

**A New Era for Customer Service Training**

In many ways, the support industry is in the midst of a renaissance. Customer service as a specialty is coming into its own, offering companies a competitive advantage that’s difficult to copy.

With the evolution of the role comes the need for a [growing set of skills](https://www.helpscout.net/blog/customer-service-skills/). A talented customer service professional is leagues beyond the stereotypical call center employee of old, and the gap will only get wider. The breadth of skills needed to succeed means “support unicorns” now exist — this is no longer a entry-level, leapfrog position, but an opportunity to build a sustainable career with its own fulfilling trajectory.

Automation, customer data, and [smart tools](https://www.helpscout.net/embed-tools/) are essential to enriching human-to-human experiences. They enable us to reduce customer effort, provide proactive solutions, and help customers even faster. But with great power comes great responsibility, and the people behind these processes will determine their success or failure. Put another way:

That’s why we wrote this book: to help you build, grow, and provide valuable customer service training to a world-class team. We’ll start off with who to look for and take you all the way through to supporting your new teammates with effective, considerate onboarding. They are, after all, the voice of your company and your customers. There’s no room for anything less than excellence.

**Chapter One**

**The Personality**



Finding the perfect hire for a customer service team is challenging, to say the least. No particular checklist of job experiences and college diplomas adds up to the perfect candidate. Instead, you’re looking for qualities that can’t necessarily be taught.

These folks thrive on one-on-one interactions within their community. They love problem solving. They’re warm, approachable, have a relatable voice, and they’re great at teaching other people how things work. When thinking about it this way, finding a great customer customer service rep kind of sounds like looking for a good buddy. The qualities that make for a good friend often line up with the qualities that make for a good support teammate.

Not convinced? Let us break it down for you.

**6 Qualities of a Top-Notch Customer Customer Service Rep**

**1. They are emotionally intelligent**

When a customer service rep is able to demonstrate sincere empathy for a frustrated customer, even just by reiterating the problem at hand, it can help to both placate (the customer feels heard) and actively please (the customer feels validated in their frustration).

**2. They are problem solvers**

Customers don’t always diagnose their issues correctly. It’s up to the support rep to take the initiative and reproduce the problem before navigating a solution. That means they need to intuit not just what went wrong, but also what action the customer is after. For example, if a customer is having trouble resetting their password, their intended action is to log into their account. A good customer service rep will anticipate that need and might even go the extra mile to manually perform the reset and provide new login details, all while educating the customer on how they can do it for themselves in the future.

In other situations, a good problem solver may simply understand how to offer preemptive advice or a solution that the customer [doesn’t even realize is an option](https://www.helpscout.net/helpu/what-customers-need/).

**3. They are good communicators**

Your customer service team works on the front lines of for the product itself, which means they should have a practiced grasp on how to reduce complex concepts into familiar, digestible terms for your customer. For example, it doesn’t behoove the customer to receive a long-winded explanation on the ins-and-outs of solving a particular bug. What’s better? “Our team is striving to solve the issue quickly and we expect resolution within the week.” Friendly, honest, and—most importantly—brief.

**4. They are methodical**

In customer service, haste makes waste. Hiring deliberate, detail-oriented people will go a long way in meeting the needs of your customers.

**Get to the heart of a problem**. There’s nothing worse than attempting a “solution,” only to have it miss the mark entirely on solving the actual issue.

**Proofread**. A thoughtfully written response loses a lot of its problem-solving luster when it’s riddled with typos.

**Follow up (regularly)**. There’s nothing more impressive than getting a note from a customer service rep saying “Hey! Remember that bug you found that I said we were looking into? Well, we fixed it.” That’s a loyal, lifetime customer you’ve just earned.

**Keep their cool**. Since the customer service team is often tasked with the tough work of cleaning up other people’s messes, it’s especially important they understand how not to internalize the urgency — and potential ire — of frustrated customers. Instead, they know how to stay calm and maintain a steady, guiding hand.

**5. They are creative and resourceful**

Solving problems is good, but finding clever and fun ways to go the extra mile — and wanting to do so in the first place! — is even better. It takes panache to infuse a typical customer service exchange with [memorable warmth and personality](https://www.helpscout.net/helpu/using-gifs-support/), and finding a customer service rep who possesses that natural zeal will take your customer service out of “good enough” territory and straight into “tell all your friends about it” land.

“You want somebody you don’t have to give a lot of rules and regulations to. Someone who is talking to a customer and understands ‘Their boss is yelling at them and they’re having a really bad day. You know what? I’m going to send them some flowers to brighten things up.’ That’s not really something you can teach. They have to go the extra mile naturally.”

— [Chase Clemons](https://twitter.com/chaseclemons), Support Pro, Basecamp

**6. They are excellent writers**

Good writing means getting as close to reality as words will allow. Without an ounce of exaggeration, teaching clear writing skills is the most overlooked, yet most necessary, skill when it comes to customer service training. Unlike face-to-face (or even voice-to-voice) interactions, writing requires a unique ability to convey nuance. [How a sentence is phrased](https://www.helpscout.net/blog/customer-perception/) can make the difference between sounding like a jerk (“You have to log out first”) and sounding like you care (“Logging out should help solve that problem quickly!”). Good writers also tend to use complete sentences and proper grammar — qualities that subtly gesture toward the security and trustworthiness of your company.

Even if your company offers customer service primarily over the phone, writing skills are still important. Not only will they enable your team to craft [coherent documentation](https://www.helpscout.net/blog/knowledge-base-article/), they signify a person who thinks and communicates clearly.

**Chapter 2**

**The Search**



One of the most overlooked parts of finding a great candidate is attracting a diverse, competent, and exciting group of prospects in the first place. The best way to do that? [Write a killer job listing](https://www.helpscout.net/blog/writing-job-posting/).

Attracting talented people starts with communicating that there is meaningful work to be done. Extraordinary people won’t take ordinary jobs, and your job posting is their first impression of your company.

Crafting a compelling job description will set a precedent for the people who apply, and increase the likelihood it will be shared, extending your reach to even more potential candidates. Remember the following as you create your next job listing.

**Attracting Ideal Candidates with Your Job Description**

**1. Be thoughtful about your title**

This can be tricky. You want a job title that stands out while still being easy to find via Google. Job titles that may be true to the spirit of your company (think “ninja”) can undermine a potential hire’s ability to understand what you are actually looking for. But while it’s important to communicate across industry standards, it doesn’t mean you have to give up all hope of being interesting.

The trick? Maintaining a 70/30 approach. That means using a majority of searchable, relevant, plainspoken keywords, plus a single dash of something interesting that will make the listing hook eyeballs. Help Scout job posts, for example, include a line about how our culture isn’t “built around ping-pong tables or Xboxes; it’s all about the work.” That may make some people smirk, but it makes the kind of people we want to attract look twice.

**2. Don’t be a bore**

People expect job descriptions to be dry, making them a chore to get through, which means you could be losing 50% of your best candidates before they’re halfway down the page.

Keep in mind that there is no actual standard for job descriptions. Most of what you see out there is a kind of uncertain mimicry—companies imitating each other because, perhaps like you, they simply have no idea what to say.

The good news is there’s an incredible range of resources available (media types, platforms, even font sizes) that can make your job listing pop. Introducing some unusual elements will help get people’s attention, motivate them to apply, and (major bonus) inspire them to share amongst their own networks. Think of it this way: you want a standout among candidates, so make sure you stand out first.

**3. Focus on the most important skills**

Customer service professionals need a core set of skills—writing competence, problem solving, and a strong sense of empathy—which don’t necessarily require a degree or extensive experience in the industry. You’ll cast a wider net if you scrape away the arbitrary requirements and stay focused on what really matters.

**4. Be true to the voice of your company**

Just as you want to stand out visually, it’s important to have a singular and distinct company voice. Skip the jargon and speak directly to the person you would hope to hire, as if you’re talking to a new friend. Unlike other parts of the hiring process, there’s no template for how this sounds. Instead, think honestly about how you would describe your company. Are you sincere? Playful? Academic? The job listing you write should reflect all those qualities so that you’re sure to attract a like-minded applicant.

A particularly good example of this is [Kickstarter’s recent call-to-hire a new executive assistant](https://medium.com/%40ystrickler/im-hiring-an-executive-assistant-b9d85879acfa#.h84gmb561). The posting is extremely personal—coming from their CEO Yancey Strickler’s own Medium account—distinctly lo-fi and candid. Strickler discusses the interpersonal challenges of the role frankly and in plain language:

“The two biggest challenges I see for the role: **1)** managing and prioritizing requests for my time, and **2)** managing me. While managing and prioritizing requests for my time is a huge part of this role, I still find the whole needing-an-assistant thing kinda strange. You’ll need the experience and comfort to jump in and take the reigns, rather than waiting for me to ask.”

This type of listing will stand out to a certain type of hire for its forthrightness and its narrative, almost letter-like approach. It’s also guaranteed to connect deeply with the exact type of person Strickler is seeking: somebody who is also candid, warm, and straightforward.

**5. Be conscious of diversity**

It can be easy to create a job listing that serves as a kind of feedback loop, appealing to the exact type of person that already inhabits the ranks of your company, at the expense of other, equally as capable candidates who may have different types of job experience and general backgrounds. There are many wonderful resources that will help you weigh what to add to a job description (and what to leave out) in order to create a thoughtful, inclusive listing. Tools like [Textio](https://textio.com/) can also help you assess your resumes for content and see how they stack up against others.

**6. Don’t be afraid to brag**

This goes almost without saying, but you’re proud of your company and you’ve worked hard to create a culture that your employees will enjoy. Don’t be afraid to spotlight that in a job listing! After all, you’re aiming to inspire people to apply, and you want them to be excited about the prospect of working with you, not just getting a paycheck.

A great example of a job listing that wins major points for shouting out company culture is [this recent post for a support specialist from Trello](https://trello.com/jobs/support-specialist-europe). After detailing requirements and outlining expectations, they dedicate a full paragraph to describing what it’s actually like to work at Trello:

“Trello was built to be an awesome place to work. We treat employees like royalty. We care deeply about your professional development and long term goals. We work with you to grow your skills both in and outside support.”

Doesn’t that make Trello sound like a place where you’d be jumping to work?

Putting in the time and effort to make sure your job description is compelling, shareable, and above all, true to the voice and mission of your company will ensure you attract candidates who align with your most fundamental values.

**Chapter 3**

**The Resume**



Parsing a pile of resumes can be a little like, well, swiping right. You’re judging a pile of candidates based on a set of superficial criteria, like what companies they’ve worked for and how many extracurricular skills they have, when what you really need to know is something altogether different: *Are they kind? Will they thrive?*

Here’s how Basecamp’s Chase Clemons puts it:

“I can teach you how to use the product, I can teach you how to look up a customer’s account or look at a bug. But I can’t teach you things like personality. Personality is key with customer service. You want somebody who is upbeat, cheerful, and always smiling.”

These qualities are more abstract than the number of years of prior experience, but that doesn’t mean they’re impossible to find in a resume. With a little extra elbow grease—and subtle intuition—you can find the superstars who stand out on the merits of their originality, creativity, and individual voice.

Here are some helpful insights on how to do that.

**1. Take pleasure in the cover letter**

Reading a cover letter should be a pleasure, not a chore. If somebody can present their personality and past work in a fresh, interesting, and highly readable way, imagine how they’d spruce up an everyday customer service interaction. (Hint: they’ll provide the kind of notable service that customers will talk to their friends about.)

So read the cover letter and ask yourself, “Was I bored?” If the answer is yes, it’s probably best to give that person a pass for now. If you find yourself excited by somebody’s cover letter, though, you’ve also found somebody who is a natural conversationalist—a quality that translates directly to memorable, positive customer service interactions.

According to Trello’s Head of Customer Support, Ben McCormack, applicants should address the specific aspects of customer service that interest them. “It’s a filter to get rid of people who aren’t going to be a good fit. Sometimes, we receive cover letters from people who are huge fans of Trello, but they don’t say anything about support. That’s a disconnect already.”

**2. Look for unique interpretations**

Some candidates will make an effort to ensure that their resume stands out, whether that means making a pinata shaped like your company logo, creating an animation, or writing you a song (seriously!). These things may be obvious once you see them, but it sometimes takes a reminder that you can and should expect them. According to Chase Clemons at Basecamp, a good candidate will have a resume that’s truly unique:

“One woman that we hired actually created a ‘Day in the Life’ video, so we could get an idea of how she was using her customer service skills in her existing job as a librarian. She took a GoPro video camera with her and said ‘Here’s how I help people in my job now!’ Building a resume that is more than standard—that shows creativity and individuality—is really impressive. You want what you are doing to stand out!”

Somebody who goes the extra mile to design a resume that’s also a great experience is obviously somebody who will not only enjoy the work, they’ll become an active contributing voice to a company culture that is vibrant and sustainable.

**3. Make sure they’re fans!**

As an extension of the point above, a potential hire is not copying and pasting information from one resume to the next. Instead, they should present work that is tailored directly to your company and demonstrates how they have engaged directly with the product, even just as a fan.

Do they talk about the product and about the community that exists around it? Do they “know” some of your team on a first-name basis from avid observation on the sidelines? If the answer is yes, that’s a great sign that the candidate is passionate about your mission and product—something that is arguably more important than lengthy experience in the customer service industry.

Some other examples: Do they namedrop one of your product verticals? Do they comment on a recent product change that they found particularly exciting? Do they reference one of your community managers who recently wrote an interesting piece on community building somewhere? All of that demonstrates their excitement about your company.

“When we open up a new position, we get a thousand applications and the majority will say ‘I love Basecamp, here’s my resume.’ That’s it. That’s fine if the company can afford to go through all of those, but we can’t. We look first and foremost at how well-versed they are in our company. Do they follow the blog? Do they know us by name? That’s instantly going to catch our eye to move ’em on and take a closer look at them,” says Chase Clemons.

**Chapter 4**

**The Interview**



When interviewing potential customer service hires you can run the risk of repeating the same questions, receiving the same answers, having the same small talk, and then promptly forgetting all the important details.

The antidote? Think creatively, establish a system, and then stick to it. You won’t be left groping for questions, your interactions will be more memorable, and you’ll be able to standardize the circumstances under which you assess candidates. A strategic approach makes for less fuss, more focus, and leads to the best person possible [joining your team](https://www.helpscout.net/blog/hiring-employees/). Here are some useful ways to conduct better interviews.

**Use storytelling to draw out details**

Great customer service reps possess an abstract set of skills that can be difficult to address head on. You need to find conversational side doors to draw these qualities out by asking questions that require a story to answer. Sarah Judd Welch, founder of community-building company [Loyal](http://www.loyal.is/), employs this tactic by inquiring about advocacy:

“I ask them to give an example of a time they advocated on behalf of someone else. I also ask for an example of a recent conflict and how it was resolved. I’m closely paying attention to how they describe the actions of others; you don’t want them to harshly blame anyone else, but objectively assess the situation and how they tried to resolve it.”

These questions encourage candidates to share a relevant on-the-job anecdote, but they also require them to tell a story in a coherent, narrative fashion. Why is that subtext so important? Because you need to appraise their ability to break down complex ideas into relatable, easily understood steps - one of the most fundamental customer service skills.

People reveal a lot about their personal psychology by how they frame a story. Reading between the lines, what do a candidate’s stories say about their penchant for patience, their willingness to help, or their talents as a team player? “I’ve rejected people who otherwise seemed really good because once they started telling stories, all of their examples lead to, ‘Someone else made a dumb decision and that’s why didn’t work,’” says Help Scout’s [Mathew Patterson](https://www.helpscout.net/helpu/customer-support-department/). Here are some good storytelling questions to get you started:

* Tell me about a time when you were trying to convince somebody to do something. Give a specific instance and detail how you handled it.
* Did your previous team ever have a project go completely awry? What went wrong? What was the final outcome? (Leave out “What could you have done better?” to give them the opportunity respond unasked.)
* Describe a negative interaction you had in a customer service situation with a different company. What do you think they could have done differently to make it better?

**Listen to how they listen**

An active listener is a prepared problem solver. Instead of auto-piloting to a solution based on what they expect to hear, they’re patient enough to listen to how a customer feels and [respond accordingly](https://www.helpscout.net/blog/customer-service-phrases/). The same answer can be packaged in wildly different ways according to a customer’s temperament, and it’s important to know if your future teammate can adapt their tone. If a candidate carefully addresses each point you’ve asked them to discuss, that means they’re an engaged and sincere listener.

You can tease out listening skills during an interview by asking multi-part questions. It’s also a good indication you’ve found somebody who will treat people well when they show up to talk to your company. **Try some of these examples:**

* What interests you about customer support, in particular? Where do you see this role taking you?
* How did you hear about our company? Is there something specific that stands out to you about the product or team?
* What’s a time you had to give somebody an answer they didn’t want to hear? Were you able to approach it in a way that resulted in an overall positive outcome? If so, how?

**Throw a ‘zag’ into your interviews**

Boilerplate questions don’t reflect the reality of customer service, and they won’t surface the candidate’s ability to thrive under pressure. Limited framing begets limited answers, so complement your essential questions, your “zigs,” with a few questions that zag.

1. Ask a question that has nothing to do with the product: “Who’s the most under-appreciated hero/heroine in any story? Why?” Is their response charming, or does it fall flatter than an ‘N/A’ reply in a written interview?
2. Get people to commit with one question (“What are you a perfectionist about?”) and then dig deeper with a second (“When has this created conflict between you and someone else?”)

You can also zag by how you conduct interviews. For instance, try taking potential customer service hires out for coffee. Observing how someone interacts with the outside world will speak volumes about their self awareness and personal motivations. A person who can’t be bothered to say “please” and “thanks” is not a person who should be in the business of professionally making other people happy.

If your customer service team is [based remotely](https://www.helpscout.net/blog/hiring-top-talent/), the digital common space provides just as many opportunities for unconventional interviewing. At Basecamp, they swap coffee for [Campfire](https://campfirenow.com/), setting up a chat between the potential hire and existing teammates. [Chase Clemons](https://twitter.com/chaseclemons) of the Basecamp support team says:

“All ten of us will participate, asking questions and seeing how they communicate. That helps us see how they’ll be on a day-to-day basis interacting with us. Maybe somebody nails their phone interview, but in a chat situation they’re giving more ‘yes’ and ‘no’ answers. That gives us some important insight into them.”

**Get real answers from references**

References can be a valuable component of the interview process if handled correctly. Granted, it can be a challenge to have a forthright conversation with a person who has been hand-picked to deliver a glowing review, but the right attitude (and some good questions!) will go far. At Help Scout, hiring managers will sometimes ask the following particularly revealing pair of questions:

**Question One**

We ask candidate’s reference to rate the person from 1-10 in living up to their potential. Most people will respond warmly (“A 9!”), but the follow-up brings more candor into the dialogue.

We ask, “How could they get to a 10?” The question lowers people’s guards and gets them talking about both a candidate’s shortcomings and their ability to improve. You’ll get honest feedback about a person’s trajectory and their commitment to self improvement — information that’s hard to glean from anywhere else.

**Question Two**

It’s also important to ask for specific anecdotes and to frame questions so they can’t be answered with a simple “yes” or “no.” For example, “What’s a time that this person resolved an intra-team conflict?” will get you a lot further than, “So, do they work well with others?”

Even good candidates will struggle to shine in a bad interview. With a considerate process and clever questions in hand, you’ll own up to your end of the bargain and set the stage for candidates to reveal who they are, how they work, and if they’re the person you’ve been looking for.

**Chapter 5**

**The Onboarding**



So you’ve found the right person. Check! It feels great to pull in an exciting new hire, but it’s not time to sit back and relax quite yet. What comes next—[the onboarding process](https://www.helpscout.net/blog/employee-onboarding/)—will be crucial in enabling your new teammate to meaningfully contribute to your company in the long term.

While getting a new person up to speed can take some time, the effort will pay off tenfold. You’ll end up with a happy, capable new customer service rep who will be confident enough to enjoy the work, contribute to a positive team culture, and who you can fully trust to be the voice of your company.

A thorough onboarding process will also infuse a new hire with a well rounded sense of both the product and overall culture, allowing them to engage customers with an ease and sincerity that reflect your company’s mission and voice. Let’s walk through some of the well-tested onboarding basics.

**1. Be ready to take your time**

Although startups have made famous the “sink-or-swim” brand of onboarding, there’s nothing more disastrous for a brand-new customer service team member. These folks are the go-to for answering questions and solving problems for your community, so if they’re confused, the customer is confused, which can translate directly to lost revenue. Ideally, a customer service representative should be an expert at your company. They need to comprehensively understand the ins and outs of your product, and that kind of mastery can only be achieved with a lot of patience and hands-on time “in the field.”

At Help Scout, we fly new remote hires to Boston for at least a week of onboarding and training. That may sound extravagant for a new employee, but the quality time is instrumental in quickly making your new team member an active, independent contributor. They’ll be able to carry their weight, work confidently without oversight, and think above and beyond the status quo of their day-to-day. It’s also key for a remote team, where the initial effort to create an in-person connection will help make your community tangible to a new hire.

**2. Establish a mentor**

A brand new work environment can be intimidating, to say the least. So many new faces, rules, and ideas to juggle! To streamline the adjustment period for a newbie, establish a point person for questions. Asking questions can be tough for a new person who’s eager to impress, but connecting them one-on-one with a person who is dedicated to answering their queries sets an important precedent for dialogue and interaction. Not only does this establish that asking questions is okay, you’re communicating that it’s preferred. That makes a huge difference! (Plus, consider the alternative: a customer gets a wrong answer because a recent hire was unsure where to double-check their reply.)

For every new Help Scout teammate, someone who’s been on board for a while steps up as their “work best friend.” As a remote team, it’s especially critical for new hires to feel comfortable asking questions, and directing them to a specific person eases any potential anxieties about that. Your “work best friend” might shoot you a quick email before your first day, offer to be available for silly questions, chat with you about anything you’re curious about, and so on. The goal is for new hires to feel welcomed to the team and learn more about our culture.

This practice isn’t for remote teams only; in-office employees retain the benefit of having a go-to person to consult the first few weeks. When it’s easy to ask questions, it will lead to less confusion and a better learning experience.

No new hire should ever work alone. Pairing them up helps set the bar on the level of work they should be doing and makes them feel integrated into a team full of friends.

**3. But you can still mix it up a little**

It’s easy to form “social ruts” in any workplace. You know, the people you work alongside are the people whose names you know, whom you default to for questions, whom you ask to back you up in a tough situation. This can be great, but also a little too easy to slip into for a new person. Instead, you want to help a new hire feel comfortable interfacing with the entire team, right out the gate. Not only is that pleasant for a new person, it will also help familiarize them with the nooks and crannies of your community, product, and culture, not to mention provide them with an important variety of perspectives and thought processes.

The best way to do this? Rotate a new person’s mentor so they’re interacting with (and understanding the workflow) of a few different people, at least once. That goes a long way toward helping them develop their own approach and tone, so they won’t establish any single person’s approach as the rule.

Katherine Pan, Kickstarter’s customer service and community manager, explains how they do it:

“Each day a point person on the customer service team trains the new hire, so they get a chance to work with most people on the team right away, and experience the various perspectives we have with regards to support.”

Chase Clemons, support at Basecamp, agrees:

“Week two, we want you to see how other people reply to the same kind of cases. It helps them develop their own tone, rather than just copy and pasting what their support buddy said during week one. We’re hiring them for their personality, so we don’t want them to lose it.”

**4. Check in more than seems necessary**

An employee’s first few weeks are a critical development period. The habits they build during this time are likely to last, so make sure they’re good ones! The simplest way to do that? Take frequent pulse checks. An end of the week wrap-up is a must, but a devoted 10-15 minutes at the end of every day, for at least their first week, will help keep them on course and make them feel good about their progress. Let them know when they’re succeeding—the fear of failure is hugely common during this time, even more so for remote employees.

This is what it looks like at Basecamp:

“The team lead checks in at the end of every single day for the first week, with both the new agent and their support buddy. She’ll want to know if everything went okay and if there are any questions. Then, at the end of week one, we do an end-of-week review. We say what we liked, what we want to see improved, and set the game plan for the following week.”

This two-pronged approach helps make sure that a new employee isn’t tasked entirely with self-diagnosis, and it guarantees a well-rounded perspective on how they’re stacking up, which will help you establish what they’ll need to continue thriving.

**5. Give homework, and keep it fresh**

Pan attributes the success of Kickstarter’s onboarding process to the creation of comprehensive and constantly updated internal documentation:

“We spent half a year in 2013 documenting everything about the work we do … everything that a backer or creator could possibly encounter and write in about.”

Chronicling everything your customer service team does is an essential step in enabling new hires to follow in your footsteps, and it also enables their independence. It means they’ll have reading to bring home with them, solid resources on hand to reference, and the opportunity to work on building their knowledge base without having to depend entirely on real-time feedback.

Pan agrees:

“I think the most important thing is to keep documentation fresh. It can be tedious, I know, to constantly have to revise, especially when it’s easy to just think about the existing team and how things have become second nature to them, but the key thing is to do revisions of documentation consistently so it doesn’t become a huge pile of work suddenly.”

To keep documentation actionable (versus overwhelming), Kickstarter breaks it down into chapters, one for each day of a new hire’s first week. Then, they split the day into two parts: the first half is spent reading and the second is spent working through a set of applicable tickets. This helps ensure that the finer points stick and that the general principles become cemented immediately as workable habits.

In order for this to work, though, documentation has to be comprehensive and exhaustive. That means taking no institutional knowledge for granted. Pan recommends starting the process of documentation by creating a glossary of team jargon:

“Think about the vocabulary surrounding the tools you use. It’s often brand jargon! ‘One-touch ticket,’ ‘macro,’ and any other internal vocabulary you have at your company. Start there and then continue on to how you actually do your work.”

The result will be a workable, ever-evolving resource that will help newcomers learn, thrive, and eventually come full circle on, as contributors of their own knowledge.

**Chapter 6**

**The Team**



You’ve posted the best job listing. You’ve found a great candidate. You’ve taken them to coffee, talked to their references, and now it’s day one! You’re thrilled to see what this person will bring to the team, and you’re crossing your fingers for the best.

Wait, stop. Back up. *Crossing your fingers?*

The long-term success of a new hire isn’t about luck. It comes down to smart [workflows](https://www.helpscout.net/help-desk-software/workflows/), deliberate oversight, and making absolutely sure that you manage the one, key obstacle to great customer service: burnout.

**Here’s a tough truth:** customer service queues can be a slog for even the best and the brightest, which is why your most lively candidate may quickly go from mach three to “meh” once onboarding is over and they’ve transitioned into full independence. Luckily, there are conscientious steps you can take to help a newbie become an accomplished old hand, without losing their spirit in the process.

**1. Value recovery time**

Nobody engages with repetitive work over prolonged periods of time without experiencing some level of diminishing returns. For example, the first two hours of support tickets might fly by with charm and aplomb, but by the time you’re entering hour three, you’re likely to find yourself feeling frayed. That’s why it’s critical to set the precedent of “recovery time,” which means buffering long hours spent in the queue with a certain amount of downtime, where team members can take a walk, read a book, or let their mind wander in productive ways.

Ensuring that recovery time becomes a habit and not a dream, though, rests on the shoulders of a good manager. Says Kickstarter’s Katherine Pan, “The health of a team depends largely on managers actively forcing people to take time off and reminding them that it’s okay.”

It’s true that an enthusiastic customer service pro, especially a new one, won’t necessarily feel comfortable taking the time off that they need to perform at their best. However, consistent reminders (as well as example-setting) from the upper ranks will help them understand how downtime is viewed as ultimately beneficial to both their personal health and the overall workload. Trello’s Ben McCormack agrees:

“You need recovery at the end of the day. If you work all day, every day, from 9-5 . . . you’re going to need to put something into yourself before you’re able to reconnect with your life. This is super common in support. You just need to mentally unplug from that transactional work and you end up having that throughout the week.”

**2. Build in ‘slack time’**

A customer service professional’s scope of potential work extends beyond the daily queue. Carving out deliberate windows of time for them to dig into other, relevant projects will keep them happy and creatively satiated.

McCormack, following the mantra of ex-Googler Rich Armstrong, calls this “slack time.”

“Slack is the time when you’re not doing transactional work, but you want to use that time strategically to do something for the company, team, or yourself,” he explains. “With support, that could be updating documentation, thinking about a new channel you’re going to provide support for. It’s stepping away from the day-to-day and thinking about how something could be better.”

Not only does this up the intellectual stimulation of a team member’s workload, it gives them a sense of personal stake in the company. They’re enabled with a tangible sense of how their thoughts and ideas can become actionable day-to-day, with a visible effect on the entire team. That kind of validation, especially when acknowledged from the top with implementation, is like a rocket booster of motivation and good feelings for any employee. Just ask McCormack, who easily ticks off the ways “slack time” has helped improve his team’s workflow:

“We’ve beefed up our internal documentation. We revamped our public documentation. We started providing priority support. I taught somebody how to write a little bit of code that helped identify customers as they come in. We started internationalizing our docs. We started having conversations with customers where we were proactively calling them — calling one or two a week — taking notes on them, sharing them with the design team.”

**3. Practice self-care**

It’s sounds like something our mothers would say, but it’s the truth: in order to take truly great care of your team, you need to make sure you’re taking care of yourself. A customer service manager’s role is to manage the workload as well as the emotional health of the team. That means you have to be in tip-top emotional shape yourself, which requires insulating yourself from the natural urgency of your team so you can keep bigger-picture priorities in your sight lines.

“You have to understand that prioritization is a constant and fluid thing and it’s okay to say ‘this isn’t important enough right now.’ Learning the value of ‘no’ is huge, as is learning the value of asking for help. Particularly in Community and Support teams, where we feel like we have to say yes. Being a martyr or holding the world on your shoulders isn’t good for anything: not yourself, your team, or your users. The power of no is amazing—and beneficial when you use it wisely.”

— Elizabeth Tobey, Head of Support, Tumblr

It’s essential to bake downtime into your own day so you can refuel your ability to be emotionally present—to listen to your employees, to empathize with their needs, and to practice foresight when navigating an impending burnout. For example, if stress levels are high and you’re overly bogged down in your own task list, it can be tough to spot a lagging team member, pull them aside, and kindly say, “Hey, you need to take ten. Go for a walk!”

Keeping yourself emotionally healthy helps you go the extra mile for your employees, and it will make the difference between having a team that treads water and one that thrives.