

New Lead

Plays for the situations a new support lead walks into

Free sample: 3 complete plays. From Draft First. Written by a customer success and support lead.

Welcome

You got the job. Maybe you were promoted from the queue you used to work. Maybe you were hired in from outside and you're meeting the team for the first time. Either way, there's a gap between "you're the lead now" and knowing what to actually do at 9:15 on a Tuesday when three people want a decision from you and the open count is pointing the wrong way.

This book doesn't follow a calendar. The job arrives as situations: a backlog that grows while everyone works flat out, the first escalation that lands on you with no owner, a teammate who wanted your job, a number your boss loves that you suspect is wrong, the first hard 1:1. Each chapter is one of those situations.

Each of the 25 plays starts with a situation you can recognize and gives you the move, the words to say, the rules for the judgment calls, a template, labelled starting defaults, the mistakes to watch for, a check step and a walk-away line. One made-up team runs through every play: Tallyfold, a nine-person support team at an invoicing software company, and Marisol, its newly promoted lead. You'll see her get things wrong and correct them.

This free sample has three complete plays: the first 1:1 question set, writing decision boundaries so everything stops landing on your desk, and stopping a backlog from growing. They're exactly as they appear in the full book.

The full playbook has 25 plays

Chapter 1. When the team is sizing you up

1. Your first team message, 2. Leading former peers, 3. Same questions in every first 1:1

Chapter 2. When the numbers don't add up

4. Freeze the baseline, 5. The metric your boss loves, 6. Work the queue yourself, 7. Find the top five drivers

Chapter 3. When the backlog is on fire

8. Stop the backlog growing first, 9. Batch the top driver, 10. Stale tickets with a way back, 11. Honest delay notice, 12. Headcount ask on one page

Chapter 4. When everything lands on you

13. The first escalation that lands on you, 14. Write the decision boundaries, 15. Ask partner teams where support lets them down, 16. Saying no to other teams, 17. Fix the thing the team keeps naming

Chapter 5. When quality and people need you

18. Score only what you can point to, 19. Calibration hour, 20. Coach from one ticket, 21. The ramp ladder for new hires, 22. The struggling performer, 23. Burnout signals

Chapter 6. When you have to report up

24. Your weekly update upward, 25. When your manager asks how it's going

The full New Lead playbook has all 25 plays, the Find your situation page, a situation map, a measurement worksheet, a templates index and a standing rules block for your AI assistant. Find it at draftfirstcs.com.

Same questions in every first 1:1

First 1:1s are one of your best data sources, and they're easy to waste by turning them into status meetings or chats that go wherever the conversation drifts. If you ask everyone the same short set of questions, you get answers you can compare. When four of six people name the same broken thing, you know where to start.

YOU'RE HERE IF You have first 1:1s coming up with each report and no fixed plan. Or you've done a few and can't say what you learned across them.

WHEN Book all first 1:1s at once so nobody is last by accident.

The move

1. Use the same six questions with everyone, in the same order. Tell them up front that you're asking everyone the same thing.
2. Take notes in a single sheet: one row per person, one column per question. Don't type during the conversation if it feels cold; write it up right after.
3. Don't promise fixes in the meeting. Say what you'll do with the answers and when they'll hear back.
4. After the last one, read across the columns and write the three patterns you see. These go into play 17 (quick win) and play 25 (the readout).
5. Within a week, send the team a short note with what you heard, in themes, with nothing traceable to one person.

Say it like this

WEAK FIRST 1:1 (DON'T RUN IT THIS WAY)

"So, how's it going? Anything you need from me? Great. What's the status on the billing backlog?" Twenty minutes later you have a status update and nothing you can compare across the team.

OPENING

I'm asking everyone the same six questions to spot patterns. I'll share themes, not named quotes. If you tell me something I'm required to pass on, I'll tell you before I do.

THE SIX QUESTIONS

1. What's the best part of this job for you right now? 2. What slows you down most on a normal day? 3. If you were me, what would you fix first? 4. What should I definitely not touch? 5. Who outside this team do you rely on most, and how's that going? 6. How do you like to get feedback, and how often?

WHEN SOMEONE ASKS YOU TO FIX SOMETHING ON THE SPOT

That's really useful and I've written it down. I'm not going to promise anything today, because I want to hear from everyone first. You'll hear back from me by [day], either way.

CLOSING

Last question from me: is there anything I should have asked and didn't?

Reader note (not part of the script): What you're required to pass on, and to whom, is set by your company's policy and HR. Know it before your first 1:1.

Decision rules

- If someone raises something that sounds like harassment, discrimination or a safety issue, stop the script. Thank them, don't investigate yourself, and follow your company's reporting policy that day.
- If one person gives you an hour of complaints, let them, then gently bring them back: "Of all of that, which one thing would you fix first?"
- If someone says nothing at all is wrong, ask question 4 again in a different way: "What's the thing new people always find confusing?"
- If you hear the same issue from more than half the team, treat it as a candidate for play 17, even if it isn't on your manager's list.

Watch for

- Changing the questions halfway through. You lose the ability to compare.
- Turning it into a status update on open tickets. You can get that from the tool.
- Taking the first loud answer as the answer. Wait for the sheet to fill.
- Leaving quiet people for last, when you're tired and rushing.

Template: First 1:1 answer sheet

Person	Best part	Slows down	Fix first	Don't touch	Relies on	Feedback style

Patterns after all 1:1s:

- 1.
- 2.
- 3.

Themes note to team sent on: [date]

The usual advice: Ask open questions and let the conversation flow.

What this play does instead: Ask everyone the same six questions in the same order, and tell them you're doing it, so you can read answers across the team.

Judgement call. Share 1:1 themes back to the team, or keep them private? Sharing builds trust but can expose the one person with a unique answer. My test: share a theme only if three or more people raised it, and say it in words none of them used.

Starting defaults: Six questions, 30 minutes, every 1:1 booked at once. Six fit in half an hour with time to listen.

Tallyfold case (made-up). Marisol changed question 4 halfway through her nine 1:1s because it felt awkward. Reading across the sheet, she couldn't compare the last four answers with the first five, so she asked those four the original question in a short follow-up. Seven of nine had named the refund form, which became the fix in play 17.

Walk away when: When every report has had a first 1:1 and the themes note has gone out, this play is done. Your regular 1:1s take over. Don't run the same six questions again until something big changes, like a reorg.

Check it worked: After the last 1:1: can you name three themes raised by three or more people? If not, your questions drifted; compare the sheet column by column.

Company policy first: If anything raised in a 1:1 touches harassment, discrimination, safety, health or a possible legal issue, follow your company's reporting policy and involve HR. Don't promise confidentiality you may not be able to keep.

Agent draft prompt (drafts only; follow your company's data policy)

Below are my notes from first 1:1s with my team, one block per person, answering the same six questions. Group the answers by question. For each question, list the themes that came up, how many people mentioned each, and a short paraphrase (not a quote) for each theme.

Then list the three strongest patterns across all questions.

Rules: never attach a name or role to a theme. Count each person once per theme. If a note is unclear, tag it [CONFIRM] rather than guess. This is a draft for me only. [paste notes, names replaced with letters]

PLAY 8 OF 25 | WHEN THE BACKLOG IS ON FIRE

Stop the backlog growing first

When you inherit a big backlog, the instinct is to attack the oldest tickets. But if more tickets arrive each day than the team closes, the pile grows while you dig, and everyone feels like they're failing. The first goal is simple: close at least as many as arrive, every day, and show that as one number everyone can see.

YOU'RE HERE IF Open tickets go up most days. The team is working hard and the number still climbs. Old tickets get attention while new ones age.

WHEN As soon as you've confirmed the open count (play 4) and it rises most days.

The move

1. Each morning, post in (new tickets, reopens, transfers in), regular out (closures excluding cleanup, plus transfers out) and cleanup, for the same queue and cut-off. Check: yesterday's open + in - regular out - cleanup = today's open.
2. Set one target for the team: regular out is at least in. Not a backlog target yet. Just stop the growth.
3. Triage by customer impact and response commitments, regardless of ticket age. Protect time for new replies and older work; assign an owner to each urgent case.

4. Remove what doesn't need a person: spam, duplicates, and auto-generated notices that don't need a reply. Follow any rules your company has about closing tickets.
5. When out has beaten in for a week or more, start working the old pile with plays 9 and 10.

Say it like this

THE DAILY POST (MADE-UP NUMBERS)

Yesterday: in 140 (12 were reopens), regular closures 132, plus 20 stale cleanups. Open went from 1,204 to 1,192. Regular closures were 8 short of arrivals, so we're not there yet. Thank you for a solid day.

TELLING THE TEAM THE PLAN

Our aim is to keep up with arrivals without rushing closures. Urgent cases and promised updates come first, whatever their age. We'll protect [time] for older work. I'll post the counts daily, with reopens and cleanup shown separately.

TO YOUR MANAGER

Before we can bring the backlog down, it has to stop growing. My first target is closing at least what arrives each day. I'll report it daily. Once that holds for five working days in a row, I'll set a target for reducing the old pile.

Decision rules

- If growth persists, check reopens, ticket mix, coverage and blocked cases. Use play 9 for a repeated issue; use play 12 for a measured capacity gap.
- If the numbers suddenly improve, check why before celebrating. Bulk closures or a tool change can fake progress.
- If someone suggests closing old tickets with no message, don't. Use play 10 so customers have a way back.
- If a single large customer dominates the backlog, tell their account owner today rather than waiting.

Watch for

- Starting with the oldest tickets while new ones pile up and age.
- Turning the daily number into individual leaderboards. It's a team number.
- Celebrating one good day. Look for a run of days.

Template: Daily backlog tracker

Date	In	Out (regular)	Cleanup	Open	Oldest days
Tue (made-up)	140 (incl. 12 reopens)	132	20	1,192	41

In = new tickets + reopens + transfers in.

Out (regular) = closures excluding cleanup + transfers out.

Check: yesterday's open + in - out (regular) - cleanup = today's open.

Target: out (regular) is at least in.

The usual advice: Clear the oldest tickets first.

What this play does instead: Stop the daily growth first: arrivals including reopens against closures excluding cleanup. Then work the tail.

Judgement call. Move agents off chat to work email, or ask for overtime? Moving people shifts the pain to another channel; overtime wears people down. My test: if one channel shows spare capacity in its own numbers, move people for two weeks; if none does, it's a play 12 conversation.

Starting defaults: Daily post at the same cut-off; move to weekly after five working days in a row with regular closures covering arrivals. Five days rules out one good day.

Tallyfold case (made-up). Marisol's daily post showed out beating in, but the open count still grew. Reopens weren't counted as arrivals, and 20 stale cleanups a day were sitting inside closures. Once she split regular closures from cleanup, the true picture was 8 a day short. It took two more weeks of batching (play 9) to get regular closures ahead.

Walk away when: Move to weekly when regular completions cover arrivals, including reopens, for five working days in a row without relying on cleanup, transfers out or temporary overtime. If growth continues, use play 9 for a repeated issue or play 12 to test capacity.

Check it worked: Every Friday: arrivals including reopens versus regular closures (excluding cleanup) for each working day. Five working days in a row with regular closures covering arrivals means the growth has stopped and you can move to the weekly count.

Agent draft prompt (drafts only; follow your company's data policy)

Here's the opening backlog and timestamped ticket events for the same queue and period: new tickets, reopens, closures, cleanup closures and transfers.
Draft: a table of date, in, out (regular), cleanup, open; the number of days regular out covered in; and a two-line daily post in this format: "Yesterday: in [], regular closures [], cleanup []. Open [before] to [after]."
Rules: use only the export. Count each event once. In = new + reopens + transfers in. Out (regular) = closures excluding cleanup + transfers out. Check: opening open + in - out (regular) - cleanup = closing open. Flag missing history [CONFIRM]. [paste export]

PLAY 14 OF 25 | WHEN EVERYTHING LANDS ON YOU

Write the decision boundaries

When everything comes to you, the team may well be able to decide. Check whether anyone has told them, in writing, what they're allowed to decide, and whether the last lead overruled them once too often. The fix is a short written list of what each role decides alone, held to for two weeks even when you'd have decided differently.

YOU'RE HERE IF Your chat is full of "can I...?" questions. Small refunds, replacements and exceptions wait for you. You're the bottleneck, and the team seems happy to let you be.

WHEN When your chat fills with "can I...?" questions, after you've mapped escalation paths (play 13).

The move

1. For one week, log every question that comes to you for a decision. Write what was asked and what you decided.
2. Sort the log into three groups: things the agent could decide alone, things a senior agent could decide, and things that genuinely need you or someone above you.
3. Write the boundaries as concrete limits: credits up to [amount], replacements for [cases], exceptions to [policy] when [condition]. Name what stays with you.
4. Add one firm rule: decide within the written limits; if the case is unclear, check first. Follow the escalation map for anything outside your authority.
5. Walk the team through it, then hold to it for two weeks. If someone makes a call you wouldn't have made but it's within the boundary, back it publicly and talk about it privately, if at all.

Say it like this

INTRODUCING THE BOUNDARIES

Too many decisions are waiting on me. Here's what you can decide without asking. I'll back calls within these written limits, even when I'd choose differently. If a case is unclear or outside the limits, check with the named owner first. Company policy still applies.

WHEN SOMEONE ASKS ANYWAY

That one's yours. It's within the credit limit, so go with your judgment. Tell me afterward how it went.

WHEN SOMEONE GETS IT WRONG WITHIN THE BOUNDARY

You made the call, and that's exactly what I asked for. Next time I'd lean toward the replacement rather than the credit, because [reason]. But the decision stands.

Decision rules

- If a decision has legal, contract, privacy or security consequences, it stays outside agent boundaries. Your company's policy decides who handles it.
- Back decisions within the limits. If you spot customer harm or a policy conflict, pause the action, explain why and follow the relevant company process.
- If a boundary is being used far more than you expected, check for a product or policy problem behind it before tightening it.
- If someone repeatedly goes beyond their boundary, address it privately, the same way each time, and check the boundary is clear.

Watch for

- Overriding early decisions. One public reversal undoes the whole play.
- Writing boundaries so vague ("use good judgment") that people still ask.
- Setting limits you're not actually authorized to delegate. Check with your manager first.

Template: Decision boundary worksheet

Role: [agent / senior agent / lead]

Decides alone:

- Credits up to [amount] per account per [period] e.g. made-up: one month's fee, once per quarter
- Replacements or resends when [condition]
- Policy exceptions when [condition]
- Closing tickets when [condition]

Decides, then tells the lead:

- []

Asks the lead first:

- []

Never decides (goes to the owner in the escalation map):

- Legal, contract, privacy, security

The rule: Within written limits, decide. If unclear, check first.

Review date: [two weeks from launch]

The usual advice: Empower the team to make decisions.

What this play does instead: Write which decisions are theirs, up to what limit, and which come to you, with the reason. Without written limits people keep checking with you.

Judgement call. Start a credit limit low and raise it, or start high? Low feels safe but keeps the approval queue. My test: set it at the level that covers the requests you approved unchanged in your first two weeks, and review after a month.

Starting defaults: Agent credit limit = the largest credit you approved unchanged in your first two weeks of logging; review after a month. It starts at what you'd have said yes to anyway.

Tallyfold case (made-up). On the second day of the boundaries, an agent gave a credit Marisol would have refused, and she reversed it in the team channel. The questions in her chat doubled the next day. She apologised to the agent privately, restored the credit, and said in the channel she'd back calls inside the limits. The questions fell back.

Walk away when: Stop treating it as a project when the decision requests in your log for a week fall to the ones you listed under "asks the lead first", and the two-week review is done. Revisit boundaries when policies, prices or roles change.

Check it worked: Two weeks after publishing: count questions to you that the boundaries already answer. Starting default: under three a week means it's working; more means the wording is unclear, not the people.

Company policy first: Check with your manager or finance that you're allowed to delegate the limits you set. Anything touching contracts, legal or privacy follows company policy, not this worksheet.

Agent draft prompt (drafts only; follow your company's data policy)

Below is a week of decision requests that came to me as support lead, with what I decided.
Sort them into: agent could decide alone | senior agent could decide | needs lead or above. Give a one-line reason for each.
Then draft decision boundaries for each role as concrete limits, using placeholders like [amount] where I haven't given a figure.
Rules: anything involving legal, contracts, privacy or security goes in "needs lead or above" and is marked "follow company policy". Use only what's in my log. Draft for me. [paste log]

Want the rest?

The full New Lead playbook has all 25 plays, the Find your situation page, a situation map, a measurement worksheet, a templates index and a standing rules block for your AI assistant. Find it at draftfirstcs.com.

Questions: hello@draftfirstcs.com. All sales are final, so read this sample first and decide if the style fits you.