The authority on managing the customer contact center

Customer Service NEWSLETTER

Service Strategies

Let "change management" guide your center in the evolution from service to sales

The idea of transitioning from a 100 percent service-oriented customer service operation to one that handles a mix of service and sales or of inbound and outbound calls is one that many companies are considering. In general, they want to leverage the service contact to increase revenue, to add more value to the customer service center, and to make it more of a profit center and less of a cost center.

One problem, however, is that many companies attempt to make this shift without thinking in detail about how it will affect their operations and processes, their customer service employees, their metrics, and their customers. Even a small change can have a profound impact, and a poorly planned change can result in a service center that is less efficient in all respects, rather than more.

Change management, as its name suggests, is the discipline of defining, planning, and implementing change in an organization. It's particularly valuable in larger organizations where changes in one department can have a significant impact on the operations of other departments, but it can also be helpful in managing the change process even in smaller organizations. It involves creating a process for managing the change. Key steps usually include setting up a steering committee, defining the goals or objectives of the change, gaining stakeholder agreement on the changes, and aligning compensation and metrics to ensure the success of the change.

Build consensus to manage expectations

It's not likely to be easy, no matter what the size of your operation. Trevor Spunt, a senior consultant in the area of CRM strategy for IBM Business Consulting Services, says, "The decision to evolve from a cost to a profit center often requires the buy-in of marketing, sales, and IT, as well as customer service. And it's critical that all key stakeholders be involved in the decision-making in terms of

Are your customer service reps ready for change?

One thing that companies fail to consider when initiating change in their organizations, and particularly when the change involves a shift from service to sales or to a sales/service hybrid, is if their current reps have the skills that they need to succeed in the new environment.

"Skill sets that are most effective in driving sales are often not the same as those typically used in problem-solving," says Trevor Spunt, senior consultant, IBM Business Consulting Services. "A sales-oriented rep will be typically a little more aggressive, somebody who is goal-oriented and who can be independent and take initiative within the relatively narrow boundaries of the repetitive phone call. You don't want some wild card, but certainly they need to have a little fire in them to be successful," Spunt says.

"The service-oriented rep, on the other hand, will be more focused on customer satisfaction and problem solving," says Spunt. "You're looking for someone who has empathy, someone who can handle an irate customer when necessary, who has good listening skills, and who can be empowered to make decisions related to compensating customers in the context of problem solving."

What it comes down to, Spunt suggests, is how far along the continuum from service to sales you want your customer service operation to move. "If 80 percent of the rep's time is going to be spent on service-related issues, and during the course of that you are going to mention some promotional items with a soft-sell approach, then your existing reps certainly have the necessary skills for that," he says. "The further you push it toward 100 percent sales, however, the more likely you will need to hire reps with more sales-oriented skill sets."

both strategy and execution."

He adds: "To do otherwise creates a risk that these departments may, at best, fail to support the initiative, and at worst, sabotage your efforts to succeed. Once key stakeholders are identified, a committee from each of these stakeholder groups should be formed to oversee the change effort.

The key to a successful change effort from beginning to end is managing expectations "within the committee, within the customer service operation, and within the company as a whole — so it comes down to communication," says Spunt. And that involves both top-down communication about what changes are in store, as well as bottom-up communication from those who are going to be most affected by the change. "Those down in the trenches — your reps and frontline supervisors — might have insights that could identify potential pitfalls that can be avoided if you identify them early enough," Spunt says.

Questions that the steering committee or management should be asking, include: Is everyone clear as to what the plan is going forward? Are the people who have a stake in the plan — who are going to be measured by its success or failure — involved in the planning? Do you have everyone's buy-in? Does what you're asking them to do make sense to them, is it realistic? Are performance metrics and compensation tied into the new expectations?

Reexamining support processes

An important part of change management is an examination of the processes that are supporting the change and that are likely to be affected by a change. These may have their own inherent inefficiencies that need to be addressed in order to get the most out of your operational change.

"When you evaluate the efficiency and effectiveness of processes based on the activities that an agent needs to engage in to complete a customer transaction you may find that they have to go back and forth between screens or have to go through a complex set of activities to get something done," says Spunt. In some cases the rep may not be able to complete the transaction within the software itself, but may have to do some parts on paper and some parts on the computer."

The goal for a customer service center evolving toward sales should be to "make agents more efficient in handling the transactional activity associated with the call," says Spunt. "Providing reps with software that is easy to navigate and that allows them to access customer data quickly is a good first step in helping them to achieve this." In general, however, fewer screen views and fewer keystrokes is better. That will "free reps to focus more time on building relationships with their customer base."

But companies need to look at the process as whole — automated or not — and ask, "Is there a better way to do this?" Says Spunt, "They need to parse out the various steps in the process that the company requires the agent to move through in order to complete a transaction, and look at those steps, starting with the most time-consuming ones, and ask if there is a way to make them more efficient." Organizational interdependencies should be considered as well, he says.

"Half of the equation in evolving from a cost to a profit center is reducing costs," says Spunt. "Organizing customer information in a way that is easily accessible and intuitive enables the agent to be more efficient with his call time (which will become longer when a sales element is added to the call), thus reducing his wrap-up time. And the more efficient the process, the sooner the company will see benefits from any change."

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For more on managing the sales-to-service change, go to www.CustomerServiceGroup.com and click on Documents Plus. ■

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