

US-Based Business Process Outsourcing Provider



Sheldon Ohringer - CEO

Caleris is a leading US-Based Business Process Outsourcing provider, specializing in Inbound Technical Support Services, Help Desk Services, Social Media Monitoring, and various Back Office Processing services. With Caleris as your Outsourcing Partner, you can expect courteous, professional services at a cost and level of efficiency that is hard to match internally or when outsourcing offshore.

Interview conducted by: Lynn Fosse, Senior Editor, CEOCFO Magazine

CEOCFO: Mr. Ohringer, would you tell us about Caleris?

Mr. Ohringer: Caleris is an outsourcing firm that specializes in customer support for IT and business applications, products and processes.

CEOCFO: Do you find that being in the US is becoming more meaningful?

Mr. Ohringer: The reason people have tended to outsource in the past overseas is because of price. We have strategically chosen locations with highly educated individuals and lower cost of living, so we not only compete on quality which we believe is superior, but we can actually compete on price as well.

CEOCFO: Would you tell us about your range of services and something that might surprise people that you have been able to outsource?

Mr. Ohringer: Most people come to us to outsource technical support and/or customer service of their technology, telecom or datacom product. An example where we have spent a great deal of focus is on a work process for reviewing user generated content. With the surge of social media applications, we have developed a niche to support applications including monitoring images and video.

This is another example of a service that can still be outsourced at a considerable savings for our clients.

CEOCFO: Do many people take advantage of the full range of your services or is it more of a pick and choose depending on need?

Mr. Ohringer: We definitely think all of our customers can customize our deliverables. Our biggest competitors probably put you in a box and say here is our offering. We do a great deal of data gathering to find out exactly what our clients' needs are and then come up with a customized solution that I think is more flexible than the companies we compete against. Most people have a need that is based upon that they are running out of room in their current location or running out of talent, so both are good reasons to find an outsourcer who could take care of both the space needs as well as the people requirements and not let the company have to worry about scaling up.

CEOCFO: How do people find Caleris and how do you reach out?

Mr. Ohringer: Over the ten years we have been in operation, most of our leads have come from referrals or people we have known or are introduced to throughout the industry. We do attend one or two tradeshows a year. We are accessible through the worldwide web but over half our business has come just from referrals of happy customers.

CEOCFO: Are there particular industries or types of businesses that you tend to work with?

Mr. Ohringer: Our typical industry is the telecom/datacom broadband space. Probably 50% of our business is triple play – for example wireless/internet / phone or phone/ internet/video. We do very well with Japanese and

US manufacturers of high-end business products that are technological based. Our business has been growing as fast as we can take over the IT helpdesk for any size corporation in any industry and manage that from our remote site.

CEOCFO: *When you are working with a company on handling their calls do they tell you how it should be handled or are you able to tell what you like to provide and offer to do so?*

Mr. Ohringer: Some customers are very sophisticated with outsourcing teams. They have a “customer experience” level that they expect you to meet. Other customers are truly looking for the outsourcer to provide best industry practices and they do not have that expertise in-house which is another reason to outsource in the first place.

CEOCFO: *How do you ensure a quality experience?*

Mr. Ohringer: The people that find their way to Caleris probably had an unsuccessful experience either in-house or through an offshore company and maybe even through another US company. When people come to us, there are typically high demands. There are two or three things we do to ensure a high quality customer service experience. We record our calls and all calls are accessible to our clients for a range of time so that they can listen to any call they would like to monitoring. We monitor all calls and do reviews on a weekly basis with our agents. We do customer satisfaction surveys at the frequency our clients request. These factors provide evidence to our clients that their users are receiving the quality customer experience they expect.

“The key for us is just to find people that are looking for a high quality customer experience still at a competitive price and would prefer a true US voice and understand that the value in retaining customers and reducing churn are the most important things in business.”- Sheldon Ohringer

CEOCFO: *When you are talking to a prospective client who perhaps was not referred is there an aha moment where they understand the difference or do they learn as they go along?*

Mr. Ohringer: So many people come to us where the CFO has gone to the business people in the corporations and direct them to lower costs. The thought immediately is probably with the television show outsource or just the experience that many of us have had by going to an overseas center. The big aha moment would be that you can actually get a quality US experience at 20-50% less than a typical cost in a major metropolitan US city from Caleris, which in most cases is about the same savings that you would get offshore. If it were the same savings in the US as it is offshore, why would you not make that switch to Caleris rather than risk your customer base to potentially poor customer experience?

CEOCFO: *Are you surprised that companies do not realize that?*

Mr. Ohringer: I am. Everybody focuses on their business and when the CFO comes in there and just beats on them and says they have to save me money by next quarter by whatever timeframe you can. They do not know about our company and we are 400 people strong. We do not do a ton of advertising or marketing. We grow through many referrals and a limited amount of marketing. We have grown at a pace that we are comfortable with. Having said that, I think that when people realize that they can get a quality experience in the US at a big savings compared to what they can do themselves then they are excited about engaging with Caleris.

CEOCFO: *Would you tell us more about the social media monitoring that you are able to do?*

Mr. Ohringer: An example would be user generated content such as pictures and videos or words. We have the ability through software when we have a business relationship with an account to monitor that either on a pre-posted basis or on an after-posted basis. Based upon who the advertisers are of the social media companies, they cannot risk putting something up if it violates the terms of use of their website. Some software will actually pick out the words these days and very little software can pick out certain things within pictures or certain things within videos. That is where a moderation product and company can come in and actually do that monitoring typically on a pre-post basis. Content is posted by a user and goes into an application for a Caleris agent to review if the content meets conditions to be posted.

CEOCFO: *How do you decide if something that can now be measured is something you would like to add?*

Mr. Ohringer: We think we are strategic in that as we meet with our current clients and future prospects we listen to where the pain is. If somebody is launching a new product, where are the customer pain points? If somebody has a product that maybe is going to have no software updates but they are trying to sell them additional maintenance contracts, then we are going to listen to where the customer's top touch points are and try to understand if there is a place where they would be comfortable outsourcing that function so they can focus on their core. The more we ask questions the more we find out about possible ways to help our clients.

CEOCFO: *What is the key when you are listening to a client to understanding what they may really want and need as opposed to what they say or think they need?*

Mr. Ohringer: They want reliability, dependability and a competitive price. You need to find the right balance. It all comes down to a reasonable cost that's less than what they are paying currently. They want to ensure a quality customer experience especially if it is a recurring revenue product of our client that is met, so that their clients continue for a long time.

CEOCFO: *What is ahead?*

Mr. Ohringer: More of the same. We plan on a lot of growing with existing clients where we handle some of the products and the next thing you know we are talking to the IT department and they are rolling out new software and now we can handle those calls. The key is listening to our clients and handling their needs.

CEOCFO: *How do you attract people who will pay attention to customer service; what are the intangibles?*

Mr. Ohringer: People ask us what business we are in and we are in the hiring, training and managing business. We have fairly exhaustive pre-employment testing where we are trying to understand if they are the right kind of people for the projects and programs we have at that time that we are hiring for. Some of our programs and projects are simpler and some are very complex. Part of it is, are we matching the right skill set of an applicant to the right skill set of a client?

CEOCFO: *Why should the business community pay attention to Caleris?*

Mr. Ohringer: Everybody is trying to save money these days in business and everybody is trying to focus on their core. In the kind of business, we are your core is maybe building the software product, the hardware product and delivering a service or some kind of a product. Your core is probably not the customer experience on an after sale environment. The key for us is just to find people that are looking for a high quality customer experience still at a competitive price and would prefer a true US voice and understand that the value in retaining customers and reducing churn are the most important things in business.



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