



About ClearSource



Meet ClearSource



17 YEARS
DELIGHTING BRANDS
CX POWERED



IN IT TO WIN IT
PRIVATELY HELD



INDUSTRY RICH
QUALITY OBSESSED



BPO & KPO
SERVICE & SALES
B2C & B2B



GLOBAL
SCRAPPY
AGILE



TECH ENABLED
DIGITAL NOW
HI + EA + AI



VALUES DRIVEN CULTURE



PEOPLE FIRST



“to drive customer loyalty
and engagement by
**creating an exceptional
experience at every
touchpoint”**

Rob Goeller
Founding Partner & CEO



Nate Spears
Founding Partner &
Affiliate Leader

Customer First



We share an intense passion for creating an exceptional customer experience.

Humble
Courage



Be brave enough to seek, deliver, and accept feedback.

Personal
Accountability



Commit to do the right thing and do it.

Hungry



Do your best every day to make great things happen.

Happy and
Healthy



Choose well,
live well.

Our Core Values

Our culture is defined by our simple yet strong core values

Our Global Presence

Bridging global operations to create "right-shore" ready experiences for every interaction and support need



Coaching Talent Performance

Associate Coaching

Review performance and tracking toward personal & collective goals

Repeat or refresh coaching topics based on demonstration

Document conclusion, "Yes associate demonstrated" or "No associate did not"

Follow up after observations completed by QA and leader focused on completion of action item

Establish baseline to understand associate skill set and gaps

Leverage reporting to select KPI and soft skill not being completed on calls that leads to results

Provide praise on strengths and demonstrate one skill to assign as action item

Schedule follow-up session to review blind observations, looking for implantation of action item assigned

Conclusion Improvement to existing gap

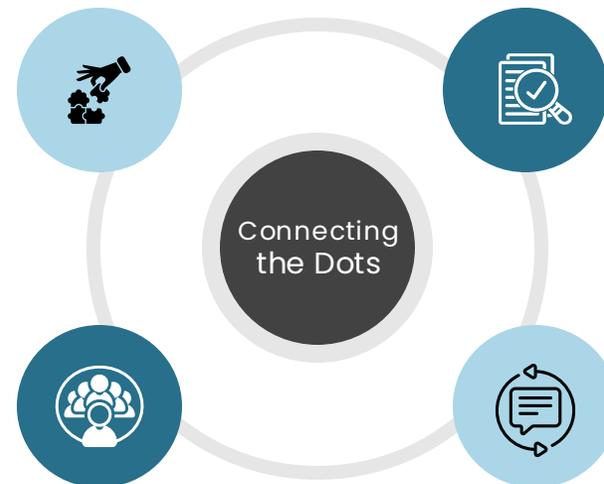
NO - Return to feedback stage and repeat

YES - Conclude and review performance Document session

Follow up Quality

Review Side-by-side & Remote Seek input Identify behavior skill/will

Review action plan Praise/coach/correct Document



Review Performance Observation

Quality review Side by side Remote Cap analysis Document session

Feedback Seek input

Praise/coach/correct Set 1 SMART action item Schedule follow-up Document session

Your Transition Team and Executive Sponsor



Deepak Luthra

Launch Leader



Andrew Hill

*Innovation
Sponsor*



**Austin
Credaroli**

*Global OPS
Sponsor*



Rob Goeller

*Executive
Sponsor*



**Kacey
Alcoran**

Program Owner



**Rose
Tajaros**

Workforce



**Kevin
Loveland**

Training



Our People

It's All About Talent



Selective Hiring

- Omni-Channel Enabled Experience
- Tested Literacy & Communication Skills
- Customized Pre-Hire Assessments
- Values Based
- Ops Scored &
- Approved for Hire



Development

- Industry Specific Training
- Top 80 Percentile Advance
- Immersive Learning, Simulation and Gamification
- Reduced Learning Curve
- Increased Speed to Proficiency



Certification

- Pre-Certified Operations (G&A) Management Team
- Defined Glidepath
- Structured Nesting
- Speech Analytics
- Associate Assist "Tech" to Drive Knowledge Acceleration

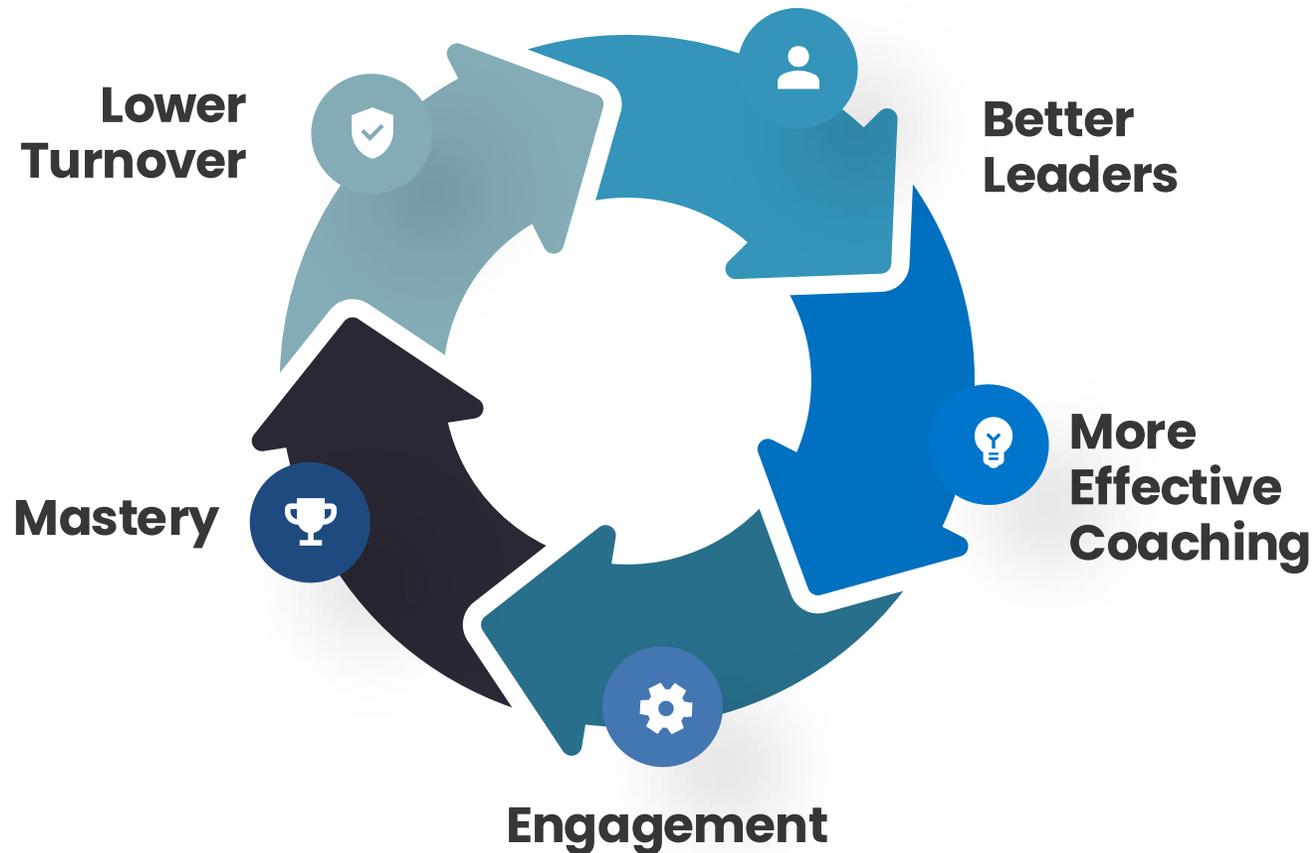


Experience

- Trained & Seasoned Leadership
- Graduate into Production w/Honors
- OTJ Mastery Defined & Measured
- Future Mentor and Leadership Candidate(s)

And Leadership

A Virtuous Cycle

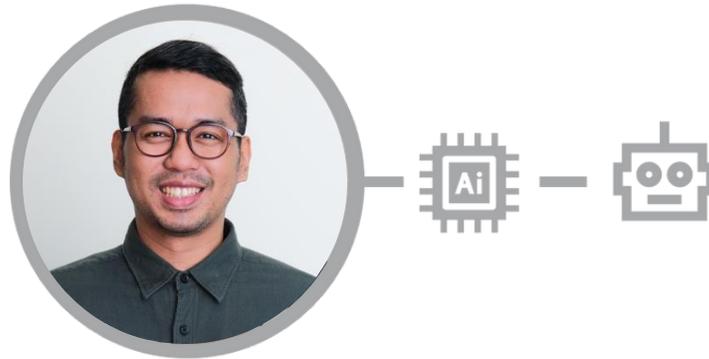


Leadership is CORE

- Better leaders make for more effective coaches, reducing time to mastery.
- Once representatives develop mastery, we challenge them with more autonomy and new responsibilities, which drives engagement.
- Engaged representatives tend to stay, resulting in lower rates of attrition.
- Reduced attrition allows for increased average tenure, creating greater subject matter expertise.
- This gives us the luxury of picking the best future leaders, completing the virtuous cycle.

Skilling Talent Development

Infusing Next Generation (AI) Learning & Development



Learning shouldn't be boring. We take a new approach by enhancing a robust learning ecosystem with AI.

It helps accelerate **speed-to-proficiency**.



Scenario 1

⊗ Attempt 1 ⊙ Attempt 2



Scenario 2

⊗ Attempt 1 ⊙ Attempt 2



Scenario 3

NEW*



Scenario 4

⊗ Attempt 1 ⊗ Attempt 2



Scenario 5

⊗ Attempt 1 ⊙ Attempt 2



Scenario 6

NEW*

Scaling Talent Development

Building Competence Through Intelligent Associate Assist Support

The screenshot displays a CRM interface for Ben Jones. The top section shows contact details and interaction history. The middle section, titled 'Interaction Activity', shows a conversation log. The bottom section, titled 'Associate Assist Bot', shows the AI assistant's responses to customer queries.

Associate Assist
Listens to the conversation

Associate Assist
Looks for the answer and article

Interaction Activity
Ben Jones - 12312

In Progress

Last Updated	Agent	Status	Contact ID	Elapsed Time	Address	Subject
Wed Jun 12, 2019, 1:03 PM MDT	Annie Pope	Active	12312	04:01:34	15008_06149503033a... Bit Transfer	
Wed Nov 26, 2016, 12:11 PM MST						

Interaction

Accepted

During open enrollment or for specific periods of time after a qualifying event, you can add a spouse, domestic partner, or child by filling out an enrollment form. Enrollment forms are accessible online via parasolhealth.com, would you like me to send you a link to the email I have on file?

Yes please. Also, **how can I get a copy of my insurance card?**

I will email you a temporary card now which works just like the real thing. I will also order you a new card from the website which will be mailed out to you within 5-10 business days.

Associate Assist Bot

country United States state Colorado option Health Plans Dependents

Listening to Call...

Topic: New Insurance Card

Respond with: I will email you a temporary card now which works just like the real thing. I will also order you a new card from the website which will be mailed out to you within 5-10 business days.

Topic: Add Dependent

Respond with: During open enrollment or for specific periods of after a qualifying event, you can add a spouse, domestic partner, or child by filling out an enrollment form. Enrollment forms are accessible online via parasolhealth.com.

Topic: HSA Contributions

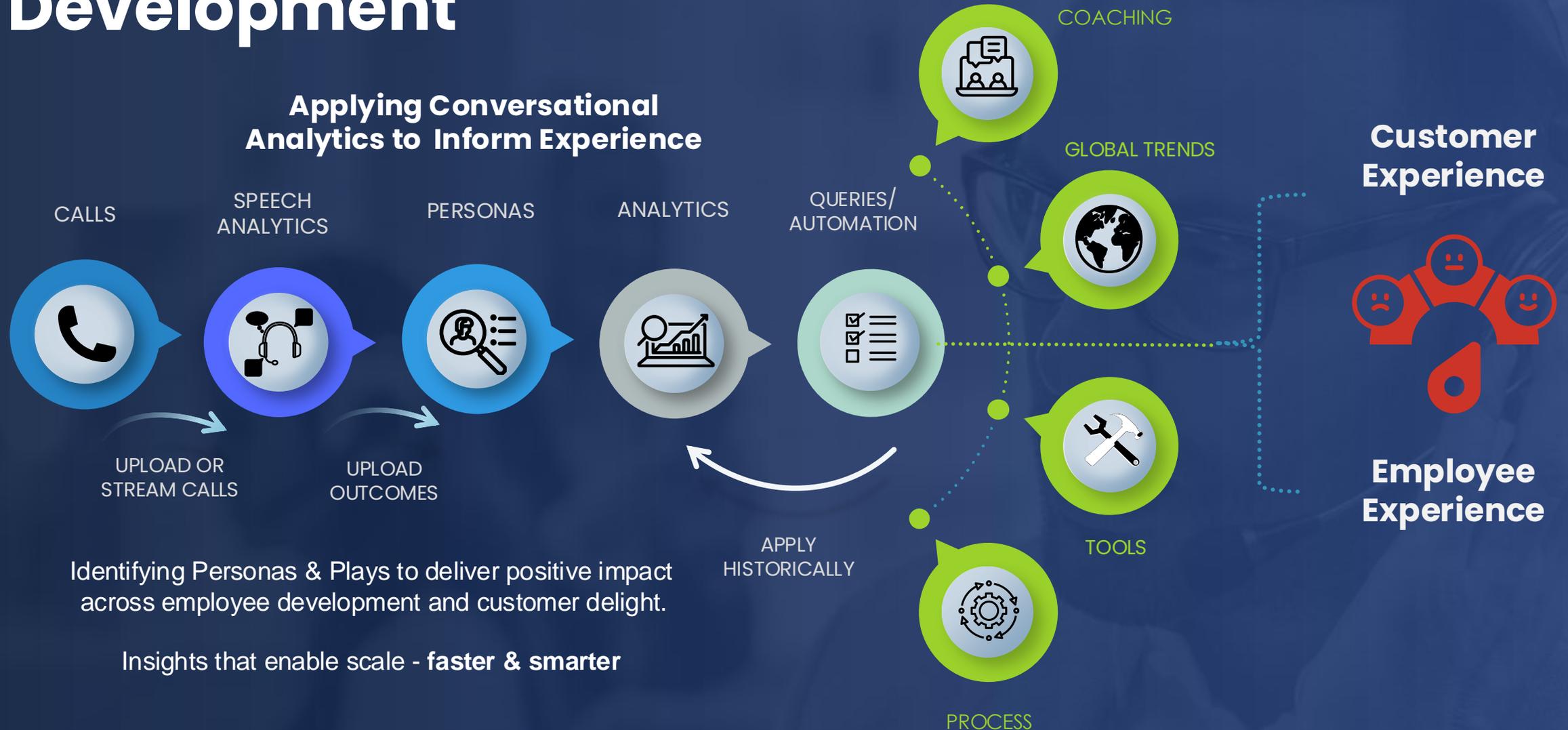
Respond with: The IRS sets the 2018 annual contribution limit, and it is dependent upon your age, medical plan, and family status. I can see by your details that the annual HSA contribution limit for your plan is \$6,900.

Skilling up takes time. We help our people accelerate to mastery through AI enhanced tools that build awareness and accuracy across every interaction.

Promoting greater job confidence and customer satisfaction never felt better.

Supporting Talent Development

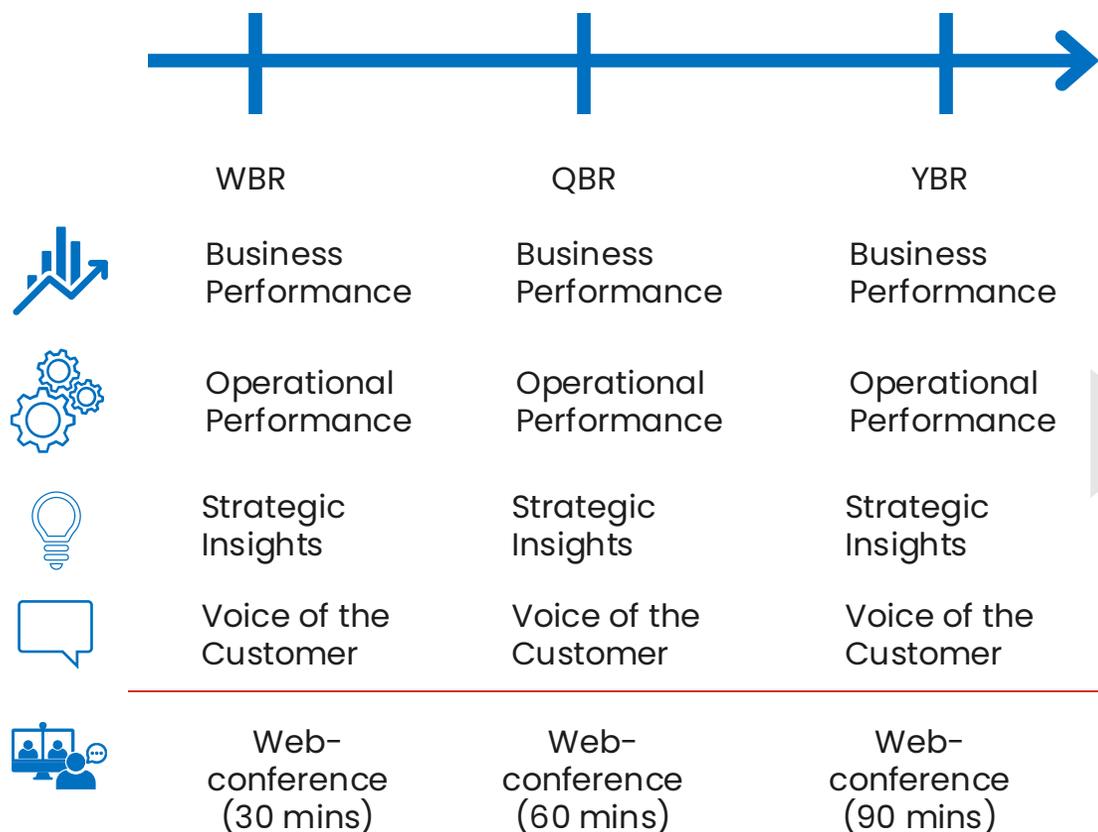
Applying Conversational Analytics to Inform Experience



Reporting Program Performance

A clear framework to maintain command + control over the program to ensure objectives are met and insights for plan optimization are continually applied

REVIEWS



STRATEGY



Business Performance

- Volume across Channels
- Pipeline, Intents, Needs
- Breakout by Segments
- Progress to Performance Goals



Operational Performance

- Lead Sources
- Rep Activity Metrics
- Conversion/Solve Rates etc.
- Trending & Benchmarks



Strategic Insights

- Customer profiles
- Contact trends
- Closing/Resolution Tactics
- Process changes



Voice of Customer

- Pains, needs, concerns
- Reaction to messaging
- Barriers to close/convert
- Competitor mentions

What Our Clients Have To Say

"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."

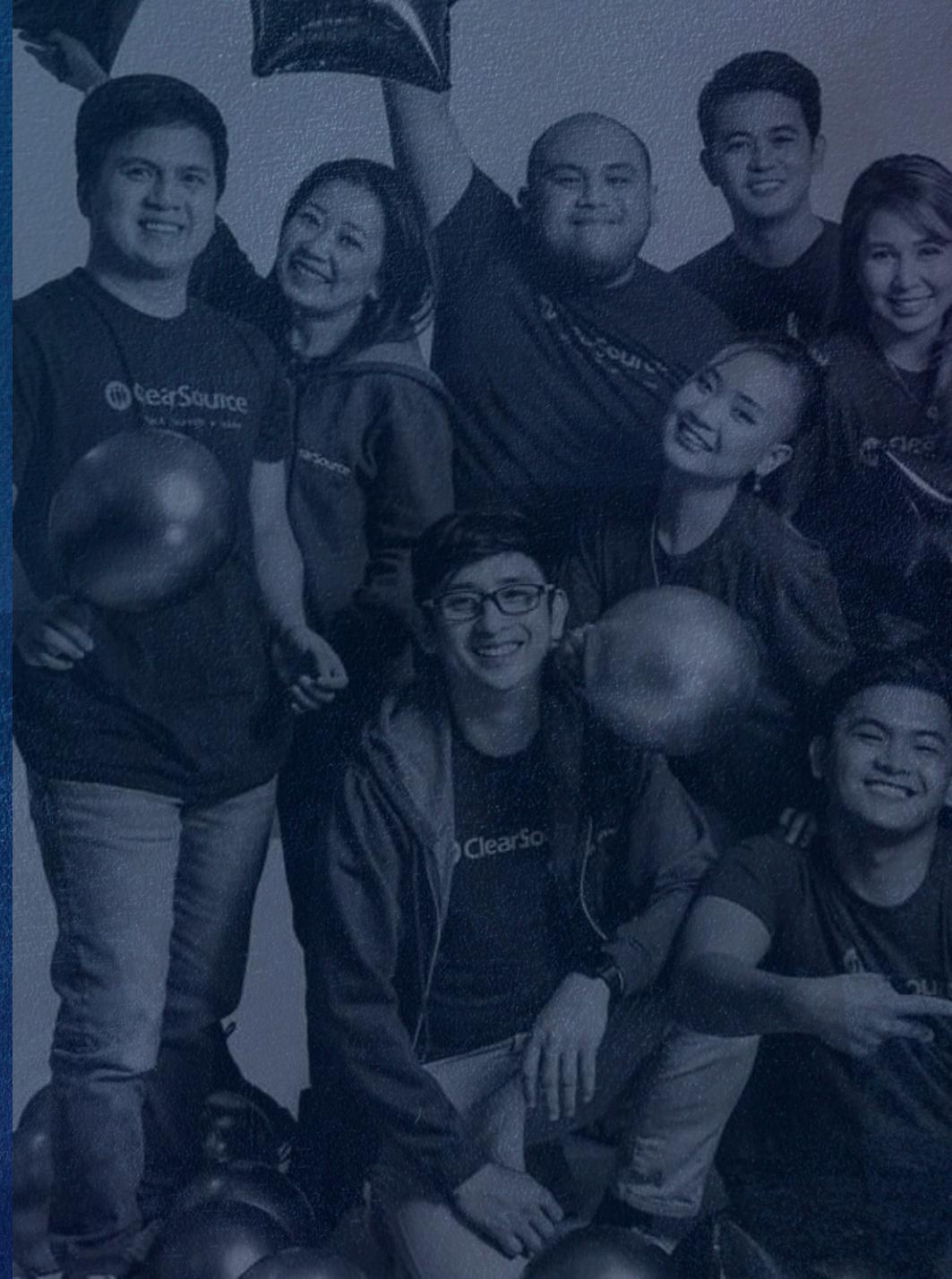
Corey L. Savory-Venzke
VP, Customer Experience &
Service at Traeger



What Our Clients Have To Say

“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”.

Matt Deering
VP, Marketing (US Health Brand)



Putting It All Together

PEOPLE • TOOLS • PROCESS • ACTIONS

Our Assurance of Quality



Accuracy: The right processes and protocols are followed to resolve upon first contact.



Connection: The customer's emotional connection with your company is enhanced.



Ease: The time and effort required of the customer is minimized.

