

From Services to Sales: Navigating a Successful Transition from a Support Center to a Profit Center

by Todd Beck



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As companies look for new ways to boost profits in an increasingly competitive marketplace, customer support centers often hear their number called.

From in-house and small entrepreneurial outsourcing centers to large, international outsourced operations, support centers may make the move to profit centers for a number of reasons. An outsourced contact center might be facing budget cuts because the parent corporation views it as a variable cost. It may be facing replacement by another call center or by self-service options. Internal contact centers may fear being outsourced to a lower-cost provider, or the move could be a strategic business transition in effort to maximize revenues throughout the organization.

Whatever the reason, such a significant organizational change could be met with some resistance. Customer service agents and supervisors who were not responsible for sales previously may be frustrated or intimidated by new expectations. Employees even may have the mindset that they weren't hired into sales.

So how do leaders persuade traditional customer service representatives to transition into sales roles? And how do they then position these agents and their supervisors to succeed in the profit center environment?

Take It from the Top

Whether it is an internal or outsourced call center, much of the outcome will depend on the impetus for the change. Is the transition being dictated by strategic planning, or is it being forced by outside circumstances? Will all employees be required to transition into sales roles, or will only some employees be affected? Leaders must consider each of these scenarios when developing their strategy for change.

The first step in making the ideological and actual transition from a support center to a profit center is to clarify and confirm the desired results in terms that are specific, tangible, and measurable. For example, "All agents should cross-sell" may be measurable, but it's not specific enough.

At the highest level, executives hold responsibility for defining the desired results and the strategy by which to achieve them. This provides everyone within the organization, at every level, with set roles and responsibilities. Senior managers then direct resources to transform the vision into action, managers develop supervisors, and individual employees deliver organizational results.

It's important to note that poor strategic execution during

the transition can lead to failure and disillusioned employees. Staff members are more likely to respond positively if the goals and strategies are well defined, if they get a sense of long-term commitment from their leaders, and if past initiatives have been incorporated into the workplace successfully.

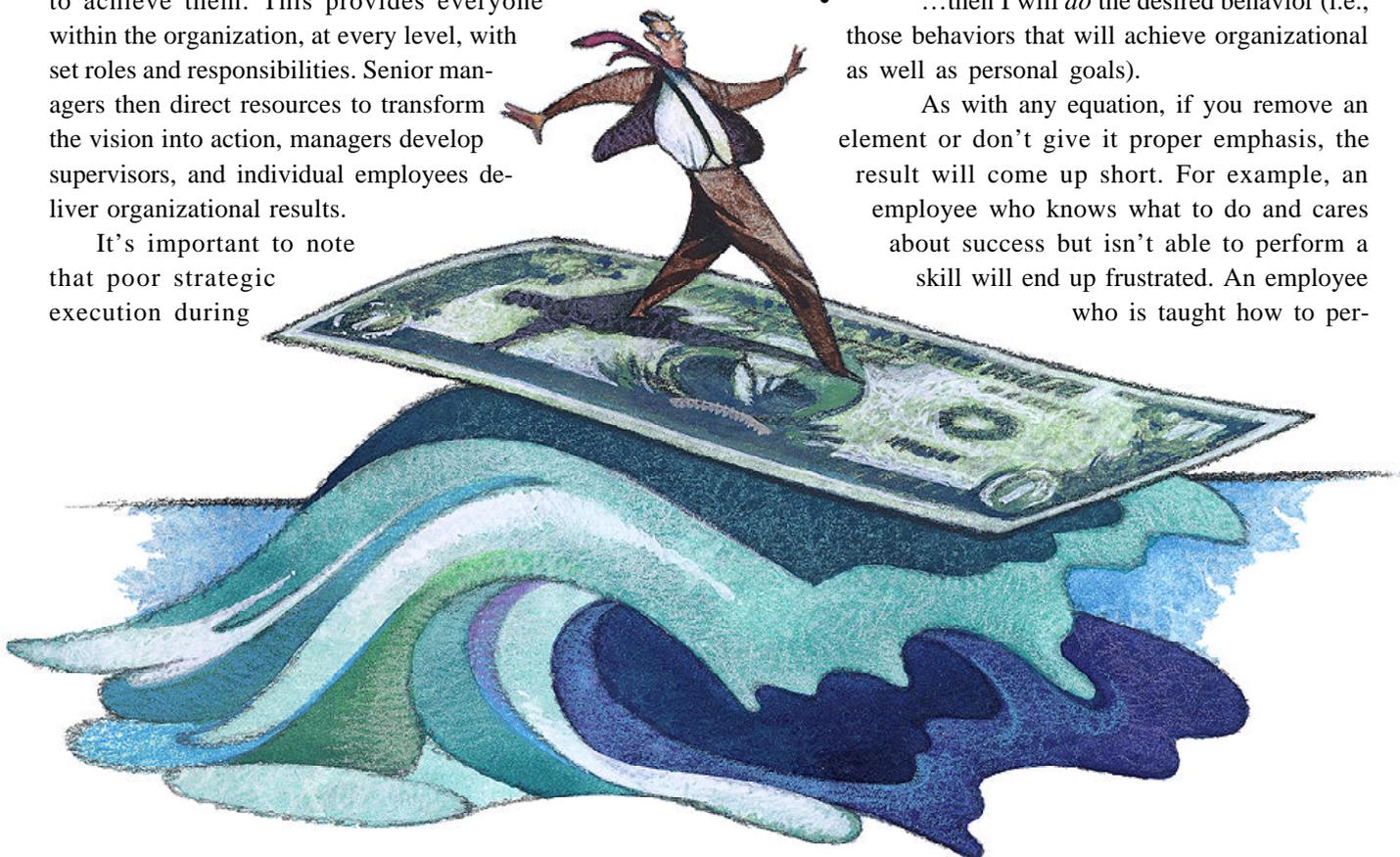
Once leaders have defined the desired results and created and communicated a plan for achieving them, they must ensure that the strategy is executed in a logical, focused, and realistic way. In order for supervisors and customer service representatives to buy into this change, the plan must make sense to them, with clear delineations of responsibility at every level. Employees also must be confident that the planned changes and actions actually can and will happen, with the proper resources dedicated to their success.

Consider the following model from an employee's perspective:

- If I *know* what you want me to do and why (demonstrates the importance of a clear strategy and effective managerial/supervisory communication), and
- If I *care* about achieving that target (demonstrates the importance of linking personal benefit to corporate goals), and
- If I *can* do what you want (demonstrates the importance of skill training, customer service training, and other behavior-related training)...

- ...then I will *do* the desired behavior (i.e., those behaviors that will achieve organizational as well as personal goals).

As with any equation, if you remove an element or don't give it proper emphasis, the result will come up short. For example, an employee who knows what to do and cares about success but isn't able to perform a skill will end up frustrated. An employee who is taught how to per-



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form a new skill but isn't given an incentive to use it usually will continue the old behavior, in which case staff at all levels of the contact center will end up frustrated.

The Sales-Services Connection

Understandably, it may take some convincing in order for employees in traditional support roles to embrace the shift into sales. It's unlikely that everyone will perceive this change as a positive initially. From their perspective, they suddenly are being asked to take on an entirely new job, with new required skills and responsibilities. Some may feel very opposed to the change. The prospect may seem extremely intimidating. Therefore, organizational leaders must build confidence and commitment by casting the transition from a support center to a profit center in the proper perspective.

At this point, it's appropriate to introduce what might be a surprising concept—that the majority of the skills and attitudes required to provide stellar service are fundamentally the same as those required to make a sale. That's right, your top-notch customer service representatives already should possess the soft skills and personal motivations needed to transition successfully into the basic cross-sell, upsell role. (Obviously, there are important, different skills needed for complex, consultative selling.)

Good salespeople understand that their jobs are highly service-focused, especially considering the growing emphasis on consultative selling. Sales professionals act as business consult-

ants and expert guides for each customer, listening attentively, asking the right questions, and

advising customers on solutions that are mutually beneficial for the customer and the organization.

Similarly, the goal of service providers always has been—and always should be—to satisfy customers' needs. Customer service representatives also are expected to serve as expert guides during each transaction, uncovering the real need behind the stated need, offering solutions to the customer, and bringing the transaction to a successful conclusion.

Now, if the successful conclusion results in customers purchasing additional products or services or changing how they do business with the organization, some might call it selling, but it's really the natural progression of a well-conducted service transaction. Service representatives who are committed to satisfying customer needs naturally will encounter opportunities to introduce product information and encourage sales. The only really "new" components are that the organization has empowered the service representatives to complete the circle and actually close deals, and the organization might compensate them differently now based on new business "sold."

For example, consider an employee engaged in a conversation with a customer who called with a question about his credit card. The service representative already has been trained to open the call, listen attentively, ask questions, and confirm understanding—the same skills involved in a sales call. As the representative asks questions, she realizes that another credit card might be a better fit for the customer's needs. Herein lies

the opportunity to "make the sale"—the representative, already trained to offer information and advice, can ask if the customer has considered applying for this second card. By employing existing customer service skills, the representative has led the caller into a sale. If this same transaction had occurred previously, it might have been perceived as a "service" call, but now that the representative actually can close the deal or will be compensated for the work, the transaction is perceived as a "sales" call. This simple label change can strike fear into the heart of an otherwise happy, capable service rep.

Other skills that cross the boundary between sales and service include:

- Demonstrating interest and concern.
- Listening attentively to identify needs.
- Gently refocusing a conversation.
- Presenting unwelcome information properly.
- Communicating the customer's value to the organization.
- Healing customer relationships.

Once service reps understand how their existing skills apply to the sales environment, the prospect of a shift from a support role to a sales role becomes far less intimidating.

Empower Your People

However, just because the skills required for "service" and "sales" job titles are fundamentally linked doesn't mean that employees who are accustomed to the support environment will welcome the new responsibility of actually closing sales. Once you've surmounted the ideological hurdle and communicated that they already *know* and *can demonstrate* the necessary skills, you'll need to go a step further

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and encourage employees at all levels to accept the new role. The following tactics, related to the “I care” concept discussed earlier, can help increase buy-in.

- **Communicate the benefits.** Supervisors/coaches must work with staff in individual and group settings to help them understand how they will benefit from the transition. For example, a profit center environment may offer increased compensation as employees learn to close sales. The transition also will provide more opportunity for individuals to expand their roles and grow personally and professionally. Whether the employee has long-term aspirations within the organization or industry, or whether his job is a stepping stone to a completely different life, new skills and the ability to adapt are marketable and transferable.

- **Link behaviors to results.** Supervisors should help staff understand the desired results—whether this is for the center to remain competitive, provide better customer service, enhance revenue and profitability, improve market share, or achieve other significant objectives. Explain how participation in growth and change will help them achieve personal as well as organizational goals. Don’t ask staff to do something “just because.” If they understand the desired outcomes, they will be more likely to demonstrate the spontaneous, innovative behaviors and the commitment necessary for the organization’s success.

Factors to Consider

As we noted earlier, most employees already should have an aptitude and experience level that would enable them to succeed in either a service or

a sales role. They understand how to bring value to a customer transaction by serving as an expert guide and satisfying customer needs. They may need a refresher or some new product training, but as we pointed out, most of the soft skills should be there already.

It’s important to note that it usually won’t work to train agents who just don’t have the aptitude. Support center employees who simply deliver answers to customer questions without adding value should be weeded out prior to the transition to selling.

For the employees deemed “keepers,” you’ll need to redefine a successful call. Service centers often are managed closely by handling time, service levels, hold time, plug-in time, and a host of other measures that are important but based solely on efficiency. Selling to needs not only naturally extends the current conversation, but it also can bring to the surface other areas where the customer might not be fully satisfied. Meeting those needs can grow revenue, but the organization’s current benchmarks—and the coaching that goes along with them—may need to be changed. You should re-evaluate compensation as well, but do so carefully.

Even if the basic selling your employees will be doing doesn’t require an entirely new skill set, there will be some new expectations, such as meeting sales quotas. Start by defining tangible, measurable results and aligning everything with them. Once you have identified necessary behaviors at every level of the organization and how they will be evaluated, you

can determine how best to compensate your employees. If the desired results aren’t communicated clearly, you will have people who don’t “get it.” Some will think it’s all about revenue generation, while others will view it as basic order taking. You risk creating agents who cut service short in order to close a sale. And some agents may not be good at sales, either, so both of your measures could go down.

It may be best to transition slowly from one compensation model to another. For example, gradually phase in the sales evaluations and quotas to give employees a chance to gain confidence in their ability to generate and close sales. And keep a significant portion of their compensation based on measures such as customer satisfaction and meeting service standards during call monitoring.

Final Thoughts

The transition from a support center to a profit center will require a lot of experimentation, planning, effort, and time from everyone in an organization, from owners to leaders, managers, supervisors, and front-line staff. A key success factor will be for organizational leaders to communicate to supervisors and agents that selling through service draws on skills already required to excel in a support center, and a sale can be the logical conclusion of a properly executed service transaction. Employees who deliver stellar service already are well prepared to succeed in a profit-center environment and to contribute to long-term success of the organization. ▼