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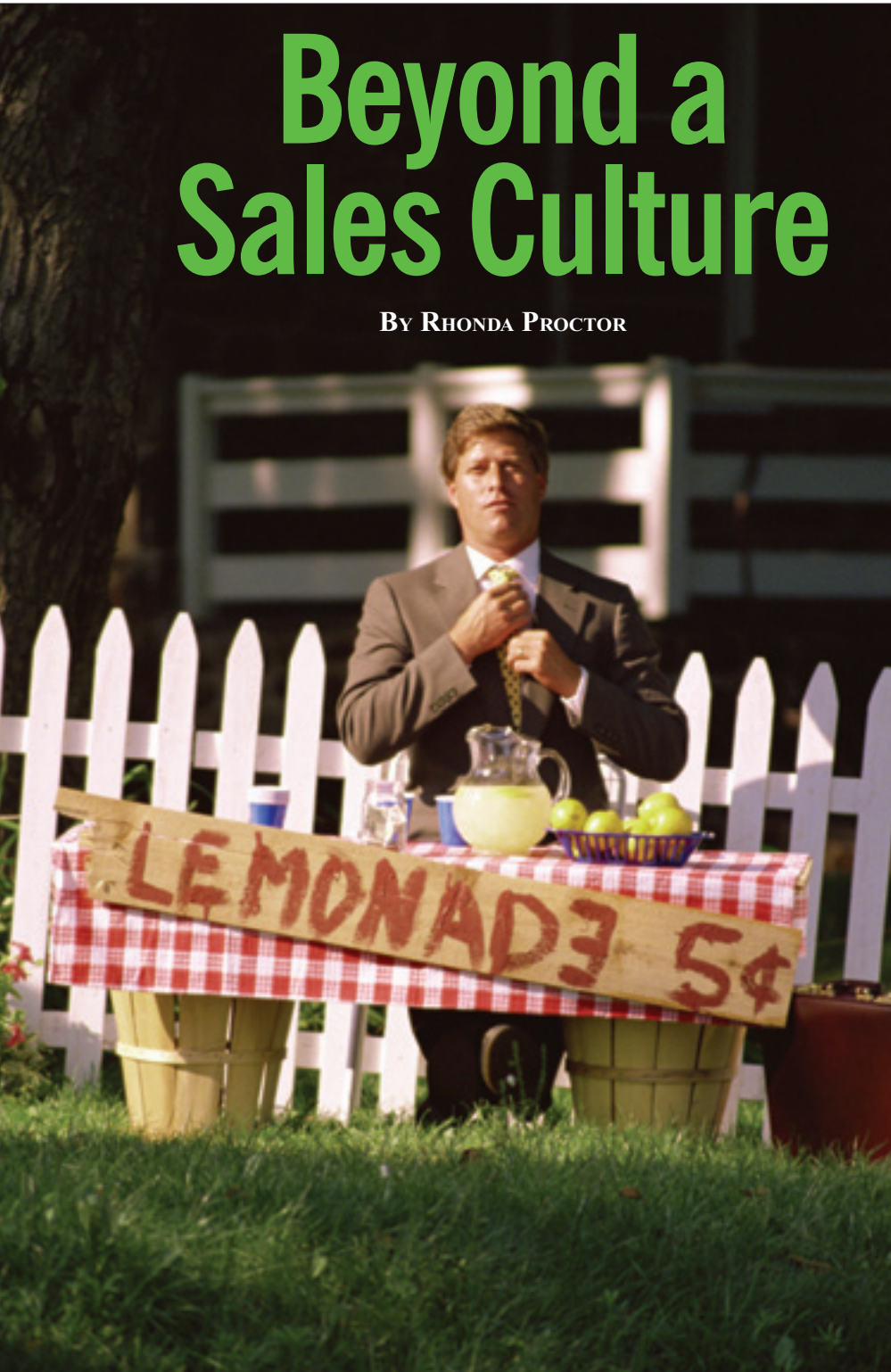
Essential information for today's contact center leaders



**Beyond a  
Sales Culture**

# Beyond a Sales Culture

BY RHONDA PROCTOR



**Over the years** many of us have led initiatives to expand our service vision to include effective, customer-focused sales strategies and tactics. It's time to take a hard look at our progress. To help accomplish this task I've invited

three industry thought leaders to join me in a roundtable discussion.

Our first expert is Dina Vance, senior vice president with Ulysses Learning. Dina pioneered sales culture initiatives in the financial services industry in the

mid-1980s and is a leader in helping contact centers blend service and sales cultures harmoniously to create productive environments for employees as well as customers and stockholders.

Joining Dina is Gerry Barber, senior vice president of Call Center Industry Advisory Council (CIAC), the global standards and certifying body for customer care and support center professionals. Gerry has been involved in the service to sales migration of contact centers since the early '80s and has direct experience managing contact centers across several industry verticals.

Finally, Carole Widmer's frontline insights will also be featured. Carole is vice president responsible for the e-Channel Services Learning Team at Harris. Carole has more than 25 years' experience in the financial services industry with more than 10 years working directly in the area of sales and service training.

*On a scale of 1 to 7, with 7 being "fully evolved," where do you find contact centers on the sales culture continuum, and why?*

**BARBER:** We all know that the migration from service to sales is not new and yet, as an industry, I believe we are only at a 4. First, many organizations are still trying to get service right. Second, many organizations are not willing to invest in what is really needed to build a proper sales culture. Third, while we have better technology today, we're expecting too much from it. We're failing to recognize that it's only an enabler. And fourth, many organizations have yet to build solid coaching and accountability into their programs.

**VANCE:** I agree with Gerry, and let me add another observation. The rating will vary by job title. Higher-level executives will rate the evolution higher than those closer to the frontline. This is troublesome because it shows a clear disconnect in the communication of organizational expectations, mission and goals from the top down and impacts how customers are handled at the point of contact.

I work with a large insurance contact center that for the past five years believed they were providing service with a sales focus. Their senior executives,

prior to our engagement, rated their center as a 6; the frontline rated themselves a 3! We conducted an extensive diagnostic and found that for every 10 calls monitored, only 1 included a sales or relationship-building component. And keep in mind you don't have to cross- or up-sell a product to build a relationship. It could be as simple as noticing information from the customer's profile or commenting on a conversation clue that could lead to future opportunities.

**WIDMER:** I think that experience mirrors reality in many contact centers because many representatives are rooted in service. "Sales" is still a bad word because of what it connotes. And yet the centers that are getting this right and moving along the continuum see service as being extreme sales and sales as being extreme service. We have to help folks blend sales and service in their minds, first, before we can see the impact on business results.

In our center, we're working on changing the "us/them" mentality between our sales and service teams. We've built an accountability system into our annual performance review process that holds everyone accountable to a mix of sales and service goals — from our frontline employees to the highest level in the organization.

### *What else is missing as we evolve along the continuum?*

**BARBER:** First, contact centers have to do a better job at building solid sales coaching and accountability into their programs. Second, they have to correct service deficiencies first because happy customers equal higher sales. Third, as Carole noted, they have to acquire a deep-rooted understanding that sales, if done properly, is the highest form of service. Fourth, they have to teach consultative sales techniques, helping reps look for clues as to what the customer might really need.

**VANCE:** Correct. We need to look for clues and meet the customer where they are "in the moment." If we interpret this from a rep's perspective, it means being sensitive to customers' needs, listening to them for their readiness and moving the conversation based on the clues they give.

What's also missing is our reps' ability to further the relationship by making the

call a memorable experience so customers come back. People buy from people they remember in a positive way. And to Gerry's point, these types of conversations come about with a solid and consistent coaching process firmly in place.

### *Harris was just honored as a "Center of Excellence" by Purdue University. Carole, what's your center's secret?*

**WIDMER:** We focus on the customer experience and how it feels to customers and our employees. We don't focus on "up-selling" and "cross-selling." It's more subtle than that and requires greater judgment. We focus on relationship building through conversations that have a different "feel." In fact, that's what our coaching addresses. On our monitoring forms, coaches, as well employees, answer the question "Was the customer experience a...Wow, Neutral, Dissatisfied?" And that drives our coaching.

**VANCE:** The best centers are making the investment to develop their coaches. But many have learned this lesson the hard way. I just interviewed an executive who confessed the reason they're not achieving their frontline sales goals is because of a decision senior management made six years ago to cut all management development programs. This left managers unprepared to help their organization strike the right balance between sales and service and provide just-in-time feedback needed to develop people's service and sales skills overtime. They couldn't effectively coach performance on a daily basis.

**WIDMER:** Providing our coaches training has really made a difference at Harris. We used to coach performance using a fairly extensive checklist of seven or more items. That took a lot of time. And, often, the coaching wasn't done. Now, our typical coaching conversations take one minute or less and focus on one "make or break" behavior on the call that the rep either did really well or could improve.

Now people can tell you what they'll be working on or what they were commended on. Before, there was so much covered in the coaching conversation that they couldn't tell you. I really believe that until coaching becomes a num-

ber-one priority in our contact centers, we will not see our organizations evolve along the sales/service continuum.

**BARBER:** Amen! And we've got to do a better job at marrying our knowledge management systems and our customer relationship data to enable our representatives to more effectively serve customers so that sales can be more intuitive. Plus, we have to develop a constant and consistent communications plan throughout the contact center. We just can't run messages across a reader board or come up with catchy slogans and say we have a sales culture. It has to be a natural part of what we do.

**VANCE:** Absolutely! A big part of the communication plan must focus on reward and recognition. And this doesn't have to be overly complicated. I work with an executive who holds a Six Sigma Black Belt. What she and her team leaders found to be most effective was sending out weekly e-mails congratulating the team, giving out kudos and acknowledging something that went well that week. And if the week was a rough one, it was a message of encouragement. It takes her only five minutes to craft the communication.

### *Any parting words?*

**VANCE:** We discussed rep and coach development. I'd like to add that it's more important than ever that we give our people a chance to develop and test their coaching, sales and service skills in a safe environment. These skills are difficult to learn and we can't afford to use our customers as guinea pigs. The competition for their business is too tough.

**BARBER:** If we fail to take steps to prepare our center staff and coach them, it's simply sales malpractice! Again, here's where we can use technology more effectively. If we buy the right training tools, simulation-based e-learning being a good example, and provide the right type of training, especially for coaches, we'll make great progress.

**WIDMER:** I'd like to see us shift our focus away from a "service culture" or a "sales culture." Why not a "customer experience" culture?

**VANCE:** Then it doesn't matter if it's a sales or a service culture. What matters is that you seamlessly blend sales and service together to create the ultimate customer experience. CP

## The Ulysses Learning Story...

A Greek shipping magnate who was passionate about training, education and technology wanted to invest in and advance the future of corporate learning. So in 1995 he formed a new company – Ulysses Learning – and, in the spirit of the epic Greek poem, our own “odyssey” began.

The first stop on the journey was to select the best, most experienced senior executives to navigate our course and charge them with a unique mission to search industry wide to:

1. identify the areas of business that could benefit most from developing human performance through technology-enabled training and related services;
2. uncover the toughest barriers to improvement; and
3. assemble a world-class team of experts to develop the best combination of training solutions to achieve and sustain demonstrable performance results.

Thanks to Ulysses’ blue-chip team - top business professionals, thought leaders, and consultants; performance improvement and training experts; cognitive scientists; and industrial/organizational psychologists – we have accomplished this mission.

Our research identified contact centers as an opportune place to begin developing frontline judgment and customer interaction skills. These two critical elements, when developed effectively, improve service, sales and coaching performance and achieve higher levels of revenue and customer loyalty results.

To that end, we developed the *CallMentor*® Learning and Performance Improvement System - simulation-based e-Learning intelligently blended with facilitation, coaching and performance improvement consulting.

Today, *CallMentor* is the contact center industry’s most recognized training solution, winning 8 consecutive Product of the Year Awards, among other industry distinctions and honors.

Ulysses has grown to be an international learning and performance improvement company serving industry leaders committed to improving their sales, service and customer loyalty at all points of customer contact. And, as our “Ulysses” name implies, we continue our journey with our clients to seek and develop the best possible combination of performance improvement methods and processes that produce measurable results and sustain the test of time.



### Learn more...

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