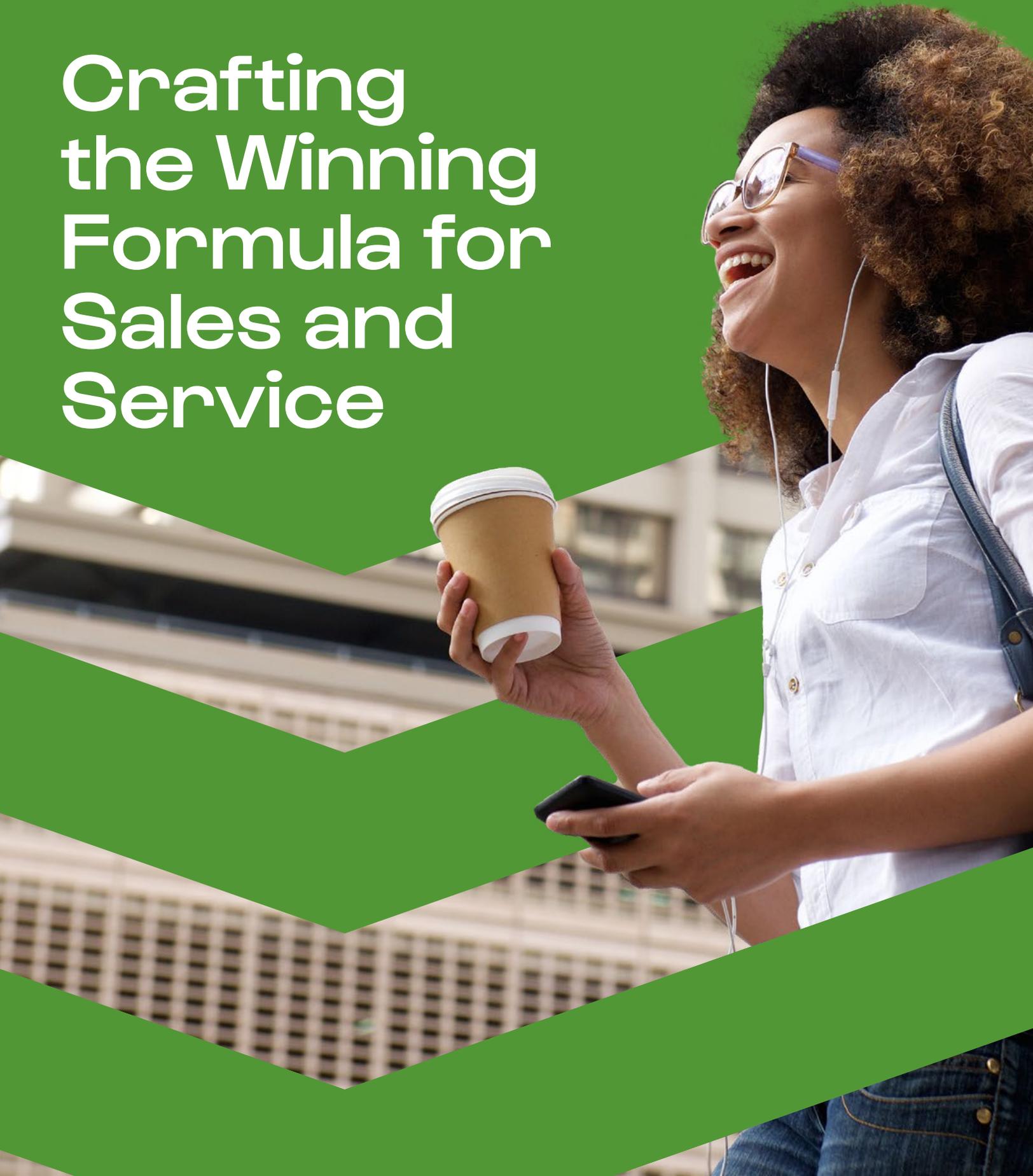




Crafting the Winning Formula for Sales and Service





Introduction

When it comes to serving your customers, every group has its job to do. Your sales team is usually the tip of the spear, developing initial relationships, setting expectations, and putting products or services into your customers' hands. Meanwhile, your service team takes the baton once the deal closes and does their very best to deliver on the company's promises and ensure customers are happy and continually deriving value.

Unfortunately, when those promises fall short or common problems arise, service teams are usually the first to hear about it. And when sales and service are fundamentally working from different playbooks, short-term customer satisfaction suffers, and long-term customer loyalty falters. The end-to-end customer experience is too valuable for each team to be off on their own with different objectives in mind.

Put simply, sales and service just go better together. Building synergy between sales and service opens up the potential for exponentially better customer experiences. When your teams do it right, they craft a winning formula that the entire organization will profit from. The key is to have a shared understanding of the customer journey and expectations, nail the critical operational handoffs, and help cultivate customers for life.



The Importance of the Customer Experience

Today's B2B consumers have high expectations. They're not just buying products or services, but rather an "experience," especially when it comes to purpose-built software services to improve each user's day-to-day workflow.

For customers, a high-definition customer experience must be intuitive, complete, and always having expectations met. It's being able to communicate issues easily and knowing your words matter, and that every person on the other end of the line is working to help you find a solution. No matter what challenge you face, it will always be a continuously advancing journey from the moment you read about a product, to when you buy it to the day you upgrade to the next version.

Companies that provide best-in-class customer experiences outperform companies that don't. They are 80% more likely to retain customers over the long haul, creating stronger loyalty and faster growth. A full 73% of customers agree that the customer experience helps drive their buying decision, and 86% say they will pay more if it means getting a better experience. When companies create great experiences, they're likely to see bottom-line growth of 10% or more.

CX Falls Short with Bad Sales and Service Alignment

Delivering a great customer experience may seem like a relatively easy promise to keep. But it goes far deeper than just ensuring a service rep is addressing tickets quickly. Sales teams contribute to the experience early by setting the right expectations, providing proper handoffs to service teams, and staying engaged even after the deal leaves their hands. They are key contributors, and when sales and service activities aren't correctly aligned, the company can't deliver on the value promised upfront.

The top challenges for sales and service alignment can be broken out into four categories:

Poorly Orchestrated Organizational Handoffs

After a sale closes, there are often process gaps that emerge as the handoff takes place. A customer

might be onboarded, for example, with immediate service issues that need addressing but go unreported. Further down the road, a service rep may change a project order, but the sales rep doesn't see the opportunity to add products or services that might improve the customer experience.

Handoffs often come down to poor information exchange and a lack of established process rules. Handoffs need well-defined inputs, outputs, and success criteria to ensure smooth transfer of care. Sales might be trying to sell additional products or services to a customer working through a difficult support issue. Conversely, a service rep might label a service issue as low-priority, when in fact, there is a sizable sales opportunity in play. And there is often no mechanism to communicate feedback between a customer, sales, and service. These poorly designed (and often manual) handoffs can lead to unresolved cases, bad user adoption, and ultimately a bad experience at the critical early stages of a relationship.



Disjointed Customer Communication

With so many disparate channels companies use to communicate with a customer, it's no wonder they become frustrated. They engage in email, chat, phone, text, self-service apps, or other channels, and they're not always dealing with the same person. Today's customers have long-running conversations with companies that span multiple sessions on multiple channels, and they expect the companies they buy from to keep up. They don't want to repeat themselves with every new interaction, and they don't want you to impose your organizational and technology complexities and disjointed interactions on them.

Internally, service and sales reps often only see their own conversations with a customer, not the aggregate interaction history to put everything in context. This leads to a lack of understanding of how to best address a service issue. Disjointed communications ultimately lead to customer frustration and a diminished relationship.

Siloed Technologies and Processes

When you're working with independent sales automation and customer service platforms, you're kicking off the customer experience at a disadvantage. Key customer data resides in different places with no way to share information back and forth, and it can take costly integration efforts to enable these systems to communicate with each other. IT teams must build new integrations each time a requirement arises, and the more nuts and bolts you add, the greater the possibility for data lag and synchronization issues.

The biggest tactical problem with disparate silos and platforms is the lack of a single, consolidated

view of each customer. Sales teams don't have visibility into the cumulative experiences of each customer along their journey. Service reps may not be aware of sales opportunities affected by the support cases they're working on. They have no way to understand expectations, prioritize their work, or suggest products that can help solve long-term issues. Lack of cohesion between systems makes it harder to identify those customers at risk and causes a breakdown across departments, processes, and people.

74% of sales professionals agree a consolidated view of customer information is necessary to deliver an optimal customer experience

SUGARCRM 2021 CRM AND SALES IMPACT REPORT

Disconnected Metrics and KPIs

Finally, having siloed operations means that sales and service teams are each tracking performance differently using potentially conflicting data. Sales might be tracking how they are meeting quotas or sell-through of renewals; service might be tracking metrics like case velocity or customer satisfaction index. These KPIs can paint a very different picture of how good the customer experience is, especially when each department uses different criteria for what success looks like, such as what a "satisfied customer" means.

When you measure performance in different ways, it's harder to meet cross-departmental KPIs that require teamwork, such as how many support cases led to new sales. It's vital to know both sides of the equation to provide better value to the customer.

Six Steps to Making Sales and Service Alignment a Reality

The work you put into ensuring sales and service alignment will give you a launchpad—and a game plan—for continued success in providing a compelling customer experience. Following are six important steps to making that happen.

1

Map Out the Customer Journey

The first step is one that companies often overlook. Mapping out your desired customer journey and outlining the steps needed to achieve defined goals is a critical starting point. Identify every stage of interaction that sales and support will be having with a customer, and determine where the common touchpoints will be. Identify existing gaps (such as when service isn't apprised of new sales initiative) and friction points between sales and service (such as who owns an upgrade to new service levels). Once you do so, you'll be able to:

- Build out the roles of each department to ensure no fumbles during handoffs
- Provide service teams a richer information-gathering environment with tools and research to understand the customer better
- Establish combined KPIs and shared goals
- Provide a single high-definition view of the customer journey to the broader organization.
- Develop training aides for new employees to understand how each organization impacts CX

Remember that when it comes to mapping out the ideal customer journey, less is more. Don't impose the internal complexities of your business on the customer. Instead, be empathetic and keep it simple. They don't need to know every detail of your internal processes, just the interactions your combined organization has with them. You rarely get a second chance to make a great impression with customers, so be sure to get the journey laid out right from the get-go.

Align Departmental KPIs

Properly aligning sales and service metrics gives you a more effective, data-driven way to improve the customer experience. When you're working on a common platform, it becomes a team effort to achieve customer-oriented goals. You can jointly determine which KPIs have the biggest impact on the customer experience and assign owners for each KPI to ensure they're properly analyzed and tying improvements back to the original metric. Aligned departmental KPIs helps you create a better balance between customer-focused initiatives and the rest of your business.

Furthermore, your sales and service teams must have a common terminology or definition of what each metric means. Issue resolution, engagement, and customer satisfaction might mean something

different to each team, so create a shared dictionary upfront that clearly defines terms and definitions, and illustrates how departmental KPIs are calculated so that everyone is on the same page. And be sure that metrics make sense: not hearing back from a customer who didn't respond to a service request doesn't mean they are happy and the case can be resolved.

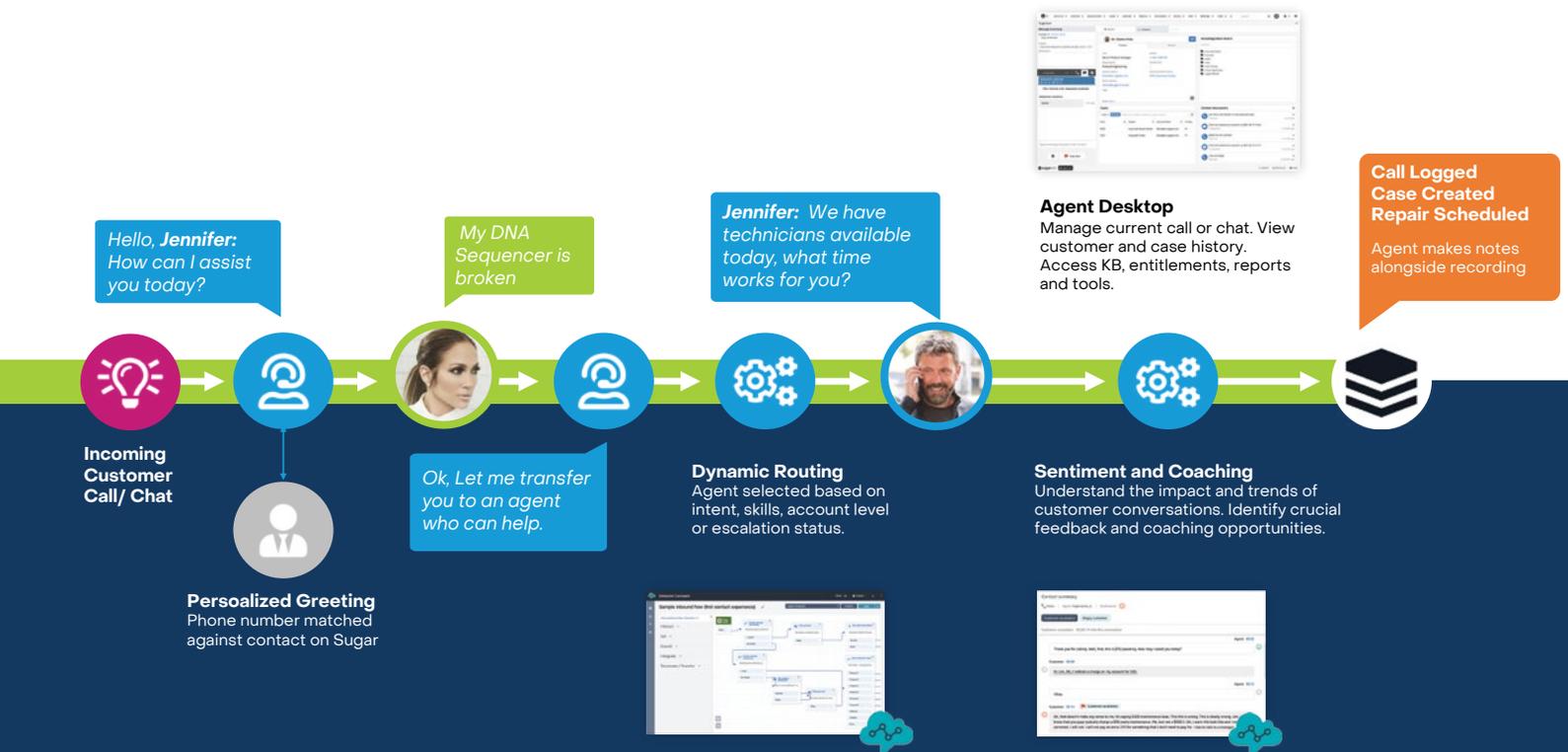
Examples of KPIs that can be measured and shared include: first contact resolution, average resolution time, cost per call, first response time, retention rate and revenue retention rate, customer acquisition cost (CAC), customer lifetime value (CLV), and new and expansion monthly recurring revenue (MRR). Get meaningful feedback at regular intervals to ensure you're making improvements along the way, not just the end of the cycle.



Design Seamless Handoffs

The handoff might just be the most important component of optimizing sales and service alignment. Like mapping out the entire desired customer journey, the internal handoff process must be thought out and documented for every stage, including defining input requirements and completion criteria for each handoff. Service reps have a huge volume of engagement to keep track of, with as many as hundreds of requests per day. They can't evaluate each case for handoff consideration from scratch every time, so criteria must be agreed upon in advance describing when cases reach the threshold for sales engagement.

Moreover, after a customer buys, the service team must be fully apprised of every relevant piece of information that impacts ongoing engagement. This includes which products were purchased, desired use case scenarios, how installation went and any known service issues, future project plans, and perhaps most importantly, promises that were made and what expectations the customer has to derive value from the solution. All of these elements can have material impact on how the customer service team actually delivers service in an optimal way.



4

Create a Complete Customer View

Creating a fulfilling customer experience is much easier when every stakeholder has visibility into the complete customer story. That includes purchase and renewal history, sales opportunities in play, service history, pending service cases, important communications, and basic customer information, all of which provide context to optimize needed interactions. A single platform shared by sales and service teams allows everyone to:

- Track how the customer experience is progressing day by day (or even hour by hour), and understand precisely when action needs to be taken
- Identify when a customer is at risk and given priority in the service pipeline
- Illuminate upsell and cross-sell opportunities that might otherwise go unnoticed
- Provide data and insights into whether a customer issue might indicate a broader trend
- Collaborate more effectively on campaigns to ensure customer satisfaction

5

Consolidate on One Common Customer Data Platform

When you use multiple platforms to manage customer sales and service, data becomes siloed and not easily shared, and the proliferation of tools needed to collaborate effectively becomes unmanageable. It also creates potential conflicts regarding which platforms are “systems of record” for key information, as well as data synchronization issues between platforms. Aggregating data into a single customer data platform gives everyone access to the same customer information, and from a cost standpoint offsets additional data warehouse and analytical expenses. A single system makes it easier to automate the busy work of data entry from one process to the next and provides a more contextual and conversational view for stakeholders to make more informed customer-facing decisions.

Working on a shared platform also boosts your ability to align data and metrics. Large volumes of customer information that span multiple processes fuel AI-driven insights and analysis of past, present, and potential future issues and opportunities. Data formats across multiple apps often don't match, such as account parameters, sales territories, and lead definitions, making it more likely that data can be misinterpreted or miscalculated. The common platform ensures data is analyzed equivalently and makes it easier to see if your customer experience strategies are working to plan.

Convert Great CX into Revenue

In the final analysis, creating a great customer experience can be a significant driver of revenue. Companies that provide best-in-class experiences improve their ability to retain customers (boosting renewals and add-ons), grow revenue (by identifying the right indicators for upsell and cross-sell opportunities), and build loyalty to enhance long-term customer value. It also has peripheral

benefits, such as improving customer success manager output, growing the field service business, and making it easier to pull customers into your reference programs.

When customers are delighted by their experience, they quite simply create word of mouth and become your brand ambassadors. There's nothing more important than a friendly word to a colleague when they're in a potential evaluation or buying cycle.



Customers Win When Sales and Service Join Forces

Aligning sales and service teams properly often means embracing an organizational culture change. But the good news is that the right software platforms and processes can help orchestrate the needed changes, prioritize collaborative customer-facing activities, and make it easier for sales and service mindsets to evolve.



Sugar Sell and **Sugar Serve** were built to work better together, keeping sales and service teams fully aligned at every touchpoint of the customer journey. By eliminating the blind spots in customer data and providing better context and insights for all customer interactions, every stakeholder will be poised to deliver a five-star worthy experience that spans critical sales and service activities. When sales and service join forces to own the customer experience, they create a thriving environment of trust and appreciation, with the ultimate goal of creating customers for life.



Let the Platform Do the Work

Only SugarCRM brings a “no blind spots, no busy work, no roadblocks” approach to achieving high-definition customer experience.

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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](https://twitter.com/SugarCRM).