



Case Study

First Time Outsourcing Done Right.

Supporting a regulated financial services organization through its most complex operational launch, at speed, at scale, and without compromise.



High Stakes. Tight Timelines. Zero Outsourcing Experience.

A leading wealth and advisory services organization was in the middle of a major transformation. A large-scale tech rollout was driving a surge in support demand and internal teams were already stretched. Support had to scale, and fast.

But there was a catch: **they had never outsourced before.** And in a highly-regulated environment, there was no room for risk. They needed help, but not at the cost of control, quality, or trust.

The Challenge: Scale Without Compromise.

They weren't shopping for headcount. They needed a trusted partner who could help them get outsourcing right the first time, with a model that would:

- Protect the advisor, employee, and customer experience
- Stand up to regulatory scrutiny
- Build internal confidence, not trigger resistance.

No Plug-and-Play Playbook.

- ✓ **Structure Before Speed.**
Before ramping, we established clear ownership, decision forums, and escalation paths. That foundation turned rapid scaling from a risk into a controlled, repeatable process.
- ✓ **Training Built for Performance.**
Existing training wasn't translating. We redesigned it: more interactive, more practical, tightly aligned with quality and operations. Teams weren't just ready to go live, they were ready to perform.
- ✓ **No Ambiguity Meant No Delays.**
We made roles, responsibilities, and expectations explicit on both sides from day one. That clarity reduced friction, sped up decisions, and built trust quickly.
- ✓ **Momentum Beyond Go-Live.**
Shared accountability and consistent governance turned early momentum into sustained performance. What started as a small pilot grew by **114% in the first year.**

Outsource Without the Fear Factor.


First time outsourcing doesn't have to feel like a gamble. With the right structure and the right partner, it becomes a controlled, confident move — even in the most regulated environments.


Results that Built Confidence, Not Just Capacity.

The first-time outsourcer gained a model that worked and a partner they chose to grow with:

 **200+ FTE**
ramped in under two months

 **5 Lines of Business**
launched in under 8 months

 **83%+**
training graduation rate

 **100% performance**
vs. 95% target

 **Ranked #1 for satisfaction**
by an independent industry benchmark*
*As of 2026.

Let's Discuss Your CX

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