



# The Exceptional Customer Experience

## About Us

Established in 2007 by experienced industry leaders Rob Goeller and Nate Spears, ClearSource BPO was inspired by the realization call centers were focused on efficiency rather than quality.

Rob and Nate decided to always put the Customer First. We take pride in providing The Exceptional Customer Experience, delivering quality and earning our clients' trust.

# Why ClearSource?

There is no substitute for discretionary effort. Many BPOs have agents who can follow a script and do just enough to get by. But very few companies have agents who go above and beyond to earn lifelong customers.



ClearSource is different because we help our people fulfill dreams instead of treating them like a commodity.



We eliminated our attendance policy and doubled down on training with amazing results -- our annual attrition is below 50% and client satisfaction is 97%.



ClearSource BPO



[www.clearsourcebpo.com](http://www.clearsourcebpo.com)





## Talent

ClearSource hires candidates who are committed to becoming a true extension of your brand. Our goal is to hire agents who already use the products they will soon support. Each candidate must demonstrate brand affinity and pass a comprehensive skills test. Both recruiting and operations interview each candidate and just 10% of applicants are hired. We then pay top wages and invest in our people along the way.

## Culture

We know that true partnerships are forged through mutual understanding and shared values. ClearSource was founded on these core values and we live and breathe them every day:



### **Customer First**

We share an intense passion for creating an exceptional customer experience



### **Personal Accountability**

Commit to doing the right thing and do it



### **Hungry**

Do your best everyday to make great things happen



### **Humble Courage**

Be brave enough to seek, deliver, and accept feedback



### **Happy and Healthy**

Choose well, live well

# OUR FOUNDERS



**ROB GOELLER**

**Chief Executive Officer  
and Co-founder**

After two decades in the banking industry, he honed his craft and developed a desire for a more unique approach to customer service, one that prioritized exceptional customer experience at every touchpoint. This desire, coupled with a vision for a better BPO experience, led him to partner with Nate Spears to create what would become a rising name in the industry: ClearSource.

 [Connect with Rob](#)



**NATE SPEARS**

**Founding Partner &  
Affiliate Leader**

One of Nate's first forays into a leadership role was at BMW Financial Services, where he and ClearSource co-founder Rob Goeller managed the outsourcing of customer support to third-party call centers. This experience proved foundational to his approach to leadership, and today, he continues to empower employees to embrace leadership, no matter their title.

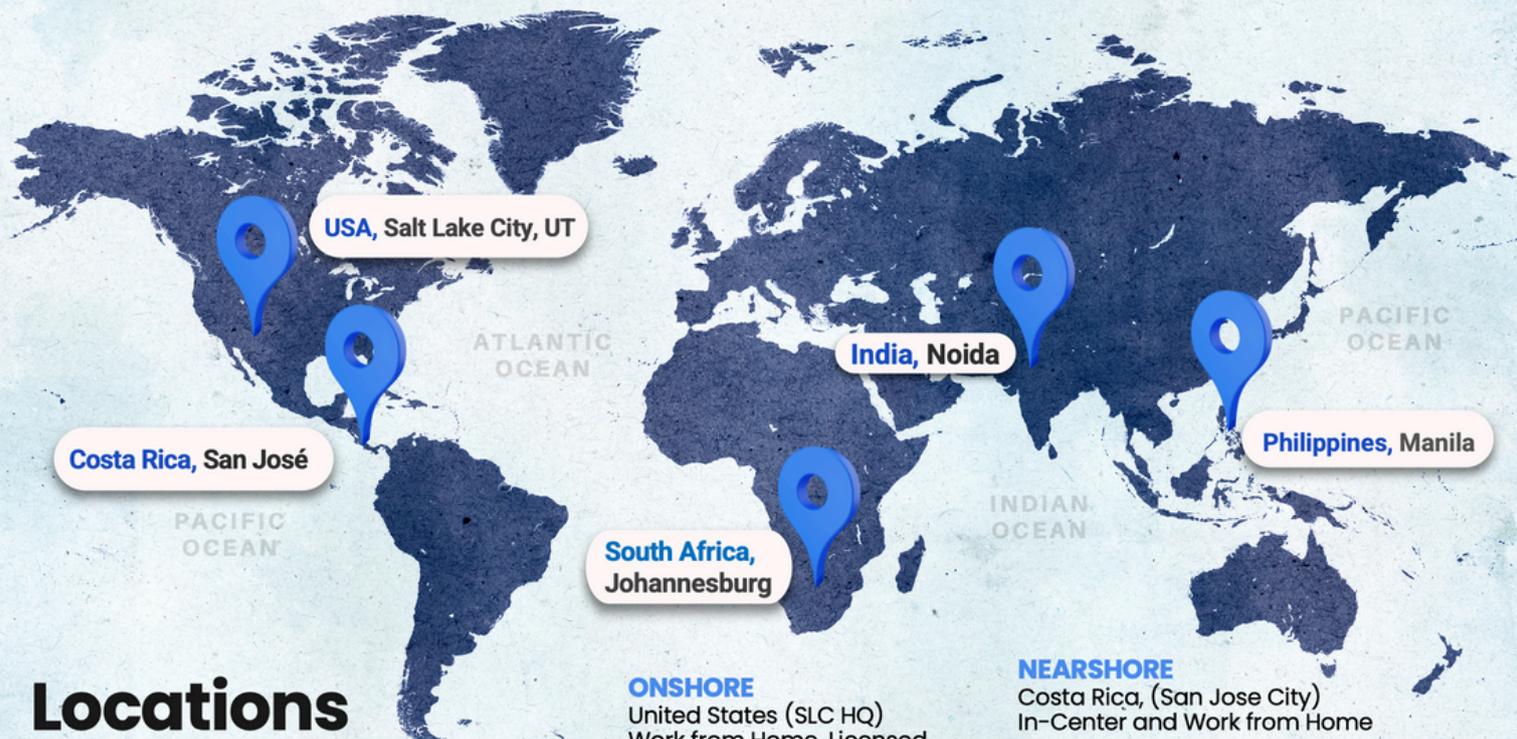
 [Connect with Nate](#)

**Our approach to leadership is at  
the core of our service offering**



# Service Options

ClearSource operates CX engagement centers with multiple sites across the US, Latin America, India and the Philippines. We leverage our global footprint to create a “right-shore” experience across every customer interaction – every time.



## Locations

ClearSource provides global operations offering blended capabilities across in-center and work from home delivery strategies. Creating “Right-Shore” experiences for every Customer interaction.

### ONSHORE

United States (SLC HQ)  
Work from Home. Licensed to operate in over 40 states.

### NEARSHORE

Costa Rica, (San Jose City)  
In-Center and Work from Home

### OFFSHORE

Philippines (Metro Manila)  
India (Metro Delhi)  
South Africa (Johannesburg)  
In-Center and Work from Home



# OUR SOLUTIONS

## Contact Center Services

ClearSource delivers winning Omni-channel solutions to brands that demand The Exceptional Customer Experience. We do so by taking the time to understand the needs of our partners, and best practices with respect to Operations, Training, Quality and Technology. By focusing on first-call resolution and customer satisfaction, ClearSource sets a high bar for Customer Experience. We believe in empowering agents to build brand loyalty during every interaction. Our goal is to win customers for life!

## Tech Support

We believe tech support agents need experience with the products they are supporting. That's why product labs are integral to our solution. If you have a complex product, demanding customers or both, ClearSource is the go-to tech team for first-call resolution. One of our clients produces high-end durable goods and its customers are huge fans of the brand. As such, they won't settle for anything less than perfection. That's why this brand exclusively turns to ClearSource. Here is a sample of our tech support capabilities:

- Tier 1, Tier 2 and Tier 3 technical support
- Software and helpdesk
- Durable goods troubleshooting
- Full sales cycle support
- RMA and warranty support

## Engineering

ClearSource has provided design services for many years. Through our experience supporting the renewable energy industry, we learned the value of transforming complex processes into simple operations that can be trained and repeated. We support over 20 design and project management functions including:

- Sales Proposal Design
- Building Permit Design
- Site surveys
- As-Built Renderings
- Contract processing
- Application processing



# OUR SOLUTIONS

## Back Office

Brands must provide a frictionless user experience to retain customers these days. If your frontline customer care team is doing an excellent job but the processes that support your product lifecycle are not properly aligned, your customers are sure to notice. ClearSource provides exceptional value with our back-office solutions team.

- Eligibility Verification
- Claims Processing
- Content Moderation
- Fraud Prevention
- Application Processing

## Revenue Generation

Do you have a high-quality product or service but lack a dedicated sales team? ClearSource is ready to help grow your brand by giving you the power to capture emerging markets and earn customers for life. We offer full cycle sales support:

- Lead Generation & Qualification
- Marketing Automation
- Customer Acquisition
- Success Management
- Retention & Growth Management

## Technology

Whether you need an Omni-Channel contact center platform, AI solutions or data analytics, ClearSource, in partnership with Amazon Connect, has a solution to meet your needs.



# PARTNER TESTIMONIALS



## **Corey L. Savory-Venzke** **VP, Customer Experience & Service**

I trust ClearSource with our business as if they are part of our company. Their passion for our brand and our customers is clear and when issues arise, their entire team – from front line to senior management – are there with us to identify the root cause, share insights on things we can do better, as well as take ownership for getting the service experience back on track. I couldn't ask for a better extension to our Traeger team.



## **James Nielsen** **VP of Operations at Project Solar**

ClearSource has always felt like they are a part of our team. It has been refreshing to have a partner who is unmatched in their focus on driving quality and continual improvement. They have become a trusted partner and we look forward to continuing our relationship for years to come.



## **Home Warranty Partner** **Sr. Manager, Home Warranty Customer Service**

ClearSource has been an amazing partner over the past 3+ years. Because of the exceptional customer experience their agents provide to our customers, we recently tripled the volume of customer service business we now send to them. We trust ClearSource to take great care of customers and their results continue to exceed our expectations. The passion and love for our product is demonstrated by the effort they put forth on a daily basis. Our partnership works because they truly care about our customers and their needs.



# PARTNER TESTIMONIALS



## **Health & Wellness Partner** **Senior Manager, Customer Service Operations**

We have been working with ClearSource for about two and a half years now. What started off with a plan to work with them for a couple months has turned into a long-term solution with which we are very happy and impressed with. From the first interactions with ClearSource, they have made us feel very important to them. Each interaction has been very personable and professional. Starting with about 20 agents and quickly scaling up to 100+ has been seamless. Their attention to quality and detail is exceptional. They go above and beyond to make sure that everything is handled and are usually a step ahead of us. We are very impressed with ClearSource and are thrilled that they are a part of our team.



## **Renewable Energy Partner** **Director of Vendor Strategy**

ClearSource has been a fantastic partner who we consider as part of our company family. We are able to make strategic decisions because ClearSource has a big variety of services and a proven track record of excellence. We could not be happier with our partnership.



## **Healthcare Partner** **VP of Marketing**

We have been working with ClearSource for 11 years. Knowing that we have a long history of cooperation and great management gives us confidence. Relying on the skill, experience, and knowledge of ClearSource has contributed to our success, growth, and profitability.



ClearSource is a business process outsourcing company that provides top-tier customer service support to various businesses across different industries around the globe. We currently operate from our offices in Costa Rica, Salt Lake City, Utah, USA, Noida, India and Pasig City, Metro Manila, Philippines. Our streamlined approach to customer service covers telephone support, chat assistance, email handling, comprehensive reporting, onshore and offshore solutions, and remote project management.

Since 2007, our focus has been on delivering quality and building trust among our clients. Shaped by our passion for creating exceptional customer service, our team is committed to helping clients fulfill their goals successfully. Visit our site to learn more.



[ClearSource BPO](#)



[www.clearsourcebpo.com](http://www.clearsourcebpo.com)