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Sales and Service Have To Know They're in the Same Boat

By Silvana Buljan, Smartworxx

How can sales and service work together to turn a contact center into a profit center? You could also ask: How can Tom and Jerry be friends?

The first thought you may have is that it is impossible to educate two completely different individuals with opposite objectives, used to fighting each other, to collaborate to make life easier. In the case of Tom and Jerry, you might be right. In the case of sales and service departments in an organization, there is hope!

If you take a closer look at both departments' *raison d'etre*, we can clearly distinguish among their objectives, operative procedures and customer orientation:

Sales has the objective to sell products and services to the customer, being obliged to top each month's sales performance. The sales departments are usually structured in geographical areas led by regional sales executives reporting to one sales director. The operative procedures are rather individual-based than team-oriented, because each sales representative has his or her own way of structuring daily work and visiting customers—even when the company has a standardized CRM sales tool. Salespeople fail if they're not able to sell to their customers. That's why a sales rep will always see the customer as a challenge to overcome, with the customer being "on the other side."

Service has the objective to provide the customer with solutions, independent of whether the company is selling goods or services, being obliged to ensure and improve customer satisfaction. The structure of a service department depends may be geographical (e.g. automotive OEMs giving support to their distribution network) or centralized (e.g. airlines, consumer goods manufacturers).

In both cases, procedures are defined to resolve customers' problems and/or give maintenance and usage support. Customer orientation is based on "being there to serve the customer."

So, how do you begin to make these two areas collaborate to fulfill a CRM strategy that clearly indicates that you want to improve your customer orientation, integrate customer knowledge, set standards in customer communication and be able to convert your customer relationships profitability?

Define your customer
You need to start with a companywide and encompassing definition of your customer that you implement in all areas with change management techniques. You can make departments (people) work together only if they are conscious about being in the same boat, each one individually contributing to the company's performance but with one shared commitment to customers.

Sales representatives will learn that:

- They do not fail if they do not sell—as long as they're able to give trust and time to the customers, they will sell twice in the long run. That's because the customer does not feel pressure to buy.
- They do not lose time when they enter customer visit reports into a CRM tool to share customer knowledge, and they, themselves, will be glad to have access to similar data when taking over from a colleague.
- They do not get fired when they share their knowledge of customers. That's because they're serving the overall CRM strategy, and people can never be replaced by a customer database.

Service employees will learn that:

- They are not the only ones in the organization serving the customer. Burn-out is high among service employees because they deal with customer problems on a daily basis and see their job as not sufficiently recognized within the organization.

- Sales is not selling "impossible" things to the customer just to reach sales figures, leaving the service reps to solve the customer's complaint. That's because of improved customer orientation during the sales visit.

- Giving solutions to the customer involves teamwork, within and outside of service. Knowledge about the product, the customer's profile and the contact history is the work of the whole organization.

Only if these mindset-change and CRM training activities are conducted is collaboration between departments possible. The second step is briefing the employees working in the customer contact center—whether attending customer inquiries or performing sales activities—on the new situation and trained them accordingly. Then the contact center can become a profit center, with the organization aware that the contact center needs to be seen as a whole, without separating it in different functions or department responsibilities: Cost—and income—is shared between sales and service.

How it works

On a recent client project, we had the task to elaborate an integration plan for the two contact centers of two different business lines within the same company. The first contact center is clearly dedicated to handling customer inbound contacts (inquiries and complaints). The second contact center is dedicated to the management of both, customer inbound contacts, as well as outbound contacts (sales activities). But the key differentiation factor is that one business line is selling a product, and the other business line is selling financing services for the product.

Our analysis has shown that for the most part, they differed in objectives, operative procedures and resource development; yet, they were using the same IT infrastructure and outsourcers. In addition to that, employees did not understand why the company wanted to integrate them into one organizational structure. The final integration plan comprised five major steps:

1. **Physical integration**, so they would work together closely to get to know each other better and to understand the work each one was doing

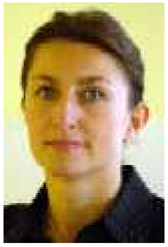
2. **Strategic communication** about the company's objective behind the integration: It's not about integrating to cut resources; it's about integrating for synergy, reducing costs for additional headcount (by training "hybrid agents") and increasing the competitive advantage by sharing customer knowledge and being more responsive to customers

3. **Alignment of operative procedures**—processes and business rules—to reach more efficient workflows, saving time and efforts

4. **Training**, so the improved procedures may be shown to everyone, with separate groups fulfilling different process functions

5. **Go-live and continuous follow-up**, because the best way to learn is "on-the-job" and with support of the colleagues, also fertilizing the common view on how things should be done and the common objective of serving the customer.

The integration plan has reached Step 2 in its 10-month timeline. But even in the early stages, the reactions from management are very positive.



Silvana Buljan has been working in CRM and eCRM Projects since 1997 as consultant, project manager and subject matter expert for such blue-chip clients as BMW Group, Lufthansa, Scandinavian Airlines, Continental Tires and Austrian Lottery Organization. Buljan's focus is in supporting her clients in making CRM work throughout the whole organization. She worked for PwC Consulting and Pixelpark before founding her own Consultancy in Madrid, Smartworxx, which specializes in CRM organizational change management, project management and training.

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