Creating a Customer Service Career Path for Your Team

Introduction

Customer service representatives have the unique advantage of being at the forefront of all business activities, and as a result can move in a wide variety of directions.

But when you're building out a team or scaling your organization, how do you create career pathing that aligns with your agents' expectations and shows them the growth potential of joining your organization?

Whether agents hope to move to another department, grow into a specialized role, or climb the ranks to become a Chief Customer Officer, it's critical that you as their manager or team leader can work with them to identify their passions and give them the opportunities to hone the skill set they need to level up in their career.

In this guide, we're breaking down everything you need to know when it comes to hiring the right fit agents, the skills you should be looking for when leveling up an agent's role, and outlining three potential career path opportunities that you can offer your team.

Hiring the Right Fit Customer Service Agents

When you're looking for a job, it's who and what you know that helps you land the opportunity. But when you're hiring, it's who you hire and how you onboard, train, and recognize and reward your employees that sets your team and company up for success.

Learning how to hire the right people is an important skill and a competitive advantage for top-performing customer service teams.

After all, CX leaders say when they bring problem solvers on board, these employees bring their A games to help improve everything - from productivity to effectiveness when it comes to handling customer interactions - and deliver excellent customer experiences.

There's nothing better than the feeling of onboarding an all-star team member who immediately gets into action, handling negative customer feedback with ease and doing whatever it takes to meet your customers' needs, all while ensuring important KPIs keep improving.

It should come as no surprise then that hiring the right people to join your customer service team can lead to higher productivity, better customer experiences, and lower agent attrition. So what does it take to find the best candidate, position them for success on the job, and give them the runway they need to continue to grow their career in customer service?

We're breaking down the most important skills to look for when building (and leveling up) your customer service team, with three key career paths and descriptions of each role to give you insight into how to structure your team and prepare your agents to grow in their careers.

Skills to Look For When Building a Team (And Helping Them Level Up)

Companies that deliver exceptional customer service are more likely to increase their revenue, outperform their competitors, and cultivate brand loyalty, among achieving other key business outcomes.

Recognizing that customer service and customer satisfaction are both extremely important factors that influence overall business success, beloved brands like Disney and Zappos prioritize training all employees on the basics of customer-centricity, starting from day one on the job[1].

The four skills outlined below are some of the top most important skills to look for that will help your company succeed, and will give you insight into whether or not an agent is ready to take on the next step in their career[2].

#1: Strong communications and relationship-building skills

As the face and voice of your company's brand, every time you and your team members answer the phone, respond to emails or social media posts, or offer support over text or live chat, you have the chance to improve customer satisfaction (CSAT), lifetime value, and loyalty.

Strong communications and relationship-building skills are key for everyone in a customer-facing role, whether they're a brand new agent just getting started or a tenured team member years into their career.

Look for someone who offers clear and concise communication on the first go, can easily translate complex ideas for whomever they're speaking to, and excels at building rapport and finding common ground.

1. Source: https://www.forbes.com/sites/shephyken/2017/02/18/every-employee-needs-customer-service-training-and-heres-why/#312cc7c84f93

2. Source: https://www.indeed.com/career-advice/resumes-cover-letters/customer-service-skills

#2: Analytical thinking and data-driven decision making

Considering that companies that monitor their customer analytics see improvements in customer satisfaction and up to a 40% reduction in average handle time, according to McKinsey & Company's "Customer First" report, data is increasingly becoming a differentiator[3].

It's not enough for your business to just collect data around your customer experience; rather, what really matters is if your agents understand how all of the data related to their customer interactions contributes to bottom-line company goals and objectives.

If your team's goal is to decrease touchpoints when resolving customer inquiries, it's key your agents understand the value of **First Contact Resolution (FCR)** and work to refine their communication skills (see #1 above!) to ensure that they're accurately and effectively handling customer inquiries on the first interaction.

Other key customer satisfaction metrics CX professionals should have a solid understanding of include **CSAT, net promoter score (NPS), and customer effort score (CES)**.

#3: Being coachable and responsive to feedback

We all make mistakes, but it's how top-performers learn from their slip-ups and find ways to improve that sets them apart from the rest.

And one of the best ways to keep getting better on the job is through access to real-time customer feedback, at the individual employee level.

Companies that share ratings and comments with agents immediately following real interactions as part of their overall **customer service training programs** are more likely to see improvements in important KPIs, like issue-resolution rates and NPS.

For example, when retail giant **Williams-Sonoma** teamed up with Stella Connect by Medallia to measure its NPS on an ongoing basis and used this real-time customer feedback to coach employees, the company's NPS increased by 50%.

Keep in mind: It's important to achieve the right balance of praise to criticism. Experts recommend aiming for a praise-criticism ratio of 5:1—sharing five wins for every time you offer up constructive feedback.

When an agent is coachable and able to take constructive feedback to implement changes to their behavior or processes, it's a clear marker of someone who is eager to learn and improve.

3. Source: https://www.mckinsey.com/~/media/mckinsey/business%20functions/operations/our%20insights/how%20to%20capture%20what%20the%20customer%20wants/customer-first-personalizing-the-customer-care-journey.pdf

#4: Demonstrating empathy, kindness, and friendliness

Being caring and considerate is one of the top ways to provide excellent customer service, and top brands ranked by the American Customer Satisfaction Index— including Publix, Chick-fil-A, FedEx, and others—have earned this recognition specifically for the quality of their products and services and the top qualities of their staff[4].

Research shows that 64% of customers say that they would stop doing business with a brand after only two or three poor customer service interactions[5]. These rising expectations mean that brands need to double down on their support offerings and ensure consistent, on-brand, and effective customer service experiences in each interaction.

They also mean that empathy, kindness, and friendliness are more important attributes for agents than ever before. Even if an agent doesn't know the answer to a question or isn't able to resolve a customer inquiry in one conversation, showing empathy and understanding for the customer's issue is going to set them apart and ensure that your customer still comes away from the experience feeling appreciated by your business.

Building Career Paths that Scale with Your Organization

Now, these skills are great to pinpoint in the hiring process, but what about when it comes to actively coaching, developing, and promoting your agents?

These foundational skills are key because they will set your team up for success in each variation of their role as they grow.

If someone is a strong communicator, empathetic, and coachable, but they struggle to be more analytical, you likely won't want to level that person up into a role like Quality Assurance Manager that focuses on analysis and data. Similarly, if an agent is analytical and empathetic, but doesn't have the necessary communications skills in place, it may not make sense to outline a path for them that involves people management.

Creating an effective career path for your organization is challenging because, in truth, it will vary by the members of your team, the goals of your business unit, the customer communication channels you use, and the systems you already have in place today.

4. Source: https://www.forbes.com/sites/christopherelliott/2018/07/11/these-companies-have-the-best-customer-service-heres-why/#1d74a4b5b80a

5. Source: https://info.stellaconnect.com/ebook/customer-service-trends-for-2021

There are many avenues your team can take - both in customer service and outside of it. Below, we're outlining three different potential career paths you could implement for your team to help them grow in their careers with your organization.

Customer Service Career Path 1: Channel and Team Leaders

This path is the most traditional for most service organizations. With this path, there is a clear trajectory outlined for your agents from entry-level to channel management to eventual team leaders, with more responsibility and accountability in each phase of growth.

Customer Service Representative	This role is an entry-level position in your customer service organization. These agents are likely newer to the workforce or to the world of customer service. Serving as the face and the voice of the company across email, phone, live chat, and other channels, Customer Service Representatives or Customer Care Specialists are the front line for addressing customer inquiries, complaints, and more.
Senior Customer Service Representative	As a Senior Customer Service Representative, team members gain more responsibility beyond the day-to-day tasks of their service organization. They're held to higher goals, expected to handle more volume, and to be resources for more entry-level members of the team when questions arise.
Customer Service Manager	A Customer Service Manager is another step up in responsibility. In this role, team members will take a step back from the front-line work of responding to customer inquiries and becoming more involved in goal setting, KPI tracking, and performance management of their team.
Channel Lead	Channel Leads take on even more responsibility and ownership as the point person for their team regarding specific customer communication channels like email, phone, or live chat. These team members are their organization's go-to resource for issues, escalations, or other needs related to the channel they own.
Team Lead	The Team Lead is responsible for just that - leading their team. These team members will no longer be on the ground answering customer tickets, but instead will be managing their team of agents. Their responsibilities will include holding their agents accountable to organization KPIs, ensuring goals are being met and exceeded, and the ongoing development of their team through coaching and 1:1s.

Customer Service Career Path 2: Quality Assurance and Operations

If someone on your team has a knack for analytics, enjoys digging into data, and is passionate about helping agents improve their performance, a career in quality assurance (QA) could be a great path to outline for them. In these roles, they'll be working directly on your company's quality standards, which can include everything from tone to problem-solving ability, and are often specific to an individual company.

Quality Assurance Associate	This role is an entry-level position in your customer service organization, focused on quality assurance. In this role, team members would be tasked with reviewing agent interactions across channels, rating the interaction according to the business's quality standards, and providing any necessary feedback to the agent.
Senior Quality Assurance Specialist	A Senior Quality Assurance Specialist is a step up on your QA team, this role will continue to monitor customer and agent interactions, but will be able to operate more independently. This role will play a part in continuous evaluation of a team's quality standards to ensure policies are resonating with both agents and customers alike.
Quality Assurance Manager	Customer service Quality Assurance Managers are the key to ensuring that customer service representatives adhere to a set of quality standards and deliver a great customer experience. Depending on the structure of the organization, they may be responsible for evaluating agent performance and leading calibration sessions across their team.
Quality Assurance Team Lead	As a team lead in the QA department, these team members are tasked with establishing and iterating on quality standards, and working with team managers to ensure they are coaching their agents effectively. It's up to ensure quality scores continue to improve, and to work effectively across their organization to optimize toward set standards.

Customer Service Career Path 3: Customer Success Account Management

For many service organizations, customer support and customer success are closely intertwined, so much so that they are often interchangeable with one another. If your business operates with a Customer Success team, a career path leading to account management and ownership of client relationships is a viable option for team members looking to expand beyond a traditional customer service role.

Customer Success Specialist	This role is an entry-level position in your customer service organization, focused on building relationships between your brand and your customers. Rather than operating off a ticketing system, agents in this role are tied to specific accounts and tasked with ensuring customer inquiries and issues are resolved to prevent churn and keep customers engaged.
Implementation Manager	An Implementation Manager is responsible for ensuring that onboarding and product training for your customers is completed and that they are set up for success with your business. This role is more technically and typically seen in B2B or SaaS businesses where a customer is learning to use a new tool or software platform.
Customer Success Manager	Customer Success Managers are similar to Customer Service Managers in that their role is another step up in responsibility, but their focus remains on a set number of customer accounts. In this role, team members will take ownership of larger accounts and become more involved in goal setting, KPI tracking, and performance management for their customers. This role often also leads to people management and running a team of Customer Success Specialists.
Director of Customer Success	As the Director of Customer Success, this person is responsible for the overall operations of the Customer Success team. Their responsibilities include creating a customer service strategy, setting goals for their team at the organization and individual level, and managing business KPIs related to customer satisfaction and churn.

When it comes to compensation for these roles and their level of responsibilities, there are a variety of benchmarking resources you can use to ensure your salaries are competitive. **Payscale** is one of our favorites.

Why Investing in Coaching & Training is Key

There is no 'one size fits all' approach when it comes to creating career paths that resonate with your service team.

The paths outlined above are a great starting point, and may be a great fit for your team, your business, and your goals.

However, it's also important to always consider the perspective of your agents when outlining a career path for them.

One way to do this is to continuously have conversations with your agents around their career goals and aspirations. If you're finding that there are specific aspects of the day-to-day role that someone gravitates towards or excels at - like finance issues, technical troubleshooting, or collecting product feedback - it's your job as their manager to help them tap into these areas more.

This can come in many forms, like giving them the opportunity to focus on tickets related to these areas as they come in, or giving them exposure to other parts of your business to get a deeper understanding of the policies and practices in place for their customer communications.

At the same time, however, it's important to ensure they're keeping up with incoming customer inquiries and never losing sight of the bigger picture - providing excellent customer experiences.

This is where consistent communication, one-on-one dialogue, and coaching come into play and make a big impact.

Having a coaching plan in place for your agents ensures that your team is set up to be successful from day one, after onboarding and training is completed and they're interacting with your customers, all the way until they're able to level up and take on a new role with even more responsibility in your organization.
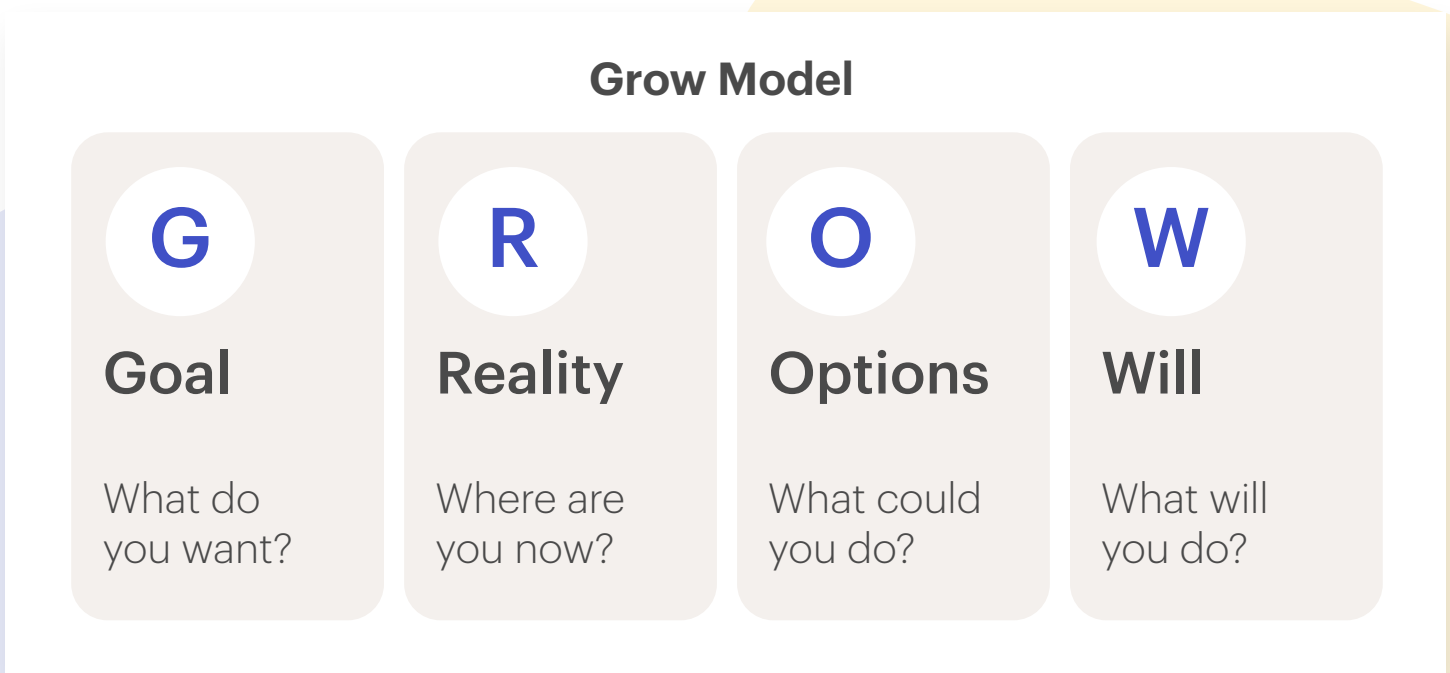
It's not enough to just have scheduled time with each team member if that time is unstructured, unplanned, and ultimately unproductive. When it comes to coaching your agents for success, you need to be strategic, methodical, and organized.

When it comes to service in particular, the **GROW model** is a perfect way to develop goals and action plans with your agents.

The GROW model of coaching was developed during the 1980s by three business coaches named Graham Alexander, Alan Fine, and Sir John Whitmore[6].

This model seeks to simplify the complexity of coaching (and being coached) by helping people clearly articulate their aspirations and plans for the future.

GROW stands for:

Grow Model

G	**R**	**O**	**W**
Goal	**Reality**	**Options**	**Will**
What do you want?	Where are you now?	What could you do?	What will you do?

This model puts the power back in the users hands, and gives them the tools to think about a complex issue or situation in four key steps.

When it comes to customer service coaching, the GROW model is an incredibly powerful framework to have at your disposal. All too often, agents are measured purely based on corporate-decided metrics.

With the GROW model, you can have meaningful conversations about what your agent wants to achieve, like a certain CSAT or QA score, and help them discover the things they need to do to make those goals a reality.

By focusing on agents' personal aspirations (not just high-level corporate objectives), you'll not only serve your brand's strategic interests, but also challenge and inspire your team.

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