

# The Sales and Service Tightrope

A Balancing Act  
without a Net

BY DINA VANCE



*"We focus on quality and providing our customers with stellar service. Sales come from providing stellar service."*

## Just over a decade ago **Strategic Considerations**

most contact centers were primarily focused on service; the hot debate at the time was whether to add sales activities under the contact center umbrella. Now, just about every company selling a product that is convenient to buy over the phone or Internet is selling (and servicing) it in a contact center.

So the issue for contact centers isn't to sell or not to sell. The real issue is how to do it all—to sell and service most effectively and efficiently while keeping your customers and executives and shareholders happy. And so begins the debate as to exactly how to accomplish this acrobatic feat of skill and daring.

In this article, readers will be treated to an insider's view on what leading companies are doing to strike the right sales and service balance in their contact centers to achieve results—meeting both customer service goals (quality service and monitoring ratings) and sales goals (product sales and profitability targets).

## The Challenge

Remember going to the circus? The tightrope act was always one of the most breathtaking...and dangerous. One false move, one misstep and the performer would plunge 75 feet to a probable death...unless they had a safety net.

In contact centers there is no safety net. Each day, reps walk the tightrope, precariously balancing service and sales goals. As they cautiously step from the beginning of each call to its successful completion, reps are exercising sound judgment (decision making and communication skills) to delicately balance customer relationships in one hand and company business objectives in the other. If they exercise poor judgment, something will "fall"—a customer relationship is harmed or lost and/or a business profitability or productivity goal is not met.

To strike the right balance you need to start with the right strategy: a customer-centric strategy that integrates the sales and service function with a special focus on getting service "right" first.

According to Marquett Smith, director of Customer Service for Verizon Wireless, "We focus on quality and providing our customers with stellar service. Sales come from providing stellar service."

Verizon representatives do not see themselves as salespeople or telemarketers. Instead, their focus is on handling customers' service needs and, if appropriate, providing value-added solutions. "Let's say a customer calls in with a high phone bill," says Smith. "Our reps will first focus on helping that customer reduce his phone bill, and if moving to a higher rate plan that saves money over the long haul is the best solution for that particular customer, that's the solution we'll suggest."

A good understanding of customer expectations is absolutely vital in developing a strategy that will help you reach your business objectives. "You have to really challenge yourself to dig down and understand what is going on with your customer," explains Mike Vantrease, who led the Sanwa/United California Bank contact center since 1998 and now serves as Corporate Development and Training Manager for Bank of the West.

When customers called in to Sanwa/UCB, their expectation was that they could have all their banking needs—no matter what they were—handled through the direct banking group. And they placed a high value on receiving that type of service. "We took care of every single segment of the bank's customers, from the retail customer to the large corporate client with cash management services, and we supported all products and channels," Vantrease reflects. "The cus-

tomers viewed us as one overall service provider, not as one company with 10 separate business divisions. To meet our customer expectation required a fully integrated contact center."

Brad Cleveland, president and CEO of Incoming Call Management Institute, a worldwide organization dedicated to advancing the call center profession, emphasizes the importance of integrated sales and service functions. "The contact centers that are struggling most with balanc-

## Typical Customer Expectations

Organizations engaged in service and sales activities will be more successful if they have a good understanding of customer expectations. According to Brad Cleveland, president and CEO of Incoming Call Management Institute, the ability to meet these customer expectations can often be just as important as the product or service being offered.

1. Be accessible
2. Do it right the first time
3. Meet your commitments, keep your promises
4. Tell me what to expect
5. Be socially responsible and ethical
6. Follow up
7. Don't make me deal with poorly trained and ill-informed employees
8. Do what I ask promptly
9. Be responsive to what I need and want
10. Treat me courteously

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ing sales and service are the ones that have artificially separated the two functions.”

Cleveland suggests that contact center executives ask themselves: “Do we have separate groups for sales and service? Do they report to different areas? Do they have different sets of objectives?” If they answer “yes” to any of these questions, Cleveland says, they need to begin to dismantle those divisions and integrate service and sales capabilities.

“You have to have the right strategic foundation,” Cleveland states. “Then when you look at your people, processes and technology – you’ll be able to make smart decisions.”

## Staffing Considerations

Vantrease relates: “I used to tease our folks that even if we had the old black phones with rotary dials and we had to hold the receiver to our ears all day long, we would still be very good at what we did. This is because we knew our business was all about the people (our managers and representatives) and the manner in which we took care of customers.”

People matter. But before you focus on the front line, make sure you have the right leaders in place. For example, when Vantrease was hired to run a contact center, he was selected, not for his knowledge in running a contact center, but for

his knowledge in building customer (and employee) relationships. He then selected a management team based on similar criteria.

In the book “First, Break All the Rules,” authors Marcus Buckingham and Curt Coffman lay out findings from their research with more than 80,000 managers in over 400 companies. What they found is that the greatest managers in the world seem to have little in common, with few exceptions: They do not hesitate to break virtually every rule held sacred by conventional wisdom. They do not believe that, with enough training, people can achieve anything they put their minds to. They do not try to help people overcome their weaknesses.

The book offers some good advice for contact center managers. “If you’re staffing a contact center that supports sales and service, you have to throw conventional wisdom out,” Vantrease warns. “You can’t take just take anybody and create the business you want to create. It doesn’t work that way. People have to possess certain talents.”

So what talents should they possess? It depends on if you’re looking for specialists, generalists, or a mix of both. Typically, a contact center will hire generalists to handle the majority of service inquiries. These folks have excellent customer service skills and they are particularly adept at identifying sales opportunities. They have an ear for it.

Verizon Wireless looks for representatives with strong customer service skills and good work ethics. “We’re not looking for telemarketers; we want people who are service professionals who are familiar with the contact center environment,” states Smith. “We don’t position this as a sales job. It’s all about quality service. And providing quality service means being able to provide our customers with value-added solutions.”

Vantrease agrees. “We’re looking for people who like the notion that they are responsible for serving customer needs and that cross-selling, up-selling or making a referral is part of taking care of the customer that creates a valuable relationship for everyone.”

In addition to hiring generalists, Vantrease’s team also hired specialists who were responsible for selling the bank’s products and services both inbound and outbound. “These people had another skill set. They were more ag-

## FOCUSED FEEDBACK COACHING

Representatives with good judgment skills know how to effectively balance quality and productivity goals on every call. Coaches can help reinforce and improve judgment skills by providing reps with focused feedback.

Focused feedback is specific, targeted feedback around one “pivotal” behavior that has the greatest impact on the outcome of the call. It’s based on the notion that, more often than not, coaches overwhelm their representatives with too many behaviors to change at once. Far more effective is coaching concentrated on only one specific, pivotal behavior that could make or break the call.

Here’s how it works. Let’s say the coach monitored a call where the representative missed a sales referral opportunity. A typical coaching response would be, “You missed the opportunity to sell the customer an additional service.” While this feedback seems specific, it does not connect the impact of the rep’s behavior to the outcome of the call or offer a better alternative.

Using the Focused Feedback™\* coaching model, the coach would focus on where the rep missed the opportunity or the pivotal behavior, saying “I’d like to share an idea that has helped others improve sales by building a product need based on clues customers offer in the conversation. The customer said their daughter is about to go away to school and that they didn’t want to drain their savings. When hearing this clue,

it suggests that the customer may need a school loan or a line of credit. By missing this, we were not able to offer the customer valuable choices.”

Then the coach offers very specific suggestions on how the rep can handle this situation more effectively, saying, “In the future, when you hear this clue, ask a question such as, ‘You mentioned that your daughter is going to college and you were concerned about draining your savings. May I share some alternatives that other parents have found helpful to fund their children’s education?’ By focusing on these types of clues, you’ll be better able to ask your needs-based question. Give it a try. I’ll check back with you tomorrow to see what questions you have.”

Through this process, the coach gains commitment from the employee to continue or alter their behavior in future interactions. Employees should be able to clearly and easily answer questions such as, “What behavior will you focus on to improve customer satisfaction? What’s the one behavior that you are going to do differently or better as a result of this conversation?” If reps can’t answer these questions, the coach knows that focused feedback was not provided.

\*Focused Feedback™ is the coaching model in Ulysses Learning’s CoachingMentor® learning system.

gressive, but just as passionate about building customer relationships.”

## Training Considerations

Once you have the right people on your team, you need to provide regular and ongoing training that develops and reinforces the type of customer experience you want in your contact center. The training has to be aligned with your objectives. If you want your reps to be able to provide outstanding service, build customer relationships and generate revenue, the training has to foot to those objectives.

Verizon Wireless follows a two-fold process. First, representatives go through a training program called “Stellar Service.” This program provides a 360-degree perspective of key service issues and helps put the total call into proper context. In this program reps learn how to maximize opportunities, not only in terms of sales, but also in terms of increasing first call resolution percentages by making sure that they address all the customer’s concerns or possible concerns.

The second part of Verizon Wireless’ training process is an informal, open forum where company telemarketing specialists visit with reps to share their tips and techniques for turning service into opportunities to provide additional solutions. Reps hear how others bridge the gap between customer needs and company services. They also learn how they can model these techniques on the job. Smith says, “These are subtle skills that can’t be taught using traditional methods in a classroom or out of a binder.”

Some companies have found simulation-based e-learning to be particularly useful in helping people learn the art of balancing customer service and sales goals. But because all simulation learning is not created equal, contact center executives need to be careful to select programs that have been researched and validated using thousands of real-life customer interactions. Without solid content, an organization runs the risk of getting simulation e-learning that might look good (featuring slick technology) but doesn’t achieve targeted performance results.

Plus, because adults learn best at the point of failure, the simulation-based program must feature expertly crafted e-learning simulations that develop targeted skills through realistic mistakes—or “potholes”—carefully built

into the skill practice. This provides learning that’s more challenging and meaningful because participants have plenty of opportunities to pursue conversation paths that go “off track.” In the process of getting the conversation back “on track,” they learn more.

Some contact centers benefit from having their own training squads. According to Vantrease: “I don’t believe that you can rely upon corporate training to handle some of the more unique needs of the contact center. It’s a different environment. You have to provide training that helps the agent get truly involved in building relationships and demonstrating how this idea of needs-based selling really works, even in a contact center environment.”

From a global perspective, Cleveland, who works with contact centers in close to 30 different countries, notes that here and in and other parts of the world, the best companies are making a point to train all their lead agents on management principles that are unique to contact centers. Those folks, in turn, take those principles out to their teams and share tips and information that not only help reps work more effectively with customers but do so in the unique environment of the contact center. These companies have found that when people are exposed to training that helps them understand their business better from a strategic standpoint, they feel more vested in the organization’s success, which leads directly to improved performance on the job.

## Coaching Considerations

“No matter how good the training is, it’s got to hit home when reps get back to the headset,” sums Vantrease. “Coaching is the most important part of training in my opinion.”

Without a doubt, coaching is an important success factor in helping representatives balance sales and service goals at the point of customer contact. Because it is truly an art, some organizations have found value in bringing in experts to help them develop sound coaching skills. “There is a tremendous amount of coaching that takes place on the floor here to ensure our quality and productivity targets are met,” notes Smith. “Because we believe in the power of coaching, we bring in experts on a regular basis who work with everyone—managers, supervisors, team leaders and lead representa-

tives who do peer coaching.”

The best organizations coach around the clock and provide a blend of different coaching experiences, such as side-by-side, one-on-one or team huddle sessions. While managers or supervisors play an important role in coaching, they shouldn’t be the only ones coaching reps. Everyone has a stake in coaching. Side-by-side peer coaching—teaming seasoned and/or skilled reps with newer reps or reps in need—is particularly effective. In these situations the reps feel more comfortable and less intimidated compared to how they generally feel when their boss is coaching them. (It’s important to note that this is typically not the supervisor’s fault, but rather a natural dynamic in many manager/subordinate relationships.)

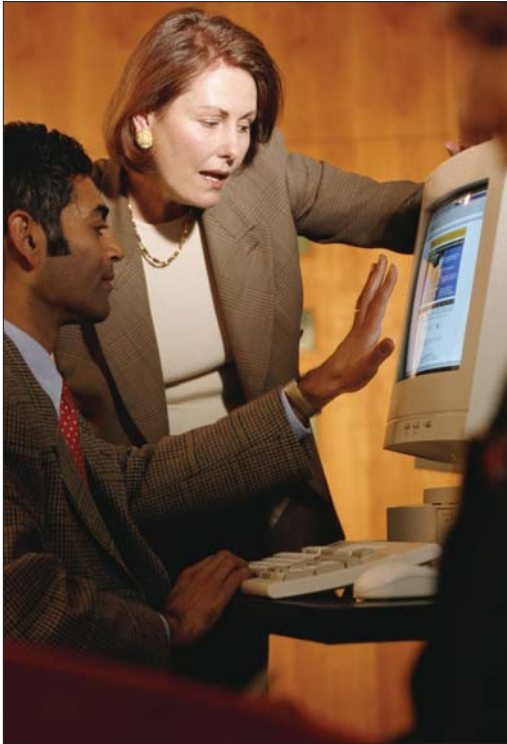
No matter what coaching method an organization uses, good coaching helps develop good judgment. And judgment is the key to striking the right balance between sales and service. Employees who can demonstrate sound judgment—decision making and advanced interaction skills expertly applied in the heat of a customer conversation—are the ones who will help your organization achieve your quality and productivity targets.

## Measurement Considerations

Measuring results consistently and accurately will advance your effort to balance service and sales. You have to focus on what’s going to get you to your desired destination and share that with everyone...every week, month and quarter. Never keep your progress to goal a secret.

“We tracked sales and referral results on a big white board that we updated every week. People loved seeing that,” says Vantrease. “We measured number of calls, number of sales conversions, number of referrals from calls handled in the service queue, and on the quality side, we measured customer satisfaction through a third-party vendor. We wanted to know how people were handling the key components of the call and then coached them accordingly to improve consistency and overall performance.”

Verizon Wireless measures key performance indicators that include number of calls per hour, average speed to answer, first call resolution and overall rep performance. To measure rep performance they use a transactional survey done by an outside firm each day and, us-



## Technology Considerations

By nature, a contact center is very technology intensive, so much so that it is easy to get swept up in the technology and sometimes forget that it is simply a tool (albeit a sometimes powerful one) to take care of customers better.

From a technology standpoint, perhaps one of the best strategies to help representatives strike the right balance between sales and service is to give them the capability of accessing and capturing client data at their desktops...and then updating that information in real time and sharing it across the enterprise. "Technology should provide customer detail across all delivery channels," states Cleveland. "An agent should be able to look at a screen and see that this caller was sent a fax last month on the 12th, there were two e-mail

ing this data, provide individualized coaching within the same week. As Smith explains, "We want reps to feel we're setting them up to succeed, not fail. If we wait until the end of the month to share their transactional scores that doesn't give them an opportunity to improve or reinforce exceptional performance."

exchanges on the 14th and five phone calls so far this year. It should also help agents determine what cross-sell and up-sell opportunities there may be based on the customer's inquiry and profile."

However, level-set with employees on the front-end to help them to understand that the technology will not always make

the right recommendation; sometimes it might miss the mark. "We were pushing a tremendous amount of information out to our agents—most of it very helpful," says Vantrease. "However, every once in a while an agent would get a screen prompt that was off track. For example, it might indicate that a customer was a good candidate for a home equity loan, but in reality they didn't even own a house." Technology is a tool.

## Future Considerations

Striking the balance between sales and service is not always easy. The struggle has been so great for some that they may feel compelled to abort the mission and go back to a service-only operation, pushing sales activities back out to the field. While there are challenges, the upside potential is far too great to take a step backward. Progress will come to those who are patient, persistent and doggedly pursue some of the recommendations above.

At the end of the day, there are more customer contacts per employee coming through contact centers than any other business channel. This means more opportunities to build and strengthen customer relationships. On this tightrope, contact centers can't afford to look down — they must keep looking ahead, balancing one step at a time to successfully reach their destination. CP

# Success Measures

*One thing we have plenty of in contact centers is metrics. However, some are more critical than others to help you determine if you're successfully balancing sales and service goals. According to ICMI, the following are "must-have" success measures:*

**CUSTOMER SATISFACTION/CUSTOMER LOYALTY:** *What is the overall quality of the customer experience?*

**EMPLOYEE SATISFACTION:** *How satisfied are employees with their jobs? Employees are most satisfied when they can offer the kinds of services that customers need and want. (And remember, there's a strong correlation between employee satisfaction and customer satisfaction.)*

**STRATEGIC VALUE:** *What is your center's contribution to other business units?*

**CALL QUALITY:** *What is the overall quality of a given call? Break out all the variables that make a quality contact—from agents providing correct responses and inputting data correctly to customers not having to verify or repeat requests and not feeling rushed—and then measure these variables.*

**SERVICE RESPONSE TIME:** *How long do customers have to wait for service?*  
*Adherence to schedule: Are your reps keeping to your staffing schedule? Are they available to serve your clients?*

**ACTUAL TO FORECASTED CALL LOAD:** *How close are you to your plan? Where can you make improvements?*

**About the Author...**

Dina Vance is a widely respected thought leader on developing and leading contact center staff and a pioneer in improving performance of financial services contact centers. Ms. Vance was responsible for the ground-level start up of two financial services contact centers before she moved into a consulting role where she also managed the call center division for an international consulting and training organization. She currently leads Ulysses' Contact Center Practice and serves on the executive boards of the Call Center Industry Advisory Council, American Bankers Association and Call Center Networking Group.

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