kayako
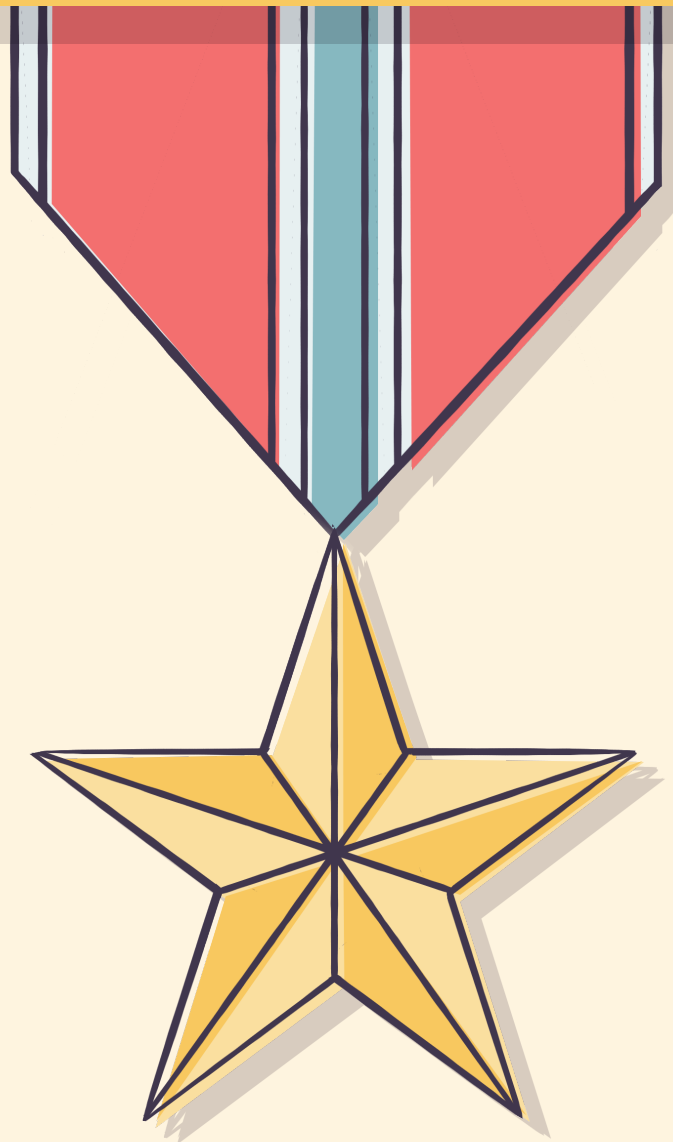
The Essential Guide To

Hiring Customer Support
EXCELLENCE

CONTENTS

Why customer support is important for your business

Customer service is the very front line of your business. The bonus of having a great customer service team allows you to WOW customers and increase loyalty to your business.

Recruiting the right people to join your support team can be one of the most tactful ways of getting your business ahead. When your customers' have a positive interaction with your support team they are *75% more likely to generate positive experiences than negative experiences (25%).*

And if that's not enough, when it comes to social influence on buying decisions:

- People are *77% more likely* to purchase a product when they learn about it from friends and family.
- *81% of consumers' buying decisions* are influenced by their friends' social media posts.

You want to be hiring the best talent possible. Your customer support team is the face of your brand. They have the power to to make great impressions, but also to cause upset and bad feelings.

A great customer support team won't just answer tickets and keep customers happy. A great support team will go further. They'll help you to:

- Grow customer loyalty
- Nurture a close-knit customer community
- Build a competitive edge in the market with their communication skills
- Develop real brand ambassadors for your organization
- Win new customers by removing barriers and reassuring potential buyers

If you care about the impression your business leaves with customers - then you're in luck. We're here to help you hire the customer service superstars that your business needs.

Ask managers in any business - hiring is tough. But for an underinvested department like customer service, it can be hard to even know where to start.

This guide is designed to hire the best customer service ninjas in your industry. Hiring the best support pros around will help keep your customers happy, solve their problems and help your team become renowned for it's customer service in your industry.

You'll find out:

- How to successfully pinpoint the right potential candidate
- How to use the 'A method' for hiring best practices
- Where to find the best potential candidates around

Setting your job requirements

The first step in your search for the perfect customer support professional is to develop a clear, helpful job description.

Before you can even think about hiring someone you need to know what they'll actually be doing in the new role.

- What does this job entail?
- What will they be responsible for?
- What basic skills should they have?
- What "intangibles" will make someone successful in the role?

To ensure you're not wasting time by screening and interviewing the wrong candidates, creating a job description that carefully details the responsibilities involved in the position will act like a beacon, attracting those who will be a good fit.

Doing this will help you clearly separate the job role from your expectations of what an ideal candidate will look like.

Here's an example of a Kayako posting for a customer support rep

Kayako is seeking a Customer Advocate to join our Customer Support team. We have offices in Jalandhar, Gurgaon and London, but you're welcome to work from anywhere with an internet connection!

Kayako is one of the leading customer service platforms, used by more than 30,000 organizations to deliver a better customer experience to millions of customers. We believe that customer support is more than just answering questions - we directly impact business goals through providing feedback to our product team and driving customer success. Our support team is one of the main reasons for our success and we want to be role models for our customers.

You'll love this role if you get your kicks by helping others. We're looking for someone who loves solving problems and creating long term customer relationships. This is a great opportunity if you care deeply, genuinely and passionately about customer support and about the role it plays in making a customer-centric team successful.

Responsibilities and goals you'll own:
- *Respond to and resolve customer queries through chat, email and the community forum quickly and effectively.*
- *Educate and empower our customers to get better at customer support through Kayako*
- *Become an expert on Kayako features and capabilities*
- *Drive our Voice of the Customer program to advocate for the customer and improve Kayako through incorporating user feedback*
- *Escalate critical support issues to the appropriate internal channel*
- *Help to develop the customer support profession through sharing knowledge, contributing to blog posts, experimenting with new innovations and discussing best practices.*
- *Assist in creating first-class Help Center documentation*
- *Increase customer satisfaction and build loyalty through providing amazing, personal customer support.*

Who will love this job:
- *You like making things easier for customers and colleagues. If there's a roadblock, you want to smooth it away.*

- *You are energised by interacting with and helping people. You know that everyone has trouble sometimes, and seek to empower and educate our customers.*
- *You love reading and learning about new ways of doing things. There's always a better way.*
- *You're a positive person and know how to look on the bright side.*
- *You bring solutions to the table not just problems. (But you aren't afraid to point out where we're going wrong).*
- *You're comfortable with a little chaos and uncertainty. We move fast and sometimes decisions are made without all of the information.*

Experience and requirements:
- *Excellent verbal and written communication skills*
- *Ability to solve problems logically and critically*
- *1+ years in a customer service position - preferably in online support*
- *Demonstrate effective time management and organizational skills*
- *A strong understanding and working knowledge of the internet and technical concepts (eg. you understand the terms HTML, browser and cache)*

About Kayako

We've brought the helpdesk a long way. We started out with an ambitious goal: a better online customer support experience. Today, tens of thousands of businesses connect to millions of customers using Kayako.

You can trace us back to 2001. We bootstrapped from there to where we are today, but that was just one phase of an exciting journey. We are about to embark on an exciting new period for the company and product, and completely revolutionize the way businesses build support and build relationships with their customers. Does that pique your interest? Drop us a line!

To apply:

Please submit a one page cover letter in addition to your resume. The cover letter should show your personality, and help us learn why you want to help provide support for support people. What about this job attracts you?

Together with the emphasis on detail, you also might notice the personality of our job description. Why not use a tone of voice in your job postings that communicates the character of your team or company culture?

As you can see in the example above, our job description illustrates that we are looking for fun, but driven individuals with a natural knack for communicating with people and enjoying the Kayako company environment.

Developing a job description

Sitting down to craft a job description can feel overwhelming. You want to build a personal team to truly represent your company and work towards your common goals. It's an investment that would be easier to get right first time, but don't let this pressure put you off.

Before you carve something out from scratch, see if you've got any hiring materials from previous appointments. Reach out to other hiring managers in your company and see if any of their descriptions can help you put something together - don't be afraid to borrow. Making a few edits is a lot less work than putting together something from scratch.

When thinking about your job description, try jotting down a list of the minimum job requirements and what skills you think are needed (Use chapter 3 for personal traits, and our tear out scorecard to help with technical skills, personality skills, and good-to-haves).

First write down your job requirements, then begin writing down your must-have skills. Once you're at a good place, review by asking yourself "are we asking for too much?" If you are asking for too much, they're more likely bonus skills which an ideal candidate will have.

Then begin shifting those "Must-Have Skills" into your "Bonus Skills" column. The

bonus skills column should be treated as skills that aren't essential to doing the work, but something your new candidate can learn.

Try developing your job requirements:

Job Requirements	Must-Have Skills	Bonus Skills

How to spot a top customer support rep

Scope the position's core competencies
What kind of person does it take to be successful in the job you just outlined?

In addition to outlining the perfect job description, you need to understand exactly what skills and personality traits this role will require.

Determining an employee's must-have core competencies helps with developing great job requirements.

Ideally, you should begin looking for indicators of these core competencies during the resume screening process. Keep an eye out for past positions, responsibilities,

accomplishments, and

projects that showcase the following valuable characteristics needed for a top customer support rep.

We've broken down them into an easy to follow list:

Get H.I.R.E.D The HIRED method will make sure you hire someone with the right skills and knowledge for your team.

If you look for these key personality traits, you'll be sure to hire someone who you can trust to represent your brand and make your customers happy.
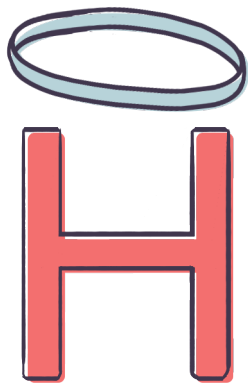
Honest

Your support rep shouldn't have to lie to customers in order to resolve issues. They should have the skills and confidence to tell customers the truth about issues in a way that is helpful to resolving the situation.
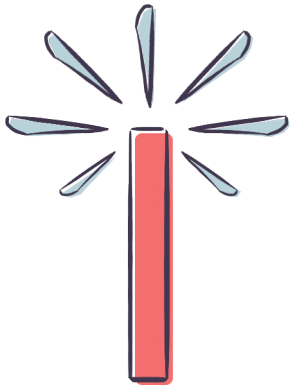
Intuitive

Problem solving should be your support rep's forte. Not only should they be creative with how they solve customers' problems, but they should have the foresight to spot a potential issue and tackle it before it becomes a problem.

Respectful

Your support rep should be mindful to the fact that the customer has taken time to get in touch. They should aim to be as helpful and personable as possible while resolving the problem efficiently.

Empathetic

Your support rep should be able to empathize with all customers, even those who are angry or frustrated. They should make all customers feel listened to and understood, every time.

Detailed

Your support rep should be observant, fastidious and able to get to the root of a problem quickly. They shouldn't skip steps, or miss any information.

In the next chapter we'll show you how to use interview best practices and techniques to dig deep for these core competencies.

"My best hires have been from casual conversations where I have paid attention to the details. I look for some set of skills that quite frankly can be scaled further, I am paying attention to things I know will make a good fit - empathy, go getter, a self starter, problem solver, someone who likes to help. I believe the rest you can learn and scale."

Navsher Puar
Technical Support Team Lead
Kayako

Interview best practices

This section includes information on interviewing best practices that you can use in your hunt for that perfect support employee. The "A Method for Hiring" is outlined in detail within the book Who. Follow our guidelines on using the A method to run the best possible interview process.

There's two very important things to have in place before you even start communicating with potential candidates.

You need a candidate scorecard, and an interview structure.

The "Scorecard"

The scorecard is not a list of job requirements. It's a description of the results you want the candidate you hire to achieve.

Focusing on results can give a clearer narrative of what the job entails, than simply detailing daily activities. It also shows you want this person to grow and thrive within their role (see our example in Chapter 10).

The scorecard puts three elements in clear language:

Mission – You are trying to accomplish a specific mission and you need a candidate who can do it. You do not need a candidate who is good at everything. As we showed you in chapter 2, remember to only scope for skills that are essential for getting the job done.

Outcomes – Many job descriptions go wrong because they describe activities instead of results. If you clarify the goals you want met and the time frame available for accomplishing them, inappropriate candidates may decide to opt out of your line-up. For an example see our sample job description (Chapter 2) with the heading: Responsibilities and goals you'll own.

Competencies – Define the characteristics of the candidate you are trying to hire. Competencies are both behavioral and cultural. Try separating these into:

- Technical skills
- Personality traits (use our guidelines in chapter 3 for essential traits)
- Skills
- Good to have

Ask all interviewees to fill in their scorecard as soon as the interview is over.

The interview structure

Use the "Select" interview structure from the A method of hiring. This structure gives you the best chance of finding "A" players for your vacancy with the least effort.

Phone Screening – Use a brief telephone interview to cull inappropriate candidates so you don't waste your time interviewing the wrong people.

Topgrading® – This interview method should happen the first time you meet face-to-face. Topgrading is a chronological walk through a person's career from beginning to end. You ask very detailed questions about their past experiences.

Focus – Have at least three team members conduct separate, one-on-one interviews lasting 45 minutes to an hour. Pay attention to the specific items on your scorecard. Press for details about experience, mistakes, and behavioral and cultural competencies.

"Calibration across the different interview stages is really important. If your recruiter doesn't know what you value in a candidate, everyone will be wasting their time. If you have concerns about a candidate in one area - ask! That's what the interview process is about. Be straightforward, and get to know the person you might be about to hire."

Sarah Chambers
Director of Support
Kayako

Mastering the interview

Now you know the best practices in hiring it's time to set up a structure to run the perfect interview.

Once you have this system down of hiring, you can trust that you will consistently hire the best people around.

When you are creating your interview process, we've set out the best way to get all information you need from each candidate. This hiring method aims to make the best use of both the candidates and your time.

Phone screening

This is first step in the interview process. Use a brief telephone interview to cull inappropriate candidates so you don't waste your time interviewing the wrong people. Try keep these within 20-30 minutes, as this keeps your questions precise and methodical.

Some great questions to ask:

- What are your career goals?
- What are you really good at professionally?
- What are you not good at or not interested in doing professionally?
- Who were your last five bosses, and how will they each rate our performance on
- a 1-10 scale when we talk to them?

Once you've conducted all your phone interviews, take a closer look at who is left, and decide who you feel is good candidate for an in-person interview.

Holding a great interview

After you've refined your list of potential candidates via their resumes and phone screening sessions, now is the time to invite the candidates into your office to meet you face-to-face. If you're hiring remotely, you'll need to organize this interview of GoogleHangouts, Skype or GoToMeeting.

When interviewing, you need to be asking questions that will reveal their current ability and potential to thrive in the role as a customer support rep. Use this time wisely to uncover some element of the competencies you identified as critical to your support rep position.

Topgrading interview

Topgrading® is a chronological walk through a person's career from beginning to end. The idea is to find out is to find out their career track, what led them to certain opportunities and why they are looking to move on.

For every job in a person's career history, ask the following questions:

- What were you hired to do?
- What accomplishments are you most proud of?
- What were some low points during that job?
- Who were the people you worked with?
- Why did you leave that job?

The aim of these questions is to find out if they were pushed or pulled from any of their previous jobs.

People who perform well are generally pulled to greater opportunities e.g. "My biggest client hired me." "My old boss recruited me to a bigger job."

People who perform poorly are are often pushed out of their jobs e.g. "It was mutual." "It was time for me to leave."

> **Tip**
>
> *If you have to interrupt candidates to get the right information, do it politely. Aim to push for as many details as you can gather, whether that's in relation to performance or projected plans.*

Plan to spend from one-and-a-half to three hours on this interview. You are not trying to grill the candidate into submission, the aim is to compile the candidate's complete story. This can be as casual or formal as you like, try discussions over lunch or chit-chats over coffee, just try to explore more about the candidate.

Every hour invested at this stage saves many more hours later as you eliminate less-than-ideal candidates from the process.

Remember: As soon as the interview is over fill in your scorecards.

"I like to hold an interview with faces that are smiling, and it's my duty to keep their smile up during the complete process. Not only does it help explore more about individual personality traits, but it's hard to lie with a genuine smile on your face!"

Vinay Sharma
Customer Support Team Lead
Kayako

6 After the interview

Once the interview is over, and you filled in your scorecards, this isn't the place to make decisions on your candidate just yet. There's two more steps we advise you take.

Take home test

A take home test is one of the best ways you can have your candidate demonstrate their on-the-job skill once they have passed your phone and in-person interviews.

The take home test is a great way to evaluate a person's support experience, communication skills and their problem solving skills. It's also an opportunity for the candidate to be familiar with a common question for the support team.

Ideally, advise your candidate they shouldn't spend more than 60 minutes on this take home test (see our sample take home test in chapter 10).

"At Kayako, we are fanatical about hiring for culture fit. We believe hiring for values is the only way you can build a great team. Its massively difficult to understand the value-culture fit in the limited time you get with a prospect but not impossible. For example, to understand if someone values "live to learn" (one of our values) we focus the interview on how they know what they claim to know, answering questions like is a prospect an avid reader, what was the incentive behind learning a particular skill etc."

Varun Shoor
CEO of Kayako

Culture founder fit interview

This is a Kayako hiring best practice. Hiring for cultural and company fit is very close to the founder's hearts.

We want to ensure that even if the candidate has the skills necessary, their cultural values fit into the company to create the ideal office environment and team that works similarly, try capturing and scaling your startup values for hiring.

Contacting References

Contacting the candidate's references is the very last thing to do before you make a decision.

If the process so far indicates the candidate is viable, always follow up on references they suggest. Try to go beyond the candidate's list to get the full scope.

Review your interview notes to select the people to call to get the information you need. Be open about wanting to contact their reference, and think about asking the candidate to arrange the calls for you. Many companies have strict policies about references, but if the candidate makes the initial contact, their contact is more likely to talk openly.

Ask these questions:

- "In what context did you work with the candidate?"
- "What were the candidate's biggest strengths?"
- "What were the candidate's biggest areas for improvement back then?"
- "How would you rate his/her overall performance in that job on a 1-10 scale?
- What about his or her performance causes you to give that rating?
- "The candidate mentioned that he/she struggled with _____ in that job. Can you tell me more about that?" Learn to listen between the lines.

7 Making a decision

If any candidates made it to the end, it's just a matter of reviewing before you send them an offer or letting them know it's not the right time to give them an opportunity.

Your interview should have taken this structure:

- Application review
- Introduction and screening call
- Take home test
- Interview with you and a team lead
- Executive interview / founder fit
- Reference check
- Offer

Ideally you will have one stand out candidate, but this is still the time to review everything you have collected from the in-person interview, take-home test and culture and founder fit interview.

If it's a "yes" - congratulations on using hiring best practices to find your new, perfect team member!

If you're not 100% sure that you want to hire this person, the answer should be "no." It might seem harsh, but don't hire someone if you're even a little unsure.
If the answer is no, consider these two possible outcomes:

They're better for another position in the company - if the candidate has great cultural fit and the founders can see them working there. But the only thing holding

them back is they're not quite the right fit for the position, consider referring them to another hiring manager within the company.

They're not ready to join now - it's possible you could end up with more than one qualified candidate and you only have one position to fill! Begin building a system to store a list of potential employees for the role next time it opens up. You never know how quickly a company is going to grow and when it does, you'll need that new hire quickly.

What if they're not convinced to join your company?
Sometimes, managers find the right people but can't persuade them to join the company. Once you have decided upon the perfect prospect, you may still need to sell him or her on the opportunity you are offering. This is the final step of the A hiring method.

Use the "Five F's" of selling:
Fit – Aside from emphasizing team and company culture fit. Get the candidate to see how joining your company can aid their career, if their chosen career path matches with your objectives, tell them!
Family – Your prospect is already intrigued, or he or she wouldn't be talking with you at this stage, but the candidate's family may be less interested. Ask what your candidate's spouse and kids want, and then address their needs.
Freedom – The best candidates dread being held back by red tape or overly controlling bosses. Prove that you are willing to give them professional freedom.
Fortune – Money is far from the most important motivator, but it matters. Remember that your internal corporate guidelines may or may not be relevant in terms of what the candidate is already earning or can earn. Pay for performance.
Fun – Having a good time means different things in different companies, but people spend a lot of time at work and want to be happy about it.
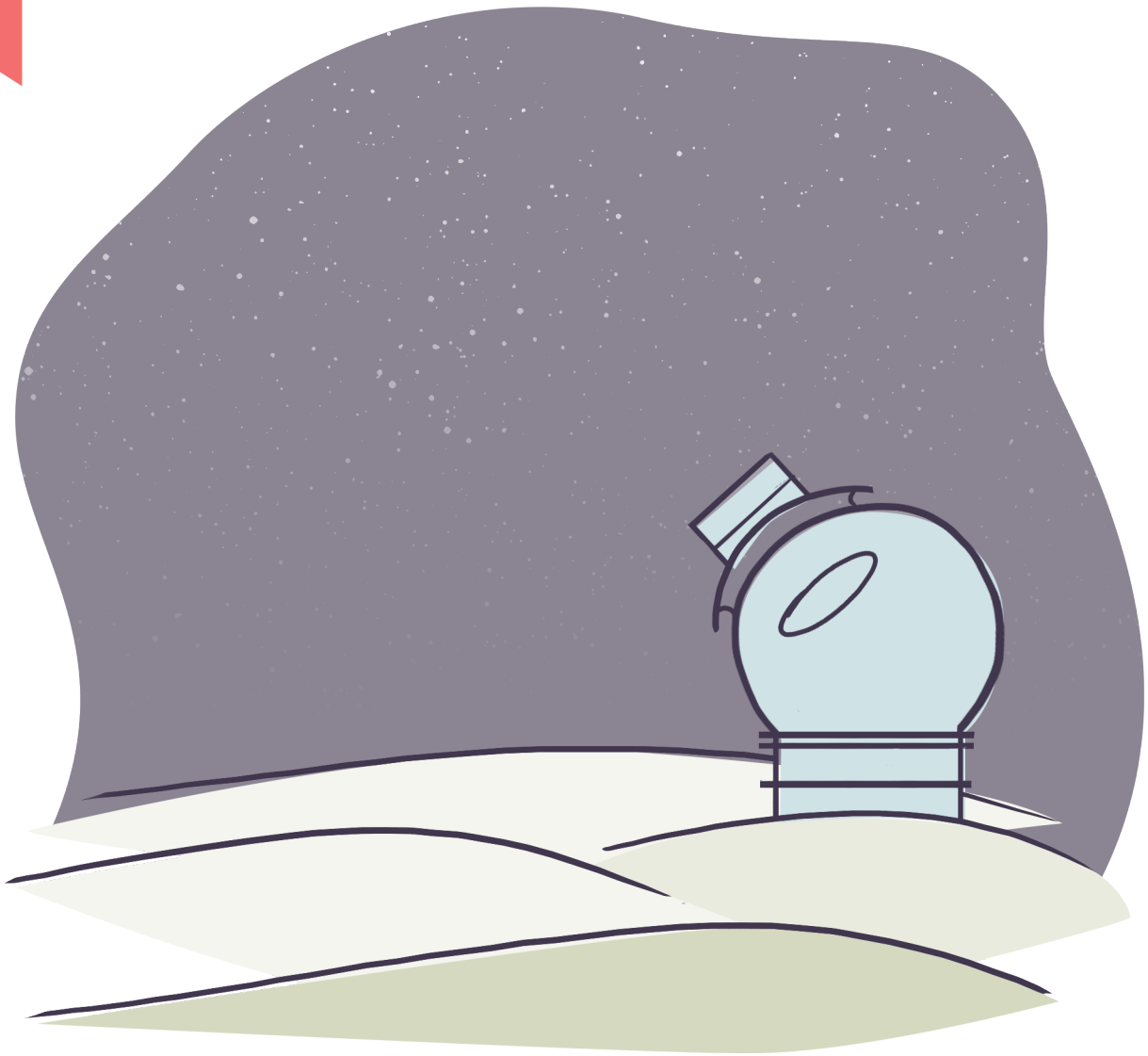
Scouting and recruiting for talent

Where to find your support team

Locating customer support professionals is not an easy task - especially when you're busy doing customer support yourself! There are, however, some great resources to help you start your search. While by no means exhaustive, here are some tools and resources to help you find your next stellar support rep.

Sourcing great applicants

The old method of hiring relies on the HR department to investigate and filter applicants for the manager. This method can take months, and there's much quicker and easier ways to fill your vacancy.

Not that posting job applications online isn't worthwhile, but it is time consuming. Before you try the traditional method, consider these five ways to find good candidates:

Network referrals – Talented professionals know other talented professionals. Contact at least one great talent in your network each week to ask for referrals to possible hires.

Staff referrals – Make good referrals part of your employee scorecard and offer bonuses to staff members who refer strong candidates.

Deputizing friends of the firm – Do you have any partnerships, or consultants? Offer incentives to the company's affiliates for good referrals.

External recruiters – Professional recruiters can be powerful assets, but to be effective, they need a thorough understanding of your business and who you need, not what.

Recruiting researchers or headhunters – These firms do not interview prospects, but they investigate the market and generate names. The more specific your scorecard is, the more able they will be to give you suitable names

Job sites

Designated job sites are a great place to look for your new hire. By posting your position in these places you should generate interest from the right candidates, however if what you want is a little too niche. You might need to step back, and post your position on a site like Craigslist or Indeed. But try these sites before you do:

- Remote Ok
- We Work Remotely
- Support Driven jobs
- Slack at work (if your internal comms are over slack)
- Angel jobs

LinkedIn

A network with over 100 million professionals, LinkedIn is the perfect place to start your search for support reps. Not only does LinkedIn offer the ability to search by

categories, expertise, companies, and more, but it can also show you whether or not a candidate has actually put time into maintaining their LinkedIn profile.

Use the following LinkedIn tools to find a good candidate:
- LinkedIn Groups
- Paid Search
- Organization Search
- Experience/Expertise/Interest Search

Industry events

Use events to meet face-to-face with potential candidates and employees. There's a handful of great events and conferences that exist for customer support professionals. Look to see what relevant events you could attend:
- Elevate Summit
- SupConf

Blogs and Publications

Are there any blog post authors that you could reach out to? Employees who are communicating their thoughts on the industry show that they're passionate about it and invest their free time in sharing their experiences. If you find someone with some great thought leadership, they could make an excellent addition to your team.

Nurturing interns

Most companies have an intern program - if you don't have one in place, now might the right time to give it a try! Not all companies put the effort into nurturing their interns for long term employment, even though interns can be wonderful job candidates.

If you take on an intern, aim to teach interns the ins-and-outs of a full-time support rep role and let them take leadership once in awhile. If they're successful in those moments, you might have a great potential hire on your hands.
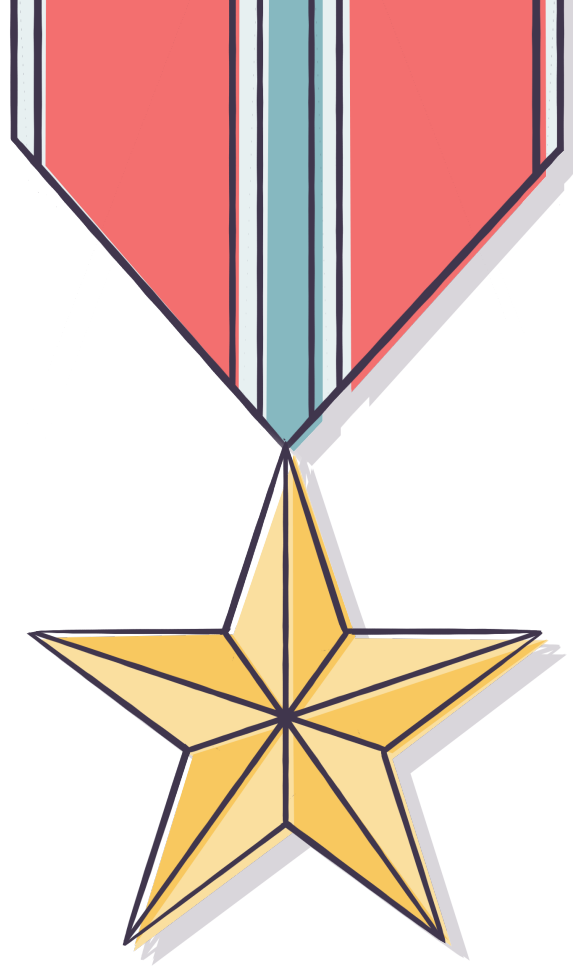
Conclusion

When it comes to hiring the perfect support rep, each support team is looking for something different.

Use the tools we have provided to set the foundation for your next support hire. The additional effort and thought you put into your job description, competency models, screening process, and interview questions will dramatically improve your chances of recruiting the right candidate. Your people are your company's most valuable resource.

Hopefully we've given you everything you need to pick the best candidates for your best possible team, one that will represent the values of your company and always make the customer their highest priority.

Hiring tear outs, cheat sheets and templates

Scorecard: Behavioral traits and skills

Technical Skills

CSS	1	2	3	4
HTML	1	2	3	4
Troubleshooting	1	2	3	4

Personality traits

Honest	1	2	3	4
Intuitive	1	2	3	4
Respectful	1	2	3	4
Empathetic	1	2	3	4
Detailed	1	2	3	4

Skills

Customer support	1	2	3	4
Written communication	1	2	3	4
Problem solving	1	2	3	4
Time management	1	2	3	4

Good to have

Experience in (your industry)	1	2	3	4
Remote working experience	1	2	3	4
Second language	1	2	3	4

Take home test

Customer Background

New kids on the block Brewfictus (dealing in coffee machine) are starting out with Kayako. They were exclusively using a shared inbox before.

Their business revolves around coffee machine + pod sales, annual maintenance, support, gathering feedback and handling quality issue reports. Their customer base is largely European but they are looking to expand their business to Northern America. They sell three coffee machines and five flavour pods.

Their product support and sales team will be based out of Boston. Their service and maintenance team is outsourced and one of the key roles of support and sales team is to facilitate communication around upcoming maintenance to the client.

They do not have a service level agreement for anything other than annual maintenance. The SLA requires them to perform the annual maintenance services within 3 days of the annual set date. For other requests, they follow an internal SLA of 8 hours unless a request is deemed critical where they try to answer within 2 hours.

If a serious quality defect is found, the support team needs to update product feedback team.

It's Brewfictus' first week on their Kayako trial and they wrote into Kayako with the following email:

Dear Support,

I'm exceptionally frustrated. I've been trying for days to get the queues setup properly for my support and sales teams. I can't seem to separate out tickets required for the different Departments.

Also, I've set up an escalation rule to flag tickets that have gone over SLAs but it's not showing anything as being missed (even though a ticket hasn't been answered in over a day). Did I miss a step?

How can I get this set up? This was supposed to be easy.

Sincerely,
Jesse Bennett-Chamberlain
Head of Support
Brewfictus

Assignment 1

Please write a sample response back. You can use the Kayako documentation and sign up for a free trial if you find it helpful.

Good news! Your response saved the day and Brewfictus have been happy Kayako clients for the last few months. Until now:

Hi Support,

Your system is impossible to use! When tickets are closed, I want them to stay closed. Why can customers keep opening them? It means I can't get the right data from closed tickets. Why don't you have a status beyond closed to keep tickets from reopening?

This is ridiculous, I need you to fix this yesterday.

Thanks.
Jesse.

Assignment 2

- How would you describe Jesse's tone? Why do you think he feels this way?
- What tactics or strategies would you use in answering this email?
- What would you do internally with a ticket like this?
- Write a sample response back to Jesse. You may find the Kayako feedback forum helpful in wording a response.

kayako

Simple customer service software
that scales with your business.

kayako.com