

## Slide 1 — Opening

*"Saurabh, thank you for the time today. Before we start, I want to say this — I have spent the last few days going through the case study, and the more I studied it, the more I recognized it. The details might be different, but the leadership challenge is the same. It's not about fixing a broken team. What is needed right now is the right discipline, governance and scalability to operate like a world class support engine.*

*What I will share today is not based on theory. It is exactly how I would run the operation in terms of the sequencing, the trade-offs, the things I would do on Day 1 vs Day 90, and the things I would consciously delay. So for the next 25 to 30 minutes, I will walk you through my strategic approach across 3 dimensions: OE, SL and WP."*

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## Slide 2 — Assumptions

*Let me start with assumptions because assumptions are where strategy either make or break. I have outlined 18 specific assumptions across budget, organizational alignment, team readiness and business context and the 3 specific area that I would focus on 1<sup>st</sup> are:*

**1. Budget alignment:** *Budget approval to hire 8 to 10 in-house agents. I want to be clear that this is not headcount expansion. The vendor is currently costing us quality, repeat contacts, and CSAT. In-sourcing is a reallocation and not headcount addition.*

**2. Engineering Partnership:** *I'm assuming engineering team will grant agents access to diagnostic tools such as traces, webhooks and logs. If agents don't have the access, they will keep escalating. Not because they lack skill, but because they lack visibility. Without this we can't bring the escalations down from 30% to 12% and that is the conversation I will have in 1<sup>st</sup> week.*

**3. Leadership support for structural change:** *Moving from a flat structure to L1/L2/L3 tiering requires change management partnership from leadership and HR. If the alignment is not there, the tier model fails before it starts.*

*Assumptions are not excuses; there are the conversations I will own in my 1<sup>st</sup> 30 days. If any assumption proves false, I will have contingency plans, which I'm happy to discuss and review"*

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### Slide 3 — Context

*"Let me frame the current reality quickly.*

*We have a 65-person team that grew from 25 people in the span of 18 months. That is 2.6x growth within 2 year's time frame. The team has been strong and that shows the quality of the people and the leadership that built it.*

*But fast growth without structural investment always creates the same pattern such as institutional knowledge concentrated in a few people, processes that worked at 25 but struggling at 65, and metrics that look acceptable on average but has huge variance.*

*SLA is at 88% average but it varies. 94% during business hours and 72% during off hours and weekends. **Merchants don't experience our average — they experience the moment they submit their ticket.***

*The good news is the foundations are solid and real. Strong payments knowledge, senior agents who are genuinely trusted by merchants, a team that has scaled without breaking. My job is not to rebuild — it is to architect the next phase. Structure for scale. Governance for predictability and a team that can absorb 2x merchant growth without 2x the chaos."*

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### Slide 4 — Philosophy

*"My approach is built on 4 strategic pillars that will oversee every decision I make in this role — because strategy without philosophy is just a list of actions.*

**1. Operational Rigor:** *Predictability is not a target — it is the operating rhythm. When governance is working, SLA consistency stops being something we chase and becomes something we maintain.*

**2. Proactive Operations:** *During a payment degradation event, merchants should hear from us before they flood us with tickets. The 300 tickets surge in 2 hours described in the case — that is not a **volume problem**, that is a **communication problem**. Trust is built at the highest leverage moment, which is when things go wrong.*

**3. Scalable Structure:** *A flat team works fantastically at 15 people. At 65, and heading to 130, flat structures create **bottlenecks, burnout, and invisible single points of failure**. **Structure is not bureaucracy — it is the architecture that makes scale possible.***

**4. Merchant-Centricity:** *An enterprise merchant processing crores of transactions daily and a startup that went live last week have fundamentally different support needs. One queue doesn't fit all. **We need to provide right support to the right merchant at the right time. Every time.***

*These pillars are not support-specific principles. It is not about working harder, its about working smarter through systems, accountability and empowerment.*

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## **Slide 5 — Leadership**

*"Before go into execution, let me go through my leadership philosophy, because at this level, my leverage is not in doing it, it is enabling others to do.*

*At **PayPal**, I inherited a team where most decisions escalated to me. Within **6 months** I had pushed decision rights down to my directs, reduced my own involvement in day-to-day operations by more than half, and the team's output and satisfaction both improved. That is not a **coincidence** — that is what happens when people are **given real authority**, not just **responsibility**.*

*In this role: my Sr Manager owns the operation. Shift accountability, vendor oversight, capacity planning — that is hers or his to run. My leads own escalation review, knowledge curation, and coaching. I set direction, remove blockers, and verify outcomes — not methods.*

***The test I use:** if I am unavailable for a week, does the operation run? If the answer is no, I have failed as a leader. My goal is to make myself the least critical person in the room for day-to-day execution — so I can focus on the things only I can do which is **strategy, stakeholder alignment, and building what comes next**.*

***Micromanagement kills ownership. And ownership is the only thing that scales."***

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## **Slide 6 — Area A**

*"Let's dive in into Area A which is about making performance predictable. Not good on average — consistent across every shift, every load condition, every product launch window.*

***SLA — the problem is not speed, it is the variance. A 22-point swing between peak hours and weekends is not an SLA problem, it is a **staffing and visibility problem**.***

- *I am putting a real-time command centre in place with alerts that fire at 80% threshold — we act before SLA is missed, not after.*
- *Shift optimisation moves 6 to 8 agents to evening and weekend coverage based on actual ticket volume data, not historical assumptions. We staff to demand and not for convenience.*

***Quality** — today quality is measured after the fact. I want it to predict **CSAT** and **FCR** before they degrade.*

- *Mandatory ticket categorisation at creation.*
- *A response quality rubric that defines what good looks like — accuracy, empathy, resolution confirmation — not just speed.*
- *5 audits per agent per week with bi-weekly calibration sessions so quality feedback is consistent, not ad hoc.*

Quality is **upstream** of everything. **FCR, CSAT, escalations** — they are all **downstream** of response quality. **Invest here and we get compounding returns across every metric.**

**FCR** — 52% is the bottleneck. The path to 72% is 3 phases.

- **Months 1 to 3:** diagnostic tools deployed, knowledge base at 100% product coverage — it is at 60% today.
- **Months 4 to 6:** agents trained on payment traces, webhook logs, API debugging — the same access engineering has.
- **Months 7 to 12:** AI-assisted routing and predictive issue detection.

Every FCR point reduces repeat contacts, escalations, and engineering load. It's a force multiplier.

**Vendor** — this is the tough call, and I have thought about it carefully. A 12-point CSAT gap and double the repeat contacts is not a vendor performance problem — it is a structural problem. You can't train culture into a 3rd party at this level of criticality. My recommendation is phased in-sourcing.

- 3 months to give them 1 genuine chance with penalties attached.
- Months 4 to 6, hire 8 to 10 in-house L1 agents and transition 60% of volume internally.
- Month 6 onwards, retain 4 vendor agents for surge only.

This is cost-neutral — repeat contact reduction and improved retention offset the hiring cost. But more importantly, it gives us control over quality, training, and culture. As a Director, vendor decisions are build-versus-buy decisions with long-term consequences. I'm choosing to build."

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## Slide 7 — Area B

"Area B is about owning what we can control, communicating before we are asked, and shifting the team's definition of done.

**Escalations** — 30% going to engineering, but only half truly need it. The other 15% is agents escalating because they can't see what engineering sees, not because they don't know how to debug.

- The fix is a clear escalation matrix — criteria that are objective, not judgment calls — combined with giving agents the same diagnostic visibility as engineering. And then tracking escalation reason codes monthly so engineering and support are partners in closing the gaps. Reducing escalations from 30% to 12% frees roughly 150 to 200 hours of engineering capacity per month. That's half an engineer's time back to build product instead of debugging tickets. This is a business impact metric, not just a support metric.

**Incident Response** — the 300-ticket surge before an internal alert reached support tells us everything about the current model. Support is at the end of the information chain when it should be at the beginning.

- *I'm integrating with Success Rate Ops alerts so we know about incidents before merchants do.*
- *Auto-created war room within 5 minutes.*
- *Pre-built communication templates ready to customise, not create under pressure. The 1st message to merchants during an incident is the most important one — it should say we are aware, here is what we know, here is what we're doing, here is when you'll hear from us again. That message builds more trust than a perfect resolution two hours later.*

**Culture** — *tickets marked resolved when a response is sent, not when the merchant confirms the issue is fixed. That is a culture problem, not a process problem. Policy won't fix it — coaching, measurement, and recognition will.*

- *I'm redesigning the quality rubric to include resolution confirmation as a mandatory field. Automated 48-hour check-ins on complex issues. And I will personally recognise agents who follow up proactively in team meetings. What gets celebrated gets repeated.*

**Merchant Segmentation** — *2 large managed accounts have flagged support quality during renewal conversations. That's not a support issue, that's a revenue risk.*

- *Platinum tier for managed and enterprise: dedicated POC, <1hr P0, health score visibility for agents when they open the ticket — they can see immediately that this is a retention-sensitive account.*
- *Gold for growth merchants.*
- *Standard for self-serve with AI deflection. I'll pilot with the top 50 managed accounts first and validate impact on NPS before full rollout."*

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## Slide 8 — Area C

*"Area C is the one that compounds. Get structure and talent right and everything else becomes easier. Get it wrong and we are rebuilding constantly.*

**Team Structure** — *today, a password reset query and a complex API integration debugging case compete for the same agent's attention. That's inefficient and demoralising for both the agent and the merchant.*

- *L1 handles volume — 30 agents, 70% resolution target, self-service deflection.*
- *L2 handles complexity — 25 agents, product specialisation, segment focus.*
- *L3 handles the hardest cases and owns knowledge — 10 specialists, enterprise support, incident management, engineering liaison. Tiering does 3 things simultaneously: **it creates efficiency, it creates career visibility, and it distributes the expertise that's currently concentrated in 4 to 5 people.** If one of those senior agents resigns tomorrow, I don't want to feel it. With 10 L3 specialists sharing that knowledge, I won't.*

**Talent** — *attrition at 24%, ramp time 3 to 4 months, undefined career paths. These are not 3 separate problems — they are 1 problem. Agents don't see a future here.*

- *The fix is a structured 4-week onboarding programme that cuts ramp to 6 to 8 weeks.*

- *A career ladder with transparent criteria — not 'when a role opens up' but 'when you hit these milestones.' And the most important retention play: formal mentorship tracks into SRE, Product, and Solutions Engineering.*

*Agents who see a future inside the company — not just in support — are far more committed than those who see a ceiling. I want support to be the most competitive function to join in this company because people know they will learn faster and have options. That is how you attract ambitious talent and keep them.*

**Knowledge** — *the 4 to 5 senior agents holding all complex case knowledge is a Day 1 risk for me. Before I change any process, I'm sitting with each of them, extracting their knowledge into playbooks and KB articles, and beginning rotation programmes. Their expertise needs to become the team's asset, not a personal one. And I will frame it correctly with them — they become more valuable as coaches and knowledge architects, not less.*

**Launch Readiness** — *12 products launched, 4 with structured support readiness. Agents learning about product behaviour from merchant complaints. That need to stop.*

- *T-30 protocol: product spec shared with support 30 days before launch, complexity assessment done.*
- *T-15: training delivered, KB articles published.*
- *T-7: shadow beta merchants, scenario validation.*
- *T-0: war room standby. And this becomes a gate — Product cannot launch without support readiness sign-off. That's a cultural shift from support reacting to launches, to support being a launch partner. I will position it to the Product team not as a blocker but as protection — poor support at launch damages NPS and merchant trust that takes months to rebuild."*

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## **Slide 9 & 10 — Roadmap & Milestones**

*"Let me quickly walk through implementation. I have build a 90 days plan and a roadmap..*

***Read out some pointers from the slide 9 & 10"***

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## **Slide 11 — Risks**

*Using SWOT methodology, we have covered the strengths, weaknesses, opportunity and now we will quickly go through the threats and how we will mitigate them.*

**The highest risk** *is tier introduction triggering attrition. If agents feel the restructure is being done to them rather than with them, we will lose the people we most need to keep. Mitigation: HR and compensation are partners before any announcement. Placement criteria are transparent. Every agent has a 90-day review window. Change lands when people feel included in designing it — not when it's presented to them as a decision already made.*

**Second highest risk:** *AI and tooling investment gets delayed. My response: the plan doesn't depend on automation to start. Escalation matrix, shift optimisation, ticket hygiene — these are*

*people and process changes that cost almost nothing and deliver immediate impact. Automation accelerates the plan. It doesn't unlock it.*

**Third:** *a key-person departure before knowledge is captured. This is a Day 1 priority regardless of everything else. I identify the knowledge holders in week 1 and begin structured extraction immediately. No single person should be the only source of truth on any product or flow by the end of month two.*

*Risk management is not pessimism. It's the discipline that separates leaders who plan from those who react."*

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## **Slide 12 — Close**

*"Let me close with this.*

*The team we have is genuinely good. Strong payments knowledge, merchants who trust our senior agents, and a function that has scaled without breaking. That's not nothing — that's a real foundation.*

*This is not about fixing a broken team—it's about elevating a good team to world-class. Building systems that scale. Creating a culture of ownership. Delivering merchant experiences that drive retention and growth.*

*That's my case. I'm ready for your questions."*

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