

# Structuring your customer support organization



# To quickly scale your customer service organization, you need to continuously rethink how to best provide support, what kind of people and skills you need, and how you're going to organize it all.

That's what this guide is all about. It's the lessons we've learned at Zendesk over many years of rapid growth and—as a result—how we structure our customer service organization around specific teams, tiers, and roles.

We define success as a combination of people, process, and technology—where the people part always comes first. One of our most important initiatives over the last several years has been our focus on building that people-first approach to customer service.

Key to that is providing well-defined roles and performance expectations, which gives everyone on the team an understanding of what they should be achieving and their career path options and goals to work toward.

This guide represents the work of many present and former Zendesk support team leaders who managed the support organization to keep pace with the company's growth and to continuously provide a great customer support experience.

What you'll find here is a framework of the core elements of a customer service organization that you can use to build out your own organization.

# 01

## The roles, teams, and tiers

The Zendesk Global Customer Advocacy team includes more than 250 people and is spread out across eight locations around the world. The organization has been structured around functional teams and tier levels of customer support to reflect increasing levels of complexity and the skills and experience needed to handle that complexity.

The Global Custom Advocacy team includes the people who interact directly with customers and solve tickets, a team devoted to supporting those customer-facing teams by building workflows and tools to make their jobs easier, customer service data analysts, trainers, the management staff, and people who manage projects and programs across the organization.

## How the organization is structured

The Global Customer Advocacy teams are currently organized into these three main functions:

- Tier 1 Customer Advocacy (Product Support)
- Tier 2 & 3 Customer Advocacy (Technical Support)
- Support Operations (Advocacy Operations)

The advocacy teams are organized into tiers to manage complexity. Tier 1 handles the easiest support issues, and Tier 3 takes the most difficult. We'll talk much more about each of these tiers in the following sections.

Directors lead each of these functions, with managers reporting to them in office locations across the globe. In other words, Director-level leadership is global, not regional. All three of these functions are global and co-located with each other. This makes sense for Zendesk because of how closely integrated these teams are.

There are some inevitable regional and product-specific differences in how teams are managed and how processes are developed and followed, but the Directors align these with the organization's overall goals and performance expectations.

All of the teams in the Zendesk Global Customer Advocacy organization report to the Vice President of Global Customer Advocacy.

Organization and management structures are always changing to adapt to the growth and changes in the business. Therefore, how you organize your customer service team at this level will reflect your own company's needs and circumstances.

## Tiers and retention

The needs to scale our organization to keep up with our rapid growth, increasing complexity, and ticket queue volume weren't the only drivers for implementing a tier structure. Employee retention was just as important.

Before we had tiers, Advocates' only option to advance their careers was a move into management, support operations, or another role in the company.

Providing levels of seniority within the Advocacy team gives people who are happy in a customer-facing support role the opportunity to demonstrate peer leadership and gain status, while staying in a job that they love. What better way to retain those great employees?

## Growth tipping points

There's no single perfect formula for growing a customer service organization, but there are some key milestones that you can consider important growth tipping points.

### When is it time to add a Support Operations team?

When you need someone working full-time on your support process and workflow tasks, which means that they're too busy to help customers. We discuss this in more detail in [Support Operations](#).

### When it is time to add a tier?

When your support team is splitting their time between the easy half of their queue (tickets that can be solved quickly) and the difficult half of their queue (tickets that require much more time and effort or specialized tools or skills).

### When is it time to specialize?

As complexity increases, it's impossible for everyone on the team to have in-depth knowledge about all the parts. Some people become experts in some areas, but you can't scale effectively with only one go-to person in those areas. We discuss how you can handle this in [Managing complexity with Tier 2 squads](#).

### When it is time to triage tickets?

Increased complexity also means that you need to be smarter about assigning incoming tickets. To do this, you need to add a triage step so that you can more thoughtfully direct support issues to the people who have the knowledge required to resolve them. Read more about how we handle this in [Zendesk on Zendesk: How we triage](#).

### Tier 0, making the most of self-service

Reflecting the importance of providing excellent self-service to manage rapid growth and satisfy customers, the Customer Advocacy team recently launched Tier 0.

This is the self-service tier: the support available to customers that does not require directly interacting with a customer advocate. This includes the knowledge base available in an online Help Center: the product training that is available to customers, as well as assistance that is available in the product's user interface.

Tier 0 isn't a staffed team, it's an initiative to better contribute to and manage self-service as a support channel; to better handle an

ever-increasing amount of incoming support requests that can be easily answered with these self-help resources.

There are two goals for Tier 0. The first is to practice knowledge-centered support (KCS), which means that reps are both generating and sharing knowledge-base content (internally and with customers).

The second goal is to devise ways to help customers discover and use that self-help content. An example of this is to use proactive support to spot an issue that a customer is having or is about to have, then proactively create a ticket that contains a link to the knowledge-base article that will help them resolve it themselves.

## Key Takeaways

01

Although your Support team may be small today, it's a good idea to think about where it will be several years down the road and define roles and an organizational structure that will help you scale.

02

Create an organizational and management structure that makes sense for your own company. Getting the functional teams in place is key; determining who they report to is part of the ongoing management of the growth of your organization.

03

Consider the complexity involved in the support you provide, the skills required to manage that complexity, and how you can organize to handle it effectively.

# 02

## Customer Advocates

The Customer Advocate teams directly interact with customers to help them quickly solve their problems and ensure customer satisfaction remains high.

The Customer Advocates are organized into 3 team tiers that reflect levels of complexity. Tier 1 is for general product support, Tier 2 is for technical support, and Tier 3 is for advanced technical support and engineering escalations.

In general, support issues assigned to Tier 1 are easier and take less time to solve than those assigned to Tiers 2 and 3.

Zendesk uses the “advocates” job title because that reflects our customer-first approach to customer service. You’ll also see “agent,” “rep,” and many other titles used across different customer service organizations.

## TIER 1

# Providing general product support

The Customer Advocates in Tier 1 provide general product support across one or more products.

This includes things like helping customers set up their accounts, resolving billing issues, helping them understand how the product works, and any other help customers need to use the product.

Tier 1 is also the first point of contact for incoming support issues. This is where all incoming tickets are triaged and then routed to the appropriate team or tier. The Tier 1 team also handles all incoming phone calls and chats.

Experienced Tier 1 Advocates take turns triaging tickets and determining how they should be assigned based on complexity, which is defined by the time needed to resolve the issue. Support issues that are assigned to Tier 1 are expected to take 15 minutes or less to resolve. If a support issue is more complex and requires more time to resolve, it's assigned to Tier 2.

Tier 1 includes these Customer Advocate roles:

- Associate Customer Advocate
- Customer Advocate
- Sr. Customer Advocate

We also talk about a Team Lead individual contributor role in [Customer Advocate Management](#).

### Associate Customer Advocate

This is the team's entry-level role. We look for people with potential, who have a year or two of experience helping customers in some capacity, and who possess essential customer service skills.

Associates are in training and need guidance to perform at the standard level set for customer advocates. We set a target for tickets solved per day and expect an overall customer satisfaction (CSAT) rating of 90%. Associates are usually in this role for at least 3 months before becoming full-fledged Advocates.

### Customer Advocate

Advocates are well-trained and can handle most types of general support issues; therefore, they don't "cherry pick" tickets. Their performance is measured by the number of tickets they solve per day and by their CSAT rating, which should be at least 95%.

### Sr. Customer Advocate

A promotion to Senior is possible after about 9 months of successfully working as an Advocate. Advocates must demonstrate that they can proactively identify problem areas and mentor and train other customer advocates on how to solve more difficult tickets.

A Senior's performance should be above the standard, and they should also have an average CSAT rating of 96%. They often specialize in one or more product areas and are considered experts in those areas.

## The Importance of Mentoring

Benjamin Towne, a Tier 1 Customer Advocate, was one of the earliest employees in the Madison, Wisc., office and helped grow the advocate team by rolling out the advocate mentor program. One of the first of two mentors in the program, he's mentored many team members and has some good advice about how to do it the right way.

You can read more about Benjamin and the mentor program he helped develop in [How to provide feedback to mentees that doesn't sound like criticism](#).

**It's really good to make a mentee feel like they aren't just another employee. They've been brought into a family or a team, and they have someone they can go to. A manager might ask an advocate to get something done, but a mentor is there to help them do it. Your old mentees should always be able to come up and still ask questions. It's also a great way to form relationships with new coworkers.**

**I think sometimes Tier 1 support is overlooked. Having a Tier 1 title doesn't mean that you're the lower end of support. For me, it's one of the most difficult groups in support. You need to learn the entire product as a whole because you get all sorts of different tickets in the queue. I've worked on other tiers, and the tickets are increasingly difficult. But the way you interact with customers tends to be more personal at Tier 1.**

## The Tier 1 Challenge

Arthur Mori, a Team Lead for Tier 1 Manila, has worked in all three support tiers, but he prefers Tier 1 because he likes interacting with customers.

You can read more about Arthur and his role as a Team Lead in ["Tier 1: The most difficult level of support?"](#)

## Essential Skills for Customer Advocates

Learn more about essential customer service skills to recruit, hire, and onboard customer service representatives.

### Empathetic

People in customer service roles should genuinely want to help other people. That desire begins with empathy: willingness to understand another person's experience and see it through their eyes.

### Internet savvy

The internet and mobile computing provide us with more ways than ever to communicate with each other. We refer to these as channels, and we often provide customer service simultaneously on many different channels.

### Strong communicator

This job is about communicating with other people. Advocates need to communicate well both verbally and in writing. Communication is about listening, then clearly articulating ideas and information in an authentic way.

### Master of simplicity

When a customer makes the effort to reach out and ask for help, it's the Advocate's job to quickly assess the problem, sort it all out, and then present the customer with the simplest answer possible.

### Growth mindset

Products, technology, and policies will change over time, and your Advocates will need to change with them. Look for people who have demonstrated a drive for learning and growing.

## TIER 2

# Where specialization conquers complexity

Tier 2, referred to as Technical Support, handles more complex support issues that require more in-depth knowledge of the product or a deeper technical understanding of it.

This team often helps customers with issues that involve aspects of the product that are not handled by the user interface—for example, resolving issues related to uploading data, making add-ons or companion products interact properly, and anything else that requires a deeper dive into the underlying technology.

The tickets that are assigned to this team are expected to take 30 minutes or less to resolve. If a support issue can't be handled in that amount of time, it's escalated to the Tier 3 team.

Tier 2 includes these roles:

- **Technical Support Engineer**
- **Sr. Technical Support Engineer**

Technical Support Engineers typically join this team after having been a Customer Advocate and developing expertise in one or more areas of the product. We hire people for this position from outside the company, as well.

### Technical Support Engineer

Typically, Advocates move into the Support Engineer role after having been an Advocate for at least one year. Of course, they also need to have developed in-depth technical knowledge about one or more product areas. For people with technical ability, this is the next step in their technical career track.

Like Advocates, Support Engineers have a target for tickets solved per day (a lower number than for Advocates because the issues they work on are more complex) and an average CSAT rating goal of 94%.

### Sr. Technical Support Engineer

A Senior has usually mastered multiple product areas, leads productivity improvements, and defines best practices within those product areas.

They're recognized as a point of contact for their product areas across the entire customer service organization, and they collaborate closely with the Product and Development teams to represent the needs of customers.

They have a target for tickets solved per day and need to achieve an average CSAT rating of 95%.

## Managing complexity with Tier 2 squads

Because Zendesk has a large and quickly growing suite of products, the Support Engineers in Tier 2 are organized into “squads.” There are currently four squads.

The first squad is for general Tier 2 support issues (in other words, the more complex issues that Tier 1 can’t handle, which also are not specific areas of the product that are handled by the other three squads). All new Tier 2 team members are assigned to this squad. This gives them a chance to master the easiest part of the Tier 2 job before diving into the more complex areas.

The other three “specialist” squads have responsibility for a portfolio of different aspects of the products (for example, one squad handles all the escalated tickets for a product like Zendesk Talk or the reporting tools).

As members of specialized squads, Advocates develop product expertise in those areas because they’re focused on them and aren’t pulled in too many other directions. The expertise that they develop helps the organization handle complexity and resolve issues more quickly.

Tier 2 Support Engineers are expected to (and want to) cycle through the three specialist squads. This gives them the opportunity to master all the areas of our products. Doing so also helps prepare them for a move into Tier 3.

## Teamwork and creativity

Guillaume Deleeuw, Team Lead for Tier 2 Technical Support in London, believes that working together is the best way to approach problems and come up with creative solutions.

You can read more about Guillaume and his role as a Tier 2 Team Lead in [“An unlikely advocate for Advocacy.”](#)



**Tier 2 often works with the development team, the product team, the operations team, and others, depending on whether we’re troubleshooting issues with the product, network, or the infrastructure. For any issue, we might work with multiple teams at the same time, or one team at a time. Even when issues are super technical, there are usually many ways to approach the problem and to work together toward a positive end result.**



## TIER 3

# Tackling the toughest issues

**Tier 3 is the highest level of technical support. This team handles the toughest issues, the tickets that have been escalated from Tier 2 (usually 5–10% of the total ticket volume).**

These tickets have no time limit for resolution; they take as long as they take to resolve. They're often issues that are hard to replicate and may be dependent on products or infrastructure beyond our own products.

This team also vets all issues that need escalation to the software development team, tests the fixes put in place by the development team, and then resolves the issue for the customer.

Tier 3 includes these roles:

- **Technical Support Architect**
- **Sr. Technical Support Architect**

Technical Support Architects have mastered multiple parts of the product (because they've participated in Tier 2 squads) and, as liaisons to the Product and Development teams, help each of those teams understand where the product can be improved and how.

## Technical Support Engineer

Within the Advocacy organization, the Architect (and Sr. Architect) role is the final stop in direct technical support of customers. Continuing to pursue the technical career track beyond the Architect role means moving into a role in the non-customer-facing Support Operations Engineering team or in the Software Development team.

A Sr. Technical Support Engineer with at least 1.5 years in that role usually has the required experience to move into the Architect role.

The difference between a Support Engineer and an Architect is experience, subject matter expertise and technical mastery, and their influence in the organization. They're expected to provide guidance and best practices for providing support for their areas of product expertise. They are trainers and mentors.

Technical Architects have a daily ticket solve target and an average CSAT rating goal of 90%.

## Sr. Technical Architect

A promotion to Senior requires a minimum 2 years of experience as a Technical Architect.

At this level, Seniors are excellent at communicating complex customer issues to software development teams and can make suggestions for improving the product and influencing the product roadmap.

They also interact directly with VIP customers to provide a high-touch technical support experience when needed.

Sr. Technical Architects have a daily ticket solve target and an average CSAT rating goal of 92%.



The team has to have persistence and patience; a lot of the issues take a long time. We have to have a broad scope—to have wide knowledge across products, but also the ability to be very technical. Also, it takes teamwork, jumping in to help each other and to form close-knit relationships.



#### Persistence and patience

Adam Lobb from the Tier 3 team in San Francisco believes that teamwork is the key to providing support at this level of complexity.

You can read more about life in the Tier 3 team in [“Advocate Spotlight on Tier 3: Bringing a hive mentality to work.”](#)



What I like about support engineering is that I can help customers, work on projects with engineering, and focus on really difficult questions. In other tiers of support, maybe you have to focus on helping more customers in less time. But in support engineering, you basically have to do as much as you can, going above and beyond to help. There’s nowhere else to go after support engineering, so you’re the last person the customer is going to talk to.



#### Going above and beyond

Abel Martin, a Support Engineer in our Dublin, Ireland office, manages fewer tickets in Tier 3, but he spends far more time on them and knows that the time he works on these tickets must be well-spent.

You can read more about Abel and his role as a Support Engineer in [“How to build great internal partnerships”](#) [hint: it involves a stick].

## Key Takeaways

01

Whether or not you're ready to split your organization into tiers, keep in mind that growth means tackling increasing complexity. Defining roles and teams to handle that complexity will help you future-proof the service you provide to your customers.

02

Defining functions, roles, and teams also provides the people on your team with well-defined career paths. Having these paths makes for happier and more satisfied employees because they have a clear understanding of what they need to do to grow their careers.

03

No one better understands the real customer experience more than the customer service organization. Must the customer experience be complex and frustrating? Customer service is a bridge to the design and development teams that helps improve your products, the customer experience, and ultimately your customer relationships.

# 03

## Customer Advocates Management

Customer service management teams are responsible for making sure that the organization delivers the kind of support that we promise to our customers. Doing that requires using resources wisely, staying on top of key customer service performance metrics, being an effective people manager, and constantly adapting to change.

To help to rise to that challenge, the Global Customer Advocacy team believes that you

need to create a great overall support experience by being as concerned with the [agent experience as you are with the customer experience](#). In short, happy agents equals happy customers.

In this section, we'll look at what's expected of each of the Customer Advocate management roles and share some of our guiding management philosophy and tools that we use to better understand the agent experience.

## Driving results and managing the support experience

All the Customer Advocate teams in Tiers 1 through 3 have a management structure that includes the following roles:

- Team Lead
- Advocate Manager
- Sr. Advocate Manager
- Director

Although management structure changes often to align with strategic goals and the need to effectively manage a global workforce, we typically have separate Directors for the general Customer Advocate teams (Tier 1) and for the technical support teams (Tier 2 and 3).

### Team Lead

Becoming a Team Lead is the first step in the management track. Although Team Leads don't officially manage the people in their teams, their supervision helps the team achieve its performance goals and helps the Lead gain experience and develop their management skills.

Like Sr. Customer Advocates, they need about 9 months of experience providing support as an Advocate before moving into this role.

They spend 80% of their time supervising a team of 6–10 Customer Advocates to consistently achieve desired performance goals established by the Advocate Manager and management team.

Team Leads work closely with their manager to help coach and build the team.

### Advocate Manager

All of our management roles require strong people and project management skills. They need to build relationships, manage performance, and deliver on their commitments.

At Zendesk we hire managers from both outside the company and within the organization—as you do too, no doubt. From within, at least one year as a team lead is typical before advancing to a manager role.

An Advocate Manager will manage a team of 2–3 Team Leads and/or 1–10 Customer Advocates as direct reports. The typical team size is 16–25 people.

Like individual Advocates, teams have performance goals such as tickets solved and average CSAT ratings. Of course, at this level, managers are also concerned with many other essential customer service metrics such as first reply time, first contact resolution, handle time, and so on. You can read more about these in [Customer Service Metrics That Matter](#).

### Sr. Advocate Manager

Sr. Advocate Managers move into that role with a minimum of 1.5 years of experience as an Advocate Manager.

They manage Advocate Managers, usually having 2 or 3 direct reports and a total team size of up to 48–150 people. They train and coach their managers as needed.

They are strategically focused on goal setting and performance, and they usually spend <50% of their time on hands-on management. They are skilled in conflict resolution, communication planning, direction setting, hiring, and change management.

### Director

Directors ensure that they achieve their performance goals by structuring, optimizing, and growing their global organizations. Directors have very large teams; although we're not this big yet, they would be expected to manage up to 1,000 people with many managers and direct reports.

They are strong influencers across the organization and company and often work with the Sales team and VIP customers.

Becoming a Director requires lots of experience successfully managing customer service teams to achieve business results. Directors report to the VP of Customer Advocacy.

## Measuring both sides of the relationship

### The Support Experience

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### Customer Experience

+

### Agent Experience

The best customer experience is achieved when you also focus on the agent experience. Combined, the two create the support experience.

At Zendesk, we've been working to achieve the optimal support experience by trying to better understand both the customer and agent experience.

CSAT surveys measure how our customers felt about the support interaction after it occurred, but it's not the whole story. That's why we also measure agent satisfaction using what we call the ASAT survey.

Every quarter, we use the ASAT survey to give everyone in the Global Advocacy team the chance to share their experience about what's working, what isn't, and how they're feeling about their jobs and careers.

Their feedback provides the management team with the insights they need to improve our service, increase agent satisfaction, reduce support costs, and lower employee turnover.

You can read more about ASAT in [Which comes first, the customer or agent experience?](#)

## 6 Core Competencies for Managers

Managing the ticket queue, improving processes, achieving performance goals, and keeping customer satisfaction high is important, but so is managing people. Your managers need to have or develop the essential soft skills to be effective.

At Zendesk, managing effectively means focusing on these 6 core competencies:

### 01

#### Communication

You communicate well by building relationships based on trust and respect.

### 02

#### Direction setting

Building healthy relationships helps you set direction by telling the story of where you're going and why.

### 03

#### Motivating and recognizing

Building healthy relationships helps you set direction by telling the story of where you're going and why.

### 04

#### Change management and removing roadblocks

You manage change effectively by using critical thinking to re-design better processes, get buy-in, train people, align everyone's behavior to those new processes.

### 05

#### Conflict management, feedback, and development

You handle difficult conflicts on the team by giving tough, fair, but direct feedback.

### 06

#### Hiring, onboarding, and diversity

Build your team with a lens on diversity and inclusion by hiring great talent and onboarding them well.

## Key Takeaways

01

Organizations and management structures are always changing. Managers don't just need to adapt personally; they need to help their teams to do so, as well. Focus on developing core competencies and the soft skills needed to help your organization successfully grow with the business.

02

Agent satisfaction is as important as customer satisfaction because happy agents mean happy customers. Regularly survey everyone in the organization to get the feedback you need to make the improvements necessary to build a better organization. You won't just have happier employees; you'll also increase CSAT, lower costs, and decrease turnover.

03

Plan for growth by coaching and mentoring the people in your team who have management potential. Team Leads may not always move into management, but the skills and experience they gain in that role will strengthen the team in whatever role or function they eventually move into.

# 04

## Support Operations

As your customer service organization grows, there's a need to spend more time developing new processes for managing the ticket queue; triaging, assigning, and escalating tickets; and tracking the many data points available to you to assess individual and team performance, as well as how well you're helping your customers.

On small support teams, those responsibilities tend to fall on whomever is the help desk administrator (usually a manager). Someone needs to create views, define workflows, and, in

many other ways, help make it easier for the team to manage the ticket queue.

Inevitably at some point, however, this work becomes a full-time job, which means that someone has to step back from directly helping customers to handle it. When you reach that point, it's time to consider creating a team devoted to this: a Support Operations team. At Zendesk, we refer to this team as the Advocacy Operations team.

## Supporting support

The Zendesk Support team came to the realization that it was time to create a Support Operations team when the organization grew to roughly 25 people.

John Beattie, the Director of Support Operations for Zendesk who was brought in to build this team at Zendesk, suggests that you might want to consider doing this when you reach roughly 10 customer service reps or whenever you reach the point when you have to pull someone off ticket duty and customer assistance to take on all your process and workflow tasks.

The Support Operations team (SupportOps) helps the teams that directly interact with and assist customers (the Tier 1, 2, and 3 teams). They do this by defining and streamlining processes and workflows, building tools to help make delivering support easier, providing education and training to Advocates, and evaluating and making sense of all the support data that's available to help assess the organization's performance and just how well they serve their customers.

The roles within the SupportOps team include the following:

- **Systems Specialist**
- **Sr. Systems Specialist**
- **Systems Analyst**
- **Sr. Systems Analyst**
- **Tools Developer (Software Engineer)**
- **Sr. Tools Developer (Sr. Software Engineer)**
- **Project Manager**
- **Program Manager**

The roles in the SupportOps teams generally require more senior-level experience and expertise. That's why many of them join from the ranks of the Customer Advocates in Tiers 2 and 3. Although, it's a good idea to mix in outside hires to add new skills and experience to the team.

Like the tier teams, the SupportOps team has the following management roles:

- **Manager**
- **Sr. Manager**
- **Director**

People in SupportOps don't directly interact with customers—remember, they support those who do. That's important to note again because this team provides a career option for people who have a systems mindset, those who enjoy developing tools that make delivering support easier, and those who like working with data. Working on the SupportOps team may also be attractive to people who have been providing direct support to customers but would, for whatever reason, like a break from doing that and also remain in the organization by taking on a new challenge.

### System Specialists

Typically, internal hires into the SupportOps team need a minimum of 2–3 years of experience as a Customer Advocate.

What do Specialists do? Simply, they handle some aspect of what it takes to provide support for the organization. As an example, a Specialist may be charged with monitoring key customer service performance metrics and reporting that data to the management team. Another Specialist may be helping to build the internal knowledge base and Advocate training materials.

Promotion to Senior requires a minimum 1.5 years of experience as a Systems Specialist, and, of course, a track record of excellent performance. Seniors are expected to know more about more things and have a larger influence on the team.

**Seniors are expected to know more about more things and have a larger influence on the team.**

### System Analysts

Systems Analysts are essentially more experienced Specialists. They usually move into this role with a minimum of 1–2 years of experience as a Sr. Systems Specialist.

Of course, with more experience, expertise and influence in the organization, they take on some of the more important or strategic projects and initiatives in the SupportOps team.

Promotion to Senior requires a minimum of 2 years of experience as a Systems Analyst.

### Tool Developers

Tools Developers are software developers who build custom tools that help the team deliver better customer service. For example, this team developed the [Time Tracking app](#). They also built a red alert app to help manage and resolve issues and customer communication during system outages, a QA app, and data migrations tools— just to name a few more.

Required experience here really depends on your specific situation, what tools you're using, how much customization you need, and the complexity involved in building those customizations.

For this role at Zendesk, we require a minimum of 4 years of experience in web application development. For Seniors, 5+ years of experience in specific areas of web application development is required (those areas depend on what types of tools we need to develop).

### Project & Program Management

Effectively managing the many projects and programs that are put in place to achieve the SupportOps team goals, the SupportOps team includes Project and Program Managers to guide them all to completion. For example, this team makes it much easier to roll out Tier 0 and help the organization move to a knowledge-centered support model.

These roles are the same as the Project and Program Manager roles that you find in many other functions within a company (for example, product development and engineering). They guide teams to get things done as planned.

We look for Project Managers who have 2–3 years of experience and Program Managers who have 3–5 years of experience.

### Support Operations Management

The Manager, Sr. Manager, and Director roles in SupportOps largely mirror the equivalent roles in the Tier 1–3 Customer Advocacy. Instead of managing Advocates, however, they are managing Specialists and Analysts, etc.

Both the SupportOps Manager and Sr. SupportOps Manager typically have teams of 2–10 people as direct reports. A Director is expected to be able to handle a team of up to 250 people.

### Telling people to do things

Justin Helley, who manages the Advocacy Training & Development team at Zendesk, never expected to end up in management, but someone recognized his potential.

You can read more about Justin and his role managing Advocate training in [“The short path from Swedish lawn bowling to advocacy training and development.”](#)



I didn't see myself in management. My father, working for the post office, ended up being a supervisor. He hated having to tell people to do things that he didn't agree with or that he didn't want to do himself, and he ended up quitting. That always stuck with me, and I didn't want to be in that position either. Zendesk opened me up to a new way of leadership—more of a servant leadership. And when we first talked about it, our recruiter helped me to see that a lot of what I was doing in the office, organizing departments into games and extracurricular activities, were examples of leadership. That's what got me thinking harder about it.



### Don't let your data lie to you

Sarah Kay, Data Analyst on Support Operations in San Francisco, joined Zendesk as a Tier 2 Customer Advocate, soon moved into a Team Lead role, and then became the first Data Analyst on the Support Operations team because she'd gotten a taste of data analysis at Oracle and saw an opportunity at Zendesk to return to something she really enjoyed. She's got some advice about the skills needed for this role.

You can read more about Sarah and her role as a Data Analyst in [“Why every support team needs a data analyst.”](#)



You need to have attention to detail, and an ability to think about data in multiple dimensions: thinking about how one piece of data relates to another. There's multiple ways to look at and filter data and to process and explain data. A lot of times, data can lie. It's just a number or a series of numbers, and you should be able to back it up and tell a story with it. You've got to segment it correctly and understand the different perspectives represented in your data.



## Key Takeaways

01

A Support team needs support as well, someone to define processes and workflows, track and report on important metrics, and build custom tools to make delivering excellent customer service possible amidst rapid growth. Therefore, consider early on if it's time for you to start building out an Operations team.

02

An Operations team also provides other career path options for your experienced Advocates and non-customer-facing, roles for those people who need a break from direct customer interaction.

03

By continuously analyzing and reporting on the many customer service metrics that define team performance and the quality of the customer experience, an Operations team helps make seeing the forest for the trees much easier.

## Conclusion

There's no one right way to piece together all the parts of your support organization; staying on track, adapting to rapid growth, and managing change is a constantly moving target. What's working well now may not work well 6 months from now. If you remain focused on managing complexity efficiently, building team strength, and keeping both your customers and your staff happy and satisfied, however, you'll be equipped and ready to handle your next big growth challenge and successfully scale your organization.

We hope that the framework of roles, teams, and tiers that we've provided in this guide will help you as you build up and expand your own customer service organization.

Assess your Customer Service organization's maturity at [assessment.zendesk.com](https://assessment.zendesk.com)