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Deal or No Deal - The Art of Salesmanship in the Contact Center

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By: [Daniel Mahon](#), [Ric Kosiba Ph.D.](#)

If you Google "the art of selling," you will get somewhere around 785,000 results. Clearly, there are a lot of sales Websites that will tell you that salesmanship is really an art form and that salespeople are really artists. Then again, these Websites are also trying to sell you something.

However, if you delve into many of these Websites, you will find that what they are selling is not a lesson in artistic endeavors. You probably won't find advice telling you to take your sales team outside, telling them to set their inhibitions aside, having them run barefoot through the grass or having them do tantric exercises to let their minds expand, all so they can be better artists and sell more stuff. Quite the opposite. What you will inevitably find is that these Websites will break down the sales process into a series of steps that look surprisingly like, well, a process. And while we all know particular salespeople who have a real knack for selling things, most sales seminars sound a lot like a recipe and a checklist of activities that will lead to better sales. They are selling a process.

But call center sales is even less artistic than face-to-face sales: overlaying the "process of selling" is the "process of managing a call center" and, excepting some very colorful contact center office cubes, there isn't a lot of art in managing a contact center either. In this, we are layering an operational process on top of a sales process. That isn't to say that there is not talent and creativity associated with managing a process, especially a process that deals primarily in people, it simply means that we do not believe it is art in the standard sense.

So let's discuss the non-art of selling in a contact center environment.

Planning to Sell

When we first began to think about this article, we both independently put together a list of attributes of a successful sales center. To be honest, we expected to disagree on many of the items on our lists. But surprisingly, our list of important activities and attributes was actually pretty similar. For example, both of us had high on our list the importance of planning and committing to the sales process.

Like any operation, it is necessary to be sure you have the appropriate tools, management processes and facilities to enable a successful sales environment. But all of this begins with a plan.

The Strategic Plan and Hiring

All plans begin with questions of purpose and size. What are we selling? How are we going to sell it? Who will sell it? Where and how many agents will sell it? How will we market our product?

While most companies' marketing departments will answer the "what and how" questions, it is up to contact center management to determine the "who, where and how many" answers. The start of any serious center plan starts here; it is a question of how to size the sales operation. Further, these questions are not at all static month over month, there is a timing problem associated with ramping up an operation and, even once an operation is mature, there is a serious seasonality component that makes the analysis of determining when (which weeks) and where to hire your sales agents very complex.

When determining the size of a cross sale opportunity, the question is even more complex - you are determining both the staff required and the number of customers (and their attributes) you'd like to pitch. This is a huge math problem.

But it is critically important to get this question of the appropriate size of your operation answered correctly. We have seen sales operations that, improperly planned, have crippled the effectiveness of major marketing campaigns. Simply, the company's expensive marketing campaigns have brought customers to the contact center, but improper hiring and planning has meant that those customers could not be serviced and they went to the competition instead. This can be a very expensive mistake.

There are commercial strategic planning systems available that will enable contact center planners to answer these and other important questions.



Given that you have invested in your strategic planning technologies, and you know how many sales agents to hire (and during which parts of the year), it is then important that you hire the right people.

Working in a contact center is not always an easy job, and selling is even harder. Hiring the right people is critical, as these sales agents will drive revenue to your organization. Here are some tips and tricks associated with hiring the right sales agents:

- There are great technologies that will help you screen agents, look into technologies like sales simulations.
- Do not hire emotionally; look at employee experience.
- Do not be afraid to use rigorous testing (even personality tests).
- Ask them to sell you something.
- Listening skills are critical. Test this.
- Don't try to fill sales slots by convincing service agents to take a sales position; your best sales folks want to sell.
- Check their unique references; talk to their customers (if they owned accounts before).

Training

Great sales agents are not born; they need to be trained to be great sales agents. Training sales agents requires training two separate skills, great phone-handling skills and great sales skills. Great phone-handling skills are standard for our industry and cannot be ignored; customers expect that every agent will be able to answer every customer service question as well as complete a sales call.

The first skill any sales agent requires is expert product knowledge. We have seen some very creative methods to help sales agents acquire and maintain their product expertise. In one retail clothing sales center, the entire product catalog was available for agents to view and handle, even while on a sales call with the customer. Imagine how powerful the discussion is when the phone agent can, when questioned about a particular item of clothing, says with certainty that a feature is as described, because they are holding it in their hands! Similarly, an outsourcer for a major electronics firm had samples of each product available to sales agents for use during their breaks. The power of real familiarity with the product is priceless.

There is a very important question you should consider - are you truly interested in hiring sales agents? There is a huge difference in the skills required for a sales agent as opposed to an order-taking agent. Even though they may be called the same thing within an organization, there is a significant difference in the skill and aptitude required to perform the different jobs. An order taker is required to have skills much akin to your better customer service representatives. They must be polite and helpful, and must help a customer complete the sales process. But real sales skills are not as necessary with an order-taking phone agent. Even though they may have a sales quota, they are not necessarily sales focused.

A sales agent is required to sell – cross-sell a customer toward a product where there was originally only a customer service question, up-sell a customer who is purchasing other items, divert a semi-interested party toward the benefits of products or services resulting in a closed deal, etc. In other words, real sales representatives must make a real difference; they create something out of a fleeting opportunity. (Wow that sounds sort of like art!)

For this reason, it is important that newer sales agents spend time listening to and learning from the current sales stars. It is never enough to memorize a script and recite it well. The best sales folks will internalize the benefits of a product; they'll understand the pros, the cons and the spin associated with turning a con into a pro. And they'll pitch it with their own personal "voice."

Sales agents must be trained in the language required to sell your products and services. If the product is complex, they must be immersed in the business of the customer, so that they understand the business jargon and, more important, the business need for your products. It is their job to help spot and convey this need to prospective customers.

For some firms, it is also very important for sales agents to become expert on the competition's offering, their strengths and weaknesses. It is a good practice to produce regular industry "briefings" so sales agents can converse with your customers about current issues concerning them.

While most companies do a fine job with new-hire training, many do not do the work necessary to provide seasoned agents with best sales data available. The best sales resource for all your sales agents is the wisdom and experience of your best sales agents. While it is impossible for every agent to sit with the superstar agent and learn by listening to their pitch (there is not enough time in the day), it is absolutely possible for management to spend an appropriate amount of effort to learn from these super sales agents and produce a series of best-practices reports and sales seminars. While this requires work for center managers (and management humility, noting that the sales superstars often know more than management), it is simply the best source of sales intelligence available. This intelligence needs to be part of recurring training (whether it is called that) for all of the sales agents.

Sales Technologies

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There are several technologies that will improve your sales team's productivity. Clearly, the standard contact center technologies are important for managing a sales call center team: call monitoring, workforce management and call routing software are all as important for a sales center as they are for a customer service center. Similarly, CRM tools are probably more important for sales centers than for customer service functions, as product information, sales history, etc... can aid an agent to make a sale.

Contact center analytic systems help bring disparate sources of data together and help agents track their performance relative to their peers. Peer pressure is a powerful motivator, and there isn't a salesperson alive who doesn't want to be number one.

Speech analytics systems have terrific application to the sales process. These systems monitor the natural spoken language for patterns, in order to raise awareness of issues or common customer comments. There is a tremendous amount of information that resides in the conversations of your phone agents and customers. Until speech analytics, this information could only be gathered anecdotally. With this technology, managers can quickly learn how customers are interacting with your phone agents in a systematic and structured way. In effect, these systems "listen" in on all of your contacts and glean business intelligence and marketing information from them. By understanding what your customers are asking for, you can do a better job of providing your solution.

A current trend in managing cross-sell opportunities is the application of mathematical models to contact center routing and sales staff planning. For instance, the contact center will be organized into customer agents and sales agents or "customer service agents who also cross-sell product." The trick is to both determine the scope of the business opportunity, and to develop the process by which you direct sales eligible customers to your sales agents. Two technologies aid tremendously in this endeavor. The first is the application of statistical models to help determine who, among those calling your customer service function, are likely to purchase your product. Several companies are scoring their customer base for "likelihood to buy" so as to improve the efficiency of the cross-sell process. Regression modeling and other traditional statistical techniques can do a great job of determining the actual probability of getting a sale from each customer profile. By sending those customers who are likely to buy to a sales agent who will pitch a product at the end of the service call, you can greatly improve your cross-sale function.

The second technology helps determine the scope of your cross sell-function. Determining the size of your sales group is important, and it is absolutely critical to your success. When developing a cross-sale function you need to determine both the demand for your product and the staff plan associated with this demand. If you are using your customer service contacts as the "hunting ground" you must develop a strategy for mining this valuable resource. If you send too many contacts to the sales group, because you overstaff this group, the efficiency of the process will be reduced as more marginal contacts (those less likely to buy) will flow to your sales group (who typically have higher handle times). Similarly, if your sales group is too small and you send too few sales-eligible customers to this group, the efficiency of this operation will also be reduced, as you are leaving sales opportunities on the table and are not selling as much as you can. It is a balancing act, and contact center strategic planning tools can help by determining the optimal size of your sales functions throughout the planning horizon (the optimal size of your sales opportunity probably changes with the seasons). By optimally planning the size of your cross-sell function, you will appropriately balance your costs and revenue potential. You will make the most of your cross-sell opportunity.

Sales Management and Processes

Managing sales folks well requires talent. While this is a stereotype, we believe that successful sales agents tend to be independent, self-assured and driven. A contact center sales manager has to understand the trade-offs associated with managing an efficient contact center operation and managing to maximize sales results.

The tension, obviously, is magnified by whether the sales efforts are transactional or relationship oriented (agents "own" specific accounts or regions, and sales are multi-contact).

Transactional sales centers are centers where sales are likely to result through a single contact, and, therefore, the more "transactions" there are, the more sales are generated. In this environment, it is important to manage the trade-off between handle times and sales. Certainly, managers are expected to maintain operational efficiency, but also they are required to manage the interaction quality through call monitoring and through sales quotas. You can run an efficient center, but you better hit your sales numbers.

For relationship sales, where multiple contacts are required to get the purchase order, the game is very different. Managers must ensure the quality of the contacts, they must manage sales pipelines, and they must keep tabs on the relationships being developed. Center managers often make mistakes by measuring relationship centers by transactional metrics. For example, if your incentive program pays on sales results, it is not likely that you will be able to manage your agents to strict handle time goals. There is no logic that can defeat the statement "I am hitting my sales goal, why do you care about my handle time?" A wise center sales manager once said, "If we are on the phone with a customer, then our competition is not." The tension between handle times and sales is an artificial one- sales rule all.

Another mistake companies make is to insist on sales scripts (transactional or otherwise). Often, sales scripts are developed by management; they are not developed by the successful sales agents. Management flexibility here is important; the best sales agents are those who truly understand your product, its benefits and can articulate these with his/her own voice.

The most effective sales management tool is the sales quota. Managing toward the sales expectation through this quota truly gets to the heart of the sales purpose. Most other items, operationally or otherwise, are unimportant in a sales-focused environment.

Finally, good management understands that for their sales agents, motivation is really not all about money. It is common to expect that commission on sales is a proxy for employee satisfaction, but if employment research is to be believed, this is but a canard. Salespeople, whether highly compensated or not, require the same care and feeding as your typical management employee. Take time to learn about their aspirations, their three-to-five year career plan, and then try to help them get there. Don't think that, because their commission payments are high, that an ego-affirming raise is not necessary to keep your best employees from moving to the competition (especially for relationship sales agents).

Planning and Sales

Great salespeople are not born, they are hired correctly, trained correctly, managed enthusiastically and given the tools required to do their jobs. Similarly, great sales centers do not magically appear. They are planned for, they are staffed optimally, and they are provided the systems and infrastructure necessary to allow their sales team to prosper.

There is a saying about knowing art when you see it. While stepping through a sales process and running an operation well certainly doesn't feel like you've been painting the Mona Lisa --- there are times when you can look back on what has been accomplished and feel like, well, an artist.

About the Author



Daniel Mahon

[About Daniel Mahon](#)

[Content written by Daniel Mahon](#)

About the Author



Ric Kosiba Ph.D.

[About Ric Kosiba Ph.D.](#)

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