

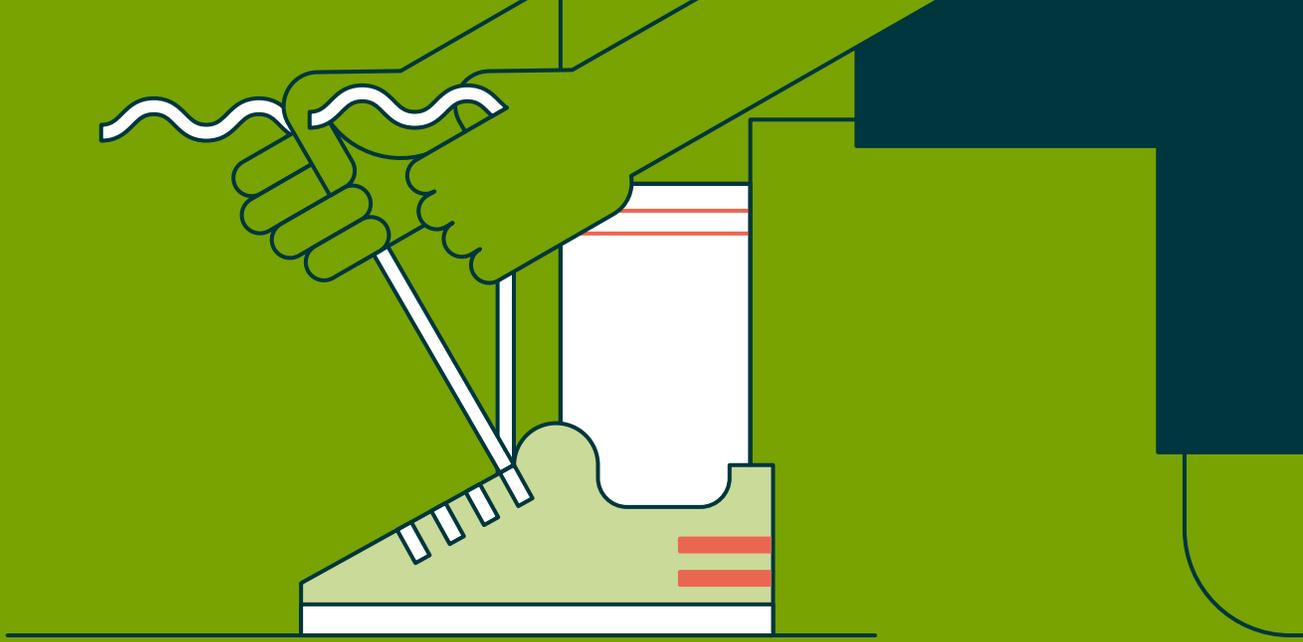
Agent life cycle

Customer service agents interact with customers more than just about anyone else.

The quality of customer service provided by agents can impact everything from the customer's feeling about a single interaction to the lifetime value of that same person; time and resources must be spent finding and training the best possible talent for the job.

The way the business treats the agents can have a direct impact on how the agents interact with your customers, which in turn impacts the bottom line. Happy agents will not only provide a better customer experience but stay with your organization longer.

Agent life cycle focuses on how to improve the way your business interacts with support agents. It costs money and precious time to onboard and re-train new agents.



High growth

As a high growth support organization, you have a unique set of challenges and opportunities. Clearly, something is working **because** you're in high growth mode. The support you are providing is resonating with your customers. But the demands are increasing, as you are time and time again asked to do more with less, straining your support team, threatening your ability to maintain the same level of quality, let alone improve it.

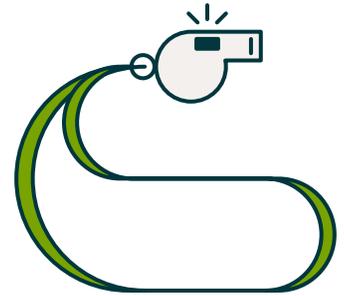
Yes, this is a difficult challenge but not impossible. Zendesk has compiled real-world support strategies that have helped companies just like yours, everything from hiring and training agents to creating best-in-class support strategies to providing great customer experiences.

This guide was designed with the high-growth support team in mind and is here to help you take your support to the next level.

Recruiting profile

Finding the right customer service agents is a difficult task. Many who enter the field come from diverse backgrounds and often lack training in this industry. Turnover is high, making it difficult to maintain a large pool of agents who you can train and mold into top performing veterans.

That's why it's imperative to correctly handle recruiting the right talent from the start of the process.



HIRING PROCESS

Here are some key activities for everyone involved in the process to make sure you're recruiting the best possible people:

Key roles and responsibilities

- Work with managers and colleagues to create a key roles and responsibilities document. This will make sure everyone is on the same page in understanding the key job descriptions of all levels within the organization and the responsibility maintained by each role.

Sourcing options

- Decide which channels from which to source: referrals, online applications, and job sites, as well as if you wish to use a staffing agency, in-house recruiting, or a hybrid.

Screening process

- Develop a standard candidate screening process for job candidates. This can include minimum years of experience and technical skills in a resume or even asking candidates to work on several sample support tickets—it's a good idea to use real-world tickets with personal details removed—to understand their working process and ensure they have the temperament to effectively resolve the kinds of issues your support agents encounter every day.

Further reading

[Hiring customer service agents](#)

VIRTUAL VS BRICK AND MORTAR

Will your support team work from a central location or virtually? Some things to consider:

Brick & mortar

A brick and mortar support center is a centralized office used for receiving or transmitting a large volume of requests by telephone.

Benefits:

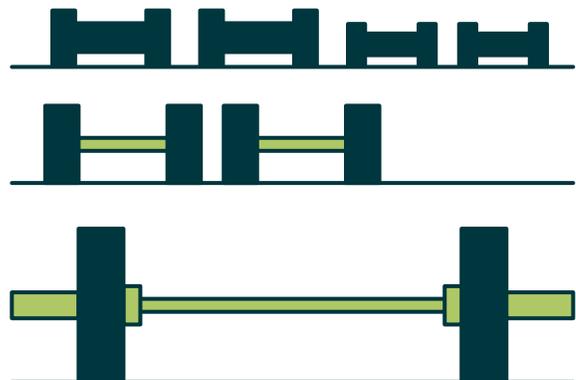
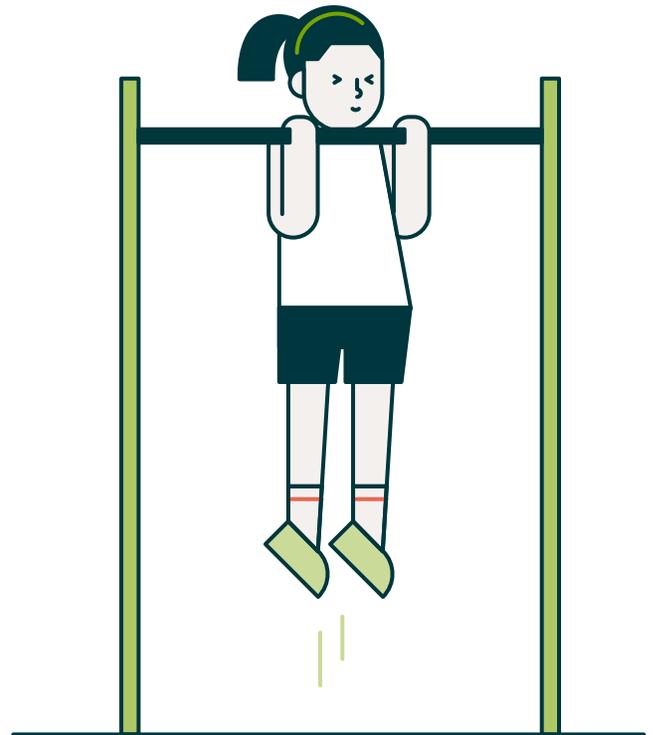
- Agents can easily rely on peers for support
- Lower potential security risks
- Fewer administrative burdens
- Easier for managers to monitor and provide motivation
- Career path is more defined
- Internal organization opportunities

Virtual

Agents can be based anywhere without installing any special hardware or software. A work-at-home agent simply logs into the web-based application to begin taking customer calls, emails, or chat sessions. Virtual agent representatives are geographically dispersed, rather than being situated at workstations in a building operated by the organization. Virtual agents require an internet connection and a workstation.

Benefits:

- Employees might prefer the comforts of home
- Ability to handle spikes in volume
- Saves overhead costs
- More schedule flexibility
- Expands the potential talent pool



Invest in your team: agent training

Properly trained agents are more likely to stay with the organization. Meaning, not only does making an investment in correctly training agents ensure that customers are receiving the best possible support, but agent turnover is reduced, minimizing associated costs of hiring and onboarding new agents.

TYPES OF LEARNERS

It would be easier for everyone involved if a one-size-fits-all approach could be used to properly train agents, but the fact is, everyone is different. So everyone absorbs and internalizes training in different ways.

While it isn't really feasible to accommodate every person at all times, before starting the process of building your training program, it's important to think about which materials and strategies to factor in the different types of learners.

- Visual
- Auditory
- Reading and writing
- Kinesthetic (or tactile)



VISUAL

Learn best by seeing. Graphic displays, such as charts, diagrams, illustrations, handouts, and videos, are all helpful learning tools for visual learners.

People who prefer this type of learning would rather see information presented in a visual than in written form.

Tools for visual learners:

- Shadowing current agents
- Video tutorials
- Documentation with screenshots



READING AND WRITING

Prefer to take in information displayed as words.

Learning materials that are primarily text-based are strongly preferred by these learners.

Tools for reading and writing learners:

- Written guides
- Handouts
- Charts



AUDITORY

Learn best by hearing information. They tend to get a great deal out of lectures and are good at remembering things they are told.

Tools for auditory learners:

- Presentations
- Group discussions
- Webinars



KINESTHETIC (OR TACTILE)

Learn best by touching and doing.

Hands-on experience is important to kinesthetic learners.

Tools for kinesthetic learners:

- Demos
- Hands-on tasks
- Shadowing current agents

SAMPLE PROGRAM

Here is a sample training program that uses multiple tools and activities:

Ice breaker

- An activity like two truths and a lie is always a good warm up when doing a live training.

Trainer presentation

- Trainer presentation should be engaging and include a lot of questions for the audience to engage with.
- Virtual training should always include a poll every 5–10 slides.

Teach back

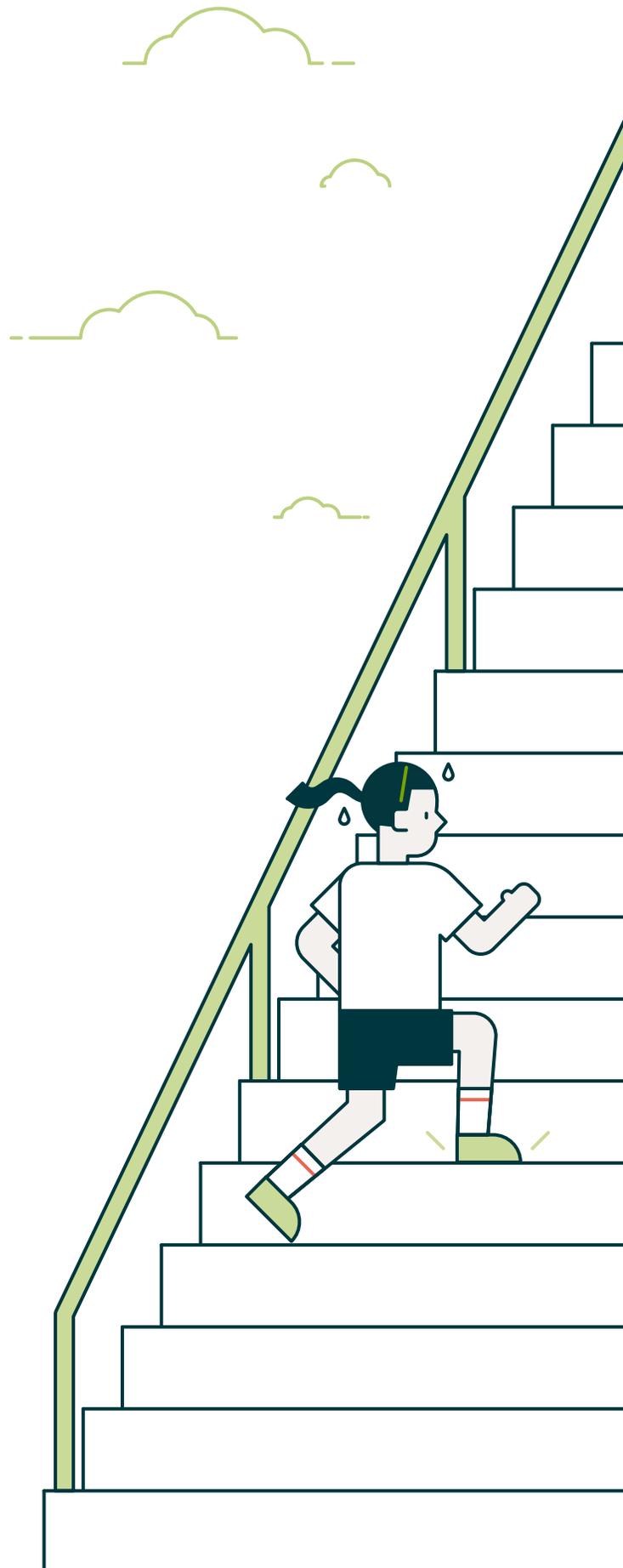
- Trainees should be given an assignment that requires them to do some research and then present their findings. It's always great to give each person something different so folks can learn from each other.

Group activity

- Trainees should be assigned group work that requires a combination of skills—presenting, demonstrating, creating, etc.

Further reading

[Customer service skills for agent training](#)



Metric reporting

Without measuring customer support efforts, it's impossible to improve. But choosing the right metrics to focus on, as well how to interpret and act on the data, can be difficult. Likewise, metrics reporting is a valuable asset for communicating the value of customer service to the rest of the company.

While every company will want to focus on a specific set of metrics, here are few basic but extremely important ones:

CUSTOMER SATISFACTION (CSAT)

Measures the customer's satisfaction with the quality of support received during their interaction. This is typically measured via surveys that ask the customer: Were you satisfied with this interaction?

Why is CSAT important?

CSAT is a transactional metric that allows you to fine tune the service provided by agents. CSAT is also a component of the overall loyalty a customer will have with the organization.

Questions to consider:

- **If CSAT is low:** Do we have a workflow setup to respond to bad ratings?
- **If CSAT is high:** Is this telling the full story? Are our survey/response rates also high?
- **If CSAT is fluctuating:** Do we have seasonal/temp agents? Does it fluctuate during high-volume periods?

FIRST REPLY TIME (FRT):

The number of minutes between the time a ticket is created and the timestamp of the first publicly visible agent comment on that ticket.

Why is FRT important?

Customers hate waiting. In fact, there is a direct correlation between customer satisfaction and slow first response times.

Questions to consider

- **If FRT is high:** What's our triage method? Could business rules assist in cutting down assignment time?
- **If FRT is low:** Is full resolution time also low or are agents taking a long time to solve tickets?
- **If FRT is fluctuating:** Are we having trouble regulating response times during volume spikes?

TICKET VOLUME

The number of tickets created per month.

Why is ticket volume important?

This metric reflects the scale of your support organization.

Questions to consider

- **If volume is increasing:** Do we have self-service options that can deflect low effort tickets from agents? Has marketing or sales launched a new product, campaign, or incentive? Did we have an outage?
- **If volume is decreasing:** Have there been changes to our self-service offering?
- **If volume is fluctuating:** Does our business have seasonality? Did we have a business change that caused a spike in support volume?

SELF-SERVICE RATIO

A ratio of the number of Help Center views to tickets submitted. This helps you measure how self-service is contributing to ticket deflection.

Why is the self-service ratio important?

Self-service ratio measures how well customers are able to self-serve versus submitting a ticket.

Questions to consider

- **High self-service ratio:** How do we empower our users to find our Help Center and self-serve?
- **Low self-service ratio:** How do we maintain our self-service content? Do we use any metrics to determine when new content is necessary?
- **Fluctuating ratios:** Have there been any business changes that impacted a spike in tickets and knowledge articles being accessed?

ADDITIONAL METRICS

Handle time:

Measures the average amount of time spent on each call and includes related administrative tasks such as submitting call reports.

First-call resolution:

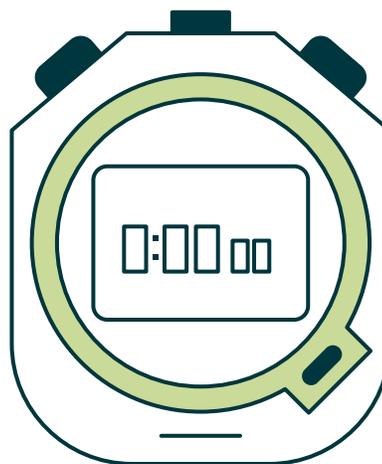
Measures the outcome of each call handled by your agents to determine how many contacts it takes to resolve customer issues.

Active vs. waiting calls:

Measures current volume compared to the number of callers waiting to be patched through to an agent.

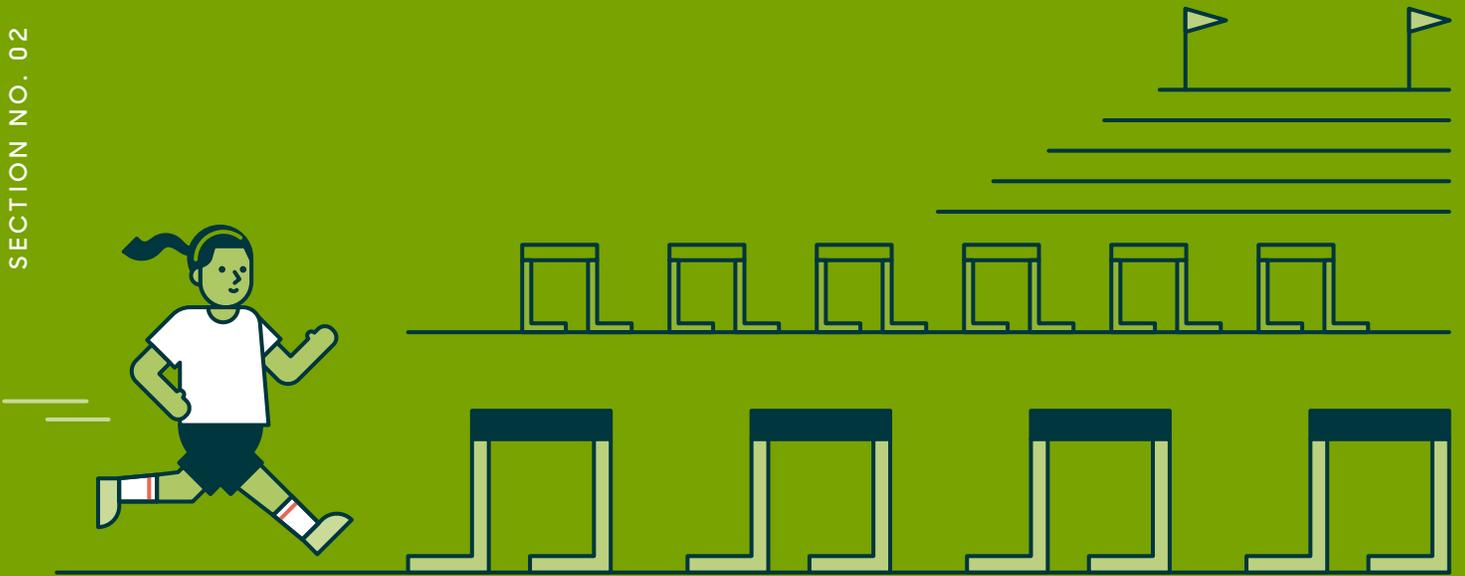
Agent turnover:

Percentage of agents that leave.



Key takeaways

- 1** Hiring and training quality support agents is vital to the success of any business, so make an early investment in building out processes to facilitate both.
- 2** Focusing on a single method of training, such as written guides, will exclude other types of learners. Create training materials and activities that accommodate multiple types of learners.
- 3** The first step towards improving is measuring performance. Determine which metrics matter the most, keep track of them, and use what you learn to provide better service.



Achieving scale

As a support team looking to achieve scale, you have a unique set of challenges and opportunities. Your organization has matured to the point that it is able to deliver quality support to an ever-increasing number of customers. You know that you are able to meet those needs, but, as the company moves to another level of success, the deluge of customer interactions is just around the corner. As your support structure and strategies currently stand, you know there is no way to meet future demand without finding a way to scale and maintain a high level of quality.

Yes, this is a difficult challenge but not impossible. Zendesk has compiled real-world support strategies that have helped companies just like yours, everything from building career paths for agents to escalating ticket management to benchmarking against competitors.

This guide was designed with the support team looking to achieve scale in mind and is here to help you take your support to the next level.

Career paths

As with any profession, a customer service job can grow in different directions, leading to many new opportunities. Agents may decide to continue with customer service as a career, while others may go into a more support-oriented role within customer service like quality assurance, training, technical support, or business analysis. Furthermore, some customer service agents might move in a leadership direction, others to different departments like product management or marketing.

Another important factor is churn. Without a clear way for agents to progress their careers, they're more likely to leave for a company that can provide it. When this happens, you not only lose an experienced agent, but you have to put time and resources into hiring and onboarding a replacement.

It's important to develop a path for all advancement, setting demonstrable goals and clear roles for employees to grow into.



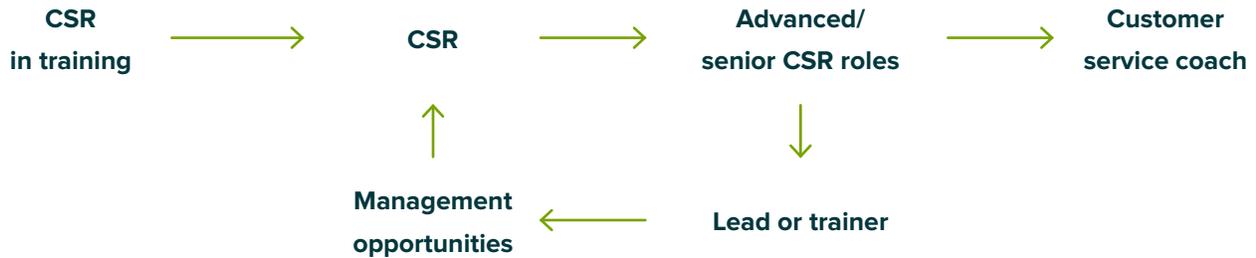
STEPS TOWARDS DEVELOPING A CAREER PATH

Before you get started, take the time to consider the following:

- Design and develop clear paths for different types of roles: management, individual contributor, and technical support.
- Offer external classes for management training at accredited institutions that offer management and leadership classes.
- Develop programs for managers and coaches to help them effectively guide their direct reports' career paths.
- Create different tiers for agents to create more growth opportunity.
- Identify areas for each agent to participate in projects and/or launches where they can show and test their skills.
- Ensure trainers are involved in process documentation.
- Involve coaches in QA.

EXAMPLE CAREER PATH

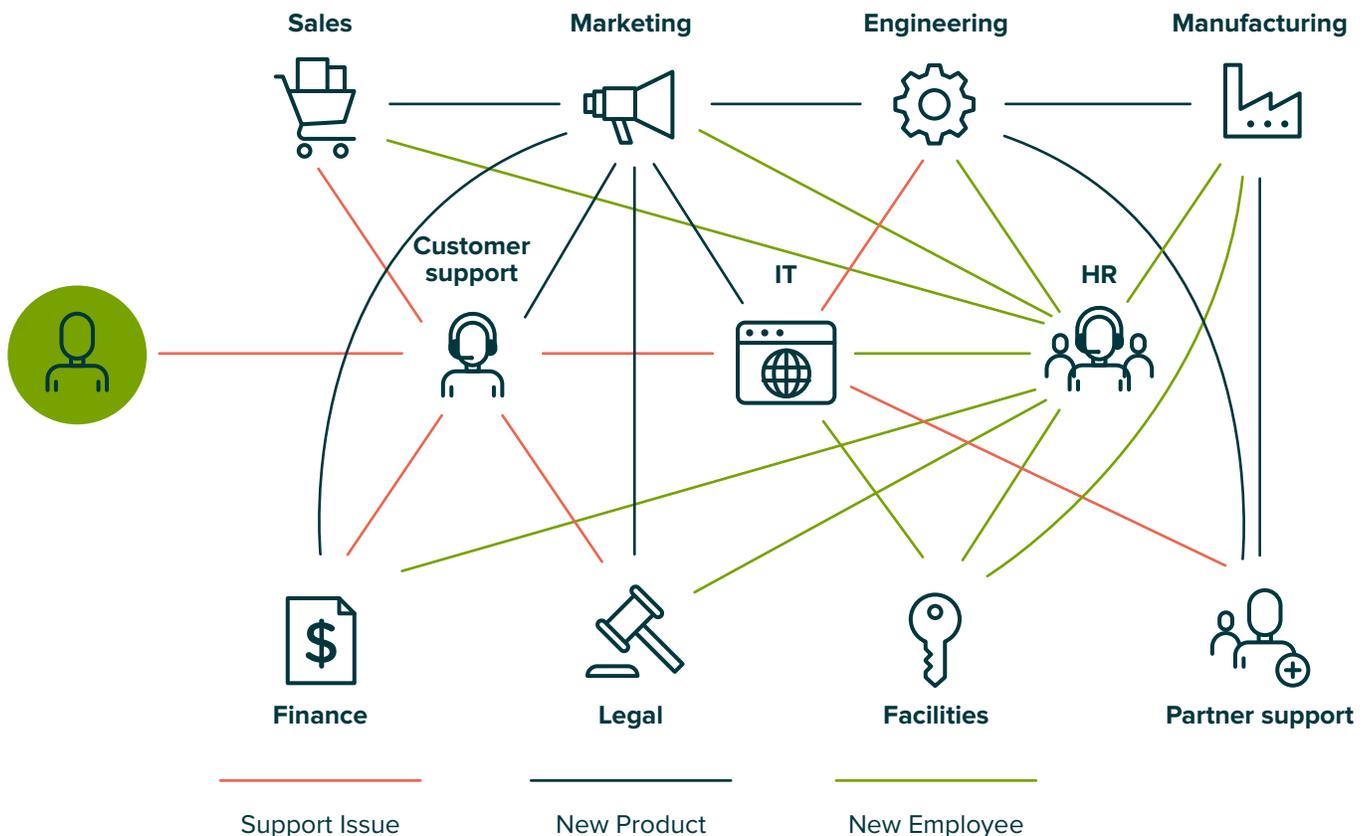
The below flow chart is just an example of a possible career path. The important thing to is to be thoughtful in building one and to communicate early and often with employees as they work their way through it.



INTERNAL NET PROMOTER SCORE (NPS)

The NPS survey is a great tool for determining a long-term understanding of how their customers feel about them. Why not use this tool internally to understand how your employees feel? It's a great way to take the broad view of employee satisfaction and see which departments need to make improvements. After all:

Everyone is a customer of someone.

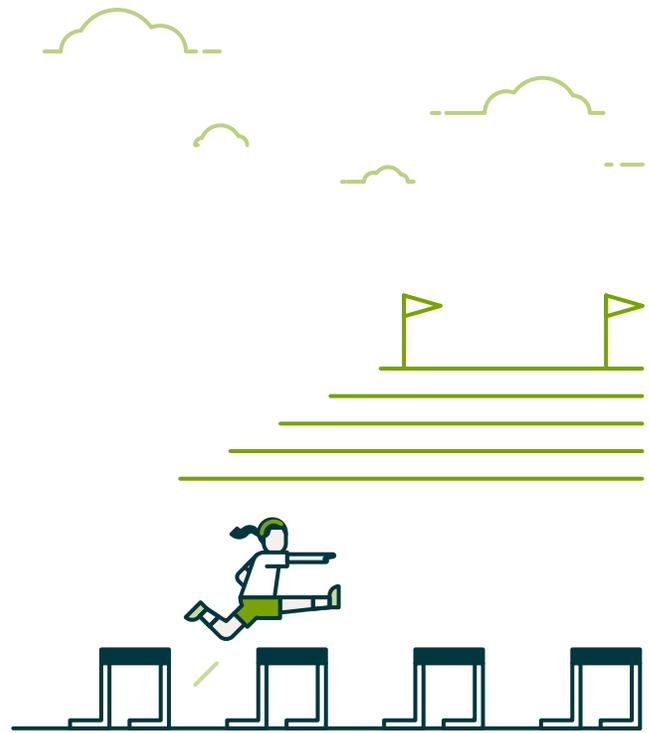
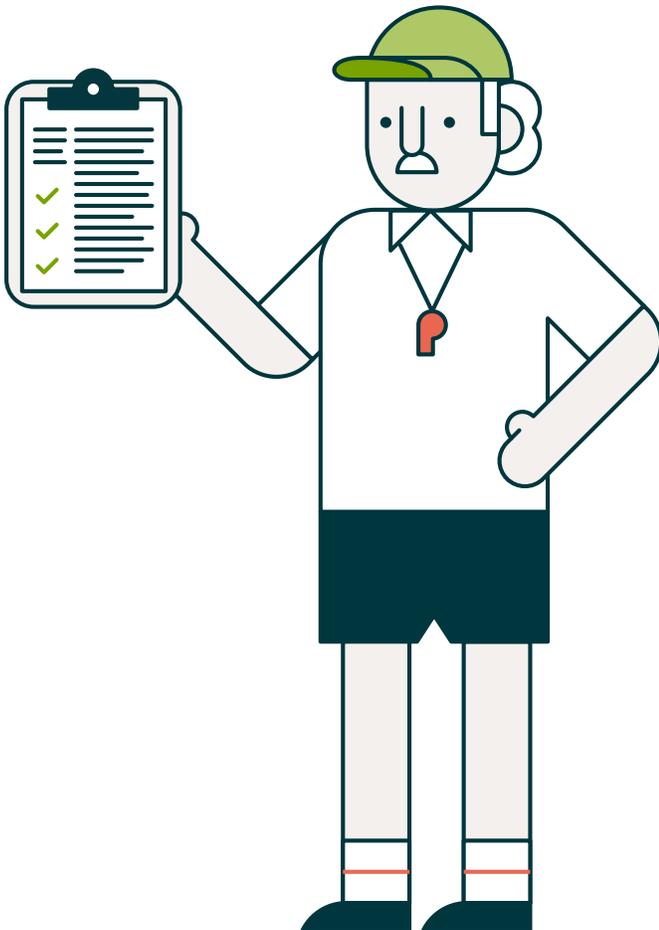


GETTING STARTED

Begin with a simple question: “How likely are you to recommend working with [insert department] to a colleague?”

Send this out to the company, then follow this procedure:

1. Request feedback.
2. Dedicate team meeting time to discussing feedback.
3. Celebrate successes.
4. Talk about failures.
5. Brainstorm ideas for improvement.



NPS BEST PRACTICES



Pick your spots

Not every interaction with every function merits feedback. Focus on the few that really matter—the episodes in which your group has a real chance to make either a promoter or a detractor out of an internal customer.



Celebrate heroes

Similarly, share positive feedback quickly, regularly, and with enthusiasm. Use stories of successful teaming, collaboration, and internal promoter creation to reinforce your organization's values.



Give it a rest

Use a process that allows you to control the number of times any individual is asked to provide feedback. You don't want to overwhelm your colleagues with an avalanche of requests.



Follow up fast

Similar to external customers, internal customers need to know their feedback has been heard and taken seriously. Moreover, you can often glean rich and valuable insights from closing the loop with your internal customers.



Maintain high velocity

Provide the feedback directly and immediately to employees who need to hear it. Connecting feedback to specific events and actions allows employees to quickly identify potential changes to behavior, processes, or policies.



Dig deep

Root-cause analysis is a critical tool for addressing the needs of internal groups, so don't stop with analysis of comments from your feedback system. Ask the "Five Whys" to go beyond the symptoms and figure out how to resolve the fundamental issues.



Keep it real

Don't protect your team from harsh comments. Instead, promote an environment in which even difficult feedback is treated as a welcome chance to improve.

Quality assurance process in agent life cycle

Quality assurance (QA) is the process of monitoring and maintaining a specified level of customer support quality. Doing so can lead to improved relationships with existing customers and increase acquisition of new ones.

Quality assurance means developing operational controls to ensure that the results match the desired outcomes. Customer service operations are designed to keep customers satisfied while protecting the organization. To make sure the organization achieves these goals through the agent, the person responsible for quality assurance must define the quality functions as they apply to how you serve your customers and the agent expectations on every interaction by channel.

STRATEGIES AND OBJECTIVES

Customer service means helping customers solve problems. To carry out this function effectively, customer service has to be easily accessible, knowledgeable, reliable, and deliver measurable results. Quality assurance identifies these requirements and measures how well customer service performs with respect to each one.

QA objectives include:

- Delivering service that matches customer expectations. If there are gaps, you can use a quality assurance system to track improvements.
- Regularly surveying customers to determine their expectations so the system can match against promises and deliveries.
- Providing key feedback to the agents on customer engagement and provide actionable recommendations that are measurable.

METHODS AND PROCESS

Different channels and technologies provide different opportunities to conduct QA, but the most basic include:

- Email monitoring: Reviewing email communications by agents
- Chat monitoring: Reviewing chat communications by agents
- Call monitoring: Recording agent calls
- Contact scoring: Reviewing recorded calls and scoring on a defined set of criteria
- Consistent agent feedback: Reviewing scores with agents regularly

Each company will choose its own process, but in general, QA should look something like this:



CALIBRATION SETTINGS

Results from QA can be used for calibration sessions—ongoing group working sessions to apply what was learned during the QA process. Participants choose a set of standards and objectives to be met in every customer interaction.

Best practices:

- Choose the frequency and schedule an hour for each session.
- Select contacts that are representative of the majority of the contacts you receive, or contacts to illustrate a particular issue. For some calibration sessions, listen or review contacts at random.
- Develop a scoring system and determine an acceptable variance in scoring.
- Choose one person to summarize the call.
- Review each standard and ask participants whether the standard was met or not met. Discuss until each member understands why the standard was met or not met.
- Review each objective, discuss the scoring variances and ask participants to explain why they scored as they did.
- At the end of the session, summarize lessons learned.
- Create notes from the session and distribute to participants for future reference.

AGENT QA

Use this sample scorecard and process as a jumping off point for conducting QA on individual agents:

OVERVIEW

This process defines a set criteria for assessing the quality of the advocate-customer interaction in a ticket. We think the starting criteria reflects Zendesk values and our understanding as a support organization about what it means to provide exceptional support. Using this criteria, we will grade randomly selected tickets resolved by each advocate on a monthly basis. Once the grading process is complete, functional managers will review the results with each advocate and begin a conversation on how to maintain and/or improve future customer interactions.

SCORING

DEFINITION

- Did not demonstrate the relevant competency.
- Demonstrated some of the relevant competency, but not all.
- Fully demonstrated the competency.

VALUE

0

1-3

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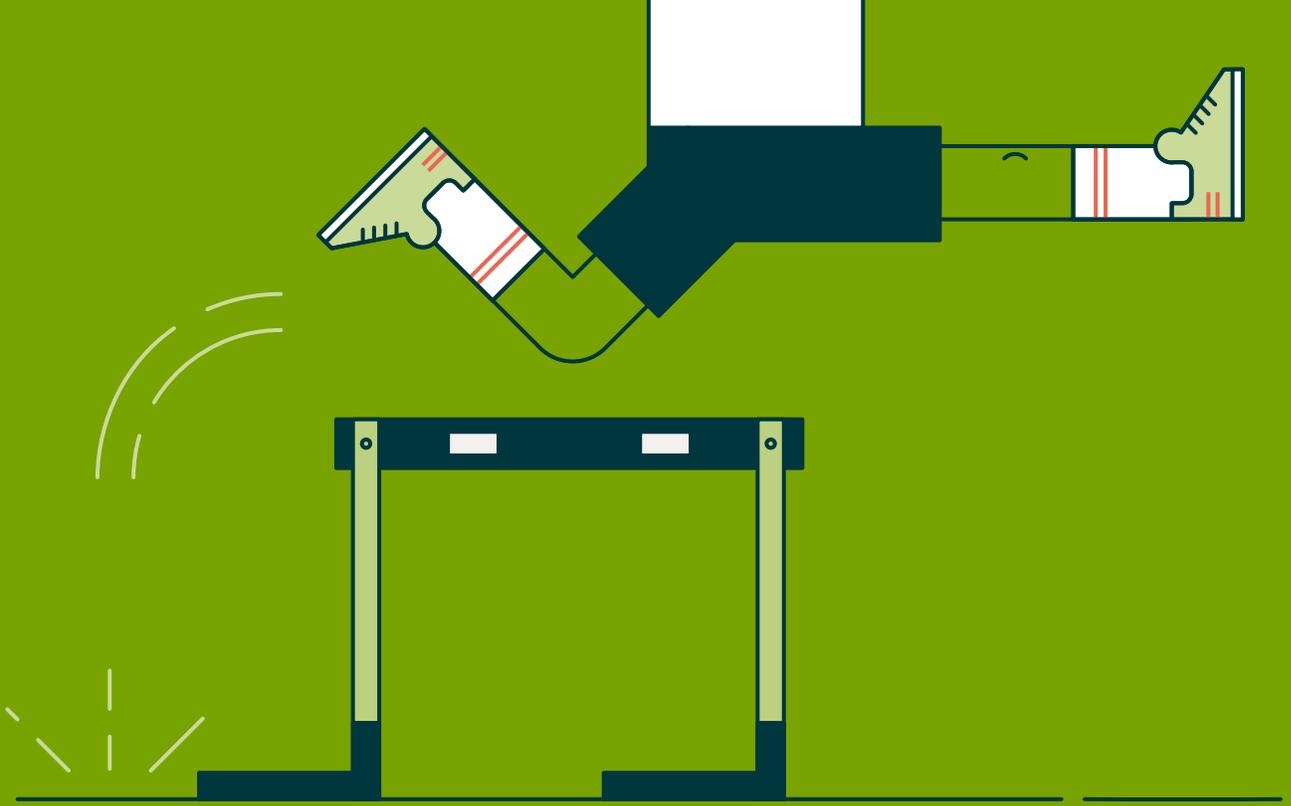
SAMPLE ASSESSMENT CRITERIA

This sample assessment criteria is set forth below. Note that there is not a clear cut definition for each but instead example questions that illustrate the scope of competency. This is not an exact science. The managers doing the assessment will be provided coaching to ensure a common understanding of each competency and similar scoring scale so that the results are as objective as possible.

COMPETENCY	EXAMPLES	SCORE
COMPREHENSION	<ul style="list-style-type: none"> Did the advocate comprehend the customer's request along with its priority/urgency? Did the advocate ask questions and provide the feedback necessary to demonstrate his or her understanding to the customer? 	0-4
ACCURACY	<ul style="list-style-type: none"> Did the advocate provide accurate information in response to the customer? Was the solution provided the best available one? 	0-4
JUDGMENT	<ul style="list-style-type: none"> Did the advocate exercise good judgment while handling the ticket? E.g., invested right amount of time to get to resolution (not too much or too little), matched language and style to customer's level of understanding, engaged the right resources for resolution (KB, Forums, SME), used the right channels of communication (email, phone), escalated when appropriate? 	0-4
COMMUNICATION, EMPATHY/TONE	<ul style="list-style-type: none"> Was the answer presented in a clear, understandable way given the customer's level of expertise? Did the advocate demonstrate empathy with the customer and maintain an informal, reassuring, and respectful (but not humorless!) tone? 	0-4
PROCESS INTEGRITY	<ul style="list-style-type: none"> Did the advocate follow all required processes when resolving the issue? E.g., filled out required fields, properly documented customer issue before transferring or escalating, followed the correct escalation path, checked for other tickets in the requester's org? Were mistakes openly acknowledged and corrected? 	0-4
HERO BONUS	<ul style="list-style-type: none"> Was the interaction exceptional in some way, suitable to be shared as an example for all advocates and representative of our team's best work? 	4

Key takeaways

- 1** It's easy to get caught in the bubble of your own support metrics. That's why it's vital that support organizations benchmark themselves against competitors—and companies in different industries—to ensure that they always maintain a high standard of support.
- 2** Different customers have different needs and expectations. Segmentation is an efficient way to organize customers into segments to provide tailored support for each segment.
- 3** When done properly, outsourcing support functions can help you scale support without sacrificing quality, provide customer service in new regions, and decrease operational costs.



Driving efficiency

As a support organization looking to efficiency, you have a unique set of challenges and opportunities. Your organization has effectively overcome the challenges that typically plague less mature support organizations. You have a robust team with specialized roles that provides high quality support.

Even though you are experiencing great success, you can't shake the nagging feeling that things could be much better. Maybe support provided from a newly opened international office isn't performing as well as you'd like, or change management still feels like it did during the startup days. As your support structure

and strategies currently stand, you know you can't rest on past successes but instead must find a way to improve even further.

Yes, this is a difficult challenge but not impossible. Zendesk has compiled real-world support strategies that have helped companies just like yours, with everything from providing multi-product support to using data to forecast different support scenarios.

This guide was designed with the support team looking to drive efficiency and is here to help you take customer service to the next level.

Regional training

As companies expand their support operations to provide support from multiple regions, they are faced with the challenge of maintaining consistent support from each of those regions. This can be difficult when one factors in geographic distance, multiple timezones, and different languages and cultures.

IMPORTANT DECISIONS

When expanding support operations into multiple regions, it is important to answer many of these questions:



Focus

Who requires training: an individual, a team, a call center, or the business process outsourcing (BPO) firm?



Development

Who should direct and review the development of training materials to ensure alignment with training objectives?



Provider: make or buy?

Should the training be developed within the support organization and/or training department or purchased from outside sources?



Location

Should the training be performed on the job, within the call center, off-site, or virtually?

TRAINING ISN'T THE ONLY ANSWER

Training is often identified as the solution to many customer support problems. However, training should be deemed necessary only when it has been determined that training is required to ensure employees will meet performance expectations, when the benefits of training are greater than the consequences of not training, and when training is the most cost-effective solution to the problem or opportunity.



Content

Should the content be customized or can it be generic and purchased “off the shelf”?



Facilitator

Should the facilitator be a trained customer service subject matter expert, an internal trainer, or an external trainer?



Delivery

Should the delivery be adapted to personal learning styles or can everyone learn the same way (e.g., all classroom or web-based)?



Evaluation

How will success be measured and determined?

REGIONAL TRAINING STRATEGIES

Once the above questions have been resolved, there are many factors to consider:



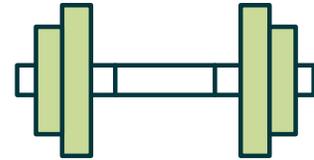
Culture

Be aware of how variances of culture, even if the different regions are in the same country, might impact the way agents and vendors need to be onboarded. Local customs might need to be incorporated.



Regional offerings

Do different regions offer different products and services? If so, you'll need to train agents in those regions to support those products and services.



Training

Determine who will develop training and how that training will be rolled out. You might want to select someone to train trainers, too. In any case, create a certificate program to ensure regional trainers comply with guidelines.

Forecasting and scheduling

Good support organizations are capable of meeting the everyday challenges as they occur, but great support organizations have the ability to forecast different scenarios and plan for them.

The most common scenario to forecast is simply normal, day-to-day operations and historical trending based on sales and product roll outs. But you may also require a forecast for special situations such as planning for new customer issues, opening a new support center, a merger or acquisition, or a change in operating hours. Or you may be in the process of implementing a new technology that will affect your call volume or pattern, and need to determine what the resulting change means to staff workload. Whatever the reason, it's important to understand the basic principles behind workload forecasting and how to apply them to accurately plan accordingly.

FORECASTING BASICS

Whatever you're trying to forecast, there are some basic guidelines to follow for collecting different kinds of data:

- **Historic**
Data about the previous two years of tickets, including average handle time (AHT) by half hour. Be on the lookout for extremes, such as holidays or busy seasons.
- **Average monthly ticket volume**
This can be accomplished via point estimates, assuming a date in the future will match a day in the past, or averaging the past few years.
- **Multi-channel**
Slice data by voice, chat, email, etc.
- **Agent activity/shrinkage**
Factor in time spent or lost in the contact center for training, in one-on-one meetings, lunch, breaks, vacations, sick time, etc.
- **Daily and half-hourly**
This involves breaking down the monthly forecast into a daily prediction, then further down into hourly or half-hourly numbers.

In all cases, adjust for other business influences. Will the billing department's new invoice format cause a flood of calls? Will sales forecasts from the Sales VP help you plan staff based on the new customer account base a year from now? Is the fulfillment area changing the way they package and ship products that may cause an increase (or decrease!) in your call volume? It's critical that you communicate regularly with all these influencers of call center workload as you prepare and fine-tune the forecast.



360° evaluations

As a mature support organization, you probably already use a formal review process for your 360° evaluations; a process for collecting feedback from the people the employee works with, including coworkers, managers, direct reports, and colleagues in other departments.

SAMPLE QUESTIONS

Always tailor questions so they focus on providing information vital to the success of the company, support organization, and individual. Some questions might include:

- What other specific achievements have you made during the preceding period?
- Of your major job responsibilities, where do you feel you have excelled?
- What projects/assignments were you not able to complete and why?
- In what area(s) do you feel uncomfortable performing?
- What would aid you in developing more expertise in those areas?
- What could I as your supervisor/manager do to help you to become more productive?
- What future goals do you have?
- Do you have any additional comments/suggestions regarding the department operations or your performance?

BENEFITS OF 360° EVALUATIONS

- Offers a more comprehensive view towards the performance of employees.
- Improve credibility of performance appraisal. Colleague's feedback will help strengthen self-development.
- Increases responsibilities of employees to their customers.
- The mix of ideas can give a more accurate assessment.
- Opinions gathered from more staff are likely to be more persuasive.
- People who undervalue themselves are often motivated by feedback from others.
- If more staff takes part in the process of performance appraisal, the organizational culture of the company will become more honest.

SELF-ASSESSMENT

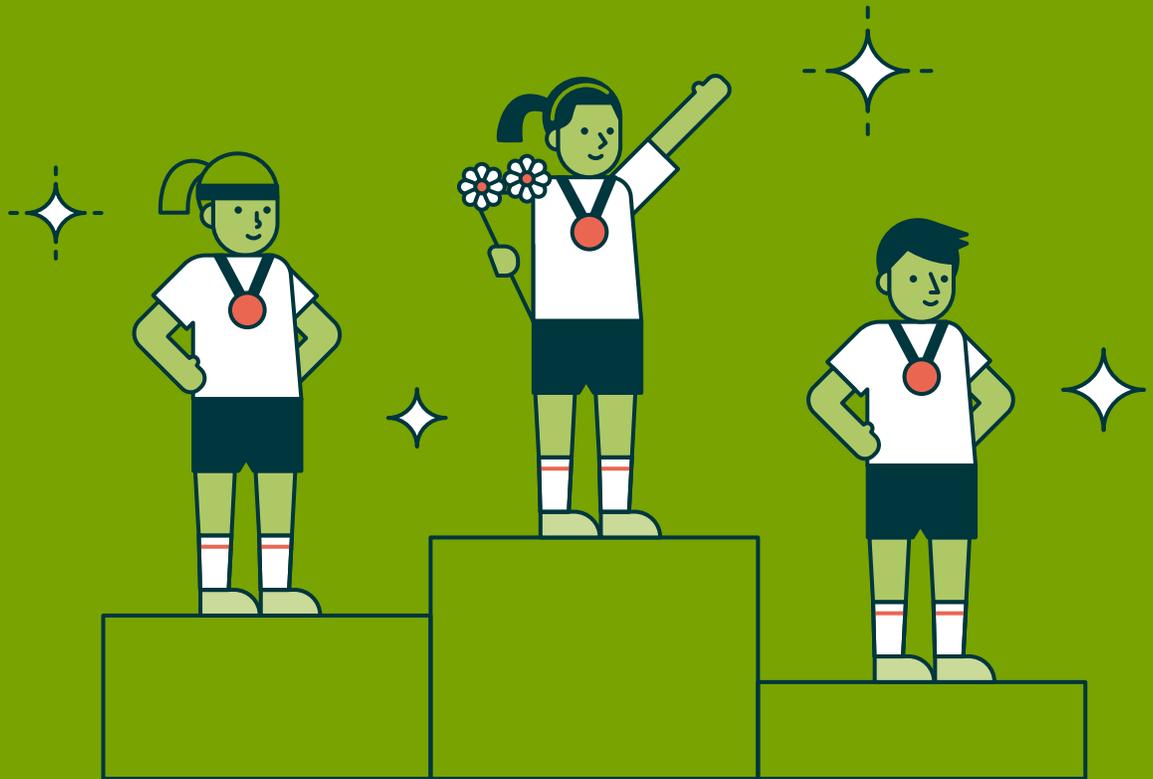
Take time each quarter for agents to review themselves.

- 1. What are your current responsibilities and/or objectives and corresponding achievements?
- 2. Include any projects that had been canceled or changed during the past year.

RESPONSIBILITIES/OBJECTIVES FOR THE PRECEDING PERFORMANCE PERIOD	RESULTS ACHIEVED

Key takeaways

- 1** As your organization expands into new regions, careful consideration must be taken to find the balance between offering consistent reports from region to region, while also accounting for differences in language and cultural expectations.
- 2** To be a world-class support organization, you need to be able to do more than just deal with problems as they arise. Using data and previous experience, you must forecast for upcoming challenges and develop strategies to overcome them.
- 3** Support is an integral part of any company, so it's important to incorporate feedback from employees of other departments when evaluating support agents.



Conclusion

The process of improving customer service never ends, so this guide is meant to be a big step in the right direction. Even if you implement and master every tip and strategy, improve customer satisfaction and loyalty, and hire and train the best possible agents, there's always plenty of room for improvement.

We hope this guide has helped you understand that while the work is intensive, great customer service is possible.

Assess your Customer Service organization's maturity at assessment.zendesk.com