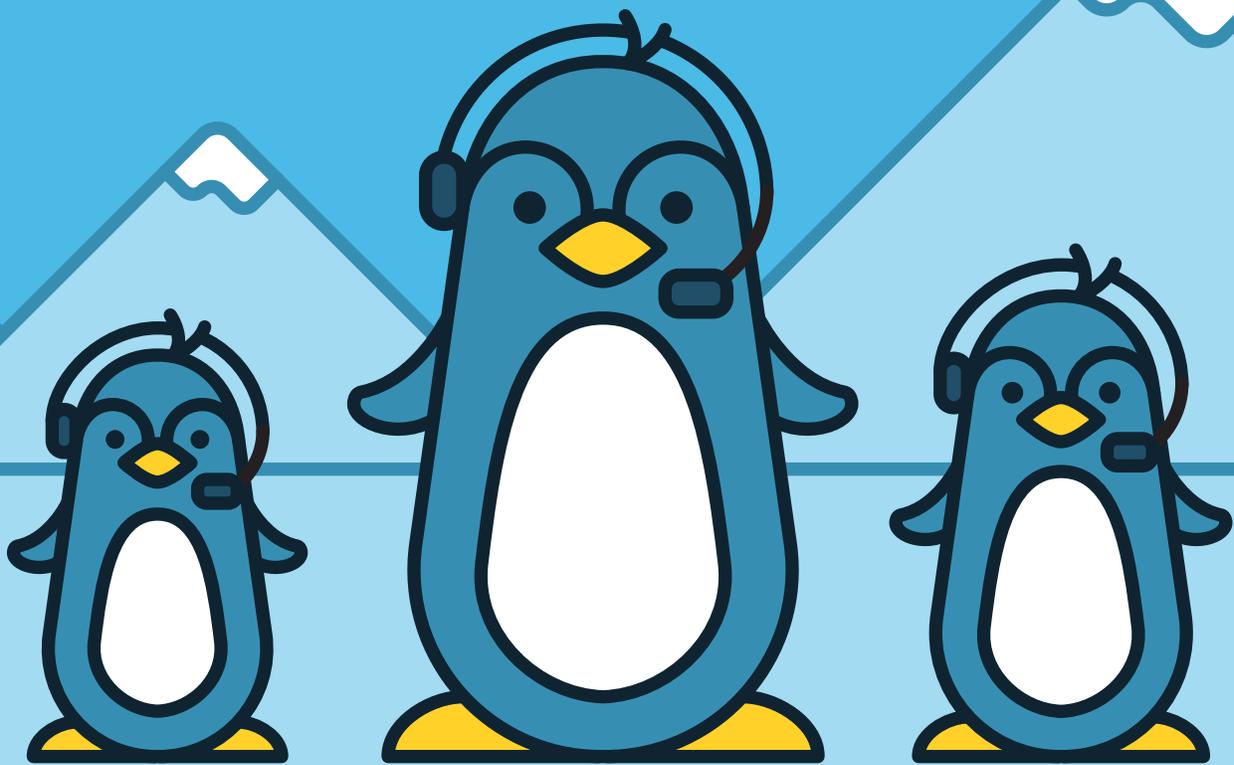




# HOW TO MANAGE YOUR AMAZING CUSTOMER SERVICE TEAM

Taking care of customers by  
taking care of your team



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# INTRODUCTION

The secret sauce to any great customer service and support organization is the people who work in it. Every organization has good days and bad days and the way the team coalesces during each defines the service you deliver. On the good days, everyone is quietly paddling along the water and delivering what the customer needs. On the hard days, they're paddling like hell under water and still delivering what the customer needs. Either way, the customer doesn't know the difference.

You can have the best, most efficient and customer-friendly processes in the world, but they will fall apart if your team is not motivated, not happy, or doesn't work together well.

That's why this ebook focuses on managing the most valuable asset you have, your people. Happy employees lead to happy customers. The following chapters are filled with suggestions on how to take care of your team.

# MOTIVATE WITH REWARDS AND RECOGNITION



[Happy employees](#) lead to happy customers. There are many ways to ensure the success and positive attitude of your employees. Using rewards and recognition is just one.

Every company has a different culture and requires a unique approach. Be sure to customize your rewards and recognition program to reflect the norms and values of the environment you want to create.

Rewards can improve morale and job satisfaction, but there are some pitfalls you need to look out for. Here are some tips to guide you in getting the best from your support team.

“ Using variable compensation drives individual performance instead of competition among the team.

## Avoid Monetary Rewards

Focusing on monetary rewards won't necessarily produce the results you expect. It might look good initially, but often ends up creating a competitive environment and bad vibes. If you do decide to take that route, proceed with caution. Typically, introducing a bonus structure that maps to clearly defined goals is the best approach when it comes to monetary rewards. Many companies call this “variable comp”—or compensation based on performance results. These monetary rewards are targeted toward individuals meeting performance targets. Monetary bonuses that incite competition have a different affect. For example, the person who solves the highest amount of tickets wins \$200 is a monetary bonus. Using variable compensation drives individual performance instead of competition among the team.

## Set Achievable Goals

Setting achievable daily and weekly goals should already be part of the normal management program. Understanding and communicating those “normal” goals makes it easier to define what it means to go the extra mile. Putting goals in place ensures your team knows what you expect of them. This allows them to measure their own success, which is critical to employee satisfaction.

## Be Selective

Institutionalized rewards lose their power. When rewards become too much a part of the everyday we stop striving for them. When employees go those extra miles, that's the time to turn on the spotlight. Set up guidelines for how often you

want members of the team to be recognized and make sure as managers you are recognizing really good achievements when they occur. Another way to reward your staff is to recognize when they have just finished a tough call or have come through a really hard experience.

“ A Weeble might wobble, but it won't fall down.

At Zendesk, we use Weeble Wobbles. A Weeble might wobble, but it won't fall down. When we see a peer come through a tough situation or even if they're in the middle of a tough situation, we pass the Weeble Wobble to them. Without saying a word, the employee feels seen and appreciated.

### Enable Supportive Culture

“ Encourage your staff to reward one another when they achieve milestones and do great things.

Encourage your staff to reward one another when they achieve milestones and do great things. At Zendesk, we all use Yammer's praise feature to shout-out those special achievements. An altruistic environment is healthy and works in everyone's favor.

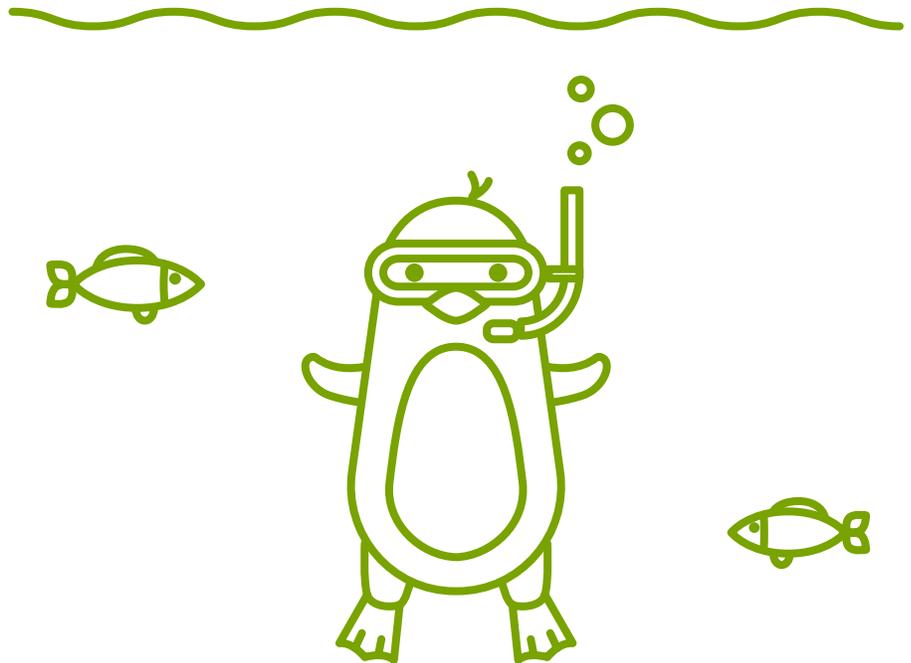
### Design Gamification Systems Thoughtfully

Leaderboards and badges are great ways of using gamification to provide instant and public recognition, but be careful to drive the desired behaviors and outcomes. For example, if you would like to see more articles in your knowledge base, rewarding on quantity alone will drive staff to publish less-than-good articles just to hit quota. Recognizing quality is more important, so consider measuring by view count instead of the number of posts. The language you use when talking about your gamification system is important too. Keep the conversation focused on personal bests rather than some being better than others.

## Remember Your Employees Are Individuals

Where some people like a fanfare, others prefer a quiet word of encouragement. So remember, one size doesn't fit all when it comes to rewards and recognition. Your staff will recognize your appreciation as genuine if you take the time to offer praise that appeals to their personalities.

# STAY COOL WHEN UNDERSTAFFED AND EXTRA BUSY



There are going to be days when you don't have enough customer service staff to meet demand. Things like flu epidemics, holiday seasons, and tricky new product releases are going to happen, and no matter how well you planned, you might have to work with fewer agents than you would like. It's unfortunate and a giant pain, but it's also inevitable, so it's best to devise a strategy for dealing with this situation beforehand.

The first thing you want to do is let your team know. Explain to them that you're running short and that you really need them to work with you to deal with the problem. Keep them engaged by explaining why you are behind, not just asking

“ It’s best to schedule extra hours and set clear expectations regarding how much extra time people can work.

them to work more. It’s also a great time to make sure you are using your rewards and recognition strategies to help keep your team motivated through the longer hours. Cancel all of your meetings and ask your staff to do the same. In fact, any non-essential activities should be postponed. Right now, you need to focus on right now. If the busy workload is going to be extended past a day, it’s best to schedule extra hours and set clear expectations regarding how much extra time people can work. Also, make sure your team knows what your expectations are during that time.

Take a look at the day’s work. Are there any tickets that don’t need to be answered right away? If so, don’t. Save them for a day when you’re not understaffed. Are there any simple tickets that someone from a different department can answer? If there are, see if you can get some help from the other department heads. Marketing, sales, product management—oftentimes tickets are directed to them anyway. If your company is customer-focused, most—if not all—the employees should have some basic training in how to respond to support tickets.

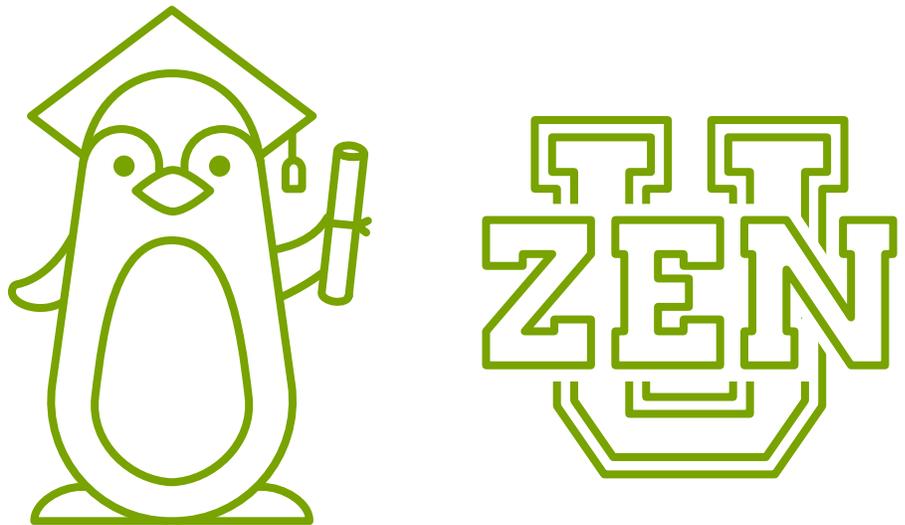
Are you the kind of team that likes to go out for long lunches? Not today. In fact, lunch might have to be on you. If you can, bring in lunch (and other goodies) for your agents on the company dime. It lets your team know that you appreciate their hard work. The most important thing is to stay calm and focused. One way or another, the day will end. It’s up to you to determine what kind of day it will be.

# BROADEN YOUR TEAM'S HORIZONS WITH EVENTS

Building a customer support team that enjoys working together and brings enthusiasm to the job every day requires a creative touch. An exciting way to motivate and encourage your team is to offer opportunities to get involved in other important company initiatives, including travel and outside-the-office activities.

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Events are a great way to do this. They often include travel opportunities and always create settings where your team can learn and network. During events, your team can share expertise and knowledge with other people in the industry. Many times there are chances to present information, lead a group, and hone skills. Events not only provide occasions to switch up the routine and get out of the office, they offer new learning experiences and the feeling of being involved in the customer service community at large. When all employees sense that they're a valuable part of the whole and an integral component of the “Big Picture,” your organization will thrive.



At Zendesk, we implemented Zen U., a multi-city, multi-country “college” of customer happiness. Zen U. events feature training sessions that focus on providing great customer service and getting the most out of Zendesk. Perhaps more important, they offer the opportunity for our advocates to meet and share knowledge with other customer service professionals.

Another event program employed by Zendesk is called Zendesk User Groups. Zendesk invites passionate users to lead and host user groups all around the world. It’s designed to help Zendesk users share knowledge and ensure they’re using Zendesk to its full potential.

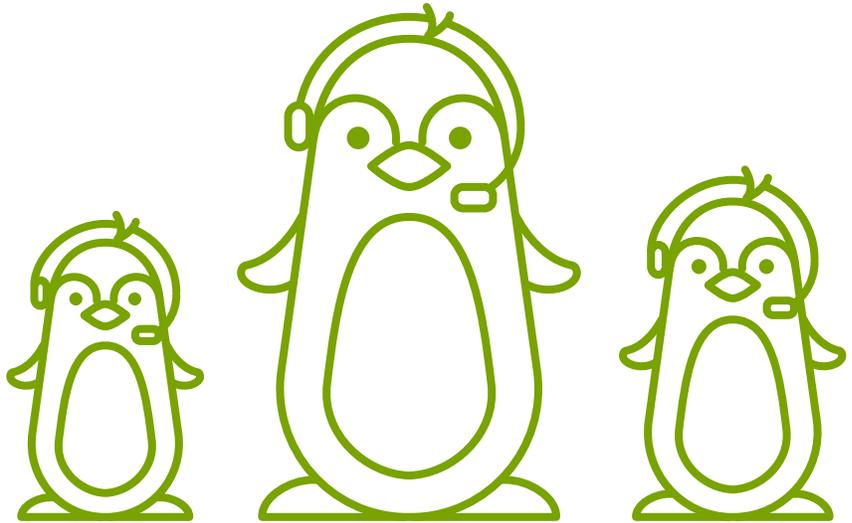
Each meeting features a Zendesk customer who discusses their implementation and experience of Zendesk, followed by an interactive group discussion. These user groups provide a great opportunity to share tips and tricks, access new features, network with fellow Zendesk users, and meet members of the Zendesk team.

**Among the benefits of the user groups events are:**

- Great leadership experience
- Early access to Zendesk features
- Increased customer service expertise
- Contact with experts and networking
- Creating agenda for future user groups

Our advocates love to attend these events and meet the customers they interact with every day, and customers benefit by having access to our best experts. Consider event programs like these to help motivate and support your customer service team. It's a fantastic opportunity for your team, and it's a great thing to do for your organization. You'll see strong results in happy employees and satisfied customers.

# KEEP THINGS FRESH WITH ROTATING ROLES



One of the first and most fundamental steps your company can take on its journey to providing great customer service is to hire a top-notch customer service team. That means finding and retaining talented individuals, something that is much easier said than done. One of the best ways to attract the best talent for the job is to create a working environment that is as interesting and enriching as possible. This can be done by building a support team structure that includes rotating roles and assignments.

It's also very important to come up with some kind of ranking system for those roles, so that when things get extra busy, you can start to temporarily pull people from the less critical roles until things get back to normal. Consider having your team work through a regular rotation of roles that includes:

“ One of the best ways to attract the best talent for the job is to create a working environment that is as interesting and enriching as possible.”

**Triage:** responsible for assigning incoming tickets to groups. Normally this is a supervisory position, but making it a peer-to-peer position rotates the responsibility. That way, everyone who takes this role has an understanding of what it's like to work on tickets, and everyone who is working in the trenches understands what it means to assign tickets to the rest of the team.

**Phone coordinator:** manages the phone queue and is responsible for getting other advocates on the phones when things get busy. When there are no calls, the phone coordinator is working on tickets.

**Ticket tank:** responsible for drilling deeper into tickets that will likely take longer than usual, which could include tickets with multiple or complex questions.

**Chat:** handles live interactions with customers via chat.

**Phones:** handles live interactions with customers via phone.

Since customer service isn't limited to the customer service department, there are roles your reps can fill that will benefit the entire company. Here are three examples of functions your support team can fill to help out their colleagues on other teams and gain insight into how different departments work.

**Training:** helps customers get the most out of your product or service. There's no better resource to train your customers than the people who spend all day supporting it.

**Knowledge manager:** writes blog and forums posts, tips, knowledge base articles, and best practices. This is a good candidate for the first position that is temporarily dropped when things get busy.

**Subject matter expert:** participates in product meetings and offers feedback. This is a great way to get insight from people who regularly use the product. Since customer service reps are in constant contact with customers, this gives them the opportunity to truly be the voice of the customer.

# ORGANIZE SUPPORT FOR FUTURE SUCCESS

For certain companies, particularly those with large support teams, it makes sense to consider organizing your department into pods:



Each support manager can be in charge of several pods. Managers can have weekly meetings with the team leaders of the pods that they are responsible for. This way managers are up to date and aware of all activities and issues without having to be bogged down in one-on-one meetings with every

“ When managers are freed up, more attention is paid to developing strategy and making improvements.

individual advocate. In the meantime, team leaders can be responsible for the day-to-day activities of their pods, further freeing up support managers. When managers are freed up, more attention is paid to developing strategy and making improvements. However, be cautious! Your managers should continue to interact with your agents throughout the day, rather than locking themselves in an office.

Another important benefit of the pod structure is it can work as a fertile ground for growing future managers. Team leaders are given a chance to show their managerial abilities. When considering a team leader's potential, things to ask yourself include:

1. What is their managerial style? Is it consistent with the overall philosophy of our organization?
2. Are they people others naturally turn to with questions and problems? If so, this might indicate a natural ability to lead and a strong understanding of your product or service.

It's a good idea to always be on the lookout for individuals within your own team who might have the potential to grow in new positions. That way, when it comes time to grow, you already have some people in mind to fill new leadership positions.

# EMPOWER YOUR SUPPORT TEAM

If you manage a support team, you are going to want to empower your employees. That means giving your team free reign to make decisions about how to respond to customers, and even make concessions, within the confines of your support structure. The idea can be a little scary, which is understandable. But empowering your employees, if done correctly, will get them engaged and motivated, and will free you and other support managers to focus on more difficult tasks. Have the agents treat the business as if it's their own and do the right thing for the customer.

## Be Patient

No matter what you do, mistakes are going to happen. So the most important thing is to empower your team, but also make sure that they are communicating with you while they are making decisions. This will allow you to monitor, and when necessary, correct any decisions that were made. In these cases, quickly coach but don't take power away as a punitive action for not making the right call. Treating these situations like learning opportunities will further empower them and help ensure the same mistake won't be made.

## Two Common Scenarios

A customer is angry because his ticket was escalated to another department and he hasn't received an update for a week. An unempowered support rep will have to get permission to track down the current owner of the ticket, forcing managers to get bogged down in the nitty-gritty details of the ticket.

“ Have the agents treat the business as if it's their own and do the right thing for the customer.

“ Customers and agents have much better experiences when they don't have to wait for approval.

Reps that are empowered can go directly to the current owner of the ticket, be it a product manager, engineer, or sales rep. When this happens, the support rep acts as the voice of the customer to make sure they are being provided with the best possible service.

Another common scenario happens when a customer does not receive the service or product they are expecting and they ask for a credit. Empower your agents to approve credits. You may want to set limits on the amount, but we find it is better to let them be the decision makers. Just like any other decision your advocates make, if you don't agree with it, you can quickly coach them on how to handle it next time. You can also measure credit decisions to spot trends for agents who don't provide enough latitude with customers as well as agents who provide too much.

Customers and agents have much better experiences when they don't have to wait for approval.

# ACHIEVE TRANSPARENCY

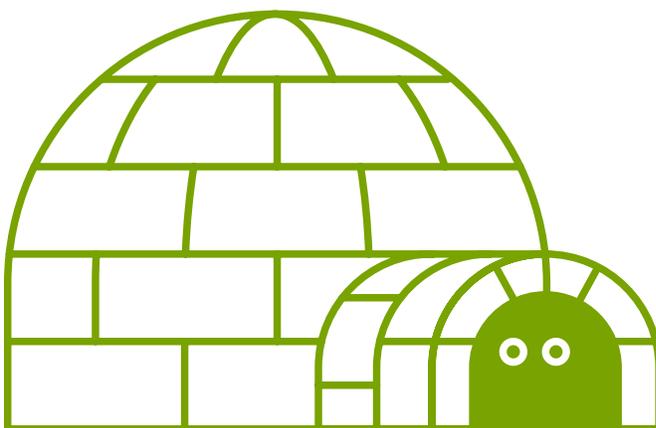
Transparency within your support team, from executive management to the front lines, is paramount to your success as a customer support organization. As mentioned before, happy agents lead to happy customers, though it's not always about rewards and recognition. Clear, open communication helps to set expectations and gets things done. The larger your organization, the more important—and challenging—achieving transparency becomes. Here are a few ideas for improving communication across your organization.

## Leadership Needs to Be Present

Make sure the leadership team for your support organization shows up for regularly scheduled meetings and that there is an established agenda in place that everyone's aware of.

## Agree on the Agenda

Send out a list of proposed topics, including the amount of time you've budgeted for each topic, in advance of meetings. Adjust the agenda based on feedback or for priority, and send a finalized version beforehand so that everyone is prepared to efficiently use the scheduled time. It sounds like a lot of work, but over time an agenda becomes a living document that helps your team stay on track and make steady progress.



## Don't Be a Hermit

It's not enough to sit in a room, making decisions and letting them trickle down, while feedback—good or bad—slowly bubbles back up. If your leadership team is making decisions that affect everyone, carve out some time to get feedback from all levels of the organization before making the decision. Be sure to leverage weekly one-on-one meetings to ensure information is flowing. In leadership meetings, be clear with your managers about information that needs to be shared, feedback that should be received, and the expected turnaround time. Information needs to move quickly up and down the organization so that decisions are not delayed. As a general rule, it's important to spend time with your front line, shadowing them and getting input about their work. This visibility helps leaders make educated suggestions for change.

## Explain the Reasoning Behind a Decision

Getting input before making a decision doesn't determine the outcome, it influences it. So, it's equally important to explain, afterward, why a decision was made, both when you've taken your team's feedback or when you haven't. Explaining your reasons helps get everyone on the same page.

## Allow Anonymous Feedback

It's really important to provide an option or avenue for receiving feedback anonymously. We do it here at Zendesk using a Google form we made available through our Support Operations newsletter. Advocates can submit their thoughts or questions, and we're committed to answering within two weeks. If you find you're not getting enough feedback, send out a survey. The important thing is to give your staff a voice without making them feel like they're at risk.

## Request 360-Feedback

“ Request 360-feedback about what works and what doesn't. Find out what you can do better and then act on it.

If you're open to anonymous feedback about your organization in general, then you've also got to be open to feedback about yourself. Request 360-feedback about what works and what doesn't. Find out what you can do better and then act on it. The last thing you want is for your agents to feel like they've taken time to share their ideas only to see nothing change or improve.

## Conclusion

Customer service can be difficult. While we can't make it easy, it's our hope that some of the lessons, tips, and philosophies within will help you manage agents who are engaged with their work and primed to provide your customers with great service.