



# From Culture Clash to Extra Cash:

Aligning Functions To Sell Through Service



Developing the 21st  
century workforce™

### “Why Can’t Sales, Service, and Fulfillment Just Work Together?”

In one form or another, that frustrated question occurs to everyone charged with increasing revenue through service. After all, expanding a customer relationship improves business performance and the prospect of continued employment. In our experience, the answer to that question has deep historical roots.

Mom and Pop Storekeepers, who owned and operated the small-town general store of yesteryear, knew that they alone were responsible for the complete customer relationship. They personally handled the sale, delivery, and service, all with loving care. They knew all their customers by name, and they kept a mental database of individual preferences. That way, they could make relevant and timely offers tailored to individual needs. Mom and Pop were the perfect Customer Relationship Management (CRM) model!

Today’s mega-corporations achieve cost efficiencies through specialization. The quality of the customer’s experience depends on different departments working intelligently together: Manufacturing, Sales, Marketing, Fulfillment, Service, and other functions outsourced to lowcost subcontractors far removed from direct customer contact. In many companies, this functional segmentation results in dysfunctional customer relationships.

Consider the woman who walks into a big-box retailer and orders a customized computer. To inquire about her order status, she must contact the manufacturer or third-party shipper. If she receives the wrong computer, she must call the manufacturer’s service group—yet another third party. So three different organizations and four functions manage this customer’s relationship. No wonder organizations struggle to retain valued customers, and customers struggle to remain loyal.

### What Happens When Metrics Collide

Compounding the problem, different functions measure their performance with different indicators. Sales measures itself by generating profitable revenue; marketing by generating leads and launching effective campaigns; fulfillment by cycle time and errors; service by productivity, cost control, and transactional customer satisfaction. While these indicators help each function articulate its own value, none of them measure the quality of the complete customer relationship.

In the end, colliding metrics not only damage the customer relationship, they also prevent the collaboration required to sell effectively through service. Service blames Sales for over-promising just to make the sale; Sales blames Fulfillment and Service for failures that impede sales. These deep-rooted conflicts, which produce costly rework and damage the customer experience, cannot be fixed by a tactical band-aid, or simply urging people in different groups to “get along.” Leaders must take a strategic view. Still accounting for distinct functional goals, leaders must promote a culture of collaboration. For the customer, the central payoff is a more satisfying long-term relationship with your organization. For you, the central payoff is increased revenue through increased customer receptivity to additional offers.

The following best practices, with relevant examples, distills our long-term experience, helping thousands of leaders worldwide to align functional metrics and break down the cultural and historical barriers to selling through service.

#### 1. Ask the Right Questions to Create a Strategic Plan.

A financial services company wanted to generate incremental revenue through customer contacts with their call center. After limited success in training customer service reps to offer additional products and services, leaders realized they needed a broader plan to break down organizational and process barriers. They focused their thinking by considering the following questions:

- Which products and services can be appropriately positioned for sale through service and fulfillment?
- How do we select, train, motivate, reinforce, and support service and fulfillment staff in this new direction?
- What needs to be modified to allow efficient processing of orders placed through the telephone service and fulfillment center?
- How can we ensure that the customer experience remains positive and builds loyalty, and that additional sales offers are not perceived as “hard sell?”
- What results can we realistically expect, and how do we measure them?

These leaders spent time and money to thoroughly explore these critical questions. Their answers led them to create new procedures and a workable implementation plan, which paid off as incremental call-center sales rose steadily.

## 2. Make Additional Offers Only to Receptive Customers.

A credit card company insisted that service reps offer an additional product or service at the end of each conversation with a customer. Reps were measured purely on the number of offers, rather than on the quality and relevance of the offer. As a result, reps offered additional services to already unhappy customers precisely when they were least receptive, creating few sales, but plenty of hostility and alienation.

Acknowledging their failure, leaders devised a new plan to train reps to be sensitive to customers’ feelings. Reps now offer additional products and services only after doing everything possible to satisfy the original customer need. This organization discovered that when the customer is satisfied and happy, they are much more receptive to a new offer.

## 3. Make Relevant Offers to Enhance the Customer Relationship.

In our experience, organizations able to position products and services relevant to individual customer needs are more likely to close the sale. This approach is a stark contrast to the “special of the day” pitched indiscriminately to every customer. When service reps are able to uncover a genuine customer need, they feel good about making an offer. When they cannot associate an offer with a benefit, they feel uncomfortable making an offer and, as a result, close far fewer sales. Further, we’ve observed relevant offers greatly reduce early cancellations and returns.

Customer Relationship Management (CRM) systems can flash suggestions on the screen to help service reps identify potential solutions for an individual customer. Still, computer software cannot pick up human nuances. Software is no substitute for good judgment based on training, experience, and selection of perceptive reps.

## 4. Make It Easy for Service Reps to Sell.

The excitement felt by a service rep when a customer says “yes” to the offer can quickly turn to frustration if order fulfillment processes have not been adjusted to make it easy to place the order. Time-consuming manual processes undermine the motivation to make the offer, especially when the rep is measured on efficiency and productivity. These metrics need to be relaxed in order to allow increased time for the rep to make sales.

## 5. Help Service Reps Make the Transition to Sales.

Functional systems aligned, the key point of contact becomes the service rep and the customer. The central leadership task becomes preparing and motivating reps to link additional products and services to genuine customer needs.

Position sales as another form of service. The very word “sales” can trigger negative reactions in service reps who initially may resist a new sales orientation. Service reps see themselves as customer advocates, sometimes even as protectors of the customer against the sinister advances of their own organizations! Leaders need to train service staff to make this attitudinal and behavioral leap.

Get middle management fully on board early. Service managers and supervisors often resist up-selling and cross-selling more adamantly than frontline staff, especially when they are used to being measured on their productivity. They may see any activity that increases time per customer contact as a threat to their efficiency numbers. It's up to executives to:

- Create new performance metrics.
- Get middle managers' agreement and support at the beginning.
- Give them thorough training in new up-selling and cross-selling skills.
- Teach them and expect them to coach the frontline service reps.

Link the offer to increases in customer satisfaction. Service staffs need to be able to link the offer of additional products and services to positive outcomes for the customer. Service reps are much more likely to embrace the new program when they recognize that customers have unsolved problems and unfulfilled needs, and their own offers of solutions lead to greater customer satisfaction.

Assure service reps that customer satisfaction is still the primary goal. Additional offers are secondary to customer satisfaction and loyalty. Reps must not damage a potentially long-term relationship by applying unwelcome high pressure on customers when making additional offers.

Provide a simple sales approach. Service reps' selling methods should involve only a few easy-to-remember, open-ended questions designed to identify and satisfy customer needs. Choose a simple behavioral approach to making offers and moving the customer forward. Implement new behaviors through a well-planned training program.

Offer support after training. Most reps will want to try new skills and succeed in making additional offers. Leaders want them to feel good about this new direction. So first, have them practice in a safe environment with gentle coaching. After initial training and before returning to their normal work station, have reps sit together for a week, with coaches available to deal with any questions and/or challenging situations. Back on the frontline, monitor performance and provide appropriate coaching as needed.

Offer recognition. Recognize and celebrate positive results achieved by trained reps who successfully offer additional products and services. Further coach any who struggle with the transition to help bring them up to speed.

Offer cash incentives. One of our clients, a home heating company, pays service techs a small bonus for securing a lead on a new heater. The offer itself goes like this: “Yes, sir, your water heater is fixed now. I notice, though, that your heating system is leaking slightly. May I set up an appointment for you to speak to one of our home heating specialists?” Revenue through this service channel continues to rise sharply. To keep customer and employee satisfaction high, the company plans the incentives and monitors calls, so reps don't inadvertently start pressuring the customer.

Revise performance metrics. Augment old measures of productivity and customer satisfaction with new measures of relationship expansion. These measures might include the ratio of relevant offers to the number of calls or the total number of referrals to the main sales group.

Consider alternatives for reps who cannot make the transition. Some service reps may be unable to adopt new sales behaviors. Help them find alternative roles matched to their preferences and capabilities. Keeping these employees in an unsuitable role can damage customer relationships, increase employee frustration and turnover, and undermine your sales-through-service initiative.

Include selling skills in recruitment criteria. Hiring people who already have the skills, aptitude, and attitude to sell in a service role will make the new direction easier. Include selling skills in job descriptions.

### The Ultimate Metric is the Bottom Line

Despite the discouraging attempts in many organizations, successful sales through service is no mirage. A tactical approach usually realizes fewer benefits and leaves the impression of “one more thing we tried.” Companies that achieve revenue gains take a strategic view and plan carefully. To start, they:

- Build new financial models as part of planning.
- Include all the new variables and determine how to allocate incremental revenues and costs.
- Allow for a learning curve, starting slow and gaining speed over time.
- Stress-test these models under different assumptions.

If expected returns exceed the investment hurdle rate under all probable scenarios, the project gets the green light.

On the human side, improving the customer’s experience just makes sense and should be expected of any employee. On the business side, a solid plan to generate additional sales through service and fulfillment functions should produce growing revenues and profits as the new initiative becomes fully integrated throughout the organization.

## About AchieveGlobal

In the 21<sup>st</sup> century, the level of human skills will determine organization success. AchieveGlobal provides exceptional development in interpersonal business skills, giving companies the workforce they need for business results. Located in over 40 countries, we offer multi-language, learning-based solutions—globally, regionally, and locally.

We understand the competition you face. Your success depends on people who have the skills to handle the challenges beyond the reach of technology. We're experts in developing these skills, and it's these skills that turn your strategies into business success in the 21<sup>st</sup> century.

These are things technology can't do. Think. Learn. Solve problems. Listen. Motivate. Explain. People with these skills have a bright future in the 21<sup>st</sup> century. AchieveGlobal prepares you for that world.



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