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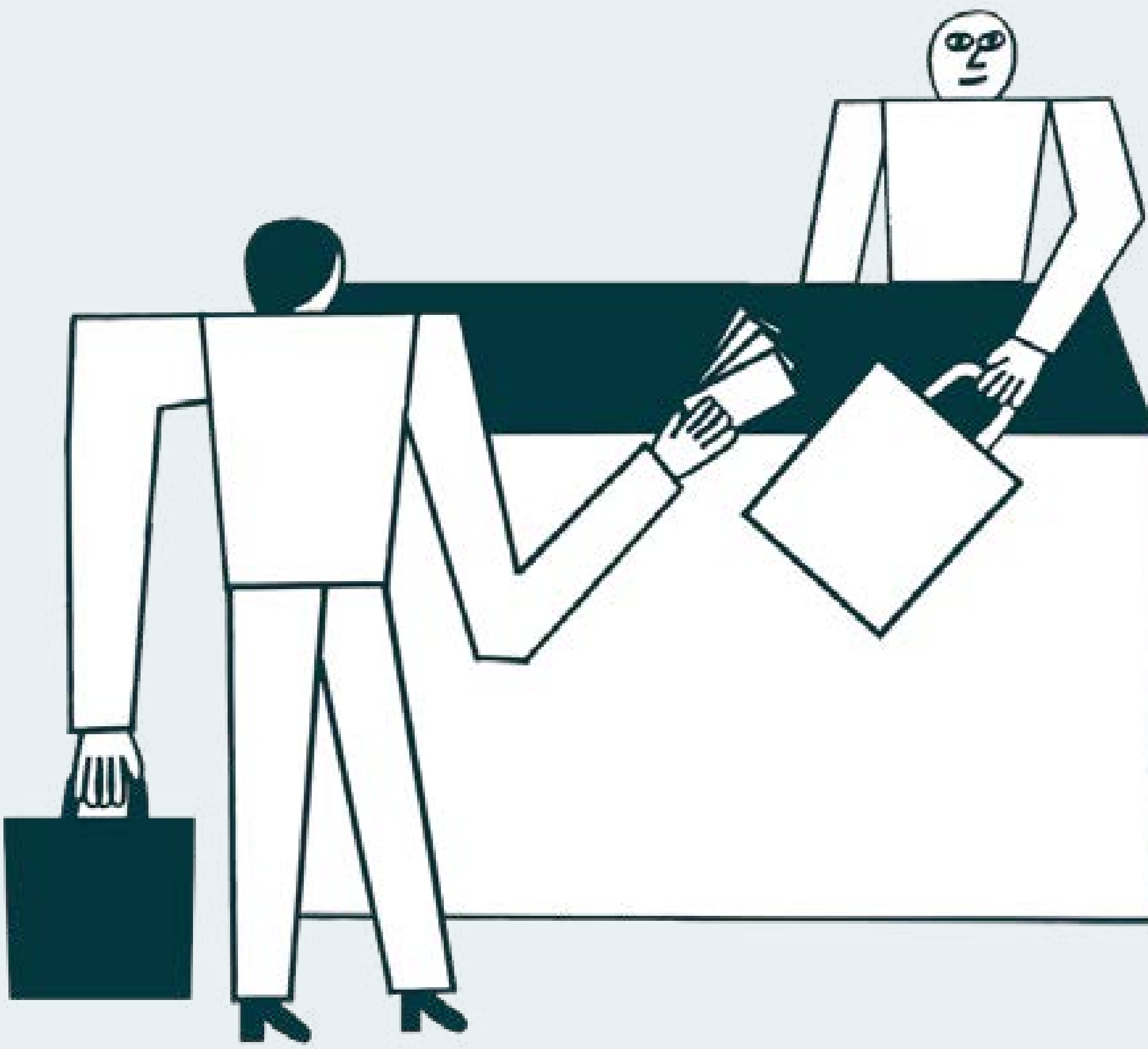
Improve Customer Experience KPIs with Sales and Support Alignment



Your customers interact with your business on a regular basis via your product, website, marketing materials and employees.

Customer experience is the collective result of each of these touchpoints, and is quickly becoming a company's largest competitive advantage - or disadvantage.

According to a recent study, customer experience will overtake both price and product as the most important company differentiator by 2020. What's more, 86% of buyers claim that they are willing to pay more in return for a better customer experience.

It's indisputable that the two teams that interact with customers the most are sales and support. Together, they can create amazing customer experiences with the power to influence key performance indicators and revenue drivers including:

- Acquisition
- Retention
- Growth
- Customer satisfaction

This guide will examine each of these KPIs to learn how sales and support can collaborate to create seamless and delightful experiences that benefit customers and companies alike.

Only 51% of surveyed sales organizations use a formal step-by-step selling process that guides sales professionals through a variety of sales interactions.

01 Acquisition

What do you think of when you hear the term “customer acquisition”? If you’re like most people, your mind probably goes straight to cold calling or landing pages: tactics typically used to discover and attract brand new leads.

However, what people tend to forget is that “customer acquisition” includes the ability to convert prospects already in contact with your business. In other words, acquisition only begins when a lead enters your pipeline.

To complete the acquisition process requires not only an amazing sales team and top notch sales platform, but also the ability to provide these prospects with quality experiences. So what are the strategies that sales and support can use to work better together to improve the customer experience and ultimately drive acquisition?

Zero in on trial-period tickets

Does your business offer a free-trial period for your product or service? If so, this is the perfect opportunity for support to make a major impact on acquisition rates.

Recent research from NewVoiceMedia estimates that US companies lose $41 billion a year due to poor customer service experiences, which is why it’s critical to provide your support team with a fast and easy way to identify tickets submitted by free-trial users with open opportunities.

Not only is this your chance to show prospects the type of world-class experience that they would receive as customers, but it also lets support reps know that now is the time to point out certain features or functionality that may only be available in the full, paid version of your offering.

Similarly, having information around tickets submitted by free-trial users available for reps to see in their CRM can make for a smoother purchasing process. Armed with the challenges a prospect had during his or her free trial, a sales rep can proactively address any concerns and elaborate on additional features that may be helpful once it’s time to buy.

Utilize a two-pronged sales process

If your product or service is a bit on the more technical side, it's not uncommon that sales reps will loop in the support team to help answer the more involved questions that arise during the sales process.

This a great strategy - not only does it allow your sales team to focus on what they do best, but it also introduces an unbiased third-party into the sales process to provide consultative support.

However, where it tends to fall apart is when a sales rep loses visibility into the conversations that support is having with his or her prospects. When this happens, the rep is basically left with two equally terrible options:

1. Waste time by tracking down support and requesting a play-by-play of prospect interactions
2. Muddle the customer experience either by missing out on these critical pieces of the sales process, or forcing the customer to play telephone between sales and support

Fortunately, integrating your sales platform and helpdesk solution can help mitigate this difficult situation by providing reps with insight into both open and closed support tickets: context, questions, conversations and even internal notes. Rather than going in blind or having to ask for a recap, reps can simply follow along with the discussion and access this information at any time during the sales process. should occur. For an extra smooth transition, take this a step further by defining how these handoffs should take place and where historical information and context should be stored.

McKinsey reports that, "Optimizing the customer experience typically achieve[s] revenue growth of 5-10% . . . in just two to three years."

02 Retention

Making new connections, moving prospects through the pipeline, signing contracts - everyone gets caught up in the celebration of closing a new customer. But did you know that increasing customer retention rates by just 5% boosts profits by as much as 95%?

Companies that are in it for the long haul must place as much emphasis on retention as they do acquisition. And just as support can help seal the deal for sales, so can sales aid support in their customer retention efforts.

Set support up for success

Although it may seem like a bit of an oxymoron, customer retention actually begins before acquisition. Promising a prospect something during the sales cycle that has little chance of happening post-acquisition is simply setting them up to churn, as does forcing a sale on a customer who is not a great fit for your product.

As senior lecturer at Harvard Business School and HBR author Jill Avery advises, "Think about the customers you want to serve up front and focus on acquiring the right customers. The goal is to bring in and keep customers who you can provide value to and who are valuable to you."

Companies often think they have a retention problem, when, in reality, the acquisition process is the issue. The first step to ensuring that your sales team is setting support up for success is to provide reps with comprehensive product training. This will help prevent them from accidentally over-promising features or functionality that your product simply can't deliver.

The next step is for reps to make sure that they fully understand prospects' needs and wants from the very beginning of the sales cycle. Putting the steps necessary in your sales process for reps to adequately evaluate pains and opportunities is one of the most effective ways for management to ensure that this analysis is consistently taking place.

Finally, empower your reps to say no. Every salesperson wants to believe that their company's product or service is everyone's silver bullet. But the reality is that it can't be the perfect fit for everybody - and that's okay. What's not okay is failing to set expectations for these folks. Long term, with the right sales data strategy in place, you should be able to pinpoint the most valuable types of leads for your business and adjust your prospecting strategies accordingly.

Tune into support conversations

Good sales reps serve as prospects' counselors and allies through the sometimes intimidating and often overwhelming purchase process. It makes sense that customers continue to look to their sales reps to provide guidance and advice after the sale has closed. In fact, it's actually a great sign, as it shows that your customer trusts you.

However, things can get a bit messy in the event that a customer, eager for answers, reaches out to both a rep and support. When this occurs, it's key for these two departments to align so as not to muddle the customer experience with conflicting information.

Such conflict can be mitigated by integrating your sales and helpdesk platforms so that reps can see exactly how support is responding to particular customer requests. This functionality also serves to alert sales of customers who are not reaching out to support, but should be. In these cases, reps can help drive retention by ensuring that customers are aware of the success resources at their disposal.

Sells's own Head of Support, Jo-Anne Rodriguez, adds, "It's important that if a rep notices that a customer

is having issues but isn't reaching out to support, that he or she makes a formal introduction, rather than just forwarding the customer's email along. This handoff is really key to providing a seamless customer experience, and helps transfer that customer's trust from the rep to the support specialist."

03 Growth

With fresh challenges constantly arising in the marketplace and frequent changes associated with headcount, infrastructure and requirements, simply “retaining” customers is not enough. Rather, businesses must seek to grow with existing clients and enhance the value of these relationships over time.

And before you think that customer growth should take a backseat to acquisition, note that existing clients spend 31% more than new customers. While revenue generating activities tend to fall within the sales wheelhouse, support can play a vital role in driving upsells and add-ons.

Perfectly timed upsells

Have you ever called to upsell a customer only to be greeted by an angry voice on the other end of the line? Your contact currently has an open ticket with support and has been trying to get her issue resolved for a week. How dare you try to upsell her! Click. Ouch.

Unfortunately, these are the types of situations that occur when sales and support teams have limited visibility into each other’s conversations – it’s nearly impossible to provide great customer experiences. What’s more, putting your sales team in a position where it must constantly ping support for information and updates about its customers zaps productivity for both teams.

Ensuring that key information like open and closed tickets is made visible to your reps in your sales platform enhances team agility as well as helps reps enter conversations with greater context.

Spot an open ticket? Now probably isn’t the time for an upsell. Did an issue just get resolved in an efficient and timely manner? Grow your relationship by giving the customer a quick call just to check in. Smooth sailing? Time to pitch that new add-on.

This level of insight also sets the stage for upselling through groundswell. For example, if your company offers a self-serve model, it’s possible that two departments from a single organization are unknowingly using your same product or service. However, sales may be in touch with only one of them.

Noting when one of these “self-servers” reaches out to support creates a perfect opportunity for sales to consolidate smaller, individual accounts into a larger corporate contract. Connecting these users under a single managed account gives sales a better understanding of the customer’s overall needs, creating a better customer experience and increasing the opportunity for long term growth.

More strategic add-ons

Approaching a customer for an upsell should never feel like taking a shot in the dark. You should know enough about their business to identify whether or not a particular product will provide real value.

As the line of defense against unmet customer needs, support can help sales by identifying areas of opportunity and the right product or service fit for specific clients. Even better, giving sales the ability to see customers' support tickets in real-time via their CRM provides context for product recommendations and opens the door for more consultative selling.

This level of integration also eliminates the types of issues that typically arise when an account is transitioned to a new rep. When reps have full insight into an account, including past support interactions at their fingertips, unfamiliarity with a customer's previous challenges and requirements is no longer an excuse for missed or mishandled upsell opportunities.

Finally, existing customers are 50% more likely to try new products than recently signed clients. Closer collaboration and insight into one another's customer conversations allows sales and support to recommend the right customers for beta programs or early releases. The exclusivity and engagement required by these programs deepens customer relationships and helps secure ongoing partnership.

04 Customer satisfaction

80% of customer service organizations use customer satisfaction (CSAT) as the main metric for measuring customer experience - not retention or growth. This makes sense when you realize that 13% of dissatisfied customers tell 15+ people about their poor experience.

Clearly, customer satisfaction has the ability to make or break your business - not to mention, satisfied customers are much easier to retain and upsell. Although CSAT may be the #1 metric for customer service teams, there are definitely ways that sales can help support create better customer experiences.

Provide seamless transitions

Sales reps are your customers' primary points of contact throughout the buying cycle, educating them about your offering, answering their after-hour questions and generally guiding the entire purchase process. If your reps are good at what they do, it only makes sense that your clients will get attached.

Shifting customers away from this trusted confidant as soon as a contract is signed can cause confusion and anxiety for them if not done correctly. Post-sale transition alignment between sales and support is key for maintaining customer satisfaction and starting support's relationship with the client off on the right foot.

Sales can facilitate this seamless transition by making sure that their customers know what they will be getting from their company in terms of people, not just product. Who will they communicate with on the support team? When and how should they submit a ticket? How soon can they expect a response?

Provide new customers with the answers to these types of questions upfront. We also suggest going so far as to introduce them to support via a quick phone call or email. Finally, the ability for support teams to see critical CRM data like account and deal information directly within their customer service platforms enables them to provide truly satisfying customer experiences straight out the gate.

While sales and support are two distinct departments, each with its own unique set of challenges and opportunities, this separation must never be felt by customers if CSAT is truly a priority for your organization.

Drive resource awareness

Has your customer success team created a support portal where customers can get answers to frequently asked questions? Do they conduct regular product webinars or have a host of "how-to" white papers? If so, don't let your customers stumble upon these resources in a time of need.

Leading companies see up to 7x the number of issue resolutions through self-service support portals compared to live support interactions. Making sure that prospects and customers are aware of the support resources at their disposal is critical to timely and effective issue resolution, which in turn impacts customer satisfaction.

This same philosophy applies for when a customer reaches back out to their sales rep with a support question. When replying with the answer to a customer inquiry, sales should simply state that while they're happy to provide assistance, the support team is available and may be able to answer questions more quickly and thoroughly. Offer up your support line number or email address (even if you know that they already have it), or even cc someone on the team and make an introduction.

Reminding clients that they have multiple avenues for help and directing them toward the team best equipped to handle their needs is sure to have positive long-term effects on your company's CSAT scores.

It takes two

Creating delightful customer experiences that drive acquisition, retention, growth and customer satisfaction requires sales and support to work together toward this common goal. Integrating your sales and support platforms is one of the fastest and easiest ways to ensure that these two teams are 100% aligned.

With our highly intuitive platforms and deeply integrated sales solution, Zendesk Sell can help you deliver incredible customer experiences.

To learn more about how Zendesk Sell can help your business deliver a seamless customer experience,

visit zendesk.com/sell
or call us at (855) 964-1010.

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