



## Service to Sales! A Powerful Transition!

### **Question:**

*These days we are trying to lend support to our companies sales efforts and make a difference in the bottom line. I have been asked to consider how our Customer Service Center can contribute to increasing revenue. We have been encouraging our staff to recommend upgrading services during inbound calls. We are a large bank and are now offering products that are new to our customers and employees. Our managers are having a hard time selling this new concept to employees who were hired and trained to focus on service. We are not seeing the results we had hoped for. Most of our best Service Representatives just don't get sales! And as Vice President of Customer Service, I'm not sure I get it either.*

*What suggestions do you have?*

### **Carol:**

This is a great question and supports the trend to diversify products and services worldwide! This diversity introduces a challenge to convert service thinkers into sales successes.

We are seeing two conditions that cross all industries in the area of customer contact. First, we have applied technology in our centers that make us more efficient. We send from 10 to 80 % of our inbound calls to Voice Response for routine calls. Next we send from 10 to 45 % of our customers/prospects to the Internet. These are both positive steps, yet we are feeling the impact.

Our customers don't have to talk to us to get what they need generally and we see our call volume decrease. The general population, even our seniors in this country are more skilled with computers and the Internet. So we see a decrease in calls and find our service levels looking better all the time. Soon someone says, "You look overstaffed!" This could result in cost saving measures intending to be more profitable. If you do more with less, you could go home a hero!

But not so fast, how are your customers doing? Are the mailed promotional materials resulting in the purchase of new products and services? Or are your customers establishing a relationship with another bank? If we can't retain and expand the value we bring to our current customers, we will surely feel it in our financial results.

So lets take a step back and look at your opportunity! Consider a ***Service to Sales Program***. The concept of this program is to focus on your existing customers and establish or re-kindle relationships with them. Begin with a plan to schedule inbound service representatives to make outbound calls to "manage accounts". This means establishing relationships. This personal contact will result in the expansion of products for some customers.

While you are at it consider the same for front office and teller positions. Let's look at the benefit to the employees:

- This additional function adds variety to their workday. People who are on the phone are usually receptive to projects that get them off the phone.
- Staff members who usually have face-to-face contact may welcome the change of pace.
- The introduction of ways to increase their income will get the attention of service staff that depends on overtime as the sole method to increase that paycheck. My guess is you

have reduced overtime with your added efficiencies. So paychecks are back to normal. Employee spending is now impacted!

- Completing additional training is always a great benefit to add to resumes. So this can be a career development opportunity.

Training is key to the success of this program. We know some investment is required to get the results you want. The training can be interactive and deliver a powerful message. Sending a service-skilled staff to make an outbound sales call without the proper education and skill practice will be devastating to many.

Once you have developed your plan there are some key points you should include in your training/workshops.

1. This is not cold calling. This is customer relationship management.
2. Think both long and short term in building customer relationships
3. The first step is to ask questions to define customer needs. Customers will buy only when they perceive a need.
4. Tips to asking questions to determine that customer need that your products and services can satisfy.
5. Recognize the need to use good listening, questioning and interpersonal skills
6. Skills learned for phone calls can convert to successful face-to-face contacts. Get everyone involved
7. Recognize that upgrading can benefit the customer, the employee and the bank as well.
8. Listening for upgrade opportunities
9. How to identify buying signals
10. Know how to ask for and close the sale
11. Realize that not every potential sales call will result in a sale.
12. Tips and techniques to maintain control of a call, the customer's interest and close the sale.
13. Everyone cannot know everything about everything! Learn the best way to "hand off" and not lose the sale.
14. Learn how to set goals that will result in both sales and service success
15. Celebrate success and have fun.

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If you have a specific issue relating to customer contact centers or have a question you would like addressed, please send your question to [question@trostle.com](mailto:question@trostle.com). Sources (name and company) are not used in Q&A articles.

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