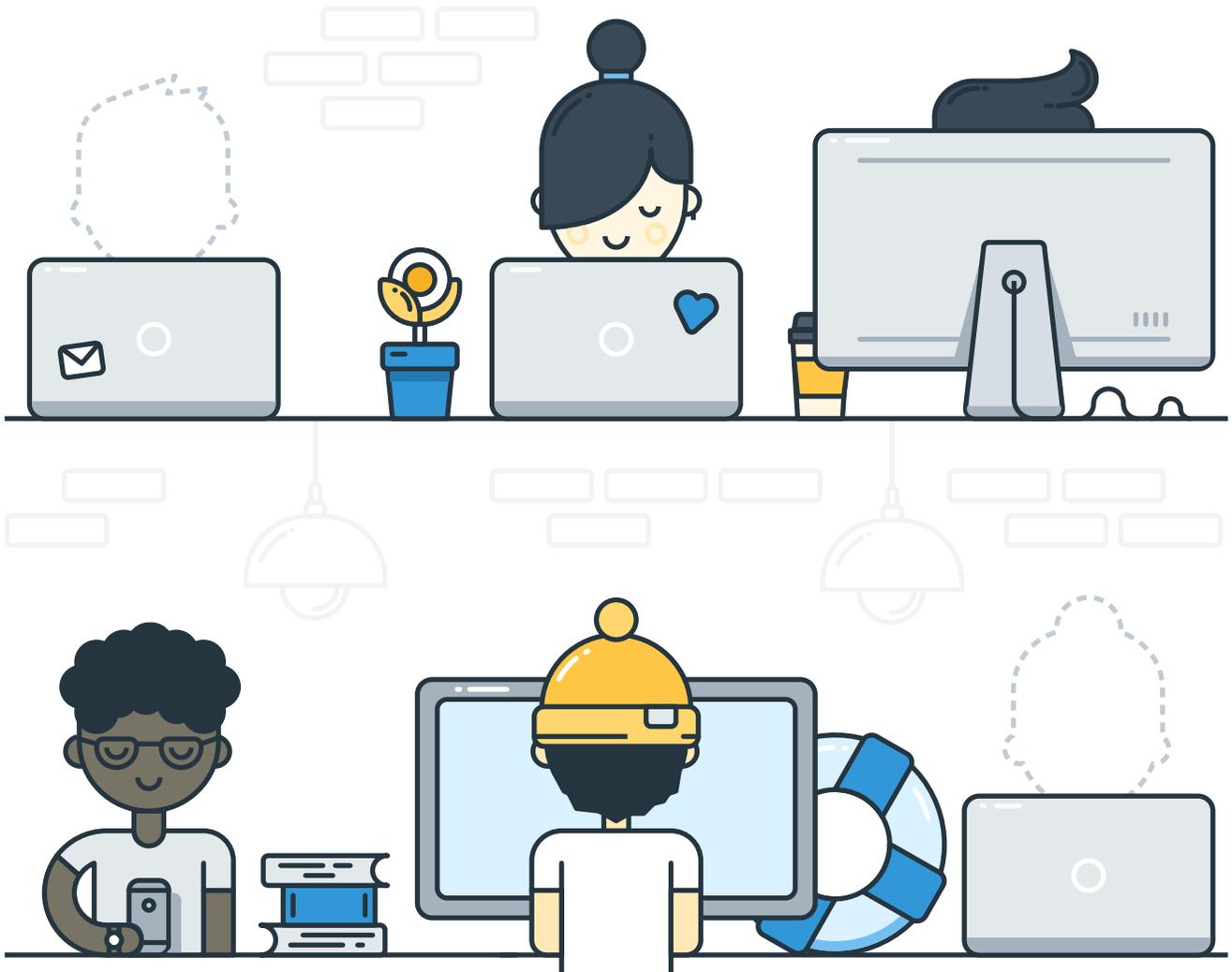




Hiring Your Customer Support Dream Team

A guide by [Help Scout](#)



Special thanks

To [Cassandra Marketos](#) for her extensive efforts in interviewing contributors and authoring this handbook. To [Emily Triplett Lentz](#) and [Stephen Murrill](#) for providing editing and design polish. To all of our generous contributors for taking the time out of their day to share what they know.

And a personal thanks to you for reading. By doing so, you've advanced the continued push for great customer support. You know building a world-class support team is serious business, and you made time to learn more about the process to improve your own approach. We can only hope that this book will help you hire the best support team around.

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A New Era for Customer Support

In many ways, the discipline of support is currently experiencing a renaissance. The days of one-and-done sales are slowly giving way to recurring revenue models, and with their departure goes the archaic view of support as a mandatory cost of doing business. Now, support as a specialty is finally coming into its own as a competitive advantage; perhaps one of the most difficult differentiators for competitors to copy.

With the evolution of the role comes a growing need for a [growing set of skills](#). As we hope this book makes clear, a talented support teammate is currently leagues beyond the call center stereotype 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 an entry-level, leapfrog position, but an opportunity to build a sustainable career with its own fulfilling trajectory.

We say this to counterbalance the current discussion around “what’s next” for customer service—a conversation dominated by tech, tech, and oh, more tech. What most people are missing is that automation, customer data, and [smart tools](#) will always work best to enrich, not replace, human-to-human experiences. They’ll enable us to reduce customer effort, provide proactive solutions, and help us help customers even faster. But with great power

“The quality of your customer support will never exceed the quality of the people providing it.”

comes great responsibility, and the people behind these processes will determine their success or failure. And let's not forget, whenever technology lets us down, we'll always want a friendly human to pick us back up.

Put another way, the quality of your customer support will never exceed the quality of the people providing it.

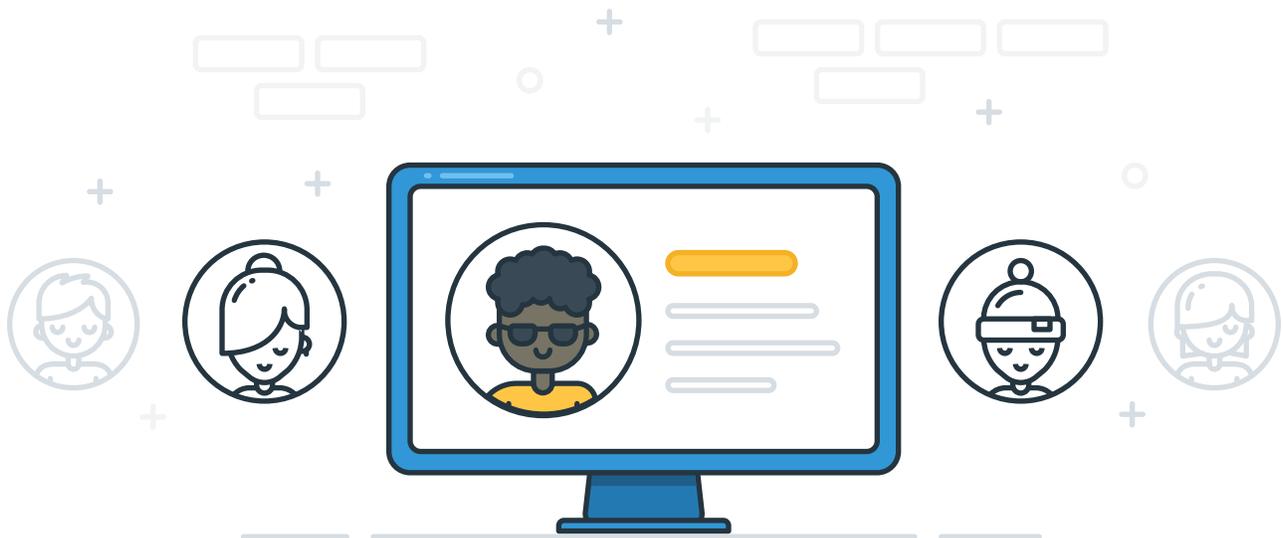
That's why we wrote this book: to help you build the best support team you're able. We'll start off with who to look for, and take you all the way through to supporting your new teammates with effective, considerate onboarding. They are, after all, the voice of your company and your customers. There's no room for anything less than excellence.

Enjoy the book!

—The Help Scout team



The Personality



Finding the perfect hire for a support team can be 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 support rep kind of sounds like looking for a good buddy. Funnily enough, the qualities that make for a good pal often line up with the qualities that make for a good support teammate.

Not convinced? Let us break it down for you. Here are six qualities you'll find in a top-notch customer support rep-to-be.



1. They are emotionally intelligent

A great customer support representative knows how to relate to anybody, but they're especially good with frustrated people. Instead of taking things personally, they intuitively understand where the other person is coming from and they know to both prioritize and swiftly communicate that empathy. Think about it: how often have you felt better about a potential grievance simply because you felt immediately heard by the other person involved? When a support 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 feel validated in their frustration).

Bonus: this quality goes a long way even in cases where the issue at hand—hello, startups—cannot be immediately solved.

2. They are problem solvers

No news flash here, but customers do not always self-diagnose their issues correctly. Often, it's up to the support rep to take the initiative to reproduce the trouble at hand before navigating a solution. That means they need to intuit not just what went wrong, but what action the customer was ultimately after. A great example? If somebody writes in because they're having trouble resetting their password, that's ultimately because they want to log into their account. A good customer service interaction 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 problem-solving pro may simply understand how to offer preemptive advice or [a solution that the customer doesn't even realize is an option.](#)

3. They are good communicators

Your customer support team is on the front lines of problem solving for the product itself, and serves as a kind of two-pronged bullhorn. On one side, they'll be the voice of your company to your customers.

That means they have to have a practiced grasp on how to reduce complex concepts into **highly digestible, easily understood** terms.

On the other, they'll represent the needs and thoughts of customers to your company. For example, it doesn't behoove the customer to receive a long-winded explanation on the ins-and-outs of solving a particular bug. (I've seen this before.) 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. One, they'll be sure to get to the real heart of a problem before firing off a reply. (There's nothing worse than attempting a "solution," only to have it miss the mark entirely on solving the actual issue.) Two, they'll proofread. A thoughtfully written response can lose a lot of its problem-solving luster if it's riddled with typos. Three, and this one may be the most important, it means they'll regularly follow up. 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.

An important side note:
The best hires are able to maintain their methodical grace under regular fire.

Since the support 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 keep a cool head and a steady, guiding hand.

5. They are creative and resourceful

Solving the problem 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**, 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. (And trust us, that land is where you want to be.)

Chase Clemons at Basecamp advises the following:

“You want to have somebody that you don’t have to give a lot of rules and regulations to. You want to have somebody who is talking to a customer and understands ‘Their boss is really yelling at them today. This person is 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.”



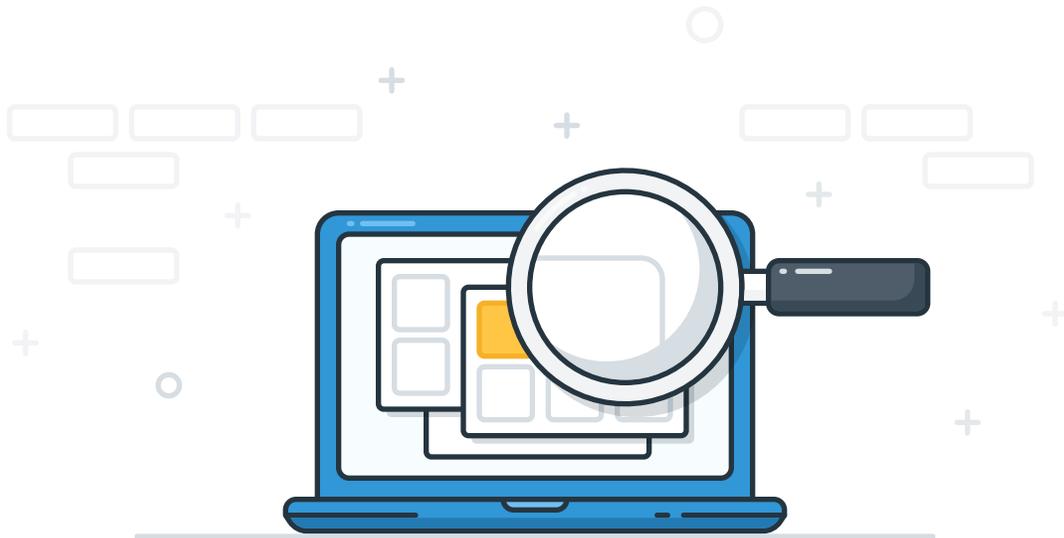
6. They are excellent writers

Good writing means getting as close to reality as words will allow. Without an ounce of exaggeration, being a good writer is the most overlooked, yet most necessary, skill to look for when it comes to hiring for customer support. Unlike face-to-face (or even voice-to-voice) interactions, writing requires a unique ability to convey nuance. How a sentence is phrased can make the difference between sounding kind of 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 support primarily over the phone, writing skills are still important. Not only will they enable your team to craft coherent internal documentation, they signify a person who thinks and communicates clearly.



The Search



What's one of the most overlooked parts of finding a great candidate? Here's a secret: it's not the vetting process. It's attracting a diverse, competent, and exciting group of prospects in the first place. The best way to do that? [Write a killer job listing.](#)

Attracting talented people starts with communicating that there is meaningful work to be done. Extraordinary people won't take ordinary jobs. Too often we forget that a job posting is the first impression. Don't let excitement to fill an open position result in wording that sounds lazy, selfish, overused, or out-of-touch.



Crafting a compelling description of your desired hire will set the precedent for the people who apply, but more importantly, it will also encourage people to share, extending your reach by miles and upping your chances to collide with the person who feels just right.

Remember the following as you create job listings to attract your ideal candidates.



1. Be thoughtful about your title

This can be tricky. You want a job title that stands out to people while still being easy to find via Google, which can force you to rethink the internal semantics of your company a bit. Job titles that may be true to the spirit of your company (think “ninja”) can undermine a potential hire’s ability to understand what it is 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, sure, but it makes our kind of people look twice.

“You want a standout among candidates, right? So make sure you stand out, first.”



2. Mix it up

People expect job descriptions to be dry, boring, cut-to-the-chase lists of skillsets and experiences, which makes them a chore to get through and means you could be losing 50% of your best candidates before they're even halfway down the page. It's important to keep in mind that there is no actual standard and that 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.

Remember that 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, right? So make sure you stand out, first.

3. Focus on the most important skills

When it comes to a job listing, less is definitely more. Customer service benefits from 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](#). The posting is extremely personal—coming from their CEO'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 (and what to leave out) of a job description in order to create a thoughtful, inclusive listing. Tools like [Textio](#) 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](#). 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.

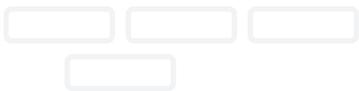
We treat employees like royalty. We care deeply about your professional development and long term goals. We work with you to grow your skills both in and outside support."

"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."

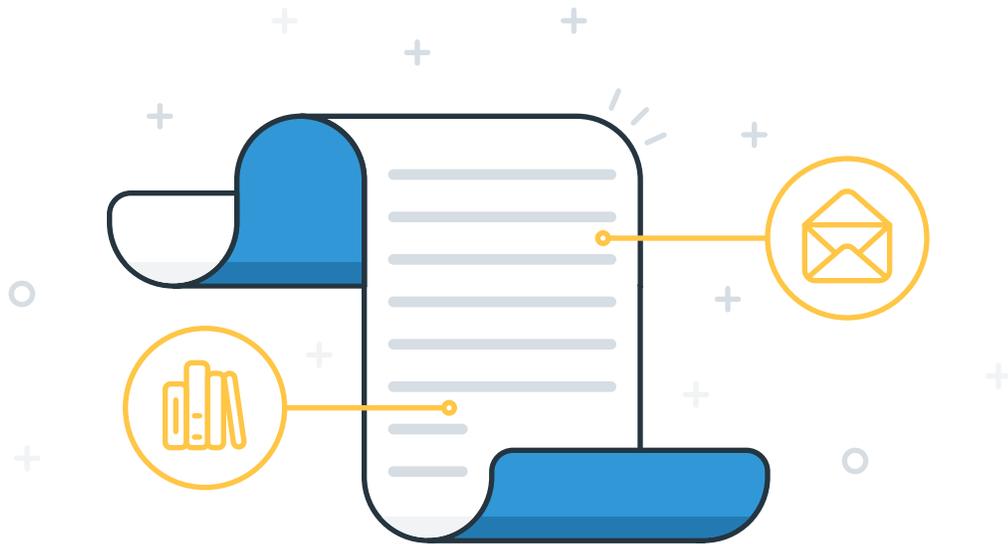
Now, doesn't that make you feel excited? Doesn't that make Trello sound like a place where you'd be jumping to work? Exactly.

At the end of the day, your job listing functions as
your **first line of defense**.

Putting in the time and effort to make sure it's 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.



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. I can't teach you things like personality. Personality is really, really key with customer service. You want somebody who is always going to be upbeat, cheerful, and always smiling."

These qualities are certainly more abstract than the number of years of prior experience, but that doesn't mean they're impossible to find in a resume. It can just take a little extra elbow grease—and subtle intuition—to filter through the mediocre candidates and find the superstars: those potential hires who stand out on the merits of their originality, creativity, and individual voice.

Here are some helpful insights on how to do just that.



1. Look twice at 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.

"Reading a cover letter should be a pleasure, not a chore."

Another thing to look for? According to Trello's Ben McCormack, applicants should address what specifically interests them about support: "It's a filter to get rid of people who aren't going to be a good fit. Sometimes, we will have people who are huge fans of Trello, but they don't say anything about support. That's a disconnect already."

It almost goes without saying that any grammar issues, typos, or incomplete sentences get an automatic “pass.”

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 a unique animation, or writing you a song (seriously!). These things are obvious once you see them, of course, but it sometimes takes a reminder that you can and should expect them. Take this anecdote from Chase Clemons at Basecamp:

“Make it unique. One woman that we hired actually went out and did 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 basically 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 an 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, it should be clear that 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 not just about the product but 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 specific mission and product—something that is arguably a more important quality than lengthy experience in the customer service industry.

Some other specific 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 shows an exciting level of engagement with your company. Back to Clemons, who summarizes it best:

"We open up a job and we will get a thousand applications. The majority will say 'I love Basecamp, here's my resume.' And 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."

The Interview



When interviewing potential support hires you always 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](#). Here are some useful ways to conduct better interviews.

Use storytelling to draw out details

Great support 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. How? By asking questions that require a story to answer.

Sarah Judd Welch, founder of community-building company [Loyal](#), handily 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 support skills.

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](#).

People can reveal a lot about their personal psychology by how they frame a story.

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**. 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 support. They surprise no one, they won't surface an ability to thrive under pressure, and their limited framing begets limited answers. That's no good, because you're searching for creativity; work isn't a multiple choice test.

Instead, complement your must-ask questions, your "zigs," with a few questions that zag.

1. Ask a question the candidate won't know the answer to. How do they respond? When they're new, they'll face many questions in the queue that will leave them stumped.
2. Ask a question that has nothing to do with the product: "Who's the most underappreciated hero/heroine in any story? Why?" Is their response charming, or does it fall flatter than an 'N/A' reply in a written interview?

3. 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 support hires out for coffee. 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 support team is [based remotely](#), the digital common space provides just as many opportunities for unconventional interviewing. At Basecamp, they swap coffee for [Campfire](#), setting up a chat between the potential hire and existing teammates. [Chase Clemons](#) 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.”

Observing how someone interacts with the outside world will speak volumes about their self-awareness and personal motivations.

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:

First, we'll ask the candidate's reference to rate the person from 1-10 in terms of living up to their potential. Most people will respond warmly ("A 9!"), but the follow-up coaches more candor into the dialogue: "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.

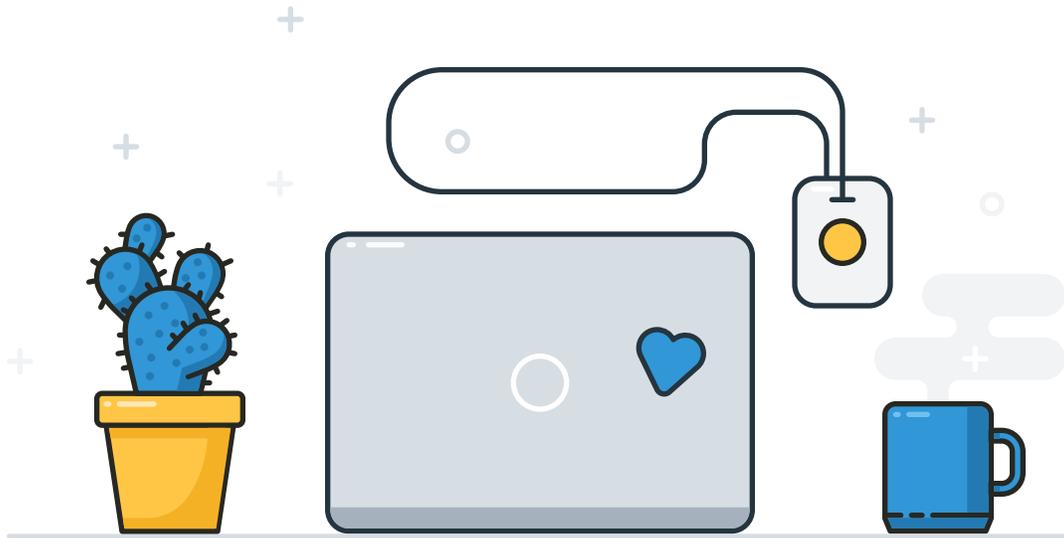
It's also important to ask for specific anecdotes and to frame questions so they can't be answered with a pat "yes" or "no." For example, "What's a time that this person resolved an intra-team conflict?" will get you a lot further than, "So, do they work well with others?"

The tricky thing about interviews is you only have one shot to set the right tone and learn what you need.

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.

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**—will be crucial in enabling your new teammate to take flight and thus 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 support rep who will be confident enough to enjoy the work, who will 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 support 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. Yikes! No good. Ideally, a support 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. It may sound like an extravagant step to take for a new employee, **but it's worth it.**

That kind of valuable one-on-one 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, it's helpful—nay, essential!—to 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.’”

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 support manager, explains how they do it:

"Each day during this time there is a point person on the customer service team who trains the new hire—this way the new hire gets a chance to work with most people on the team right away, and gets to 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 would reply to the same kind of cases. That’s gonna help 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. We don’t want them to lose it, if they’re copying and pasting what somebody else sounds like. Plus, we’re integrating them with the rest of the team.”

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 you want to 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 support 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."

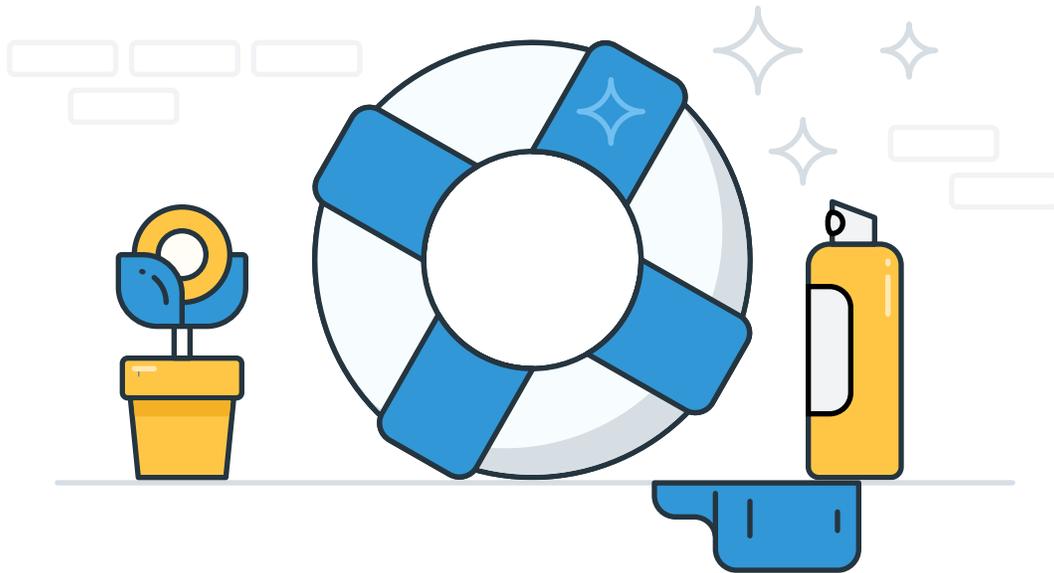
To keep documentation actionable (versus overwhelming), Kickstarter breaks it down into chapters, one for each day of a new hire's first week. Then, they split the day into two parts: the first half is spent reading and the second is spent working through a set of applicable tickets. This helps ensure 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.



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. Rather, it comes down to smart 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."

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 support 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. You have to recover a little bit. 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 support 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 help 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.”

Boom!



3. Practice self-care

It 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 support 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.

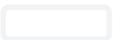
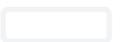
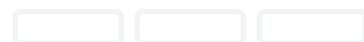
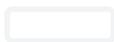
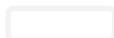
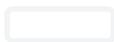
“You have to understand that prioritization is a constant and fluid thing and it’s okay to say ‘this isn’t important enough right now,’” says Elizabeth Tobey, head of support at Tumblr.

She continues:

“Learning the value of ‘no’ is huge—and learning the value of asking for help is also huge. Particularly in Community and Support teams, 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.”

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.



About Help Scout

Help Scout is a suite of tools designed for providing outstanding customer experiences at scale.



Help Desk

Customer support software with a personal touch



Docs

A knowledge base that works beautifully on any device



Beacon

A contact form you can install on any web page

Our [help desk](#) is designed to serve as one place for all of your inbound customer queries. [Docs](#) enables you to build a turn-key help center that's as beautiful as your product. [Beacon](#) is a smart contact form that you can install in-app or on any web page in minutes; customers can even search your Docs content through Beacon, before they contact you.

For enterprise teams, check out [Help Scout Plus](#).

Want something else to read?

If you're looking to craft a friendly but professional set of tone and style guidelines for your support team, our [Brief Guide to Writing Better Support Emails](#) can help.



Authored by Chase Clemons of Basecamp, who has years of experience in delighting customers, it's a hearty 48-page book full of real emails, honest tear-downs, and meaningful takeaways—and free to share with your team.

