

How to introduce support reps to your CX strategy

Get the conversation started with these tactical questions



Once an organization has decided on a customer experience strategy, executive leaders and mid-level managers are responsible for introducing the new process to their customer support representatives.

Serving on the front lines of support, reps need to know what's changing, why it matters, and how it's going to impact their operations. Most of that information should come in the form of a conversation, not just an announcement. And leadership is responsible for spearheading the discussion.

"If you have disengaged leaders, you will 100% have disengaged agents," explains [Ana Wiechers](#), director of advocacy customer trust at Zendesk.

To execute any CX strategy, execs and managers need to inform and inspire their support reps. They also need to ensure that reps are able to voice their concerns, share their insights, and get the support they need to succeed.

EXECUTIVES:

Prep managers to lead a shift in CX strategy

Executive leaders need to get managers excited about new strategic initiatives so that managers, in turn, can inspire their support reps.

To prepare managers for that role, it's important that execs share their thought process behind the strategy. The more visibility that managers have into the decision-making process, the better they'll be able to explain it to others.

"A very common issue that executive leaders run into is assuming that everything that lives in their brain – all the background, all of the conversations – is understood by everyone else," Ana says.

If your managers didn't sit through the same two days of off-site meetings, where you discussed the new CX strategy, they don't have all the context. Let them know what was talked about and how the strategy was crafted. Otherwise, they'll be able to dictate policy changes to support reps but not explain them.

"It can't just be the basic, 'here are the words I want you to say,'" explains Ana. "Because then they'll just regurgitate it, but they won't be bought in."

To help clarify the reasoning behind the plan, also explain how the new CX strategy ties into the broader company strategy. Once managers understand what the business is trying to accomplish with the new plan, they'll be able to pass that on to their teams.

"It's really important that your support team knows the full picture of the corporate strategy, and how they fit in, and how this new thing fits into that," Ana says.

Execs should also lead the first CX strategy kickoff meeting for the entire support department. If possible, have everyone – reps and managers – present when executives introduce the overarching objectives. Afterward, managers can talk more in-depth with their teams about what the changes will mean for them.

MANAGERS:

Ask support reps these 4 strategy questions

After the initial kickoff event, managers should host smaller team meetings, where they can explain to reps everything that the new CX strategy entails.

Support reps will likely have some thoughts and concerns about the changes, and it's the manager's job to tease those out. Try asking your agents these four questions to spark a productive conversation about the new initiative.



What problems might we run into?

Support agents know better than anyone what your company's customer service looks like in practice.

Leverage the institutional knowledge of your reps by asking them what roadblocks might arise with the new CX strategy. Another way to frame this question would be to ask your reps, "What didn't we think of?"

"People in support roles are inherently problem-solvers," Ana says. "So even if you don't give them a problem statement, they will be able to quickly see whether there's a blind spot."

Reps have day-to-day experience that can help them identify logistical issues with the strategy that might've been overlooked at the exec level. They can probably tell you if there are any current processes, technology solutions, or procedures that won't scale with the new initiative. Proactively address the issues they call out so that the shift in strategy goes smoothly.



How do you think customers will react?

Support reps tend to engage with customers the most out of anyone in the whole company. That level of familiarity can help them predict how a new CX strategy will be received by consumers, both positively and negatively.

"I think, depending on your industry, you can ask about customer sentiment, because your support team is often the very closest to the customers," Ana says. "It could be like, 'Hey, what are customers going to say? What tickets do you think you're going to get?'"

Use this conversation to talk through how your team can prepare for these potential reactions. For example, part of your strategy may be an increase in self-service options. Your reps can probably tell you whether your FAQ actually answers the most common questions they get from customers. Support agents also get to hear the most common complaints, and they can probably tell whether your new strategy appropriately addresses them.



How comfortable are you with these changes?

It's important to get an honest assessment of how your reps are feeling. Do they expect an easy transition, or are they a bit apprehensive about doing things differently?

Do a gut check to see how your reps are really feeling about the new direction. Ana recommends asking advocates to tell you how they're feeling "on a scale of one to five," with five being the most comfortable.

If the numbers are low, dig deeper into the reasons reps are feeling uncertain. Ask what's giving them the most pause and what would make them feel less reticent about it.

Even if the numbers are high on average, follow up with the outliers to see why they still have reservations. Make sure every member of your team is comfortable moving forward.



Given these changes, what would make your job easier?

To implement a new strategy, your support reps need your support. Gauge their comfort level, and identify their pain points, and then let them know how you can help.

If your team is large, delegate a handful of ambassadors to express the biggest concerns. Tell your reps to bring their issues to those delegates, who can filter problems and report them to you.

You probably won't have a fix for everything. Just be sure to explain why, and remember to follow up if and when the situation changes.

"Even if you get a problem you can't solve for because it's unknown, it's important to follow up on those things," Ana says. "Maybe reps tell you that refund flows will be a problem, but you don't have your new billing system in place yet. Explain what you're waiting on, and give context to why you're asking folks to make adjustments in the meantime."

Ana also stresses the importance of being prepared to respond to your reps' questions and concerns. These four strategy questions are meant to start a dialogue, so don't ask them unless you're ready for the conversation.

"You have to be really clear on what your goal is before you start asking questions," Ana cautions. "The last thing you want to do is ask a question you don't want the answer to."

Harness the power of your support reps

Your reps have a lot to share. To get engaged with a new CX strategy, ask them to weigh in with their own thoughts, predictions, and concerns. The more invested they get, the more valuable insights they'll be able to share.

"The thing you have to understand about support reps is that they are, hands down, the closest to the product and the process," Ana says. "They know all the ins and outs."

