer Direct can build reporting systems to track customer engagement and provide valuable market data points. Imagine the power of data that brings real insight into what your customers want and how they think.

**Targeted KPIs**

**Real-time Data**

**Custom Reports**

**24 Hour Online Access**

## PROVIDING 20 YEARS OF INDUSTRY EXPERTISE

The team at Customer Direct is well-equipped to handle the customer care and business processing needs of any industry. Over the past 20 years we have established ourselves as industry leaders in Hospitality, Retail, Health Care, Tech Support, and Subscription Services.



### HOSPITALITY

Whether your guests are on the phone, chatting online, or sending an email, Customer Direct is available 24 / 7 to deliver the voice of your brand in order to capture reservation opportunities and boost conversion rates for your properties.



### RETAIL

With scheduling challenges, holidays, weekends, overflow and after-hours, we understand that life can be hectic. Customer Direct is available when you're not.



### HEALTH CARE

Customer Direct works with hospitals, pharmaceutical companies, and doctors to provide support services for their patients. Your patients deserve the best care, and we genuinely want to help you provide it.



### SUBSCRIPTION SERVICES

We are a complete customer service center that allows you to stay focused while we care for your subscribers. Through our partnerships, Customer Direct provides a full suite of subscriber support services, so you can put your time and resources to more productive use.



### TECH SUPPORT

Our technical support solutions include a tailored service and support process that is designed to actually reduce the number of customer issues.





# How We Work

## PROVEN PROCESS

The team at Customer Direct prides itself on being a boutique contact center that builds custom solutions for unique brands. We take the time to learn and understand your business to develop streamlined processes that increase accuracy and productivity while delivering an unparalleled customer experience.



### 1. BUSINESS DISCOVERY

During the onboarding process, the Customer Direct operations department will sit down with your team to understand the nuances of your business and its unique needs.



### 2. CUSTOM WORKFLOW

After the discovery phase, our expert customer service managers use our proprietary software to develop, customize, and implement the most efficient and effective workflow strategy for your business.



### 3. SYSTEMS INTEGRATION

Our technical engineers will work with your systems admins and/or IT staff to quickly integrate Customer Direct's workflow tool and deploy the telecom strategy that's right for your business.



### 4. REPORT BUILDING

After specification of your unique reporting needs, Customer Direct will capture all call record statistics and key performance indicators. The data includes key quality and performance metrics and is available via a web-based reporting platform.



### 5. STAFFING PLAN

Customer Direct's Human Resources department develops unique hiring profiles for each of its clients. Our agents are all non-unionized, company employees, and are carefully selected based on education, experience, and skill.

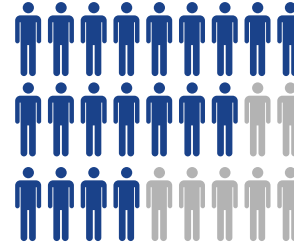


### 6. TRAINING & QUALITY MONITORING

Customer Direct offers a customizable quality assurance program to meet each client's needs. Quality control standards and statistical process controls are put in place based on your requirements.



# Built for Growth



## RISK AVERSE SCALABILITY

We understand that navigating the unknown can be hard for all businesses. You never know when you're going to need to ramp up your workforce to allow for growth, planned or unplanned.

Customer Direct is an ideal partner to assist in scalability. From our extensive network of work-from-home agents to our seasonal/intermittent workforce solutions, we'll make sure you have all the agents you need to deliver genuine, excellent customer service for every interaction.

## SEASONAL & INTERMITTENT SUPPORT

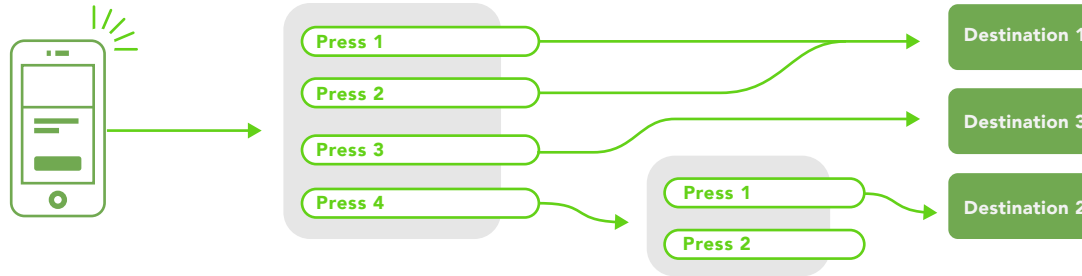
If you have a seasonal business or cyclical surges in business it can be hard to predict your workforce needs from season to season.

## HOME-BASED WORKFORCE

Approximately 20% of our current workforce is home-based, with the capability to scale this number as required for growth and business continuity needs.



# Built On Trust



## BUSINESS CONTINUITY MANAGEMENT

Customer Direct's business continuity management platform is focused on providing the most consistent and reliable service on the market. We offer intuitive technology and systems integration at an affordable price by leveraging the high cost of software, engineering, and infrastructure over our large customer base. Our technical engineers will work with your team to set up and integrate all systems required to build your strategic workflow. Rest easy knowing our systems are integrated with cloud-based redundancies, quality assurance, and customer reporting to ensure the highest performance and continuity of service.

**RespOrg Service**

**Telecom Strategy**

**Systems & Software Integrations**

**Workflow API**

**Backups & Redundancies**



# How We Hire

## IT'S ALL ABOUT OUR PEOPLE.

At Customer Direct, our people are more than just a name and a number. They are our most valuable asset and they will be yours as well. We go to great lengths to recruit, train, and assign the right agents to the right brands.

Our company culture is built around our agents and ensuring their success. In addition to great benefits, flexibility, and industry leading education, we offer amazing opportunities for career advancement. We have a career path learning plan that provides our customer care agents an opportunity to advance. This learning plan is designed to provide our agents with the tools to deliver exceptional customer service on behalf of our clients.

Whenever possible, Customer Direct strives to hire from within and promote our exceptional agents to managerial and administrative positions. In fact, more than two-thirds of our team leaders and supervisory staff started as call center agents. When it comes to staffing our call centers, our main goal is to elevate people who believe what we believe about the power of customer service and help them build a successful career in our organization.

- 1 **Recruiting**
- 2 **Pre-Screen**
- 3 **Skills Assessment**
- 4 **Background Check**
- 5 **In-Person Interview**
- 6 **Orientation**
- 7 **Training**



# **CustomerDirect** *University*

We are committed to professional growth & service excellence.

Learning and professional growth is a large part of the culture at Customer Direct. That's why we developed an ongoing training platform based on identified opportunities and new challenges called Customer Direct University (CDU). On a regular schedule, our agents participate in facilitated training sessions designed to optimize sales performance.

Observations are performed both by a dedicated team of quality evaluators and the team supervisors. Custom call quality criteria and scorecards will be created to suit the specific needs of your business.



# Let's Get in Touch.

Let us begin providing genuine customer experiences on behalf of your company today.

Our company is built on years of respecting our clients, their customers, and one another. Everything that members of the Customer Direct team touch is a reflection of pride and professionalism. Every action of every team member strives to live up to the Customer Direct promise of delivering genuine customer interactions.

## **WE'RE HERE FOR YOU**

Drop us a line, send us an email, or stop by our offices. We'd love to chat.

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WE LOOK FORWARD TO A LONG-TERM, POSITIVE  
RELATIONSHIP THAT MEETS OR EXCEEDS  
YOUR CUSTOMER EXPERIENCE GOALS.

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