CHAPTER 16:

Titles for Support

Junior Customer Support Rep (L1)

Skill

Technical
- Communicates basic product knowledge to customers well and with enthusiasm.
- Customer emails adhere to the style guide with occasional need for redirection. Able to work independently on routine emails, and doesn't need help answering commonly asked questions.

Tech and Tooling
- Demonstrated good technical understanding of most of the software systems and tools needed in daily work. Technical knowledge of the products is limited and developing.

Scope
- Works primarily on customer communication; no project work or limited involvement.

Judgment
- Capable of managing individual to-dos. Pitches in on project work when asked, with oversight.

Engagement

Ownership — Manager of One
- Manages the individual steps to arrive to solutions once assigned work.

Communication
- Communicates well on team calls and in Basecamp check-ins. Asks questions of more senior teammates after doing research to find answers.

Planning

- Able to plan individual daily tasks with little feedback or oversight. Able to call attention to opportunities for small improvements to projects and product.

Flexibility

- Has some points of view about technical solutions and best practices, but mostly observes and learns from the more senior members of your team.

Trust

- Work is reviewed, and mistakes in quality and general approach do not repeat often.

Coachability

Feedback

- Actively seeks feedback. Receives feedback with a positive attitude, and applies corrective feedback well. Hungry for growth & development.

Customer Support Rep (L2)

Skill

Technical

- Confident in product knowledge and well versed in one product. Communicates knowledge to customers well and with enthusiasm, and able to adapt messaging to the situation.
- Customer emails adhere to the style guide with little need for redirection. Able to work independently on all emails or calls.

Tech and Tooling

- Demonstrated technical understanding of the software systems and tools used in your daily work. Good technical understanding of one product.

Scope

- Participates in project work with oversight from a senior teammate.

Judgment

- Manages daily workflow and to-dos without oversight.

Engagement

Ownership — Manager of One

- Sets their own direction once assigned work. Asks questions but does not need status checks outside of email reviews.

Communication

- Attempts to unblock themselves but asks for help when needed. Communicates well within the team structure, sharing knowledge and bringing in more experienced teammates when needed.

Planning

- Able to plan individual daily tasks with minimal oversight. Routinely calls attention to opportunities for small improvements to projects and product.

Flexibility

- Demonstrated willingness to express a viewpoint and opinion, and able to disagree and commit.

Trust

- Productive member of the team, able to contribute effectively to small projects. Work is reviewed with the occasional need for edits.

Coachability

Feedback

- Able to weigh in on larger discussions at the team level with helpful, relevant feedback. Receives feedback with a growth mindset.

Senior Customer Support Rep (L3)

Skill

Technical

- Proficient in one or more products. Communicates knowledge to customers well and with enthusiasm, and able to adapt messaging to the situation.
- Customer emails adhere to the style guide with no need for redirection.Able to work independently on all emails or calls, and doesn't need help answering questions.

Tech and Tooling

- Able to diagnose and escalate low-level technical issues appropriately. Good technical understanding of all products.

Scope

- Works independently on small projects and are a reliable contributor to larger projects.

Judgment

- Manages daily workflow and special projects with minimal oversight or approval. Good sense for when to cut scope to deliver projects on time, within appetite.

Engagement

Ownership — Manager of One

- Sets their own direction and works with little to no oversight or help. Conceptualizes new work to be done, steps to get there, and then executes the steps to complete it.

Communication

- Attempts to unblock themselves but ask for help when needed. Communicates well within the team structure, sharing knowledge and bringing in more experienced teammates when needed.

Planning

- Plans individual projects effectively with little oversight. Contributes to cycle planning. Identifies work without having it assigned and without asking others what's important. Able to pitch projects to the team and explain why it's important and should be prioritized.

Flexibility

- Demonstrated strong points of view about technical approaches and solutions that are rooted in experience. Willing to express a viewpoint and opinion, and also able to disagree and commit.

Trust

- Fully productive member of the team, able to contribute to almost any project. Work doesn't necessarily need to be reviewed, but general approach may be.

Coachability

Feedback

- Able to act as informal mentor, and provides helpful, direct, specific feedback to more junior teammates.

Lead Customer Support Rep (L4)

Skill

Technical

- Proficient in multiple products. Communicates knowledge to customers well and with enthusiasm, and able to adapt messaging to the situation.
- Customer emails adhere to the style guide, and contributes to the style guide and snippets repo. Able to work independently on all emails and calls, and can handle difficult cases and frustrated customers.

Tech and Tooling

- Able to diagnose and escalate most technical issue appropriately. Capable of correcting low-level customer technical issues independently, with support from on-call.

Scope

- Elevates team and company standards through developing new processes, procedures, and effective communication. Major contributor on special project work.

Judgment

- Strong ability to set scope and manage large ongoing projects with minimal oversight or approval. Sought out for advice by teammates and outside the team.

Engagement

Ownership — Manager of One

- Capable of setting small team direction. Manages projects and resources, requiring little to no redirection or input from leadership.

Communication

- Acts as a representative to the company, weighing in on larger discussions and making recommendations. Rarely need help unblocking themselves, an acts as a resource for others.

Planning

- Key contributor to cycle planning. Able to plan and execute large projects.

Flexibility

- Strong points of view rooted in experience, technical expertise, and industry best practices. Expresses opinions confidently and effectively, and can balance recommendations with the larger needs of the team.

Trust

- Able to contribute to any project and able to resolve almost any customer interaction. Work happens autonomously with no regular need for review. Work is almost always free of mistakes, and often helps others improve the quality of their work.

Coachability

Feedback

- Sought by colleagues on and off the team for help with critical work or decisions.

Principal Customer Support Rep (L5)

Skill

Technical

- Expert in multiple products. Communicates knowledge to customers well and with enthusiasm, and able to adapt messaging to the situation.
- Customer emails adhere to the style guide, and contributes to the style guide and snippets repo. Able to work independently on all emails and calls, and can handle the most difficult cases and frustrated customers.

Tech and Tooling

- Able to diagnose and escalate all technical issues appropriately. Capable of correcting many customer technical issues independently.

Scope

- Capable of conceptualizing and executing large special projects and working with a team to complete them.

Judgment

- A leader in ensuring robust and effective best practices are understood and followed across the team and organization. Has a wide range of focus and finds opportunities to make improvements to work, without it being assigned.

Engagement

Ownership — Manager of One

- Capable of setting team direction. Manages projects and resources, requiring little to no redirection or input from leadership.

Communication

- Demonstrate project management and communication best practices. Ensures leadership is informed on team progress.

Planning

- Able to plan and execute large projects while keeping team and company strategy in mind.

Flexibility

- Demonstrated ability to think through problems and devise and apply novel solutions that are outside the box.

Trust
- Significant contributor to problem resolution and code resolution; demonstrate consistent maturity and leadership.

Coachability

Feedback
- A leader on the team. Sought by colleagues on and off the team for help with critical work or decisions.

Customer Support Manager (M1)

Skill

Mastery
- Makes meaningful contributions to developing team service standards and requirements. Communicates service standards and requirements reliably and effectively to reports.
- Maintains regular, productive communication with cohorts of 2-4 Reps. Acts as a coach and a resource for reports for improving their customer service skills & comms style, technical troubleshooting, and project advancement.
- Oversees performance management for team of 2-4 reps. Runs 3/6/12 performance reviews, administers PIPs recommended by leadership, performs terminations recommended by leadership, onboards & trains new hires, recommends promotions, and effectively manages job performance lags.
- Capable of shaping, pitching, and executing support projects that add value to team skills and tooling, team/company processes, and customer experience.

Tech and Tooling
- An expert in all existing software systems and tools needed in CS work. Can identify where existing tooling should be improved, proposes solutions, and oversees implementation.

Scope

- Capable of devising and running cycle projects, taking them from concept to completion with minimal review or guidance. Strong track record of introducing significant improvements in CS systems.

Judgment

- Has accumulated sufficient experience to be consistently sought by peers, across teams, for advice. Improves existing professional standards for the team. Demonstrates curiosity, prioritizes work to serve the best interests of the team. Leaves documentation in a better place than they found it.

Engagement

Ownership / Manager of One

- Conceptualizes new work to be done, and executes the steps to complete it successfully. Independently explores areas in their work area that could use improvement.

Communication

- Attempts to unblock themselves but asks for help when needed. Communicates well in Basecamp check-ins, team calls, and within the team structure. Shares knowledge and acts as a resource for others. Communication happens reliably in the open, in Basecamp.

Flexibility

- Has strong points of view about leadership & technical approaches/solutions that are based in their own experience. Willing to express a viewpoint and opinion, and also able to disagree and commit.

Trust

- Work doesn't necessarily need to be reviewed, but general approach may be.

Coachability

Feedback

- Receives feedback with a positive attitude and applies corrective feedback well. Identifies areas for personal growth & development.

Senior Customer Support Manager (M2)

Skill

Mastery

- Defines and documents team service standards and requirements with approval from Head of Support.
- Maintains regular, productive communication with cohorts of 5+ Reps. Acts as a coach and a resource for reports for improving their customer service skills & comms style, technical troubleshooting, and project advancement.
- Oversees performance management for team of 5+ reps. Runs 3/6/12 performance reviews, recommends and administers PIPs, recommends and performs terminations, onboards & trains new hires, recommends promotions, and effectively manages job performance lags.
- Capable of shaping, pitching, and executing large-scale, far-reaching support projects that add value to team skills and tooling, team/company processes, and customer experience.

Tech and Tooling

- Recommends, implements, and uses tech and tooling that provide meaningful insights into team performance and processes.

Scope

- Capable of running long-term projects that substantially impact departments outside of Support. Manages critical work without oversight or approval.

Judgment

- Defines professional standards for the team. Prioritizes work to serve the best interests of the company.

Engagement

Ownership / Manager of One

- Conceptualizes projects that address gaps in the company's Support footprint. Able to devise & execute steps to form & complete the project, with guidance.

Communication

- Acts as a representative to other teams, weighing in on larger discussions and making recommendations. Rarely needs help unblocking themselves.

Flexibility

- Makes tactical & strategic recommendations based in experience & industry best practices, and can balance recommendations with the larger needs of the team and company.

Trust
- Work happens autonomously without check-ins or regular need for review.

Coachability

Feedback
- Can provide specific and constructive feedback on the work of others and to teammates. Reliably and judiciously incorporates feedback from leadership

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Head of Customer Support (M3)

Skill

Mastery
- Successfully supervises representatives that are answering customer inquiries over the phone and email. Through training and oversight, ensures customers have a positive, thorough, and consistent experience when contacting the company.
- Establishes and maintains effective mechanisms for gathering and measuring customer satisfaction, team efficiency, and team performance and sharing data in a useful way to internal stakeholders, executive leadership, and product development.
- Oversees performance management for CS Managers. Assists Managers with administering PIPs, performing terminations, onboarding & training new hires, recommending promotions, and managing performance lags. Able to act as ultimate authority for all team performance management and make accurate judgment calls that reflect the needs of the team & company.
- Approves and maintains oversight and controls over Support projects that add value to team skills and tooling, team/company processes, and customer experience.

Tech and Tooling

- Proficient in Support stack, and uses technology appropriately to provide meaningful insights and to make recommendations. Makes informed, thoughtful decisions about new tools & services and communicates those to team/executive team as needed.

Scope

- Oversees all team project work with support from Managers. Able to act as ultimate authority on project management and able to make accurate judgment calls about project direction and goals that reflect the needs of the team & company.

Judgment

- Has a wide range of focus and finds opportunities to make substantial improvements to the Support environment and how Support interfaces & influences other departments.

Engagement

Ownership / Manager of One

- Fully capable of leading the most complex projects from inception to completion, coordinating multiple teams or external contractors independently.

Communication

- Acts in a leadership capacity to the company, weighing in on larger discussions and making recommendations. Trusted advisor for everyone at the company in matters of Support and leadership.

Flexibility

- Strong points of view rooted in experience, expertise, and industry best practices. Expresses opinions confidently and effectively, and always considers the needs of the company when making recommendations.

Trust

- Trusted to run the entire CS team with support from M1-2 Managers. No day-to-day oversight, occasional strategic redirection from Sr. Leadership. Work happens autonomously with no need for status checks. Work is almost always free of mistakes.

Coachability

Feedback

- Sought by colleagues on and off the team for help with project work or decision-making and professional guidance.