

# Product Support Skills Matrix

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The Product Support Skills Matrix is designed to help agents see where they are today and where they can grow next across the core skill areas: workflow, quality, product knowledge, escalation, mindset, communication, and projects. At a glance, the matrix outlines the key qualities and behaviors expected at each level, making it easier for agents to recognize current strengths and identify gaps.

Following the matrix, each core skill area is broken down in more detail to show how different dimensions progress over time. Agents and leads can also reference concrete “opportunities for growth” — specific behaviors and practices specialists can adopt to move toward the next level.

## CAREER LEVELS

<b>Junior</b>	Developing team member or contractor who is building foundational product knowledge, learning workflows, and adapting to team processes and culture.
<b>Intermediate</b>	Established specialist who demonstrates good decision-making, validates customer needs effectively, and confidently troubleshoots standard issues.
<b>Advanced</b>	High-performing agent who operates with excellent metrics and demonstrates deep product knowledge that connects customers to effective solutions.
<b>Senior</b>	Expert-level performer who balances multiple responsibilities, delivers exceptional quality, and serves as go-to resource for complex escalations.
<b>Lead</b>	Strategic team manager who sets team standards, drives department initiatives, and focuses on high-level goals while coaching others.

## THE MATRIX

# Core Skills Overview

Skill Area	Junior	Intermediate	Advanced	Senior	Lead
<b>Workflow</b>	Learning inbox with guidance. Building rhythm for accepting, replying, and closing. Hitting 80% of metric targets.	Established workflow. Consistently meets performance expectations and maintains steady inbox rhythm.	High maturity. Excellent metrics across intake, engagement, and resolution. Makes smart decisions. Shares effective processes.	Balances direct support with other responsibilities while maintaining excellent performance. Adjusts workload dynamically.	Focuses primarily on strategic work. Steps into direct support during high-volume periods. Provides managerial-level guidance.
<b>Quality</b>	Demonstrates empathy and kindness. Follows basic communication standards and internal processes.	Consistently validates and clarifies customer needs. Provides accurate, tailored responses with clear expectations.	Goes beyond baseline quality. Efficiently moves issues toward resolution and builds trust with customers.	Delivers exceptional quality that strengthens customer relationships and influences positive outcomes.	Sets standard. Coaches others on meaningful customer experiences that drive retention and satisfaction.
<b>Product Knowledge</b>	Basic understanding of core features. Knows where to find docs. Can navigate the platform and explain basic functionality.	Thorough understanding of features, limitations, and common use cases. Confidently troubleshoots standard issues. Stays current.	Advanced understanding of complex workflows, integrations, and specialty areas. Identifies creative solutions for limitations.	Deep product expertise across areas. Anticipates customer needs. Identifies improvement opportunities and contributes feedback.	Product authority who influences feature discussions and supplies roadmap feedback. Trains others. Creates documentation and resources.
<b>Escalation</b>	Knows when and how to ask for help. Brings issues to Slack channels with clear context and necessary details.	Consistently escalates with proper tagging and categorization. Recognizes patterns in similar issues before escalating.	Identifies trends across multiple interactions and communicates them proactively. Provides context and potential solutions.	Spots root causes behind recurring issues and collaborates with other teams. Becomes go-to for complex escalations.	Leads escalation strategy and trains others. Works cross-functionally to implement solutions that prevent future escalations.
<b>Mindset</b>	Maintains a positive attitude during onboarding. Shows willingness to learn. Takes responsibility for assigned cases.	Receives feedback well and implements suggestions. Embraces changes and new processes.	Brings interactions to lead for review. Processes feedback thoughtfully. Influences the team through a positive attitude.	Models exceptional growth mindset that lifts team performance. Seeks feedback beyond reviews. Drives adaptation initiatives.	Sets standards for growth mindset. Creates a feedback-rich environment. Anticipates change and leads adaptation.
<b>Communication</b>	Attends 1:1s and team meetings, listens actively. Discusses topics raised by their lead and asks good questions.	Actively participates in 1:1s and meetings. Brings questions and contributes meaningfully to discussions.	Takes initiative in 1:1s with a prepared agenda. Raises valuable discussion points in team meetings and helps answer peer questions.	Leads productive 1:1s with clear objectives and action items. Relied upon to present topics and facilitate discussions.	Conducts 1:1s focused on career development and goal-setting. Leads team meetings effectively across the organization.
<b>Projects</b>	N/A — Focus remains on mastering core support responsibilities.	N/A — Continued focus on developing core skills and consistency in direct support work.	Takes on small projects aligned with business objectives without impacting direct support performance or hours.	Leads projects that align with business objectives and connect with team goals. Support workload can be adjusted.	Coordinates strategic projects. Develops frameworks, mentors others, and drives cross-functional collaboration.

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# Core Skill Areas Breakdown

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Each skill area is broken down below, showing how dimensions progress over time and providing concrete opportunities for growth.

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## Workflow (Inbox Performance & Management)

### Progression dimensions

<b>Autonomy</b>	Learning workflows → Independent decision-making → Smart management → Multi-responsibility balance → Strategic intervention
<b>Performance</b>	Working toward targets → Consistently meeting expectations → Excellent metrics across all areas → Maintained excellence with competing priorities
<b>Decision-making</b>	Basic reply timing → Good conversation management → Strategic prioritization → Dynamic workload adjustment → Managerial-level guidance
<b>Team contribution</b>	Individual skill building → Personal consistency → Process sharing & optimization → Supporting team capacity → Leadership

### Opportunities for growth

- Track your daily metrics (response time, resolution rate, CSAT) and identify patterns
  - Develop a personal rhythm and/or schedule for checking and responding to new conversations throughout the day
  - Practice decision-making on conversation priority: which require immediate attention vs. which can wait
  - Work with your lead to understand what "good performance" looks like and set weekly improvement goals
  - Document your most effective processes and share techniques for inbox management with the team
  - Learn to adjust your inbox workload dynamically based on team needs and priorities
  - Develop expertise in recognizing when the team needs additional inbox support and stepping in strategically
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# Quality

## Progression dimensions

<b>Communication approach</b>	Basic empathy & standards → Consistent validation → Exceeding expectations → Relationship building → Setting team standards
<b>Customer impact</b>	Following processes → Tailored responses → Trust building → Journey influence → Driving retention & satisfaction
<b>Role &amp; influence</b>	Individual compliance → Reliable execution → Personal excellence → Team resource → Organizational leader
<b>Process involvement</b>	Following procedures → Consistent delivery → Enhancing experiences → Mentoring others → Improving systems

## Opportunities for growth

- Practice active listening — repeat back what customers say to confirm understanding
- Reference their specific school/account details in responses
- Review the QA rubric weekly and self-assess your interactions against each criteria
- Ask clarifying questions before providing solutions to ensure you understand the full context
- Look for ways to exceed customer expectations in each interaction (additional resources, proactive suggestions)
- Focus on resolution efficiency — aim to solve issues in fewer back-and-forth exchanges
- Lead quality review sessions and provide constructive feedback to teammates

# Product Knowledge

## Progression dimensions

<b>Depth</b>	Basic features → Thorough understanding & limitations → Complex workflows & integrations → Comprehensive expertise → Strategic product authority
<b>Problem-solving</b>	Resource navigation → Standard troubleshooting → Creative workarounds → Anticipating customer needs → Influencing product direction
<b>Knowledge sharing</b>	Personal competence → Staying current → Connecting features to goals → Training others → Creating organizational resources

## Opportunities for growth

- Dedicate 30 minutes weekly to exploring different areas of the platform hands-on
  - Create personal notes documenting feature limitations and common use cases you encounter
  - Follow relevant Slack channels and review each update thoroughly
  - Practice explaining features in simple terms without relying heavily on help docs
  - Start connecting customer requests to broader business outcomes and goals
  - Take ownership of becoming the team expert in 1-2 specific product areas
  - Lead product knowledge sessions and create training materials for the team
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# Escalation Practices

## Progression dimensions

<b>Approach</b>	Basic help requests → Effective escalation → Proactive communication → Strategic collaboration → Cross-functional leadership
<b>Pattern recognition</b>	Issue by issue basis → Similar issue patterns → Multi-interaction trends → Root cause identification → Systemic problem prevention
<b>Communication style</b>	Reactive questions → Proper categorization → Proactive reporting → Solution-oriented escalations → Strategic planning

## Opportunities for growth

- Practice writing clear, detailed escalation messages with all necessary context before posting
  - Learn proper Slack channel usage and tagging conventions for different issue types
  - Start tracking your escalations to identify when similar issues arise
  - When escalating, include potential solutions or workarounds you've already considered
  - Begin documenting patterns you notice across multiple customer interactions
  - Analyze recurring issues to identify underlying root causes rather than just symptoms
  - Lead cross-functional initiatives to address systemic issues that cause frequent escalations
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# Mindset

## Progression dimensions

<b>Attitude</b>	Personal positivity → Team morale support → Team influence through resilience → Performance-lifting leadership → Organizational culture setting
<b>Feedback approach</b>	Open acceptance → Actively seeking → Improvement-focused application → Coaching others → Creating feedback-rich environments
<b>Adaptability</b>	Adjusting with help → Embracing change → Helping others adapt → Driving change → Leading organizational transformation
<b>Influence scope</b>	Self → Peers → Team → Department → Organization

## Opportunities for growth

- Proactively ask for specific feedback on your interactions and areas for improvement
  - Practice implementing feedback suggestions and report back on your progress
  - Volunteer to try new tools or processes when they're introduced to the team
  - Share positive observations about teammates' work to contribute to team morale
  - Look for ways to stay positive and solution-focused during difficult or stressful periods
  - Begin coaching teammates on how to receive and implement feedback constructively
  - Design and lead team sessions focused on growth mindset and continuous improvement
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# Communication & Meetings

## Progression dimensions

<b>Participation level</b>	Attentive listening → Active contribution → Initiative-taking → Productive leadership → Strategic facilitation
<b>Preparation</b>	Reactive → Engaged → Prepared → Organized → Proactive
<b>Impact</b>	Personal benefit → Team contribution → Peer support → Team facilitation → Organizational influence
<b>Ownership</b>	Following lead → Contributing meaningfully → Raising valuable points → Leading discussions → Driving outcomes

## Opportunities for growth

- Come to 1:1s and team meetings with at least one thoughtful question prepared
  - Practice active listening by summarizing what others say before adding your own thoughts
  - Volunteer to share updates or insights during team meetings when appropriate
  - Prepare a brief agenda or talking points for your 1:1s with specific topics to discuss
  - Look for opportunities to help answer teammates' questions during meetings
  - Begin leading your 1:1s by setting clear objectives and desired outcomes for each session
  - Design 1:1 conversations focused on long-term career development and strategic goal-setting
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# Projects

## Progression dimensions

<b>Readiness</b>	Core mastery required → Continued skill development → Small project capability → Project leadership → Lead coordination
<b>Business alignment</b>	Individual competency → Consistency building → Business objective alignment → Goal-connected initiatives → Strategic business impact
<b>Workload management</b>	Support-only focus → No performance impact → Negotiated adjustments → Strategic coordination

## Opportunities for growth

- Volunteer for small improvement projects or process documentation initiatives aligned with team goals
- Demonstrate ability to maintain quality support metrics while taking on additional responsibilities
- Connect project outcomes to measurable business objectives and team performance improvements
- Practice project planning skills by breaking down initiatives into clear steps with timelines
- Lead cross-team projects that require coordination between Support, Product, and other departments
- Create project templates and frameworks that can be reused by other team members

## NEXT STEPS

# Career Pathways

Whether you're looking to advance within support or move toward a new function, there are many behaviors and skills you can start practicing in your current role today. The key is being intentional — turning routine support tasks into opportunities to develop strategic thinking, build cross-functional relationships, and expand your impact.

## Operations & Project Management

*Focus on process improvement and project management*

- Analyze Intercom data to identify improvement opportunities — look for patterns in volume, resolution times, and escalation trends
- Participate in process documentation and workflow management — suggest workflows, update knowledge base, and notice trends with the AI agent
- Optimize team workflows and tools — suggest automation opportunities, repetitive tasks, and share efficiency tools
- Develop project management skills — plan and execute team initiatives with clear timelines, stakeholders, and success metrics
- Practice people leadership — train and mentor teammates, facilitate team discussions, and help resolve challenges
- Build cross-functional relationships by working with Product, Engineering, and other teams to drive operational improvements

## Customer Success

*Focus on proactive relationship building with users and business outcomes*

- Build customer relationships beyond issue resolution — follow up on resolutions, check in on overall experience, and understand creators' business goals
- Identify expansion and retention opportunities — notice when customers could benefit from additional features or need guidance to maximize value
- Track "customer health" indicators — notice usage patterns, engagement metrics, and satisfaction trends to predict customer needs
- Develop consultative communication skills — practice shifting from reactive problem-solving to proactive strategic guidance
- Understand the creator lifecycle — learn about onboarding, growth stages, and common success milestones
- Collaborate with CS team on complex accounts — volunteer to assist with high-touch customers or participate in renewal conversations

## Product

*Focus on deep product knowledge and customer advocacy skills*

- Aggregate and analyze customer feedback patterns — identify recurring feature requests, pain points, and use cases from support interactions
- Develop opportunities based on support data — create compelling cases for improvements that would reduce support burden or ease user issues
- Follow the product development processes — understand how features are planned, built, and released
- Consider business case development — connect customer problems to potential business impact and revenue opportunities
- Collaborate on product launches — support beta testing, documentation creation, and customer communication for new features

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This framework is a living document. As the team grows and our products evolve, so too will the expectations and opportunities at each level. Check in with your lead regularly to discuss your progress and next steps.

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