SupportMan by Tettra

Scaling Support

A Handbook for Modern Customer Service Teams

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Introduction

Who is this for?

This guide is tailored for customer support, customer service, and operations leaders who are essential in designing, implementing, and scaling customer-facing functions within their organizations. As businesses grow and customer interactions become more complex, support teams face increasing pressure to deliver high-quality service while managing a larger volume of inquiries.

Scaling a customer support team involves more than just hiring additional team members. It requires an integrated, strategic approach to building and managing systems, processes, and team dynamics. At Tettra and Supportman, we see this every day and work with teams to make it happen. This handbook contains insights from our users and other customer service experiences.

You'll find actionable insights and practical strategies derived from industry best practices and real-world experiences. It's a comprehensive resource to help you navigate the challenges of scaling your support team. Whether you're a new support manager taking over an existing team or a seasoned leader guiding your team through a growth phase, this guide offers valuable perspectives on making strategic decisions that align with both customer needs and business objectives.

Key Areas of Focus

- **Building a Foundation of Trust and Respect:** Learn how to cultivate a culture where trust and respect are paramount, setting the stage for effective teamwork and change management.
- **Effective Change Management:** Discover strategies for managing both planned and unplanned changes within your support operations, ensuring successful rollouts and the prompt identification and resolution of obstacles.
- **Embracing Technology and Innovation:** Selecting and implementing the right tools for a scaling support team is a massive challenge. This handbook will guide you in choosing a tech stack that aligns with your team's needs and enhances their efficiency—now and in the future. From knowledge management systems like Tettra to advanced customer relationship management (CRM) platforms, you'll learn how to approach and implement the right technology.
- **Leading People Through Change:** Change is constant in customer support. This handbook provides a roadmap for managing different types of change—from the expected to the sudden and disruptive. Learn how to prepare your team, manage their diverse reactions, and ensure continuity in customer service excellence.
- **Building a Culture of Continuous Improvement:** Successfully scaling a team requires fostering a culture of continuous improvement. This involves creating feedback loops, training, development opportunities, and a commitment to refining processes and systems based on measurable outcomes. You'll learn strategies to cultivate this kind of culture, ensuring your scaling team excels through the changes growth brings.

Chapter 1:

Building a Foundation of Trust and Respect

Delivering great customer service at scale requires a system of flexible and interconnected parts that, taken together, are capable of consistently helping and delighting customers.

Every support team relies on a combination of tools to deliver help to customers, and those tools are becoming increasingly capable in the age of generative AI.

But the core of that system — the beating heart of it all — are the people that make up your customer support team, whether it's a small team of three or a sizable team of 300.

Those humans are an indispensable part of everything you do, and you'll never be able to scale your customer service if you can't first lay a solid foundation.

Building Trust

Everyone knows customer service is often a stressful job. It's fast-paced, always-changing, and regularly involves helping frustrated individuals with problems you didn't personally cause.

That's why trust is so important among customer support teams. When you're working in a high-stress environment, it's crucial to know that your peers (and bosses) have your back. Similarly, it's critical that you're someone who can be relied upon.

But what does trust within a team actually mean? It can feel vague or hazy to say, "Trust one another."

People are complicated, so how can you foster trust between members of a growing team?

The key is to recognize that trust within a team isn't merely about believing in each other's abilities; it's about creating an environment where transparency, accountability, and mutual support are at the forefront.

How do you do this well?

Building trust doesn't happen overnight or automatically. It requires building foundational habits and cultural norms into the way your team operates, and following through on those values consistently.

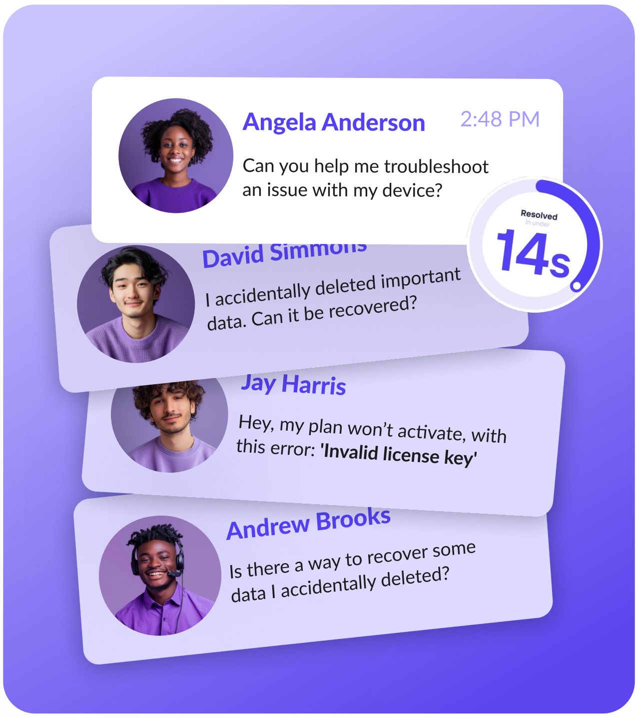
In customer support, three factors are particularly important to getting this right:

- **Be transparent:** Whenever possible, pull back the curtain and be transparent — about the 'why' behind decisions, about how you're feeling, about obstacles to success and your hopes for the future.
- **Follow through on commitments:** It's cliché, but actions really do speak a thousand words. When your team sees you following through on your promises, it signals they can count on you in the future.
- **Be accountable for outcomes:** Accountability for outcomes means you're taking responsibility to make something happen, even if you encounter unexpected obstacles along the way. If (or when) you can't achieve a specific outcome, it also means taking ownership and not making excuses.

Here's an example of all three of traits in the real-world: Say your CSAT scores are consistently low, and they need to improve or the likelihood of customers churning will go up. Being transparent would mean sharing not just the score itself, but the context around why scores are low, why they need to improve, and why your team members should care about increasing CSAT scores.

If, in your research, you find that one big reason CSAT scores are low is because your scheduling is inadequate and customers are frequently stuck waiting on hold for a chat agent, you'd then make a commitment to improve your scheduling and decrease wait time within a certain time period, then working toward that goal.

Lastly, being accountable for outcomes means that you'd define the success of your project up front — say, reducing chat wait times by two minutes this quarter — and flagging risks to achieving that outcome. Whether you hit the goal or not, you'd work to overcome obstacles and share learnings along the way. It's far easier said than done, but the only way to build meaningful trust is to embed habits like these into your team's operating environment.



Measuring Trust

Implementing qualitative and quantitative measures, such as employee satisfaction surveys and leadership satisfaction surveys, can provide insights into the level of trust within the team. These are often the best 'formal' metric for measuring the level of trust you've developed.

But there are also other, less-tangible ways to measure trust, like gauging the speed of adopting a new process and the frequency and quality of feedback your team provides you with.

If your team is comfortable sharing uncomfortable feedback, risky ideas, and admitting mistakes, you've achieved at least some measure of **psychological safety.**

Earning Respect

Respect is closely related to trust. It's earned through taking action that demonstrates your commitment to the team's success and well-being.

That can take many different shapes, from challenging a decision made by your executive team to choosing to shut down the phone lines for half a day to focus on team building and training exercises.

Recognizing Inequity and Power Dynamics

Every social group in the world has inherent power dynamics, and a customer service team is no different. It's worth calling out that one way effective leaders serve their team — earning respect and building trust — is by recognizing those power dynamics and finding ways to ensure every team member feels valued and heard.

From celebrating diversity to conducting regular one-on-ones to developing transparent performance and promotion criteria, there are many ways you can create a more equitable environment for your team to work in.

Encouraging Curiosity and Resourcefulness

Creating a culture where curiosity is encouraged and resourcefulness is rewarded helps in building a resilient and adaptable team. As you scale your customer service, you'll face all kinds of new problems and unexpected challenges. You want team members who are willing and able to take creative risks and attempt novel approaches.

As a leader, you should try to foster an environment where asking questions and seeking better ways to solve problems are strengths to be celebrated, not threats to be silenced.

Managing Responses to Change in a Customer Support Team

There are many different responses to change, ranging from anxiety and excitement to resistance and indifference. Since change is always happening in customer support, understanding responses to change and approaching change thoughtfully also helps to build additional trust and earn respect from your team.

Anxiety Around Change

Anxiety is a common response to change, particularly when changes are significant or sudden. To manage change-related anxiety effectively, it's essential to communicate clearly and consistently — even when you don't have much time to prepare.

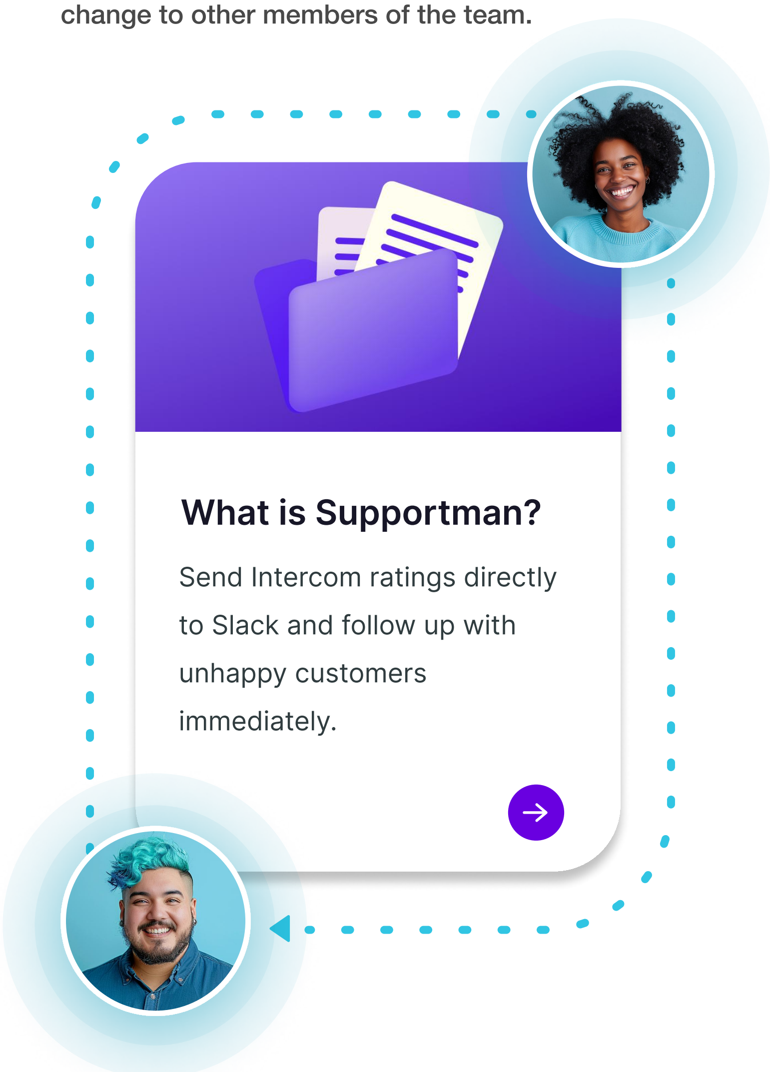
A good way to improve at this is to practice preemptively addressing potential questions and concerns, based on what you know of your team and your company. How do you think Tom will react? What is Imani likely to feel?

Anticipating how change will land with your team enables you to tailor your messaging, providing appropriately detailed explanations of the changes, and ensuring you leave open channels for feedback. Ensuring that your team feels heard and understood can massively reduce anxiety and build confidence in the overall change process.

Excitement About Change

While some team members may feel anxious, others might be excited about changes. When harnessed well, this excitement can be a powerful asset and can help create buy-in with the rest of the team.

When a team member is excited about change, try to link the benefits of the change directly to that team members' needs and goals. This will help reinforce their initial enthusiasm, and will increase the odds that they'll help champion the positive aspects of the change to other members of the team.



Resistance to Change

Resistance is another common reaction to change, stemming from fear of the unknown, discomfort with new processes, or even just from satisfaction with the status quo.

When working with team members who are resistant to change, it's important to engage with them. Ask questions to understand their concerns.

Find ways to involve them directly in the change process. Use their feedback to refine your approach to change.

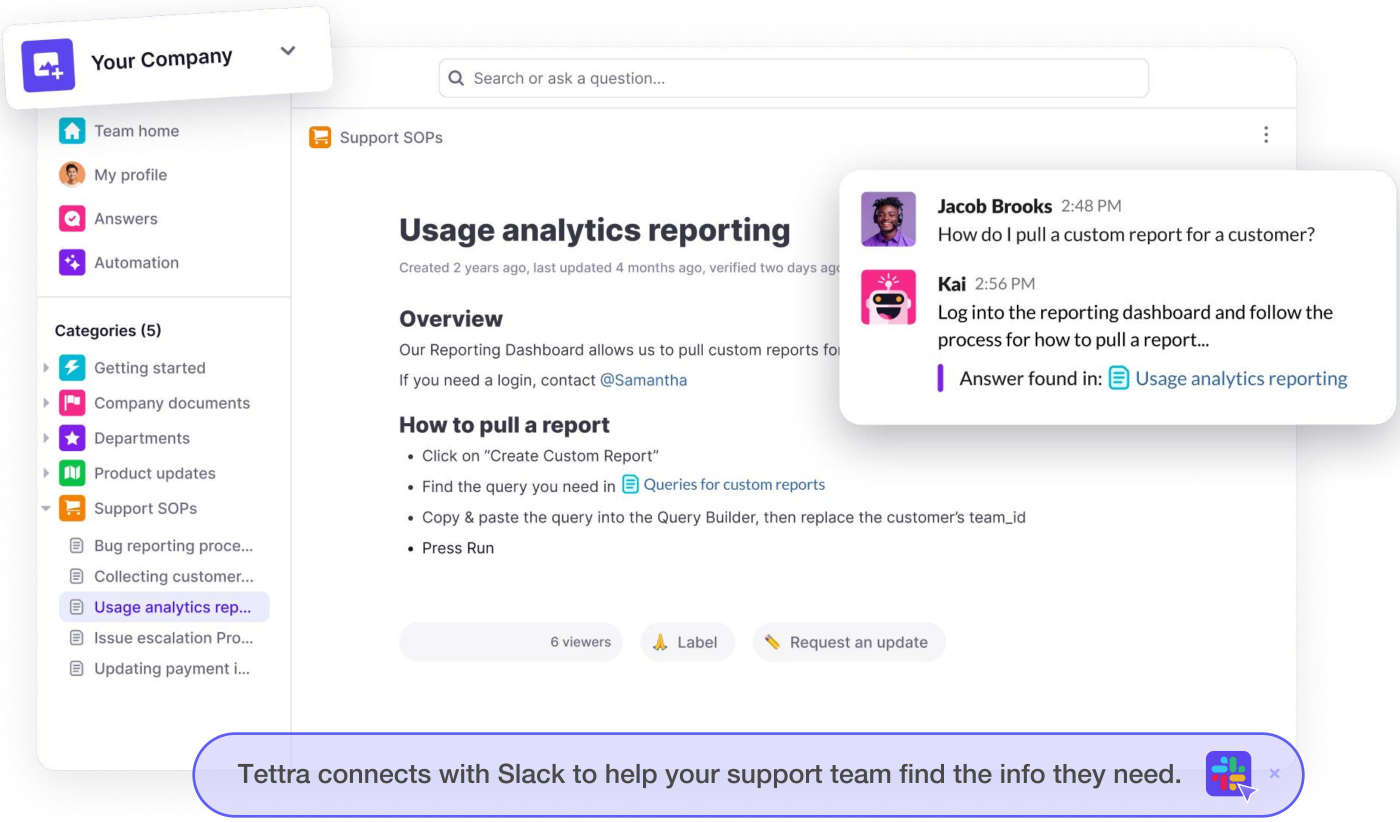
We care about things we help create, and anytime you can find ways to get a resisting team member to shift from dragging their feet to helping create the change, the result will be less resistance and more acceptance.

Indifference to Change

When a team member is indifferent towards upcoming change, it's often a symptom of a deeper problem. For instance, indifference might signal a lack of overall engagement or a lack of investment in the outcomes of the change. Sometimes, indifference to change can even be a sign that a customer support agent is checked out and will soon be leaving for another role.

Tackling indifference to change isn't quite as straightforward given these underlying issues. Often, it's helpful to use tools like employee engagement surveys to understand how team members feel about their role, their career, and their bosses.

The more clarity you can get around what motivates your team members, the more you can then tap into that motivation during the change process.



Sustainable Workloads and Processes

The customer support space is sadly infamous for unsustainable workloads, high turnover, and burnout.

As your team scales, the complexity and volume of work can increase exponentially. Trying to navigate this while also dealing with high burnout or low job satisfaction isn't just about operational efficiency — it's about the health of your team and your organization.

Protecting your team's mental and physical health should be motivation enough for developing sustainable workloads and efficient processes, but also realize that it's impossible to deliver high-quality customer service if your whole team is disengaged or is constantly turning over.

Recognizing Unsustainable Practices

Unsustainable work practices often start subtly, but can quickly become the norm for any team. Despite your best intentions, they can become entrenched in your team's culture and then become difficult to change.

Unsustainable Practices:

- **Consistently high occupancy rates:** Occupancy measures the percentage of time your team spends actively helping customers versus the time they're available to help customers (e.g. if they're on the phone for three hours in a five hour shift, that's an occupancy of 60%).

  When occupancy rates consistently exceed 90%, your team is at risk of burnout and something needs to change.

- **Increasing turnover rates:** When you see team members begin to leave at a higher pace, it's often a signal of unsustainable work practices. Decreasing employee engagement often precedes increased turnover.

- **Reduced headcount and budget:** When you expect the same or increased output from a team while cutting back on resources and headcount — without investing in tools or other ways of unlocking efficiencies — you're in trouble.

- **Inconsistent workloads:** Every support team will include higher performers and lower performers. But when you have a small subset of agents consistently doing far more than their fair share of the work, it's often a sign of mismanagement and isn't sustainable for the long haul.

Customer support volume often ebbs and flows. Seasonality or outages can bring huge increases in volume and can force teams into unsustainable situations.

"I remember in a past role, during an election year, our marketing team decided to pull our advertising from a particular news segment because they felt it was getting too 'out there'," says Larry Barker, CX Operations Manager at Teamshares. "No one gave us a heads up or expected any backlash, but it led to our normal volume of several hundred tickets per day spiking to tens of thousands. Fortunately, it peaked within a week, then tapered off in the weeks that followed."

The duration is a key factor to consider when evaluating your team's workload. Any solid support team can step up to the challenge and shoulder a ridiculous workload for the short-term. In fact, sometimes those wild moments can bring a team together and create more unity and solidarity than you've ever had before.

But if it drags on too long, eventually it will erode trust and respect, totally undermining any work you've done to build up those two critical items. Letting unsustainable practices become the new normal signals to employees that their well-being and satisfaction aren't priorities for the organization.

One approach that can really help here is to build great working relationships with other departments across your organization.

While an increase in volume isn't always due to a poor decision or a mistake by another team, it's unfortunately not uncommon for other departments to underestimate (or forget) the impact their decisions have on the support team. Useful tactics include:

Hold post-mortems after a season where your support team faced a huge spike in volume.

- Overworked and stressed support teams are less likely to interact positively with customers consistently.
- Investing time in understanding and supporting the needs of your support team can help mitigate potential volume spikes and improve planning for change, making it a worthwhile investment.

Pulling together stakeholders to understand what went wrong is a great chance to educate the leaders of other teams on the trickle down effect their decisions have, particularly on support and on your customers.

You can then take these learning to share with your team, encouraging them that you're proactively working to make things better.

How to build connections across teams

- Set up shadow sessions or "a day in the life of support" demos to help engineers, marketers, and product managers understand the support team's operations.
- Strong relationships between support and other teams creates more empathy and collaborative decision-making

Building Sustainable Workloads

To counteract these unsustainable practices, customer service leaders must focus on creating and maintaining workloads and processes that support the team's long-term success and well-being:

- **Set ambitious, yet realistic metrics:** Choose goals and metrics that challenge your team to do their best work, but also acknowledge their need for breaks, varied work, and personal growth.
- **Build shrinkage** into your workforce management process to give your team time to tackle other tasks and join training sessions. Your metrics have a huge impact on your staffing forecast, so do your best to dial in key metrics to determine what a sustainable workload looks like.
- **Plan ahead:** When your ticket volume is likely to increase — due to things like seasonality or a major marketing push — you need to get upstream. Recruiting and training new hires can take weeks (or months), so plan ahead and start recruiting early when you think it will be necessary.
- **Create a regular review cycle:** Support teams aren't static. They're always changing, and improvements in technology are opening up new ways to support customers. Build a quarterly or biannual review into your calendar, and use that time to review metrics, performance, tool improvements, and customer feedback.

The way you approach staffing, workload management, and scheduling will always need to match the stage of your company's growth (and your current business objectives).

For example, when a SaaS company approaches the 1000 customer threshold, it's very important to understand the ticket rate per customer per month and what the primary contact reasons are.

Instead of continuing to hire team members at the same pace to handle every type of customer ticket, you might decide to invest more time in self-service options for customers to eliminate straightforward tickets that produce significant volume.

This could lead to creating a new, smaller tier of support that can handle more complex tickets and help produce and maintain self-service content.

Implementing Sustainable Practices

All of the above will help in building a more sustainable workload for your team, but when it comes to operating sustainably, customer service leaders should also consider these best practices:

- **All tickets aren't created equal:** Solving highly technical problems takes far more time and effort than handling simple issues. Realities like these need to be baked into your metrics, so that you can accurately understand your team's current performance and so you can create the best possible plan for your team's future.

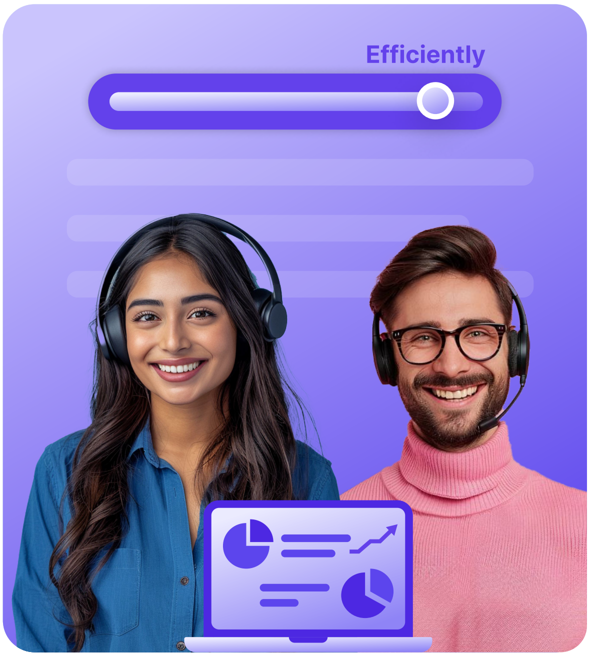
- **Fight for a place at the table:** It's very easy for support teams to have a victim mentality and feel like they can't affect change. Even though many teams have been conditioned to think that way, the vibe is changing as customer experience is becoming a differentiator. As a CX leader, advocate for your team's needs and find ways to quantify the impact of great support — even if it feels like an uphill battle.

- **Lean heavily on continuous process improvement:** Aim to make things better, each and every day. While finding ways to save ten seconds on a ticket might not feel like a big deal, if you're handling thousands of tickets each month those seconds quickly add up.

  AI-powered tools are becoming more capable every day, and there are probably dozens of ways you can refine processes to improve your team's quality of life.

- **Be transparent about resources:** When workloads are stressful, be upfront with your team about resource constraints and how you've allocated the resources you have — especially if you're asking them to do more with less. While it may not make the work easier, helping your team understand the business context and how decisions are made can take the sting out of those decisions, helping them to not feel undervalued or exploited.

Building sustainable workloads and practices in a customer service team is a job that never ends, but it's critical to building a capable support team that can scale efficiently and effectively.



Takeaways

- [ ] Trust within a support team is built through transparency, accountability, and consistency. Measuring trust can be both qualitative (surveys) and observational (feedback quality).
- [ ] Respect is earned through competent leadership and addressing power dynamics within the team.
- [ ] Encourage curiosity and resourcefulness to foster a resilient and adaptable team.
- [ ] Managing responses to change thoughtfully helps build further trust and respect.

Chapter 2:

Effective Change Management

Change is inevitable in a scaling business, as growth forces you to constantly reinvent key processes, implement new tools, and shift responsibilities around.

This is especially true in the customer service and operations space.

The risks of poor change management are also particularly high in customer service, because it's the team that has direct interactions with your customers — all day, every day. A continually overworked and stressed out team won't perform as well. You certainly don't want your team to pass any change-related stress on to your customers.

Finding ways to effectively manage change is absolutely essential.

Planned vs. Unplanned Changes

The nature of the change — whether planned or unplanned — significantly impacts how it should be approached and managed.

As you'd expect, planned changes are changes you can anticipate and prepare for in advance. Planned changes in customer support might include launching a new support channel, expanding to 24/7 coverage, or sunsetting a product.

Whatever the exact situation, the key to managing planned changes is thorough planning, clear communication, and involving the team in the process from the start.

On the other hand, unplanned changes are sudden and unexpected. Their sudden, disruptive nature means unplanned changes often provoke a higher level of anxiety and resistance from team members.

In customer support, changes like these include major product outages, unexpected outbursts of negative social media publicity, or supply chain issues caused by a natural disaster.

Managing through unplanned changes requires flexibility, rapid decision-making, and transparent communication to quickly realign the team's focus and direct their efforts.

Having an existing foundation of trust and respect with your team makes navigating unplanned changes significantly easier.

These changes catch your team (and you) off guard and so the stakes feel extra high, and so they often force support leaders to make educated guesses and work with a less-than-complete picture as the situation unfolds.

When you're working from a place of mutual trust, that's significantly easier.

Using Technology for Change Management

Technology plays a pivotal role in facilitating effective change management, when you're facing both planned and unplanned change. Platforms like Tettra are helpful in both scenarios, because they can streamline the change management process by centralizing communication, documentation, and feedback.

Facilitate feedback & engagement

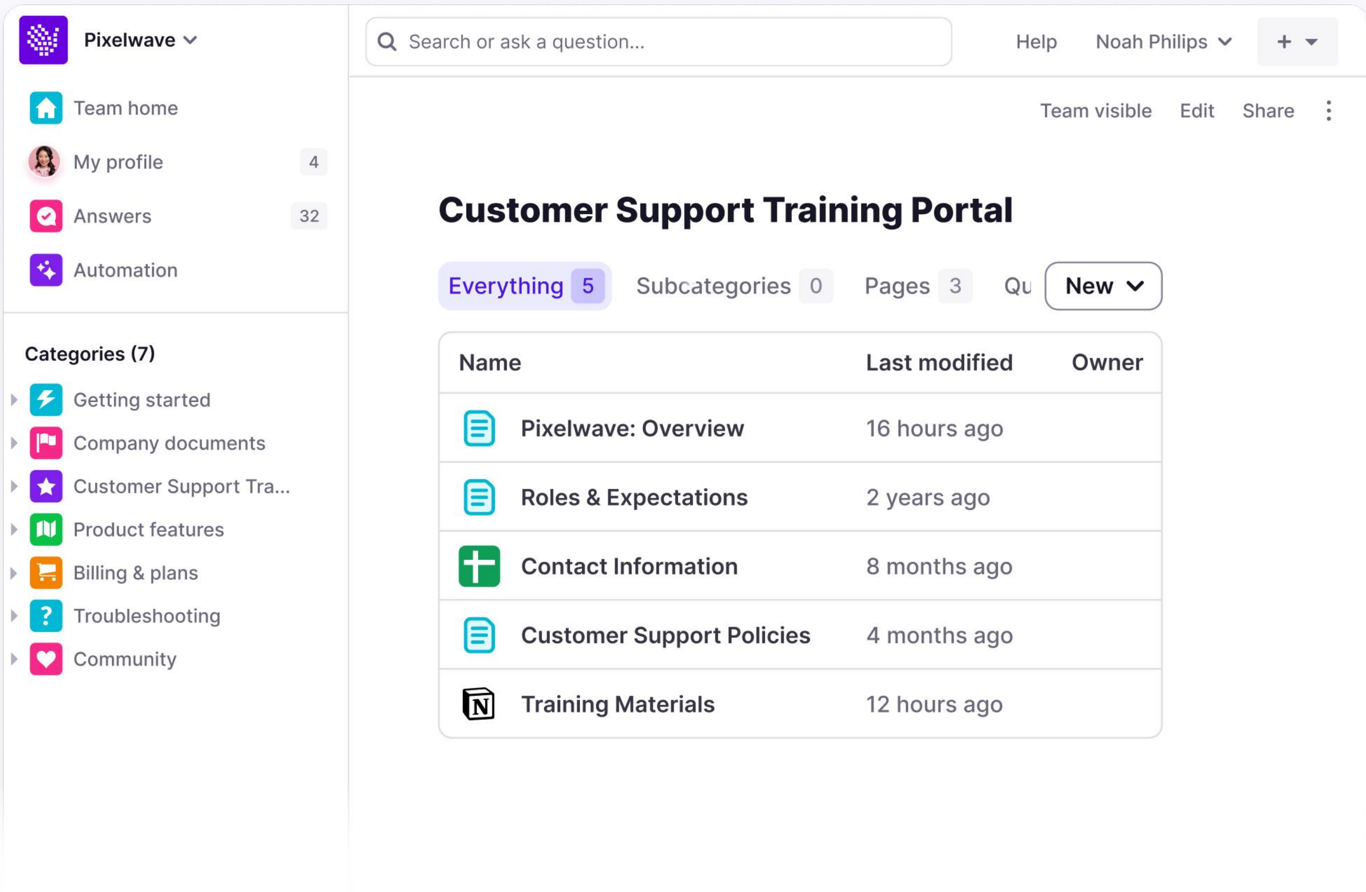
Change management works best when it's a two-way conversation, and technology platforms often include features that encourage team feedback and engagement. For instance, Tettra includes an internal Q&A feature allows agents to ask a question once, and get an answer from Tettra's AI (pulled from your company documents in Tettra) or from your team's experts.

Centralize knowledge and communication

A knowledge management platform like Tettra acts as a single source of truth for your team. During planned change, this means using it for things like sharing update process docs or customer service scripts. During unplanned change, it helps keep your team aligned and updated because they know exactly where to find the latest information.

Simplify training and onboarding

As you introduce new processes or tools to your team, technology plays a key role in the training and onboarding process. This helps you scale by quickly getting new team members ramped up, while also leveling up your entire team's confidence in their product and process knowledge.



A Roadmap for Planned Change in Customer Support

It's impossible to give a plan for effective change management that will apply across every situation. There's simply too many unique circumstances. However, the below high-level roadmap highlights the key factors and milestones you should keep in mind when introducing planned change to your customer support team. Use it to navigate your course through changes both big and small.

Get Clear On Your Objectives And Rationale

Why? It's the first question most people ask when hearing that change is coming soon.

Knowing that, the first step in effective change management is to get clear on why you're planning to make changes — the objectives of the change and the rationale for it. These two are usually closely related:

- We want to reduce our average response time (objective) because we think it will lead to happier customers (rationale)
- We plan to expand to 24/7 support next quarter (objective) because our global customer base is growing and they need more support (rationale)

The clearer and more compelling your rationale and objectives are, the easier it will be for your team to get on board.

Planning Your Change

It's hard to prescribe best practices for planning changes, because there's a near-infinite number of projects and scenarios customer service leaders face that create the need for change. Despite that, keep these factors in mind as you approach the planning process:

- **Involve your team early:** Gaining buy-in is easier when you're able to involve your team in the decision-making process.

  You may have a clear mandate on where you need to get to, such as, "We need to increase self-service rates by 25% this quarter." Once that's defined, pull in your team to brainstorm ideas on how to get there.

- **Acknowledge concerns:** No change goes perfect, and no change is without tradeoffs. When your team brings up concerns or criticisms, address them the best you can. Where you can't, help them understand that while you're aware of a risk or tradeoff, you need to move forward anyway — and share how you plan to minimize any negative consequences.

- **Identify dependencies:** Dependencies can put your entire change process at risk. If step C can't start until step B is completed and step B gets derailed, your project timeline is shot. Identify dependencies up front, and build in workarounds or extra time where you expect potential challenges.

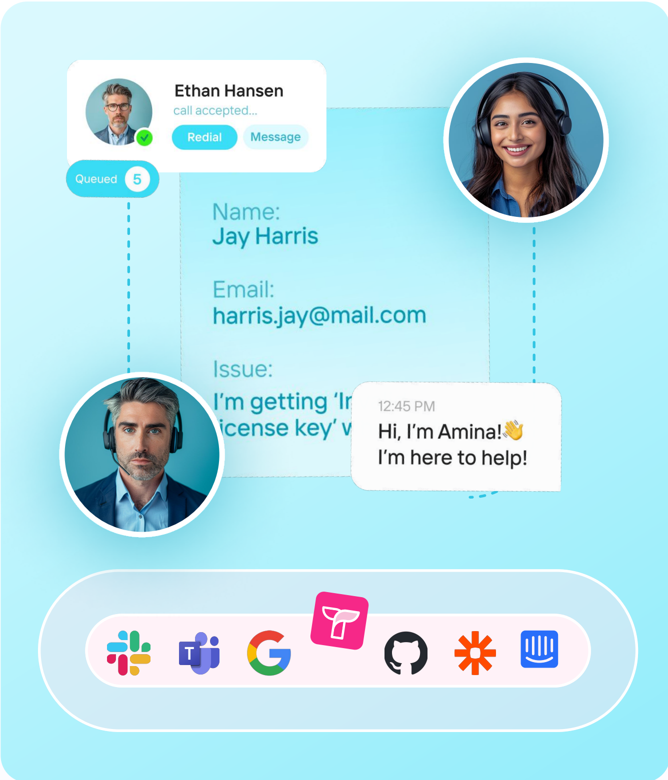
The end result of your planning process should be a plan with a timeline, clear roles and responsibilities, and a well-defined end state. Whether you're redoing your knowledge base, launching a new support tier, or implementing a new AI-powered tool, keeping these best practices in mind will increase the odds of a smooth change rollout.

Takeaways

- [ ] Planned and unplanned changes require different management approaches.
- [ ] Technology like Tettra can streamline change management by centralizing knowledge and communication.
- [ ] Effective change management begins with clear objectives and rationale.
- [ ] Involving the team early in planning builds buy-in and mitigates resistance.
- [ ] Identifying dependencies upfront helps avoid project delays during change implementation.

Chapter 3:
Leveraging Technology in Support Operations

Technology has always played a role in customer support. Dedicated call centers took off back in the 90s, leading to the development of complex IVR systems, CRM forerunners, and the emergence of email support.



Fast forward thirty years, and today's customer support teams rely on tech stacks often consisting of a dozen or more integrated tools. While it can be a lot to manage, effectively leveraging the right technology can make serving thousands or millions of customers possible with a relatively small team possible.

As the number of tools and systems customer service teams use has grown, it's given way to the rise of dedicated support operations teams.

These roles are responsible for implementing tools, maintaining knowledge bases and process documentation, and for enabling customer service teams to do their best work.

The customer service technology landscape is vast and ever-changing. In this chapter, we'll explore the role technology plays in customer support, including how to choose the right tools and how to use them to unlock efficiencies for a growing support team.

Choosing The Right Customer Support Tools

Every customer service team today relies on technology to operate each day. At its simplest — like in a seed stage startup — this may be as simple as setting up a support@acme.com alias in your Gmail account, then having your founder monitor for inbound customer questions.

But as your team grows, so does your need for great tooling. To find the customer service tools that make sense for your business and your team, it's best to start with identifying your standard.

Define Your Ideal Customer Service Experience

Every customer service leader has their preferences and biases, but the shape of your team will be unique to your business and your customers. Given that, start by thinking about **what a great customer service experience would look like to your customers.**

Any demographic info you have will help here. If you're serving retirees, they might prefer phone support and may not love self-service. If you're serving college students, they'd rather die than have to call you for customer service, so you're better off investing in self-service and live chat.

While it's critical to base your customer service standard on your customer's preferences, that's not the only factor. The other big piece of the puzzle is to think about what you can realistically provide to them.

What level of support can you provide?

- If you're a huge enterprise business with a massive budget, maybe you can provide live support over seven different channels, 24/7/365.
- If you're a small, fast-growing ecommerce business, you're probably better off focusing your efforts on one or two channels and really knocking it out of the park during each support interaction.

After this process, you should end up with clarity on what kind of customer experience you're aiming for. It may be helpful to summarize this in a customer service vision statement of sorts:

Vision Statement Examples

- We want to provide quick, friendly human support across email and live chat during standard business hours.
- We want to provide best-in-class phone support to our customers, which means we'll answer 80% of phone calls within 20 seconds, 24 hours a day.

Assess Your Current Tools

Whatever stage you're in, your team is already using certain tools. Make some time to solicit feedback from team members and to personally reflect on how each of those tools is impacting your ability to deliver the kind of service you're aiming for.

- What's working well?
- Where are there product gaps?
- What's causing friction for customers?
- What's frustrating for your support team?

When you're hunting for new technology, it's easy to get starstruck by all of the features and marketing hype you encounter. Crystalizing your needs and pain points into a short list of priorities makes cutting through that noise significantly easier.

There are two critical—and related—things to be keep in mind when you're assessing your current tech stack:

Don't forget about sunk cost fallacy: When you've invested time, effort, and money into building or implementing a tool, it's natural to shy away from change. It can be helpful to examine current software capabilities before implementing new technology.

But, if you're not careful, sunk cost fallacy can also lead to biased decision-making. Don't let past time or money spent on your current tool stop you from switching tools if a new tool brings the most benefits for your business today.

Consider switching costs: While sunk costs can be dangerous, switching costs are also a very real thing. Moving your whole team has a big impact on their productivity. Don't take the decision to switch lightly. If a new leader or team member simply prefers a different tool, that shouldn't unduly influence your decision-making.

Here's the bottom line: Understand what your current tech stack can do and maximize the ROI from it. Don't be afraid to walk away from a tool if it can't do what you need, but do so thoughtfully.

Explore Tools On The Market

You know what you want your customer experience to look like and where your major pain points are, which means it's time to start exploring the tools available on the market.

Your "vision statement" will help narrow down your search by dictating the kind of tools you need. Take the first example from above:

We want to provide quick, friendly human support across email and live chat during standard business hours.

This short statement means you need to find:

- A help desk tool that includes multi-channel support, including a great live chat experience.
- A knowledge base to help your human team members easily find information and provide prompt help to your customers.
- A scheduling or workforce management tool to ensure you're appropriately staffed to manage inbound volume and achieve great first response times.

For each type of tool you need, I recommend setting up at least three demos or sales calls. If a particular tool looks promising, see if the vendor will set up a proof-of-concept so you can get hands on with it for a few weeks before committing to a long term contract.

Your notes during any demos or POCs will probably contain a lot of details. Purchasing a new tool is a process of elimination — you do your best to compare tools side-by-side, and eliminate the ones that are lacking.

As you work through this process, it might be helpful to use a helpful framework shared by Alexander Armstead, Customer Success Operations Manager at Clever, a digital security platform for schools.

"There's a lot that goes into picking a new tool," he said. "But at the end of the day, we always try to simplify it to CBT: Customer, Business, Team. Any good recommendation to invest in a new tool should examine the costs, benefits, and impacts on all three groups."

	Costs	Benefits	Other Impacts
Customers			
Business			
Team			

This simple framework can help you drill down to the major impacts for each core group of stakeholders you should be concerned about.

Integrating Knowledge Management Systems

At Tettra, we define knowledge management as the process of gathering and structuring all the disparate knowledge within an organization so that it can be used, shared, and maximized fully.

Every customer service team needs a robust knowledge management system to operate at their best.

When you're small and scrappy, you may be able to get by with messy, half-baked documentation in something as ***simple as a Google Doc.***

But that quickly gets unwieldy, and the more members you add to your team, the worse the problem becomes.

If you want an effective and scalable support team, then you need a reliable trustworthy process for capturing, maintaining, and sharing all of the valuable information that lives in your teams' heads, in your Slack channels, in your support tickets, and in a dozen other tools and databases.

Benefits of a Knowledge Management Tool

Consistency and standardization: Your customers expect a consistently good experience. If your team members have access to wildly different levels of knowledge — say one is tenured and one is brand new — they'll deliver vastly different experiences to customers that they help.

Efficiency: Asking and answering the same questions over and over isn't just mind-numbing — it's also a huge waste of time.

Documenting answers in a knowledge management system eliminates the need for that. ***Tettra's AI knowledge management*** searches through your documentation and provides real-time answers to help your support team.

Resiliency: When important information lives in your team's heads, it's a big problem when they leave or change roles.

Knowledge management solves this problem by creating structured processes that encourage team members to document and share out that information.

Regardless of how big your support department gets, you'll never outgrow your need for a great knowledge management tool. For instance, when I started as the first technical writer for HubSpot, we had between 40-50 agents. I was responsible for maintaining all customer-facing help documentation, as well as creating guides to help users learn best practices for using HubSpot.

Today, HubSpot's support team is a global team with hundreds of agents, and they're still leveraging their knowledge base to deliver effective support.

Real-world stories of using technology to drive CX efficiency

A great knowledge base makes your team more efficient by putting the info they need to do their best work at their fingertips — but there's a lot more technology can do to make your team more efficient. Rather than share more best practices, let's look at some real world stories of how technology has transformed customer support teams and helped CX leaders scale.

Odyssey

Odyssey's platform is designed to connect states, families, and vendors to enable families to pay for their children's education expenses. But that comes with a lot of complexity, as they're serving state governments, businesses, and consumers—they're effectively B2G, B2B, and B2C all rolled into one.

Fernando Duarte, Odyssey's Director of Support, joined the company in July 2023. The team consisted of nearly two dozen support agents, handling about 5000 Zendesk tickets each month.

Fast forward a year, and they've scaled up to managing over 25,000 tickets each month, without increasing headcount. They've simultaneously introduced more specialized career tracks for their team, such as QA, WFM, documentation, and management tracks.

The secret? Francisco led the careful implementation and rollout of a new AI-powered CX platform. This platform has had a huge impact across Odyssey's support operations, including:

- **Reducing new hire onboarding time** from two weeks to three days. By their third day, new agents use the tool to generate suggested replies to customers. After confirming accuracy, they send out the replies. This also helps continually train the AI model.
- **Increase first contact resolution to 80%:** Because of the continual training the AI model receives, its suggested responses are highly accurate, often eliminating the need for any back-and-forth with the customer and driving up Odyssey's FCR rate.
- **Maintained a high level of customer satisfaction:** Despite handling 5x the volume with a similar-sized team, Odyssey's team has maintained consistently high CSAT scores.

To be clear, none of this was easy or automatic. While Odyssey's seen great results, no tool delivers results like this on autopilot, even if it's AI-powered. Fernando offered three big tips for support leaders looking to achieve similar results:

1. **Remember that everything starts with good documentation and ticket tagging:** Without a great knowledge base, your agents and your AI-tooling will be less effective. Before scaling your team or investing in technology, you need to build a good foundation of SOPs and documentation.
2. **Don't overlook the importance of training and feedback:** AI technology will never be at its best without ongoing training and feedback—and neither will your team members. Build feedback loops and continual training into your team's everyday processes.
3. **Be thoughtful about implementing technology:** Fernando intentionally rolled out their new tool internally first, to enable more training and to limit any negative impact on customers if things went wrong. Each time he's rolled out new functionality, he's taken a phased approach. For instance, you might start with 10% of tickets, then ramp up to 30%, then 70%, then 100%.

With the foundation they have in place now, Odyssey's support operation is well-positioned for future growth and for tackling new challenges.

Fortnox

[Fortnox](#) is a Sweden-based business platform, offering services like accounting, payroll, and invoicing. With multiple products and services available, Fortnox's customer service team fielded many different kinds of questions.

Unfortunately, they didn't have a great way to make knowledge searchable for their agents, leading to longer than necessary wait times for customers, wasted time and resources, and an overall lack of productivity across the support team.

To solve that problem and build a more scalable support operation, Fortnox chose to use Tettra as their internal knowledge base.

"Tettra simplifies the question and answer process at Fortnox with always making sure that we have our new information and up-to-date information for the agents," says Tobias Persson, Fortnox's domain expert on their support tech stack. He highlights two key features that made the team far more efficient: the user-friendliness of the Tettra platform and the accuracy of its AI-powered search functionality.

Having one source of truth and a simple and reliable process for getting questions answered — and then reusing those answers — has been transformative for Fortnox's support team.

Healthtech startup

While leading the growing support team at a healthtech startup, Hilary Dudek faced big challenges with scheduling the support team effectively. With both an in-house team and an outsourced team, using Google Sheets to build weekly schedules created all kinds of issues:

- **Manual work:** Building the team's schedules took a lot of time and manual effort each week. When things changed unexpectedly—like a team member calling in sick or a customer call running long—making changes on the fly was incredibly difficult.
- **Lack of visibility:** Building the team's schedules took a lot of time and manual effort each week. When things changed unexpectedly—like a team member calling in sick or a customer call running long—making changes on the fly was incredibly difficult.
- **Struggles to hit metrics:** First reply times were inconsistent and the team would routinely miss calls, creating a less-than-ideal experience for customers.

To solve these challenges, Hilary proactively searched for a workforce management tool that could help. She found a WFM tool she really liked, and she communicated intentionally with her team members throughout the exploration and implementation process to reduce change anxiety. ***"I didn't want there to be any surprises,"*** she said. ***"Change can be scary, and I definitely wanted buy-in from the team."*** Four months after implementing their WFM tool, the impact was already clear:

- **A 50% reduction in time spent creating and managing schedules week:** The new tool synced to team members' Google calendars, making it easy to create schedule around other commitments and reducing the need for adjustments.
- **Improved schedule adherence:** The new tool's reporting showed a number of team member with adherence rates of 40-50%—well below the team's goal of 85%. With clear data, Hilary and her managers were able to coach those team members to improve their performance and reduce their need to hire.
- **A 47% decrease in missed phone calls and a 10% increase in first response time:** Since the new tool created schedules based on historical data and predicted call volume, team members were more readily available when customers really needed help.

By thoughtfully introducing technology that addressed specific pain points for her team, Hilary and her team improved the customer experience and created a more scalable support operation to enable future growth.

Playtomic

Giulio Castiglioni leads the Customer Care team at Playtomic, the world's largest SaaS app for booking racquet sports. His team includes nearly 30 people responsible for providing B2B and B2C support across 9 languages and more than 50 countries.

As Playtomic has grown across countries and languages, their support team faced big challenges managing the influx of support tickets. Although many tickets were straightforward, their hiring budget was limited and product improvements weren't always being released as quickly as customers wanted.

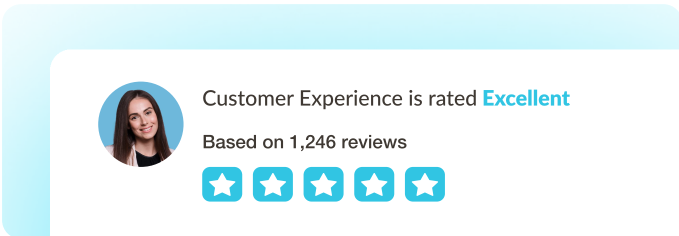
To solve this challenge, Giulio and his team implemented an AI-powered system that's now capable of resolving 60% of all incoming customer inquiries.

The keys to unlocking this success involved several steps:

- **Revamping their knowledge base:** The AI system relies on their knowledge base to help customers, but their old knowledge base wasn't structured in a way that was easy for the AI to ingest and use. They revamped the whole knowledge base, leading to clearer AI-generated answers for customers.
- **Developing intents:** Guilio's team created a list of more than 70 different customer intents, which they used to train the bot and improve its understanding of what customers needed.
- **Using generative AI:** Playtomic had tried using a chatbot once before, but customers didn't like it because it was often inaccurate and felt impersonal. By leveraging generative AI (instead of a pre-set menu), they were able to overcome this hurdle and deliver a more human-like experience for customers.

The impact has been huge. Beyond the platform's ability to handle 60% of incoming tickets, Playtomic's also seen CSAT for chat conversations increase nearly 20%. They also measure bot satisfaction, which has skyrocketed from 21% with their old chatbot to 76% with their new system.

Taken together, all of this means happier customers and a more scalable global team to support Playtomic's passionate customer base.



Takeaways

- ☐ Choosing the right tools starts with defining your ideal customer service experience.
- ☐ Assess current tools and identify pain points before exploring new technology options.
- ☐ Integrating knowledge management systems like Tettra improves efficiency and standardization.
- ☐ Technology can significantly enhance onboarding, training, and ongoing support team performance.
- ☐ Real-world examples show the importance of thoughtful technology implementation for scaling.

Chapter 4:
Operational Excellence and Metrics

As your customer support team scales, it becomes increasingly important to hone in on how you'll measure the success of your operation.

For better or worse, there are dozens of metrics every customer service team could track. But which ones should you track? Which ones are essential and which ones are optional?

In this chapter, we'll zero in on the key metrics modern support teams should track as they scale.

Many of these metrics work across companies and industries, but you'll need to identify any underlying factors unique to your business that require adapting them.

We'll also look at the other key to operational excellence in your support team: creating feedback loops with customers that drive continuous improvement.

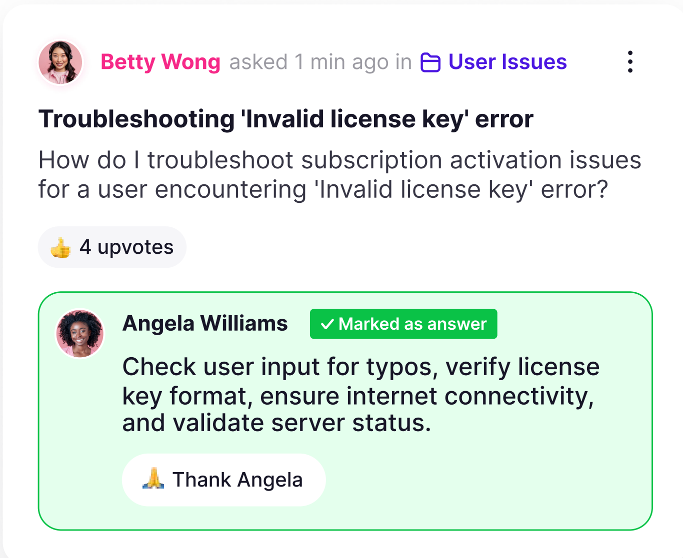
Key performance indicators for customer service teams

The customer service metrics that work in an early-stage SaaS startup will look different from an established ecommerce brand. And both of those will look very different from the customer support metrics at a multinational Fortune 500 company. These are the key performance metrics you need to track at each stage of business growth.

Early stage

In the early stage of your business, your customer service team often isn't a team. Support usually starts as a founder with a Gmail alias or several people keeping an eye on a shared inbox.

During this stage, you aren't spending much time thinking about building a robust customer support operation. You're focused on finding product-market fit, proving your business is viable, and identifying ways to efficiently deliver it to customers.



Early Stage Customer Service metrics

First or average response time: When your customer base is small, you want to stay highly engaged with them. Your product likely has a lot of flaws or bugs at this stage, and being super responsive and quickly providing help encourages customers to give you extra grace and understanding.

Net Promoter Score (NPS): NPS is a measure of how likely customers are to refer your product/brand to a friend. When you're in this early stage, finding product-market fit and growth is critical. Tracking NPS helps you gauge your success. Follow the standard NPS question up with an open-ended question—like "Why did you pick that rating?"—to gather more context and find ways to improve.

Customer satisfaction (CSAT): CSAT is a great tool for understanding how customers feel about the help you've provided. Ask it after each customer support interaction, and follow it up with an open-ended question to gather more context.

Customer contact rate: This metric tracks the number of tickets you get per customer per month, and it's critical for understanding how your team will scale. As you deploy self-service resources and improve your product, you'd expect to see your contact rate decrease, which means you can serve more customers with less agents.

Note that because you may not even have real help desk software at this stage, tracking these metrics often requires some manual work or approximations.

Mid-stage

This stage is often characterized by building systems and processes. The chaos of the early stage has ended—you've survived it and built a product customers like. It's now time to build systems and processes that will help you deliver a consistently good experience.

Support teams in this stage often have at least a few customer service agents. Those agents may be starting to specialize, and you'll likely invest in tools like a help desk and a help center to promote self-service among customers.

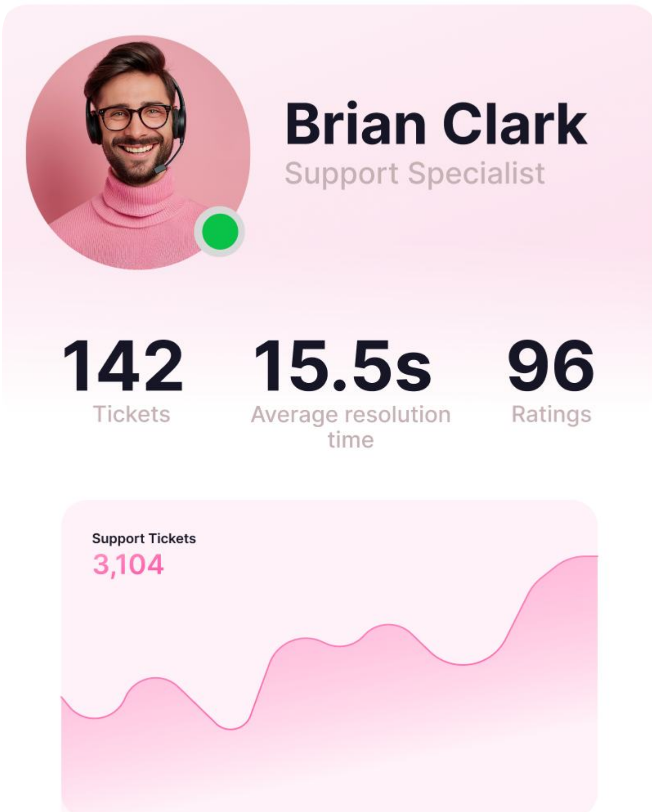
Mid-stage customer service metrics

Average or median resolution time: As your team grows, the time it takes to resolve issues for customers becomes a key measure of your efficiency. Response time is still important, but adding in this metric helps you understand if you're effectively helping your customers.

Self-service score: Since you're probably beginning to invest in self-service offerings, this is a good time to start measuring how effective they are. You want to understand if customers are able to find your help center and how well it's working.

Ticket volume by channel and/or day: As you build foundational support processes, it's critical to know when and where customers are reaching out to your team. This information will shape everything from the channels you offer to your scheduling and hiring needs.

Escalation rate: As your team and customer base grows, you'll likely need to formalize your process for escalating tickets, whether that's to higher support tiers or to other internal teams like engineering. Tracking your escalation rate helps you uncover opportunities for improved training and tooling to make your frontline agents more effective.



Growth Stage

The growth stage is where things really take off. You're beginning to scale. Customer count is growing rapidly, so your customer service team may be doing the same thing.

While it's always important to respond quickly and resolve issue effectively, the key metrics for this stage are based around efficiency:

Growth stage Support Metrics

- **First contact resolution (FCR) rate:** Improving FCR is one of the best ways to make your support team more scalable. When they're able to resolve customer interactions with one contact, your agents have capacity to help additional customers. But keep in mind that if you're using a chatbot or similar tool to answer your easy and repetitive questions, it can actually reduce your FCR rate (because your agents will be handling more complex issues).

- **Replies per ticket:** This metric is closely related to FCR. High replies per ticket means more time spent on each ticket, which means you'll need to grow your support team faster.

- **Bot deflection rate:** This stage is often where companies introduce tools like AI-powered chatbots. If that's you, then it's vital to measure your bot's effectiveness at handling customer interactions without involving your human support team.

While it's not truly a metric, this is also the stage when you'll want to ensure you're categorizing customer conversations by type and product area. Segmenting your contact volume in this way drastically improves your reporting, helping you understand what areas of your product need improvement.

The growth stage is often messy and introduces significant change to your team, so it's also critical to have a thorough internal knowledge base on a platform like Tettra, which makes finding answers and recalling processes easy.

Enterprise / Mature Stage

As your business matures, it's common to move up-market and focus on selling to bigger organizations. This means complex sales cycles, multiple internal stakeholders, and higher average contract values.

It also introduces things like service-level agreements (SLAs), which contractually obligate you to meet a certain standard of support (or to pay penalties for not meeting that standard). Important customer service metrics to track during this stage include:

Enterprise Support Metrics

- **First contact resolution (FCR) rate:** Improving FCR is one of the best ways to make your support team more scalable. When they're able to resolve customer interactions with one contact, your agents have capacity to help additional customers. But keep in mind that if you're using a chatbot or similar tool to answer your easy and repetitive questions, it can actually reduce your FCR rate (because your agents will be handling more complex issues).

- **Customer health score:** At the enterprise level, losing just a few customers can make or break your quarter or year. Customer health score is often owned by customer success teams, but it's usually impacted by support factors like the volume of recent tickets and CSAT scores. It's also incredibly valuable for support agents to have visibility into the overall health of the customer before they start engaging with them.

- **Time to resolution (TTR):** Enterprise customers bring more complex issues, which normally take longer to resolve. Many customers understand complex issues take time, but when issues fester for too long, it hurts their trust in you. Tracking TTR and finding ways to keep it low reduces this risk.

There are plenty of other metrics a growing customer service team can track, but every support organization would benefit from having the above metrics on their dashboard across each stage in their business growth.

Feedback loops and continuous improvement

Tracking metrics is important, but metrics aren't an end unto themselves. If you aren't using those metrics to drive continuous improvements across your team and customer experience, you're creating a recipe for trouble. Your customer service metrics should function like the canary in a coal mine—they're your first warning when something is going awry. When a metric slips into an unhealthy area, it's time to take action.

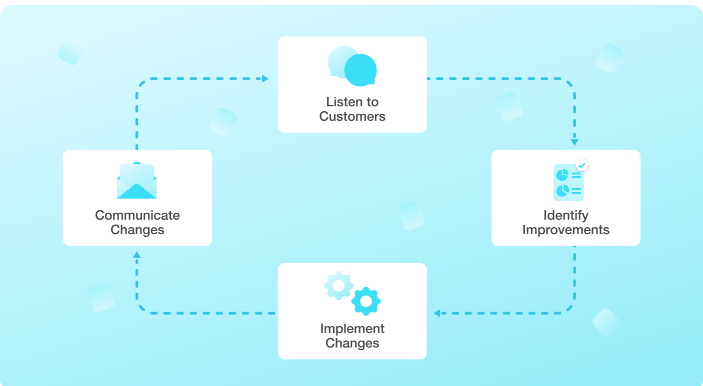
There's one other major input that should drive continuous improvement and change within your customer service operations: feedback from your customers and your team.

Customer feedback comes in many formats: survey responses, customer replies, help center analytics, in-product feedback, and online review sites.

Feedback from your team often surfaces in engagement surveys, 1:1 meetings, [quality assurance reviews], and more.

Whatever the source, feedback should be viewed as a valuable resource with the potential to help you grow and improve. That doesn't mean all feedback is equal or valid—but it all has the potential to help, if you're willing to take it seriously and take thoughtful action in response to it.

This is why creating reliable feedback loops can be so transformative. Within the customer service world, a feedback loop is a system that allows you to continually listen to customers, identify improvements you can make, implement changes, and communicate them out to customers.



From there, you rinse and repeat to foster a never-ending cycle of improvements to your team and to your customer experience.

Feedback Loop Example

Imagine you're supporting a SaaS product customers use for creating process maps and diagrams — something like Miro.

You've recently started selling to larger enterprise customers, each of whom has many users on their account.

As those users start interacting with your product, your support team identifies a spike in support tickets around sharing projects with other users. Customers are seeing errors and changes to projects aren't saving like they should.

That's the input—the first step in your feedback loop. Noticing this, your team quickly engages with your engineering team to find the root cause. You share the error messages and affected accounts, highlighting how quickly the number of affected users is growing.

Engineering uses their expertise to troubleshoot the issue, and it becomes clear the root cause was a bug in a recent release.

That's your data— improvements you could make based on this feedback include improving the QA process your engineering team uses.

But that's not all.

You also realize that if your senior support agents had more knowledge on the technical aspects of your product, they could have done a better job troubleshooting the issue themselves, uncovering the cause earlier and limiting the impact on your customers.

So you've found an opportunity to improve your customer service training. There could also be an opportunity to improve your support processes or technology.

For instance:

- Maybe you should have escalated the issue to engineering sooner?
- Maybe you should co-own a status page with engineering, improving your ability to let customers know about outages sooner?
- Maybe you should give your senior agents access to an additional tool, which would also make troubleshooting issues like these easier in the future?

Whenever something goes wrong or a system fails, it's an opportunity to get more buy-in to experiment with a different method.

Once you've aligned on the changes you should make, you implement them and, where appropriate, communicate the changes back to your customers.

Some changes—like fixing the bug—will be quick and relevant to customers, whereas other changes (like improving your training or tooling) will take more time and won't require informing customers about.

When your business encounters a major incident, like a massive product outage, you might also consider conducting a formal incident postmortem to crystalize what went wrong and to uncover additional ways your team can improve.

One additional way to create effective feedback loops is to leverage dedicated tools for gathering and centralizing customer feedback.

At Tettra, we've used Savio to make collecting feedback and closing the loop with customers easier—you can read all about the impact that's had.

Takeaways

- ☐ Key performance metrics vary by the stage of business growth, from early-stage response times to mature SLAs.
- ☐ Feedback loops with customers and teams drive continuous improvement and operational excellence.
- ☐ Metrics should inform action, helping identify areas for process or service improvements.
- ☐ Standardizing metrics helps maintain quality and efficiency as teams grow.
- ☐ Effective feedback loops involve listening, identifying improvements, implementing changes, and communicating results.

Chapter 5:
Scaling the Team and Maintaining Quality

While AI-powered tools and automation can help you scale your customer service operation efficiently, scaling support eventually means growing your team.

In this chapter, we'll dig into strategies and best practices for growing your customer support team while delivering a high quality support experience for your customers.

Hiring And Training For Customer Support Roles

Before you can excel at hiring new team members at scale, there are a few key steps you need to take:

1. Define the role(s) and required skills
2. Build a repeatable process for interviewing and evaluating candidates
3. Attract great candidates

Defining Customer Service Roles And Skills

We've identified over a dozen common customer service job titles used by modern SaaS companies. With so many different roles, it's vital to remember that the responsibilities and required skills of each customer service role will look different.

For instance, the top skills a customer support team lead needs will be different from the core skills every customer service agent needs.

That being said, some key skills will apply across virtually every member of your customer service team, whether you have two agents or two hundred:

- **Strong communication skills** are always critical, whether you're a frontline agent taking phone calls from customers, a team lead handling escalated issues, or a support operations lead working with other internal teams.
- **Problem-solving skills** are essential, as support team members constantly need to be resourceful, think critically, and adapt to new problems and customer issues.
- **Empathy** is a core customer service skill because, by default, customer support exists to help customers when things go wrong. The better your team members are at empathizing with customers, the better they'll be at their jobs.
- **Technical knowledge** requirements will vary depending on the complexity of your product, but every customer service role requires some minimum of technical proficiency.

As you're scaling up your team, you'll need to hire regularly.

Creating clear and accurate job descriptions with the required skills and experience ahead of time will make this process significantly easier.

Attracit Great Candidates

You can't hire great team members if they don't first apply to your open roles, right?

That's why building a great company culture and reputation is so important. There are many ways you can "market" your company as a great place to work, including:

- Investing in building great profiles on sites like LinkedIn and Glassdoor
- Encouraging current employees to share open roles, and maybe even creating an employee referral program to incentivize this behavior
- Exploring certifications like Great Place to Work

The more qualified candidates you can convince to apply, the easier it becomes to hire great talent and scale your customer service without sacrificing support quality.

Build A Repeatable Customer Support Interview Process

Interviewing job applicants is both an art and a science. The science part—creating a fair, repeatable process for evaluating candidates and finding the right ones—is the part you can develop ahead of time.

There are two big parts to creating a repeatable and reliable interview process.

First, you need to develop an evaluation scorecard to ensure you're reviewing candidates in a consistent and objective manner. There isn't a "right" format for doing this, but a smart approach is to develop a handful of key criteria you're looking for, then use a scale of 1 to 5 to rate each candidate.

Second, you need to figure out how to effectively use technology to build a good hiring system. Most companies—especially ones that are rapidly scaling—use an applicant tracking system (ATS) like Lever or Greenhouse to build hiring pipelines and manage the recruitment process.

Beyond that, you should also explore tools like TestGorilla, Talogy, and Alva Labs to improve your hiring process.

These kinds of tools do everything from talent assessment tests, assessing culture fit, and gauging problem-solving skills.

One of my favorite interview tactics for customer support roles is to ask candidates to teach me the basics of one of the last things they've learned. This helps me figure out how curious and resourceful they are.

Depending on the topic, it can also help me understand how technical they are. Because I ask them to assume I know little about the topic, it also gives me insight into how empathetic they'll be with customers and how well they can translate complex topics into understandable instructions.

If your interview process includes multiple interviews, make sure that each interview has a specific purpose and clear objectives.

For instance, your first interview might assess if the candidate has the right skills for the job, whereas a second interview might focus on whether they'll be a good cultural fit with the team.

As you're interviewing, keep in mind that it's incredibly rare you'll find a perfect candidate. Needles may exist in haystacks, but they're uncommon and searching for them is a waste of time. Instead, assume that all candidates will require training—although the specific needs will vary from person to person.

Onboarding and Training for Customer Service Roles

A great onboarding and training program should quickly turn new hires into valuable, contributing members of your support team.

Your onboarding and training goals should include giving employees a clear understanding of their role, educating them on the systems, tools, and processes your team relies on, and educating them on your product and customer base. As part of creating a repeatable hiring process, build out a schedule or timeline that all new hires should move through. For example:

1 Day

Days 1-5

Company orientation, introduction to key tools, and basic product training.

6 Day

Days 6-7

Begin handling tickets on an asynchronous channel (like email). Have a manager or more tenured agent review replies before sending.

8 Day

Days 8-10

Mix the above asynchronous work with shadowing tenured agents on a live support channel.

Day 11-12

Have new hires field tickets across all channels, but have a more tenured agent "reverse-shadow" them to provide immediate support and coaching.

There are hundreds of different tools you can use to help onboard new hires, many of which are specific to your company's tech stack and customer base.

Use an Internal Knowledge Base

There's one tool that's guaranteed to make your onboarding and training process easier though: a great internal knowledge base, like Tettra.

An internal knowledge base makes onboarding and training easier because it acts as a central source of truth for everything. New hires don't need to access dozens of disjointed Google Docs or Powerpoint presentations. They don't need to wonder what problems your product solves, or lose sleep over whether they're recalling how to troubleshoot a product feature correctly.

Instead, they just need to ask your AI-powered knowledge base.

They'll get an immediate answer, if it's available. If not, Tettra's AI will assign the question to the right subject matter expert—sparing your new hire from needing to hunt around or awkwardly ask in a public Slack channel.

Once the subject matter expert verifies the correct answer, Tettra's AI will document it and remember it any time a similar question surfaces in the future.

It's a feedback loop in action, making your ramp up process for new hires faster, saving your experienced team members time, and consistently leveling up your training program.

For a real-world example, look at Techstars' experience. They were relying on Google Docs and Slack to share information, leading to glitches, lost information, and tons of wasted time.

After implementing Tettra and integrating it with G-Suite and Slack, over 90% of Techstars' accelerator team relies on Tettra each month.

Maintaining Customer Service Quality at Scale

Humans are great, but they're prone to error. And when you're a scaling business that's constantly hiring and training new support agents, it's easy to see customer service quality slip.

While it's never easy to manage a large team and a growing customer base, there are several proven strategies support teams around the world have used to scale high-quality customer service effectively.

Implement a quality assurance (QA) program

Quality assurance programs have been a staple of growing customer support teams for a long time. In a typical QA program, a subset of customer interactions are evaluated against a QA scorecard to assess if agents are delivering a high-quality experience for customers (however you might define that at your organization).

Generative AI is changing the look of QA programs, as many QA tools can now automatically review 100% of customer interactions in near real-time.

This transforms QA from being a backwards-looking process primarily meant for evaluating agent performance into a powerful tool for generating real-time insights about your customers.

Create standard operating procedures

Standard operating procedures (SOPs) are a set of instructions that describe the steps team members need to take in order to properly perform a business process—whether that's setting up a new customer's account, troubleshooting a technical issue, or escalating a support ticket.

If your documentation is a mess, you'll never be able to scale your support team while maintaining a high bar for service quality.

It's impossible.

But, when you spend the time to document your essential processes, you'll make it possible for anyone —even a new hire—to understand how to complete common tasks correctly and efficiently.

This might seem like a lot of work, but by leveraging common SOP formats and templates and involving your team in the process, you'll be amazed at how quickly you can document common workflows.

Once your standard operating procedures are documented, you need to make them accessible and keep them updated. That's a great opportunity to use a tool like Tettra as part of your knowledge management system. Tettra's Verification feature lets you assign SOPs to specific users and set up alerts so that, whenever you think it's necessary, they'll be reminded through email or Slack to verify the content is still accurate—or to update it, if needed.

Helping your team's development

A scaling company creates plenty of opportunities for team members to learn new skills, stretch their abilities, and take on new challenges. The more you can do to help your team learn and develop in their roles, the more likely they'll stay engaged and provide great service to your customers.

Develop career tracks

A small support team usually has two roles: frontline agent and support manager.

As your team scales, the number of roles and responsibilities quickly multiplies. You'll eventually need roles like:

- QA specialist
- Knowledge manager
- Technical writer
- Support engineer
- Training manager

In addition to all that, as your headcount increases, so will your need for additional team leads and managers, making a leadership track a viable option for interested team members.

It's unfortunate, but many people see customer service roles as dead-end jobs. That's changed in the last twenty years, and proactively creating clear and viable career paths for your support team members will motivate them to take on new responsibilities and develop new skills.

In fact, I like to ask job applicants about their preferred career track during the interview process. While those preferences may change over time, understanding their current preferences helps me hire a mix of agents who want to make customer support their career and agents who are looking to move outside of the support space. Both bring valuable benefits—the former helps you reduce turnover and retain knowledge, while the latter helps you build strong relationships between other departments when support agents move into those roles.

Promoting knowledge sharing and learning

Customer service is always evolving, because both your product and your customers are continually changing. While this may feel like a pain at times, it's also a great opportunity to continually upskill your team through sharing knowledge and creating learning opportunities. There are a few common approaches to doing this that work well for customer service teams:

Team meetings or "lunch and learn" sessions: Meetings like these can be great for fostering camaraderie and giving team members an opportunity to share knowledge. You can even bring in members of other teams—a product manager can explain an upcoming product change, or your marketing director can train your team on your brand voice. Dedicated meetings can be hard to facilitate when you're a scaling support team, because they require stepping away from your support inbox for a certain amount of time. If that's tough for you.

Investing in a training platform: A digital training platform can enable flexible, asynchronous training. That's great when you're a remote support team working various schedules. Learning management systems make it easy to create your own training content. You can also invest in tools like Udemy or Coursera to offer your team training on tons of additional topics and skills.

Schedule in non-queue time: Many customer service agents have experienced being scheduled to interact with customers for their entire shifts. That's necessary at times, but building in non-queue time to your team's schedule—slots where they can do things like take on interesting projects or shadow other teams—enables them to flex and grow other skills.

Making time and space for training and development in the customer service space is particularly hard, because it requires giving your team time away from their primary job of helping customers. When you're getting started, start small but be consistent.

Engaging in quality assurance and training is like a muscle—you need to engage it consistently over time to see the gains you're hoping for across your team.

But it's worth the investment, because it can have a huge ROI in terms of engagement and productivity.

Customer service hackathons

Running dedicated customer service hackathons is another great opportunity to encourage your team's creativity, problem solving, and overall development.

If you aren't familiar with hackathons, it's a focused way of giving a group of people a dedicated amount of time to solve a specific problem. Sometimes they're used for brainstorming and ideating; other times, they're used for actually building and implementing solutions to those problems.

Spendesk has a great writeup of how they approach hackathons. The key steps are:

- **Identify the key themes or problems you want to tackle:** Your support team is probably already well aware of the most common and most upsetting issues your customers experience, but you can supplement their firsthand experience with survey data and help desk ticket reporting.
- **Form your hackathon teams:** For the best results, each team should be a cross-functional group, including members from teams like support, sales, marketing, product, and engineering.
- **Block out your time:** Once you have participants formed into teams, you need to give them time to work. The right approach depends on the problems you're solving—it might be a focused four-hour session at a company retreat, or it might be two straight days of planning and prototyping.
- **Demo solutions:** The whole point of a hackathon is to foster creative approaches to solving customer problems. Once teams have solutions in mind, give them space to demo their ideas to one another. This will unlock even more creative thinking.
- **Build it:** Brainstorming solutions is great, and your team can learn and grow even if a solution never leaves the idea phase. But hackathons are far more rewarding and impactful to your business when you give your team time to build or implement the solutions they come up with.

If your whole company isn't on board with the idea of a hackathon, it's possible to run them solely within your customer service team, too. Just create teams that are as diverse in skills, roles, backgrounds, and experiences, then unleash them to brainstorm process and product improvements that will make your customers' lives easier.

Takeaways

- ☐ Define roles and required skills to streamline the hiring process and ensure team alignment.
- ☐ Build a repeatable interview process with evaluation criteria and leverage technology to improve hiring efficiency.
- ☐ A robust onboarding and training program quickly integrates new hires, enhancing their productivity and understanding of team tools and processes.
- ☐ Maintaining customer service quality at scale requires implementing QA programs, SOPs, and promoting knowledge sharing within the team.
- ☐ Invest in team development through career tracks, non-queue time, and creative approaches like hackathons to keep the team engaged and motivated.

Conclusion

If someone tells you scaling a customer service team is easy, they're wrong. Scaling a support team doesn't have to be overwhelming, though. We've covered a ton of ground in this ebook, including:

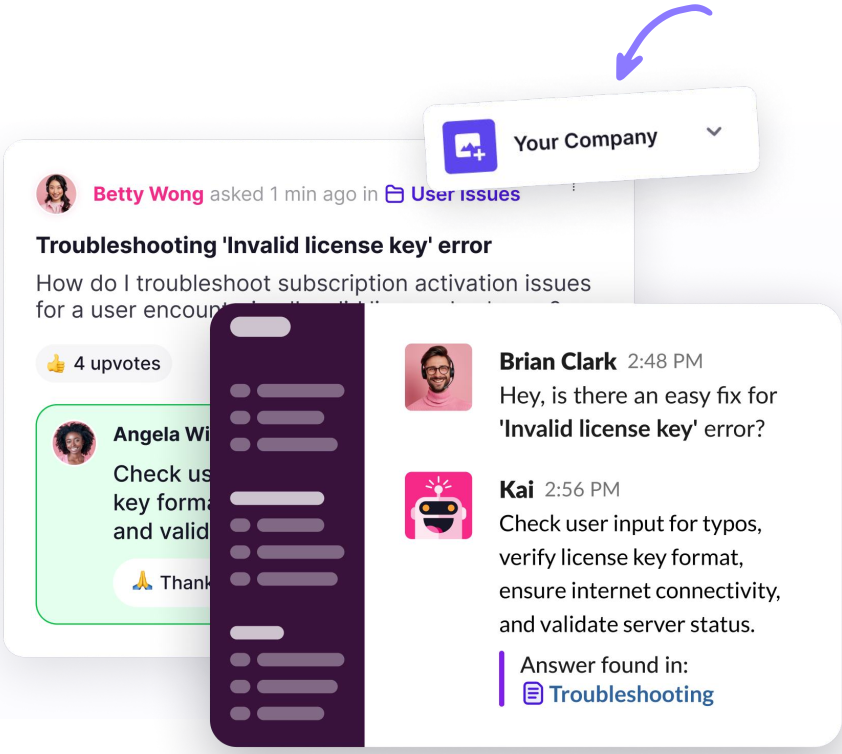
- Building a culture of trust and respect
- Managing change effectively
- Investing in the right tools and technology for your support operations
- Setting thoughtful goals and metrics that are relevant to your stage
- Building reliable systems for hiring and training support team members

By following these steps and adopting a thoughtful, proactive approach to leading and guiding your customer service team, you can take your team from an agent handling a few inquiries in a shared inbox, all the way up to a large team with a complex, integrated tech stack.

Most importantly, you can do it all while creating a great customer experience and building a highly engaged, motivated team.

Learn more about Tettra

Learn more about Supportman



More Resources

Get access to templates, checklists, and other resources mentioned throughout this eBook.

Surveys: Change Management Employee Surveys | Tettra Talks

About the author

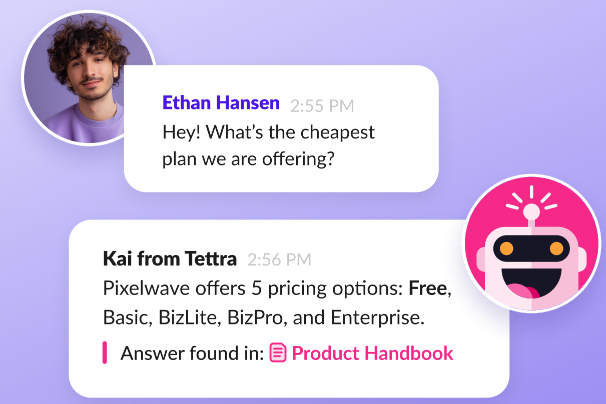
Sam Siskind brings over 15 years of proven expertise in building and leading customer support and operations teams. Throughout his career, he has successfully consulted with hundreds of businesses, focusing on optimizing processes and scaling customer-facing functions to support business growth. Sam's extensive experience spans roles such as technical support leader, operational excellence manager, and full stack software engineer.

As the Head of Operations at Tettra, he continues to champion innovation and operational efficiency. This ebook delivers actionable strategies for leaders navigating how to scale support teams. Drawing on real-world insights and best practices, Sam offers a deep understanding of technology, change management, and fostering a culture of continuous improvement.

About Tettra

Tettra is an internal knowledge management platform powered by AI that helps service teams onboard new reps faster, drive agent productivity, and increase CSAT scores.

- **Quickly access answers:** AI-powered search makes finding documentation easy.
- **Slack integration:** Access Tettra directly from Slack for instant knowledge sharing.
- **Reduce resolution times:** Support agents resolve customer issues faster with up-to-date information.
- **Empower your team:** Minimize time spent searching for answers, enhancing team efficiency.



Learn more about how Tettra helps support teams.

Click Here

Learn more at Supportman.io.

Click Here

About Supportman

With Supportman, connect Intercom and Slack to get instant feedback on how your agents are doing.

- **Quickly follow up with unhappy customers.**
- **Receive notifications directly in Slack about customer feedback.**
- **Understand team performance better to enhance customer satisfaction.**

Glossary of Key Terms

1. **Change Management:** The process of managing both planned and unplanned changes within support operations, including strategies for successful rollouts and handling obstacles.

2. **CSAT (Customer Satisfaction Score):** A metric that measures customer satisfaction with the support experience, often used to gauge service quality and performance.

3. **Customer Contact Rate:** Also known as tickets per customer per month, this metric measures how frequently customers reach out for support, helping to forecast future volume and staffing needs.

4. **Deflection Rate:** A metric that measures the effectiveness of self-service tools or automated solutions, such as chatbots, in handling customer inquiries without needing human intervention.

5. **Escalation Rate:** The frequency at which support tickets are escalated to higher tiers or other internal teams, often indicating the need for improved training or more efficient tools for frontline agents.

6. **FCR (First Contact Resolution):** A key performance metric that measures the ability of a support team to resolve customer inquiries or issues in the first interaction.

7. **Internal Knowledge Base:** A centralized repository of information, procedures, and FAQs used by support teams to quickly access the necessary knowledge to resolve customer issues efficiently.

8. **NPS (Net Promoter Score):** A metric that measures customer loyalty by asking how likely they are to recommend a company's product or service to others, providing insight into overall customer satisfaction and advocacy.

9. **Occupancy Rate:** The percentage of time support team members spend actively assisting customers compared to their total available work time, with high rates often indicating potential burnout.

10. **Quality Assurance Reviews:** Evaluations of customer interactions to ensure that support agents meet predefined quality standards, which helps maintain high service levels and identify areas for improvement.

11. **Replies per Ticket:** A metric that indicates the average number of responses needed to resolve a support ticket; a lower number suggests higher efficiency and effectiveness in handling inquiries.

12. **SOPs (Standard Operating Procedures):** Documented processes that provide step-by-step instructions for completing tasks within the support team, ensuring consistency and quality in service delivery.

13. **Service-Level Agreement (SLA):** A contract that defines the expected level of service, including metrics like response and resolution times, which must be met to avoid penalties.

14. **TTR (Time to Resolution):** A metric that tracks the amount of time taken to fully resolve a customer's issue, crucial for assessing the efficiency of support operations.

15. **Ticket Volume:** The total number of support tickets received within a given period, used to gauge demand and plan resources accordingly.

16. **Turnover Rate:** A measure of the rate at which employees leave the support team, which can indicate team morale, workload sustainability, and overall job satisfaction.

17. **Workforce Management (WFM):** Tools and processes used to forecast, schedule, and manage staff effectively to meet service demands while balancing team workload and availability.