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Dismantling the Silos for Effortless CX

Aligning Sales, Marketing and Service

Introduction

Creating a positive customer experience is more important than ever. Not only does a great experience lead to an increased average transaction value of 140%, but 73% of consumers report that a good customer experience influences their loyalty to a brand.

Customers don't think of their experience with a brand by department. Instead, their perception of the company is a sum of their interactions with a brand—whether it's the sales process, onboarding, or troubleshooting. Customers expect personalized interactions, meaning that organizations need a full view of the customer journey that includes a detailed account of touchpoints, engagements, and interests. The summary of these interactions requires everyone in the organization to be on the same page and updating a customer record for a complete picture. Yet, for many organizations, teams still work in silos—sales doesn't talk to marketing, marketing doesn't talk to service, service doesn't talk to sales, and so on. This disconnect causes teams to struggle in alignment and initiatives, and not only does the company suffer, the customer suffers.

It is this lack of alignment that supports the customer belief that 54% of organizations need improvement. The low-quality, siloed experiences leave customers with lackluster impressions, and with customer experience more important than ever, it's imperative to close the experience gap. By aligning your organization and a cohesive strategy that dismantles the silos around departments, you unlock your ability to achieve a positive experience for current and future customers, further increasing your profitability and retention rates.

Where the Silos Started

What sounds simple on the surface has become a stumbling block in day-to-day business. Marketing opens doors, sales walks through the doors, customer service nurtures customers while they're part of the customer base, but something along this path broke, and each department began to compete against each other and break the interdepartmental conversations that had once occurred. However, departments depend on one another to be successful, making the relationships rife with challenges.

Current Reality

33% — **One third** of marketing and sales teams don't talk regularly.[1]

62% — **62% of consumers** say service knowledge and insight are critical to their interactions with a company.[2]

Only **35% of sales people** think marketing understands what they need.[3]

44% — **44% of customers** stopped working with a brand as a result of poor customer service.[4]
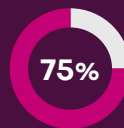
47% of marketing teams don't have a documented buyer's journey.

Yet...

70% of executives believe CX is their key differentiator, with more than[5] **two thirds of marketers** say their companies compete mostly on CX.[6]

75% — **75% of organizations** have increased their investment in CX technology.[7]

The Results

35% — **Less than 35% of customer-experience** initiatives are successful, in part because of lack of cohesiveness across the organization.[8]

81% — **81% of organizations** are stagnant in their customer-experience endeavors.[9]

[1] Upland, Benchmark Report, 2018. [2] American Express, Customer Service Barometer, 2017. [3] Upland, Benchmark Report, 2018. [4] Statista, Customer Service Statistics, 2016–2018.
[5] CustomerThink, Customer Experience Is the Key to B2B Differentiation, 2020. [6, 7] Gartner, Customer Experience Survey, 2018.
[8] Customer Think, An Inconvenient Truth: 93% of Customer Experience Initiatives Are Failing, 2018. [9] Forrester, US Customer Experience Index, 2019

This approach of unifying sales, marketing, and service teams fosters enhanced customer experiences and creates a cohesiveness across organizations, because at every touchpoint across the customer journey, there is a consistent message and cohesive response that do not alter, regardless of which department the customer interacts with.

> "Responsibility for the customer experience... sits in siloed business units. This means there's a lack of overall strategy, or indeed a sense of what the 'big picture' looks like."
>
> **— KPMG INTERNATIONAL**

The alignment of departments creates an elegant and effortless CX experience for customers, but it must be rehearsed and practiced.

> "Organizations with a 'cross-team approach' with the customer at the heart of all initiatives are nearly twice as likely to exceed their top business goal by a significant margin (20% vs. 11%)."
>
> **— ADOBE DIGITAL TRENDS REPORT, 2018**

Why does it matter?

In companies that invest in CX across people, process, and technology, the entire business thrives. Research shows that high-performing, experience-led organizations have:

1.6x
higher brand awareness

1.9x
higher average order value

1.7x
higher customer retention

1.9x
higher return on spend

1.6x
higher customer-satisfaction rates

Journey to Effortless CX

The customer journey is a complex web of interactions that weaves from marketing to sales to service and back. More than three quarters of the customers Gartner surveyed described their purchase as very complex or difficult, which is concerning. While it's essential for organizations to understand every level of the buyer's journey, customers should never feel as though they are stuck in an endless cycle. Viewing marketing, sales, and service from the customer's perspective, it doesn't matter where the experience is achieved for the customer, just that an effortless experience is achieved. Organizational teams cannot work separately to obtain a streamlined experience.

There is nothing more alienating than a disjointed customer hand-off and when teams work siloed. This process is jarring to customers—lacking the care and quality they expect from brands. Without a streamlined process from one team to the other, customers get lost, which means lost revenue.

While increasing revenue is more than enough reason to engage customers with an effortless journey, the results of inter-departmental alignment can also lead to other remarkable outcomes:

- Marketing leveraging sales and engagement data to effectively segment campaigns
- Sales teams taking advantage of customer-service data to identify new up-sell, cross-sell, or retention opportunities; and
- Customer service capturing information about customer interactions, which marketing and sales can then use to address customer needs or roadblocks

Through this powerful, aligned relationship, companies can turn dead or closed-lost opportunities into signed sales agreements. Not to mention, streamlining efforts and changing the ways these teams work together tends to retain customers at a rate of 99.9%. Organizations that align service and marketing programs around the customer report 55% greater annual increase in customer satisfaction rates than do organizations where service and marketing operate in silos.

What happens when marketing, sales, and service teams achieve are unified in their view of the customer journey and deliver seamless CX? Outcomes at companies where these teams collaborate closely include highly qualified leads, shorter sales cycles, and happier customers.

> **"Customer service is the new sales engine."**
>
> **—MICAH SOLOMON**
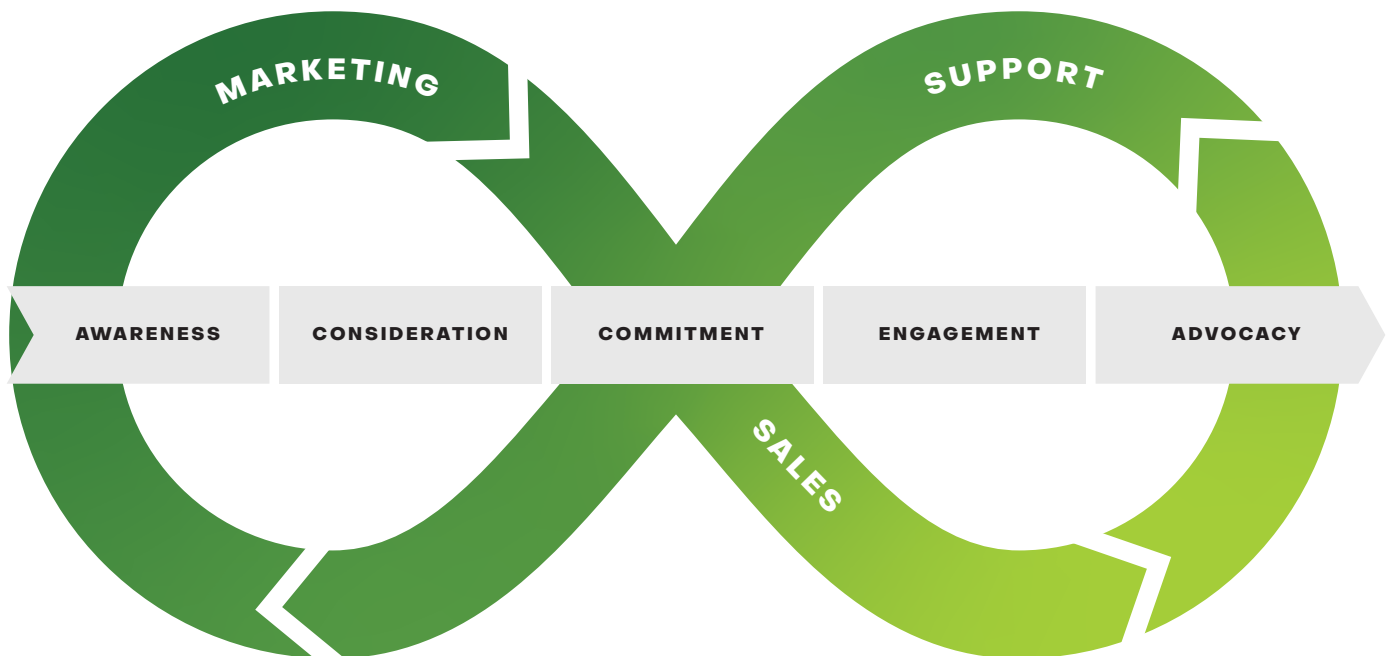
Setting up a Framework to Achieve

When marketing, sales, and service work together, the result is a symbiotic relationship where everybody wins. Instead of viewing themselves as separate departments with competing goals, these teams learn that they can do more together than apart. It's important to start at the top with three objectives:

1. Obtain Leadership Buy-in

When working toward the goal of unifying teams, it's critical to involve managers, directors, and executives from the start. Leadership ultimately drives the relationship between marketing and sales, so having early buy-in is essential as you work to adopt new processes, systems, and technologies.

2. Find Common Ground Among Departments

Many of the strategies pursued by marketing, sales, and customer service overlap, particularly when it comes to cultivating customer relationships. Look for areas where efforts replicate, and don't be afraid to get granular, since numbers can reveal new insights. When everyone's pursuing the same revenue and pipeline goals, it makes sense to work together.

3. Optimize Your Technology to Support the Alignment

Having a steady, streamlined flow of information among teams is key for collaboration. Customers are interacting with your company through a variety of channels; it's essential to centralize those conversations. By capturing the data in a single place, every member of your organization will be on the same page, and as a result, collaboration and communication will increase.

After coordinating at the top levels and aligning department leaders, this new dynamic needs to take shape within your organization. While this might sound like an enormous undertaking, in reality, it starts with a simple framework. The crux of this alignment is the practice, learning, and understanding of what goes on among departments and with customers.

Increase Communication, Not Requests

In the era of CX, communication is key. If sales representatives are only submitting marketing requests, or if marketing doesn't regularly seek input from sales or service, it's time to restructure your approach. When sales and marketing work together, the result is a well-oiled demand-generation and renewal machine. The key is for teams to understand how they can meet each other's needs. Rather than tasking the other team with providing one-off

content and campaigns, marketing, sales, and service should be in continual collaboration based on the latest interactions and real-time customer data.

What's the best way to support this environment? Unify your data. Most modern marketing teams rely on marketing automation platforms (MAP), while sales teams handle customer relationship management (CRM). Often, this can lead to customer insights that are differentiated and critical information that is stored in separate systems. By combining them into a single integrated CX platform, everyone benefits from quick access, real-time insights, and 360-degree views.

Create a Continuous Feedback Loop

What landing pages and email nurtures are having the most significant impact? Which sales scripts work best? What support issues keep cropping up? Where are sales and marketing efforts resulting in upward returns on investment, and where do you need to make adjustments? These are the kinds of questions marketing, sales, and service teams need to answer together. And not just when inspiration strikes, but at pre-scheduled, regular intervals.

- Sales provides insights marketers can use to modify lead scoring, develop landing pages, and incite new email campaigns
- Campaigns and content are adjusted based on reactions and real-time data
- Marketing sends sales qualified leads (SQLs) for personalized conversations
- Sales has the most recent engagement and service data at their fingertips to drive meaningful conversations
- Sales lets marketing know when a lead isn't yet ready for sales and sends the lead back to marketing to nurture

- Marketing returns to sales and service for deeper insights based on the latest interactions, and the cycle continues
- Sales increases the amount of data recorded to share with customer service alongside the marketing numbers to help service better understand customer needs
- Customer service indicates interest from customer conversations to sales and marketing to increase opportunities to engage with a client

Keep Your Customers at the Center

Most importantly, it's critical to keep your customers at the center of every conversation and collaboration. For businesses to thrive in the current experience-driven landscape, creating more meaningful connections with customers is crucial. After all, your customers don't see silos. They don't care if they're hearing from a sales representative or a marketing team member. They just want to know they'll have the same seamless experience with your company.

"Collaborating on CX efforts improves the quality of CX outcomes by encouraging better cross-functional CX execution.

—GARTNER
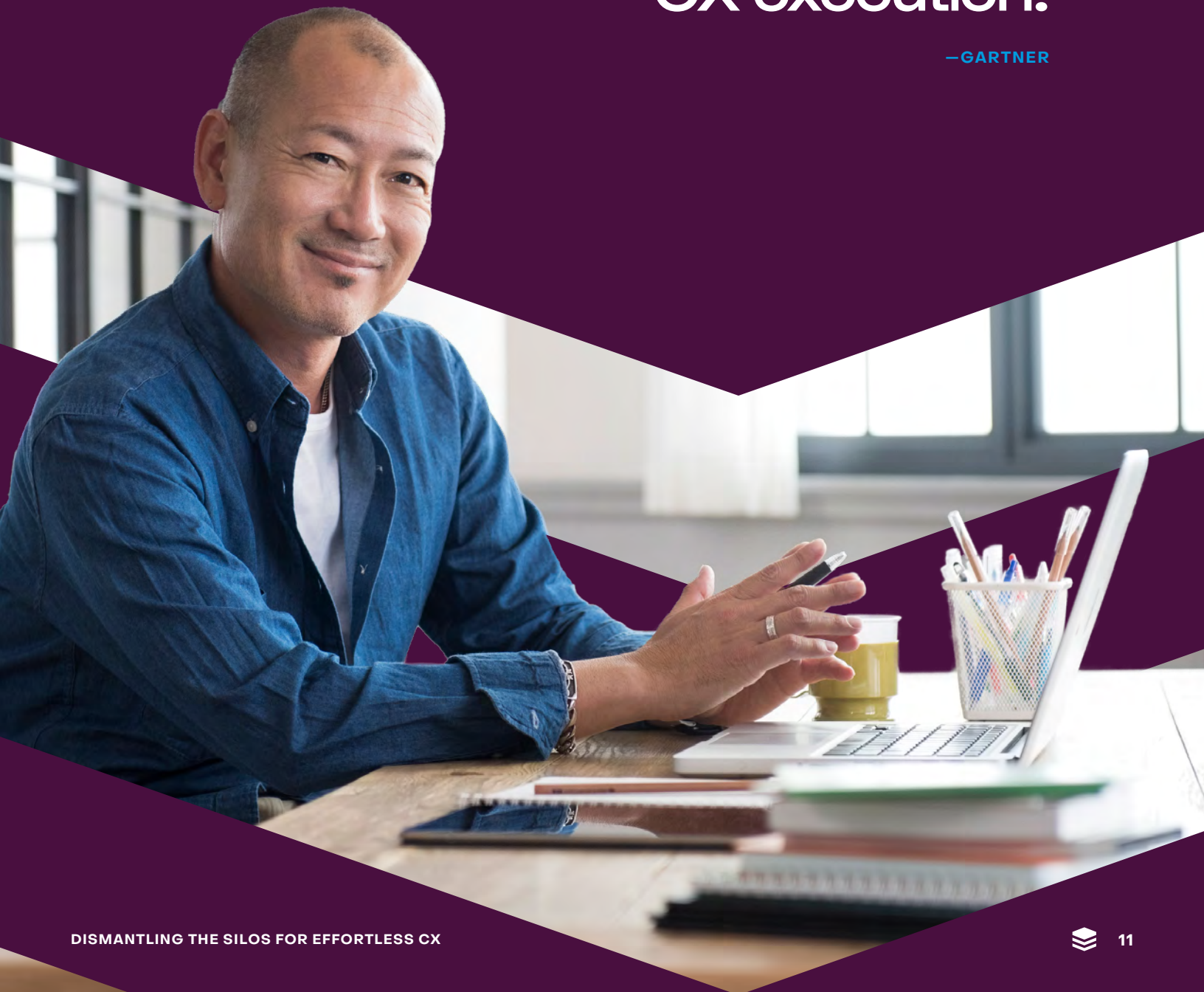
Making CX an Organizational Practice

Understanding how you're interacting with customers and how customers perceive your interaction is also important. Use NPS scores, surveys, and conversations to gauge what you need to change with your organizational customer experience, then continually hone the journey. Your customers are your health indicator of this process, and checking in with them regularly is important. Companies leading with CX begin by putting customers at the center of sales and marketing, and think of customer service as an opportunity center—not a cost center. And every campaign, conversation, and collaboration should work toward the larger goal of creating extraordinary customer experiences and increasing customer lifetime value.

There are simple steps you can take to begin to operationalize high-definition CX at your company.

The relationship among marketing, sales, and service may be a highly complicated one, and dismantling decades-old silos won't happen overnight. But now that companies are competing in the experience economy, it's more critical than ever to tear down the walls that separate these teams. As soon as you have full support from leadership, it's time to start building a newer, better model—one that unites these mission-critical teams.

With vision, technology, and the right attitude, this process can transform your company and transition you to a customer experience-forward organization to create customers for life.

Let the Platform Do the Work

Learn what SugarCRM can unlock within your organization.
A better solution is just a click away.

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About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow **@SugarCRM**.

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