Surfboard

Scaling a customer support team

Foreword written by **Tue Søttrup** at **Dixa**

The complete guide
with best practices from
seasoned support leaders.

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Revolut monzo The Economist ultimate.ai Webhelp yoummday

Foreword

Retaining existing customers is six to seven times more cost-effective than acquiring new customers. In current times, businesses realize the increasing importance of retaining customers. Help and advice on scaling the function that speaks to your customers the most is critical. Alongside invaluable advice, take time to dig deeper and clarify the impact of scaling your customer support function.

Are you scaling the team to keep up with the current workload to reduce the ticketing queue? Do renewals, cross-sells, or up-sells need a dedicated person? Or is it a relationship-builder who can onboard clients seamlessly?

Carefully consider your customers - how could you improve their touchpoints with your brand? Are you missing a vital piece of technology or need to re-think your tooling?

Think about your team - It's no secret that happy and empowered agents create happy customers, which helps grow your business. They are your customer-facing superstars! So finally, and arguably the most important, what friction points do your agents have day-to-day?

Solving customer and agent pain points quickly turns into saved hours and productivity improvements and has tangible effects on sales.

Once you've mapped out which additional hires you need (and why!), alongside your customer and agent friction points, the answers become crystal clear. The pay-off from additional investment into the CS department becomes a no-brainer!

Tue Søttrup
VP, CX Excellence
Dixa

Contributors

Claas Van Delden
CGO
Yoummday

Dan Sheldon
Group Product Manager, CX
Deliveroo

Randy Berridge
Head of Community Operations
Dott

Rona Ruthen
Ex-VP of Customer Operations
Monzo

Sagar Haria
Group Product Manager
The Economist

Sarah Al-Hussaini
COO
Ultimate AI

Shamas Azis
Head of Customer Service
Selfridges

Vladyslav Lytvynenko
Ex-Head of Support
Revolut

Tim Kirchner
Business Director
Webhelp

Introduction

Scaling a customer support team is not a walk in the park. Hiring takes a long time, training is time consuming and costly, metrics change at different stages of growth, businesses grow in complexity and customer service needs to resist adding that complexity in their function. Then you have to deal with angry customers when there is a product or service defect. Add on high agent churn in the industry and as a manager you've really got your hands full.

That's why we've built this guide. Support teams for decades have needed to reinvent the wheel because there aren't enough resources out there. At Surfboard, we're lucky to have some of the best and brightest support leaders in our network. They have been kind enough to share their insights, learnings and best practices so that other support leaders at all stages of their growth journey can benefit from their wisdom.

We're called Surfboard because we know that you're always navigating waves when running a customer support team. We're providing you the tool to do this: the Surfboard. As the phrase goes: You can't stop the waves, but you can learn to surf.

We're grateful to the incredible set of leaders who have lived through the scaling of support teams at notable companies and shared their learnings with us.

Happy Surfing!

Contents

Chapter 1

Measuring performance in a support team

As your team evolves you will change what metrics are important and that are used for individual agent (or surfer) performance as well as reporting to the broader organisation and leadership team. Every leader we spoke to referenced the need to fight complexity. In doing this, make sure your metrics stay simple and focus on the root cause of what the objective of your team is. For most companies it involves responding quickly, fully solving customer problems, and doing this at a manageable cost.

Team metrics

At a team level, the first thing you need to do is define how quickly you want to respond to your customers; also known as your Service Level Agreement (SLAs). These can be set by channel (phone, email, chat, social media channels) or by ticket type and urgency of queries.

At the beginning, SLAs are usually set using some sort of finger in the air methodology. As you scale and depending on which industry you are in, you'll need to put more analysis into this evaluating the maximum amount of time you want to keep your customers waiting, the cost you want to incur and how quickly you can reasonably scale your team or build automations to help you
reach your SLAs.

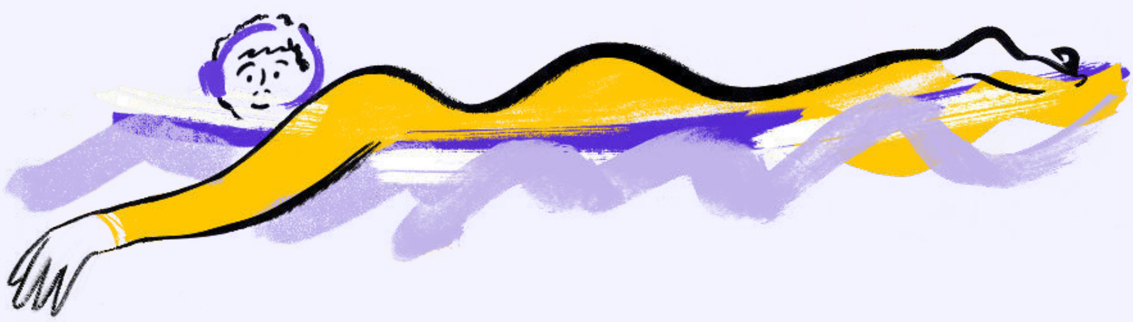
The measurement to determine how well you are doing relative to your SLAs is called Service Level, and this refers to the percent of tickets you respond to within your defined SLAs. Generally in support, above 80% is considered good performance and you will see variants at different times of the day and different days of the week based on the patterns of when and how customers get in touch.

SLAs and Service Level don't always tell the entire picture as the metrics are very binary. If you set an SLA of responding to phone calls in 10 seconds, and you respond in 15 seconds, you're still doing well but that won't be reflected in your metrics. You need to look at the average wait time as well to understand the distribution.

"It's easy to provide quick and high quality service if you have an unlimited budget. That's why you also need to measure the cost to serve."

At a team level, you also want to be measuring quality. This could be Net Promoter Score (NPS), Customer Satisfaction (CSAT) or Customer Effort Score (CES). You may decide to use all three, or you may decide your customer support team just needs one. This depends on how holistically you want to measure the impact your brand has on your customer beyond a specific interaction.

Customer effort is useful but underutilised – it goes beyond just asking if a customer would recommend your brand based on their experience, but specifically asks how easy it was to solve their problem. This is critical feedback for both your support and your product teams.



Revolut introduced a WOW rate as a quality metric to take CSAT one step further. This is the percent of customers that rates their experience as five stars. Instead of a normal CSAT rating, they repurposed the framework to include three gradings: poor, great and WOW.

It's easy to provide quick and high quality service if you have an unlimited budget. That's why you also need to measure the cost to serve. This represents the overall efficiency of your organisation. Productivity is an input in cost to serve so it gives you a holistic picture but also helps you assess how ambitious or realistic your service level targets are.

"SLAs and Service Level don't always tell the entire picture as the metrics are very binary."

Agent level metrics

While SLA and Service Level are team metrics, separate agent metrics are inputs in understanding your SLA performance.

Average handle time is a ubiquitous measure for customer service teams and a key input into capacity planning. *Rona Ruthen* said this was the most important metric at *Monzo* because it reflected how many COPs (customer operations) hours they needed to service their customers and helped them identify which tasks and channels were taking longer, focusing product teams more effectively as well.

Dan Sheldon suggests that in addition to average handle time you need to also look at first contact resolution to see that problems are actually being solved rather than having an obsessive focus on productivity that isn't customer outcome focused. First contact resolution can and should be looked at per agent but also at a team level as it impacts customer experience. If a customer has to get in touch multiple times to solve the same problem, there are either issues with your training or your incentive models. ■

Rona Ruthen on setting your service levels

Most startups aim to provide a great user experience by setting short SLAs. As you add customers (scale) and features (complexity) it gets harder and more expensive to maintain. Most companies set ‘finger in the air’ SLAs trying to balance customer experience, operational and cost efficiency and staffing/shifts.

At *Monzo,* Rona and her teams relied on extensive research, as well as experimentation to identify the right balance between these elements. They were also clear and the highest priorities from a company perspective at different periods, as well as defining the level of urgency of each task, coupled with the appropriate SLA and staffing levels. It’s important to understand when you can take the risk of being understaffed and building a backlog, thus impacting the customer experience and efficiency, and when not to compromise on the defined SLA.

As an example, a chat from a customer at 3am about using their card in Mexico in an upcoming vacation can sustain a longer SLA, whereas a message from a customer about suspected fraudulent transaction on their account should be handled promptly (within minutes) day or night.

Over time, experimentation and analysis, Rona and her teams set different SLAs per task/topic, channel, urgency and other characteristics.

Chapter 2

Investing in automation

What does automation mean?

Automation doesn't just mean automating conversations and how you respond to tickets. According to *Ultimate AI*, 60% of agent work happens outside conversations with customers. These include back-end processes to fix customer accounts, identify necessary context to solve a problem and track statuses. These are crucial but repetitive tasks, making them great opportunities for automation to work effectively to enable agents, not replace them.

Dan Sheldon on automating with the customer in mind

Too many support teams think about automation for the agent rather than for the customer. If you are about to invest in automation for your team, it's useful to go one step further and think about how you might automate solving the problem for the customer, reducing their need to get in touch in the first place. Thinking of support from the root cause is a worthwhile investment that stops a lot of downstream issues and can help you get time back for your team.

Be transparent on how you use automation

Responding to customers with an automated bot when they expect to speak to a human creates a bad experience and customer frustration. Customers should always be aware of whether they are going to be put through to a human or a bot to respond to their query.

Deciding on what to automate

Dan Sheldon succinctly describes the best opportunities for automation as processes or tickets where you have "a codified way of dealing with them".

If you find your agents applying the same processes or policies on each ticket, with the exact same logic flow, then these are good opportunities to think about automation and having your team getting time back to work on more useful things.

On the contrary, for queries that involve human judgement and sensitive information, such as dealing with vulnerable customers, automation should be avoided. These are where agents can be most impactful.

Generally speaking, 80% of contacts relate to 20% of issues – a Pareto distribution. Analysing what these contacts are in your organisation is a good starting point to identify where automation will be the most effective. Since most of your volume occurs with these tickets, chances are you have already developed good processes and can automate these faster and more effectively.

"Don't automate the serious stuff – anything safety related or relating to vulnerability should always be handled by a human."

Randy Berridge of *Dott* suggests looking at both ends of the spectrum when evaluating what to automate. Tickets with the highest handle times and tickets withthe lowest handle times both present good opportunities.

Randy suggests going one step further than just looking at tickets. She prioritises automating gathering context so that by the time a query gets to an agent, they have all the necessary information to be as impactful as possible during a real time conversation.

Generally speaking, 80% of contacts relate to 20% of issues – a Pareto distribution.

If you can use automation to reduce your average handle time, you will be able to provide great service at a lower cost. If you use automation to avoid even handling a query, this can be risky as you can just create more problems for your team and frustrated customers. ■

Chapter 3

Turning your support team into a profit centre

Within an organisation your service centre is either a profit centre or cost centre. It can't be both and you need to be clear on which one it is as that trickles down to decisions on how you structure and scale your team.

Often (but not always) more traditional businesses treat their service team as a cost centre. This isn't necessarily tied to how they perceive profit opportunities and not realising the potential for a support team to drive retention, but more a result of how their team has been historically structured and how incentives work.

Many successful organisations take deliberate steps to ensure their support team is a profit centre. *Zappos* is the most famous example of this, really leveraging customer service as a brand differentiator.

In the *Zappos* case, it was so crucial for them it led to the radical decision to move their Company HQ outside of San Francisco so that their customer service team could be a core part of the team and that they were based somewhere with access to a strong talent pool with a more affordable cost of living.

When it comes to incentives and metrics, they moved away from measuring average handle time and using scripts to encouraging their reps to really develop an emotional connection with customers. This is the extreme example of customer support being run as a profit centre but worked extremely well for them as they fought off competitors and ultimately were purchased by *Amazon* for $1.2 billion.

Your support team is a profit centre if:

- [ ] Team members have autonomy to solve customer problems fully and go out of their way to enhance the customer experience to drive retention.
- [ ] Team performance and targets are measured in a holistic way beyond just ticket volumes.
- [ ] Team members are trained to solve a broad range of queries rather than having customers routed numerous times to solve a single issue.
- [ ] The support team inputs into the product roadmap identifying bug fixes and opportunities to improve the overall customer experience and drive more self-serve.
- [ ] Automation is used to to enhance team productivity and give your team more space to solve trickier problems rather than to replace your team entirely.
- [ ] You invest in properly training and re-training outsourcing agents.

Case study: Octopus Energy's member base model

Octopus uses a unique member base model, where each team of less than 10 reps is responsible for a few thousand customers each.

This means that each time a customer gets in touch, they will be put through to the same team. In addition to the advantage for customers who are always getting consistency, it also means teams are incentivised to fully solve customer problems and go above and beyond to avoid other issues from emerging as these same customers will always be put through to the same team. They are heavily incentivised to get to the root cause of a problem.

Your support team is a cost centre if:

- [ ] Customer support sits in isolation to solve problems rather than improve the broader customer experience.
- [ ] Customer support has little interaction with other functions and sits completely separately to the wider organisation.
- [ ] Targets are extremely rigid and tied to ticket volumes rather than outcomes (first contact resolution, quality scores).
- [ ] Quality assurance is used for the sole purpose of managing agent performance rather than to identify product defects and improvements.
- [ ] Automation is used to replace and dehumanise your team.
- [ ] Your team is trained on a very narrow range of topics, not able to fully solve a customer problem without routing to other team members.
- [ ] You rely on outsourcing as a quick fix without investing in training external partners.

"Within an organisation your service centre is either a profit centre or cost centre. *It can't be both* and you need to be clear on which one it is as that trickles down to decisions on how you structure and scale your team."

Chapter 4

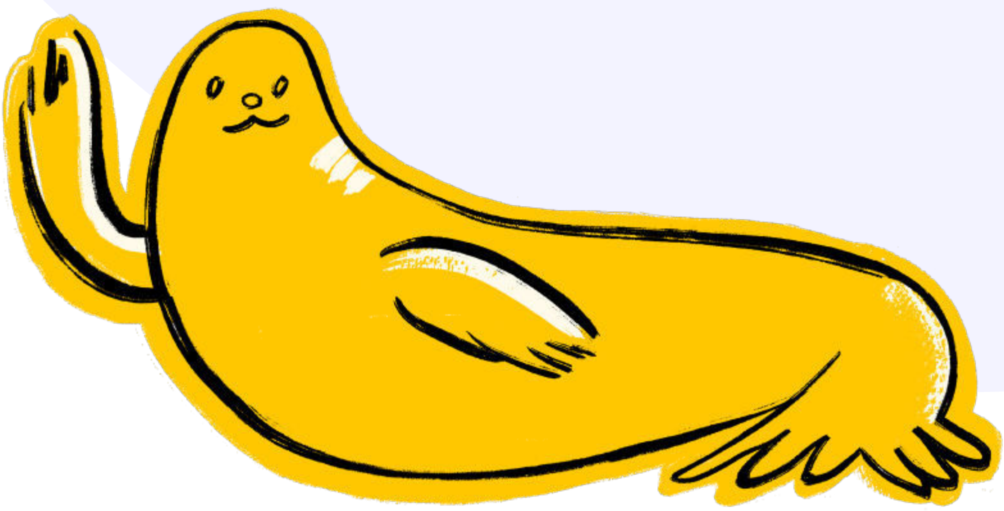
Managing incentives and motivating your support team

Once you've decided if your support team is a cost centre or profit centre, you need to figure out your incentive structure. Incentives are critical to get right, managing the trade off of motivating your team to do their best work, keeping quality consistent but also ensuring you meet your Service Level Agreement and delight customers with quick responses. And you want to keep your metrics simple. We see software that gives support teams over one hundred different metrics when in reality they only need three. Figure out your objectives, and tie your metrics to that. Don't just pull all available data because it's there. It will confuse your team, distort your incentives and avoid having your team work towards one singular direction.

So which incentives matter most? This depends a lot on what stage company you are in. A FTSE 100 has a very different incentive structure to a venture-backed start-up.

"Figure out your objectives, and tie your metrics to that. Don't just pull all available data because it's there."

Incentives can have monetary value or cost your business money. But there are also intangible incentives relating to how you conduct feedback, setting team culture and making your support team somewhere people want to work.



Feedback and 1:1s

We've talked before about metrics but incentives go beyond just how you measure performance. Performance management has two parts: quantitative measurement and qualitative feedback.

A strong feedback culture is imperative in successfully managing and scaling a support team. Given the nature of the job and how real-time and metrics driven it is, we've seen the best companies have at least weekly one-on-ones between managers and support team members.

One-on-ones need to go beyond just going through performance against targets. These are a great opportunity to discuss progression frameworks and understanding the ambition of your team members. It's also important to get a sense of whether direct reports have had to deal with difficult customers and get a pulse on their wellbeing and psychological safety in their jobs.

Setting the right culture and team morale

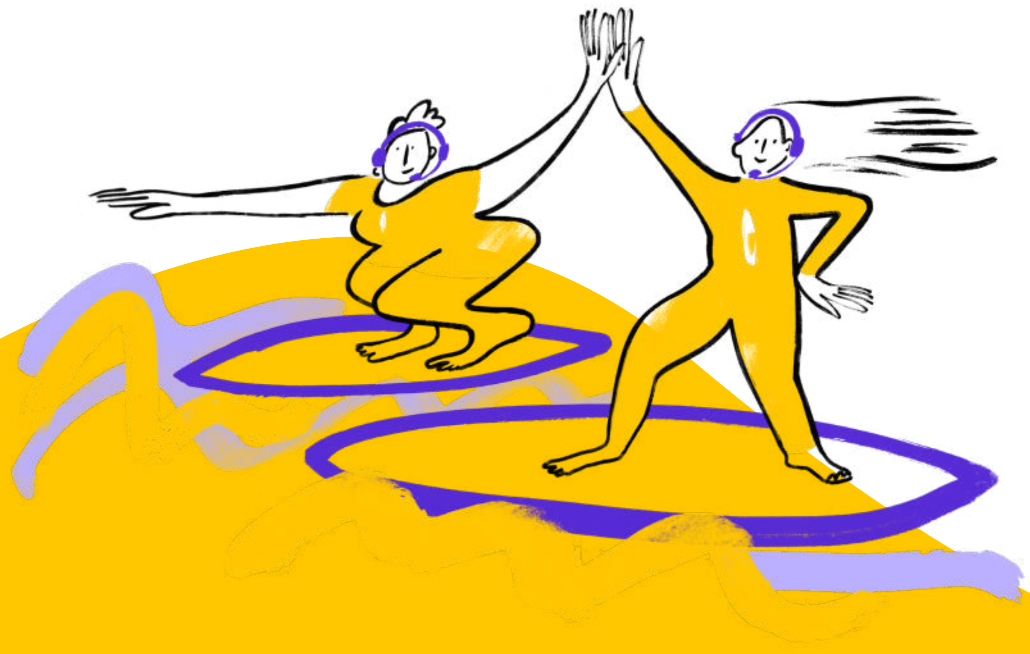
Small teams work well to build morale and camaraderie across your team. We've seen across support teams that have strong cultures, the average ratio of a manager to their team members is 1:10. This gives managers and coaches an opportunity to get to know their direct reports well and not treat team members as "just a number".

Regardless of the overall company size, a good culture means that support team members feel connected to the overall objective of the company and understand the part they play in achieving company goals.

"A good culture means that support team members feel connected to the overall objective of the company and understand the part they play in achieving company goals."

Even if the support team isn't based at the Company HQ or if you have outsourcing partners, it's important to make them feel part of the mission and managers should be well equipped to do this.

Practically speaking, this means talking about company performance, achievements across different functions, product roadmaps and releases



and setting company level context so support team members know why what they are doing matters at a broader level.

Regular (monthly) team socials are also popular across support teams, especially where managers have smaller reporting lines and teams have a stronger bond.

This has two advantages: first and foremost, it makes work more enjoyable. The secondary benefit is that teams feel more loyal to each other and a sense of accountability as they don't want to let down their peers. If your company doesn't have a budget for team socials, it's still good to encourage the team to get together socially outside of work and managers should lead efforts in doing so.

Monetary incentives

Across startups and scaleups incentivising teams with bonuses in addition to equity is popular and works well for performance and retention.

Bonuses can be dangerous without the right targets in place, often leading to team members identifying ways to game the system. A good bonus system goes beyond an individual team member's performance and ties their rewards to your support organisations performance, namely how quickly your team is responding to customers and the quality of responses.

While this can sometimes cause frustration because team members feel more distanced and less able to control whether outcomes and whether they will be eligible for a bonus, it also means your team will be more tied to broader team objectives and understand the part they play.

Across support organisations that offer bonuses, these are usually done on weekly or monthly cadences since they are metrics driven. It's important to note that base salaries need to be set at a level that allows team members to reasonably manage their cost of living and bonuses should be used in addition to that rather than to replace reasonable base salaries.

Startups and scaleups also have the ability to offer equity to employees. This has worked well for organisations such as *Monzo* where everyone in the company receives options and feels bought in.

As well as being a good incentive for performance, it also drives more loyalty as options are subject to a vesting schedule.

The average options to salary ratio in customer support is around 10% across startups and scale-ups.

Progression frameworks

Progression frameworks need to be transparent and frequently discussed with support team members.

It's important to get a sense of the ambitions and motivations of each team member. Not everyone wants to become a manager and not everyone wants to stay in support. By understanding what motivates your team, you can set incentives accordingly and keep your team excited about their prospects within your company.

The good thing about support in comparison to other functions is that the metric driven nature of it means that it's much easier to set thresholds for progression. Beware though, not every team member who is great at responding to phone calls quickly and with a high CSAT is the right person to become a team manager.

These are the nuances you need to understand so you can set different paths based on what your broader organisation looks like. ■

A few example branches of progression in a support team could be:

01 **More specialisation**. This is good for motivating team members who are excellent with customers and can handle more challenging topics such as complaints, fraud, or working with vulnerable customers.

02 **Management opportunities.** Where team members have mastered their direct role of solving customer problems and have shown the ability to coach and work with new joiners, progression to a manager role is a good opportunity for them to flex their mastery of customer service and develop new and transferable skills.

03 **Workflow or operations mastery.** Customer support goes beyond just talking to customers. Often there are operational tasks like dealing with external partners and fixing back-end issues that require time and specialist knowledge. Where your team member proves strong attention to detail and an intrigue in improving processes, these opportunities can be good for their progression and diversify their role.

04 **Opportunities in different functions.** This is popular across organisations of all sizes. This can mean moving to product, sales, and operations teams. While it results in losing headcount in the support team, it is a great opportunity for team members and helps attract, retain and reward talent. We've seen great companies support team members move permanently into other parts of the organisation or on a rotational basis.

Chapter 5

The most useful, non-obvious tooling recommended by leaders

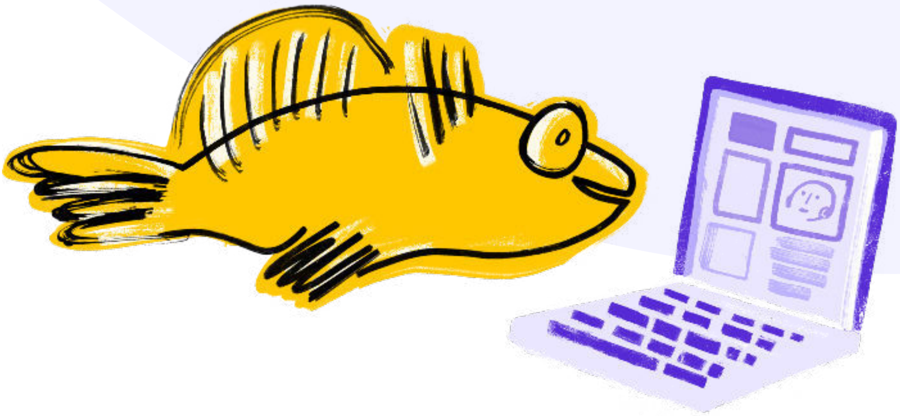
Apart from the basics of ticketing systems, CCaaS systems and all the business as usual tooling, we asked support leaders what the most useful tooling they implemented was.

To our delight, both *Vladyslav* from *Revolut* and *Rona* from *Monzo* recommend scaling teams adopt workforce management software as early as possible.

In *Monzo's* case, by the time they realised their internally built spreadsheets weren't cutting it, they were a team of 200 with multiple processes. Reliance on a spreadsheet meant that everything from forecasting, shift patterns, annual leave and the overall complexity of running a team had a single point of failure and that was a spreadsheet.

Rona also cautions support teams away from rushing to build proprietary tools. If it's not part of the unique selling point of your company, you should be careful on whether what you are building is going to be good enough to scale.

Building internal tools is a huge endeavour for engineering teams and so



you need to really evaluate if that is purpose built and out there isn't fit for purpose for your team. In *Rona's* case, building an internal CRM was worth it because they had enough people in product and engineering devoted to making it work and it allowed the team more flexibility to work how they wanted their support team to be structured. On the other hand, building an internal chat system didn't leverage enough advantages beyond what was already off the shelf and available.

"Building internal tools is a huge endeavour for engineering teams and so you need to really evaluate if that is purpose built and out there isn't fit for purpose for your team."

Revolut's international presence meant that language coverage was always an added complexity. One of their big wins was building an in-app translation product. While improving efficiency, this also meant that while hiring at scale they were less constrained in needing to hire to cover the exact needs of each language their customers communicate in.

Dan Sheldon cites *Zapier* as extremely effective. You need to automate and *Zapier* allows you to glue anything together in the short term. He cautions that things will break at some stage and it won't be acceptable, but it gets you far, quickly. ■

Chapter 6

Hiring at scale

"My hiring is on track", said no support leader, ever.

The next chapter will be on outsourcing, but first we've collated how different companies have hired at scale.

The right hiring profile for your team

Shamas Aziz, a seasoned enterprise support leader, recommends you always hire profiles who have been in service environments before. This doesn't necessarily mean they have dealt with phone calls or chats, but even in a retail setting where they have developed two critical skills: they can solve problems quickly, and they can learn about a product portfolio or service offering in sufficient detail to understand the intricacies of it.

Every company changes what types of backgrounds they hire from as they grow.

In the case of scaleups like *Monzo* and *Bulb*, they started by hiring ambitious and hungry graduates who wanted a foot in the door at an exciting startup. They started by giving new hires a lot of independence to develop processes and solve tickets. With scale, the work involved in support becomes more repetitive and the initial cohort you hired gets bored. In the hypergrowth stage, it's easier to accommodate having early team members move into different roles but scaling this becomes hard and a distraction. To put an estimated figure, by the time the support team is about 50 it becomes trickier.

It's at this point that companies begin to change the job profile and how they speak about the opportunity of working in their support team, converging much more closely with how traditional or enterprise businesses advertise and hire for support roles.

This doesn't mean that you necessarily need one uniform profile to hire from. In *Monzo's* case, they ended up with a very diverse team and matched different profiles to different parts of the support organisation and where certain backgrounds were needed, ranging from fraud to first line support.

Where to base your support team

Most companies can't facilitate the *Zappos* model of having the entire organisation based in one place so that the support team can be based at the headquarters. Where this is possible, there are obvious advantages. Support teams are intricately linked with other functions, specifically product,technology, marketing and sales. Cross functional interaction helps identify opportunities to improve the broader customer experience and reduce failure demands.

BLOOM &WILD

Case study: Bloom & Wild's flexible staffing

Bloom & Wild is a direct to consumer (D2C) flower delivery company which grew 160% in 2020 and has heavy seasonal requirements on the customer service team. To handle the large changes in volumes, Bloom & Wild works with a mixture of full-time, part-time and outsourced customer delight associates. Their service team (including outsourcers) can range anywhere from 20 to 160 based on the day of week and time of year, giving them flexibility to change up their team as and when needed.

"In the hypergrowth stage, it's easier to accommodate having early team members move into different roles but scaling this becomes hard and a distraction."

Monzo and *Bulb* both had their teams based in their London headquarters sitting alongside the broader team for the first three years of their existence. In *Monzo's* case, they opened a Cardiff office and began scaling down their London team. Similar to *Zappos's* choice to move to Las Vegas, Cardiff was advantageous since it was a good hub for hiring into the support team with a strong ecosystem of companies with large support centres.

Bulb later opened an office in Brighton, also leveraging a strong network of talent with experience in their sector and a city culturally aligned to their mission of lowering carbon emissions which helped attract talent.

In countries such as the UK, government grants can be helpful in identifying where it can be economically advantageous to grow your team.

Hiring processes at scale

Shamas Azis tests support team candidate skills using assessment centres that replicate a customer support centre as closely as possible.

Prospective team members work with others in a simulated environment to test how they respond to stressful situations and how they use reason and logic.

Shamas specifically has applicants prioritise which items they would bring to a desert island to understand the personality traits of different applicants and how they communicate with conviction.

On premise vs. hybrid vs. remote

Even prior to the pandemic, *Monzo* implemented a distributed first hiring strategy. This meant accessing talent became easier, they could more easily manage different shift patterns and they could offer flexibility to their team in new ways where work could be built around personal commitments.

This also improved productivity as the team became more satisfied at work. As we love to say at Surfboard, happy teams make for happy customers.

Post-pandemic, most teams have moved to either hybrid or remote. Leaders have cited an improvement in communication as an essential precursor to getting the transition right. You no longer have the advantage of sitting next to direct reports where you can jump in quickly if they are having an issue with a customer. For some teams, they had to invest in better routing. For others, better utilisation of slack and teams became prevalent. Thankfully at this point, most tooling with the exception of legacy systems have transitioned from on premise to cloud making a remote team much more possible to scale.■

Chapter 7

Working with outsourcing partners: is it right for you?

A more directly relatable test he uses is a mock customer problem where applicants are asked to solve the problem and write the script they would use. This adequately tests communication skills and problem solving ability.

Outsourcing shouldn't be thought of as an easy fix and needs serious thought on whether it's the right approach for your organisation.

The obvious benefits are that it allows you to scale your team quickly without needing to manage hiring processes internally. It also means that the overhead around managing a team is no longer something that your organisation is directly responsible for.

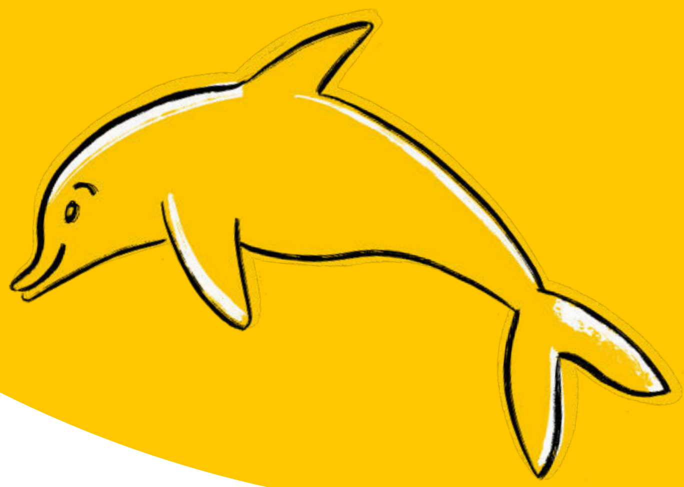
It might sound easy: you provide your outsourcing agency with your ticket volumes and SLAs, you set the budget, and they do the rest.

That doesn't tell the whole story though.

There is still a lot for you to consider. What types of tickets you want to outsource, ensuring reliability and consistent quality, and how you standardise processes.

Rona Ruthen recommends outsourcing from as early as possible.

As soon as you make the leap, you need robust and consistent



processes in place to make it work. Working with outsourcing partners earlier forces you to get these processes up and running. At a granular level, this means aligning on your tone of voice, setting up internal systems to allow outsourcing agents to interact with customers easily and improving security features. These are all good things to do and working with outsourcing partners forces discipline on your team.

Choosing an outsourcing partner

Outsourcing comes in different forms: you can have onshore and offshore. There are also newer flexible outsourcing solutions such as *Yoummday*, which allow support teams to be based from anywhere in the world. In deciding the model you want to go for, the considerations are quality of service, timezone coverage, language coverage, and of course, cost.

"Outsourcing shouldn't be thought of as an easy fix and needs serious thought on whether it's the right approach for your organisation."

Tim Kirchner from *Webhelp* believes the main mission for startups who are onboarding outsourcers is to ensure that both the agents and managers at the chosen outsourcer have the same mindset as the in-house team. Being able to speak the same language in terms of culture and values means you can build something truly exceptional and scale it as you grow.

Deciding what to outsource

Once you've taken the plunge into working with an outsourcing partner, you need to decide what types of tickets or queries you want them to handle.

Some companies pass all customer support related tickets to an outsourcer and don't have internal teams. Most companies have a mix of both an internal team and an external outsourced team.

"Ensure that both the agents and managers at the chosen outsourcer have the same mindset as the in-house team."

Yoummday, a flexible customer marketplace has customers that pass a broad range of tickets that even go beyond customer support into outbound sales and technical support.

Many companies break down support into first level and second level support. This can be an efficient way of triaging tickets, where first level refers to basic tickets which require less specialist training. *Claas van Delden*, *Yoummday's* Chief Growth Officer, cautions companies that it is essential they have a structure that allows customers to be passed in an efficient way, otherwise it causes customer frustration where they have to repeat context and start over

each time they speak to someone else. Systems that allow for 360 degree customer reviews are a success criteria for having customers speak to different agents so CRMs need to be chosen and implemented accordingly before you work with an outsourcing partner.

Vlad from *Revolut* says they decided before they entered hypergrowth that they were going to work with outsourcing partners. His tip for success is understanding what the limitations are. In *Revolut's* case, they frequently launch new products and features meaning that their internal team can be better equipped for handling related queries. Once they feel an outsourcing partner is fully up to speed and reliable, you can give them more work.

Making outsourcing work

Managing an outsourced team doesn't mean you can have a "set it and forget it" attitude. It requires setting expectations, frequent reporting, accurate forecasting and ongoing training.

Your company has more information on upcoming events, seasonal patterns, and new products which means forecasting and sharing expected ticket volumes should be your responsibility.

Outsourcing agents will often help you review this data so that they can get their staffing right as that impacts their hiring, scheduling and quality of service.

You also need to have good frameworks in place so that you can monitor how quickly you are responding to customers across all channels and quality of responses on a regular basis. It's critical to have members of your internal team devoted to quality assurance to check tone of voice is consistent and that responses from outsourced agents are in line with your brand values. ■

Chapter 8

Embedding product and engineering teams into customer support

Customer support never sits in isolation and should always be thought of in the context of the broader customer experience.

That means that your support team is one ingredient in how a customer interacts with your product or service. Regardless of what type of organisation you are in, there is always going to be product or engineering interaction with your support team.

The level of embeddedness will vary depending on the type of organisation. Technology businesses in many cases will have a closer link between product and support, especially if support is critical to the unique selling proposition.

Self service and reducing failure demands

Self service is another big part of the equation - giving customers the tools to solve problems on their own.

Anything relating to "how to" shouldn't be something that comes to the support team, Rona says. Within a product or app there should be contextual help relating to each feature. This provides a better experience for the customer, and allows the support team to run more efficiently.

What is essential regardless of the model according to Dan Sheldon is that you have to adopt a customer-first point of view. It is a universal truth, he says, that customer contact is self-inflicted, or a "failure demand".

Customer contact is self-inflicted, or a "failure demand".

Companies are failing to do what customers expect and this is often a result of not understanding the root cause of why customers are contacting the support team. Having a close link between support and product helps get to these root causes and avoid failure demands. *Dan* warns that there is no shortcut and this may require a fundamental redesign of your services. ■

Case study: Monzo's Product Partners

Monzo has a team of "product partners" who are customer support team members assigned to product squads. They act as liaisons, ensuring the support team is aware of any change to features and products and take responsibility for making sure everything is ready from a support point of view: building out FAQs, preparing scripts and responses to questions and training the front line team. Rona is a big believer in having a function that sits in the middle to make sure the right conversations are happening at the right time.

Afterword

Top advice for first time support leaders

“ Be clear on what your service should look like, have scripts in place, have training in place. Standardise to scale fast otherwise it becomes hard to control quality.

Claas Van Delden

“ Get workforce management and planning tools in place and build the right expectations for your team.

Vladyslav Lytvynenko

"When you work for a company that is growing quickly, things will break every few months and that is okay.

Have a list of what you need to look at every six months and assess whether your systems and processes are still fit for purpose. This includes your communication channels, your rituals, your organisational structure, and your tools and systems.

Join groups with similar leaders and absorb all the great content that is out there. There is nothing more valuable than speaking to other people in the industry.

Rona Ruthen

"Your company is going to get more complex - you will have more products, features, teams, lines of communication, processes, customers, more of everything.

If you aren't careful you will end up with a support operation that is also very complex and becomes unworkable. You need to always be fighting complexity. Fight to keep as much standardisation as possible.

Companies that have scaled support well have standardised processes to the extent that you can leverage automation or at the very least provide tooling that keeps things simple.

Dan Sheldon

Get in touch

We’d love to talk to better understand your needs and see how we can help.

www.teamsurfboard.com

contact@teamsurfboard.com

@teamsurfboard

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