

Tailored BPO Solutions for Your Financial Services Needs.

ClearSource’s founders, Rob Goeller and Nate Spears are experienced in the financial services sector.

With that, they made ClearSource a trusted provider of outsourcing services across critical industries like financial services.

Known for exceptional customer service, strict data security standards, and client-centric support, ClearSource tailors its offerings to enhance customer retention and service efficiency for industry-specific needs.

Key Financial Services Services

Data Security & Compliance



ClearSource adheres to PCI-DSS and SOC 2 Type 2 standards, ensuring that sensitive financial data is always protected.

This focus on compliance and security addresses the growing need for privacy and cybersecurity in financial transactions and customer interactions.

High-Quality Customer Support



With specially trained staff in financial services, ClearSource offers empathetic and responsive customer support, which is crucial in maintaining client trust in sensitive areas like banking, loans, and payments.

Employee Stability/Low Attrition



By strategically locating its service centers and offering competitive wages, ClearSource achieves low employee attrition, which supports consistent, knowledgeable service—critical in the financial sector where customer loyalty hinges on familiarity and trust.

CASE STUDY:

ClearSource Delivers for Partner Company

A leading U.S. Home Warranty Company sought to manage rising call volumes while containing costs. ClearSource was engaged in a pilot program to improve quality and cost efficiency.

Challenges

- Rising demand led to increased call volume.
- Cost containment was critical to enable growth and market share expansion.



Solution

- Launched a pilot program with ClearSource.
- Recruited agents tailored to client specifications.
- Emphasized quality through positive agent coaching.
- Scaled operations based on client demand.

RESULTS:

ClearSource successfully scaled operations for the Home Warranty Company, boosting customer satisfaction and operational efficiency while delivering significant cost savings.

Expanded from **5 to over 150 agents** at peak

 **Expanded to over 150 agents**

Agent attrition was reduced by 50%.

 **10x**

Productivity increased by 19%

 **Productivity increased**

Absenteeism decreased by 200%

 **200%**

CSAT (Customer Satisfaction) improved by 11%

 **11%**

Total **cost savings** of \$1.9 million

 **\$1.9 million**

Testimonials from Financial Service Partner

“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.”

– Sr. Manager, Home Warranty Customer Service Partner