



Running the Extra Mile: Going Beyond Standards in the Sales and Service Process

When companies implement processes to improve performance, many develop a comprehensive list of standards and practices. These often become items on a “checklist” and customer service departments or sales representatives are trained and managed to follow these procedures.

It is assumed that by following checklist procedures that good customer service will be provided. However, standards and procedures often become ends rather than the means to increase sales, loyalty and advocacy. There are a variety of reasons why this happens, which is why understanding how to maintain focus on the ultimate goals are important.

Employees often follow their training and instructions with a checklist mentality. They follow the standards-based process to insure each item on the list is completed and reported.

It is assumed that by following these procedures, the customer will be served well and will become a satisfied, repeat customer who may

even recommend the product to others.

Why Standards-Based Processes Often Fail

If employees complete the checklist at their timing and pace, irrespective of customer desires, feedback and interaction, customers may develop negative feelings. What went wrong?

We find by examining these programs, they fail because they are not being executed with an orientation toward individual customers. Instead, it becomes thoughtless – a mechanical routine in performing each step.

During customer interaction with a company sales representative, the representative may follow defined steps to move the customer along to the next phase BEFORE the customer is mentally ready to move. The customer develops a feeling of being rushed, pressured and neglected. They may choose to end the sales process early. This not only results in a lost sale, but there are negative repercussions from the

customer's bad experience, which reflects poorly on the company.

The Remedy: Focus on Interim Outcomes

Instead of focusing on completing a standards-based checklist, we suggest focusing on customer-based interim outcomes. This ensures that customers will offer clear signs that they are ready to move to the next phase before the sales representative attempts to make them.

The process requires asking the customer for feedback as the sales representative interacts with the customer. Listening for specific customer reactions and adjusting the sales process accordingly replaces a checklist mentality and minimizes the possibility of developing negatives.

Implementing the Use of Interim Outcomes

Through research and measurement of the variables within the customer interaction process, we have identified a specific set of key underlying princi-

pals that serve as “interim outcomes.” It is essential that the key principals be defined from the customers’ point of view.

One of the key principals is that customers want to feel they are in control of the process. The customer’s feeling of authority is important. It is essential to achieve customer satisfaction, loyalty, and advocacy at all times.

There are many fundamental consumer needs and key principals. Focusing on some of these principals, while ignoring others, results in a significant reduction of customer service and a degradation of loyalty and advocacy.

Applying the Fundamental Principals of Sales

The processes to improve customer relations are far more complex than many first assume. The following chart helps to visualize the process within a sales setting.

Customer feelings are listed around the outside of the wheel moving clockwise starting with “skeptical.” The goal is to move customers toward the positive feelings: from being skeptical to becoming interested.

The sales phases, shown on the innermost position on the wheel, are

defined as the typical standards: greeting, needs assessment, product presentation, financial proposal, product delivering and follow up.

Interim outcomes are listed in the middle position. It is important that customers conclude from the process that the key principals have been delivered appropriately to insure the customer moves clockwise toward the most positive position of customer advocacy. Moving a customer from being skeptical to advocacy will occur only when the company sales representative delivers the proper communication, which addresses specific customer needs throughout each of the sales phases.

For example, during the initial greeting phase, a key principal is: Make the customer feel comfortable. The sales representative must not attempt to move a skeptical customer to the next phase before he or she has become neutral or trusting, or else the sale may be lost and negative consequences would happen. If the customer is neutral, the sales representative will insure that the customer feels they are heard while needs assessment is executed. As the customer becomes trusting, the sales representative is focusing on developing the customers’ feeling of confidence during the sales phase of product presentation.

The process continues to move clockwise around the wheel. At each sales phase, the representative is focusing on interim outcomes to be delivered, soliciting customer feedback, and adjusting their presentation accordingly.

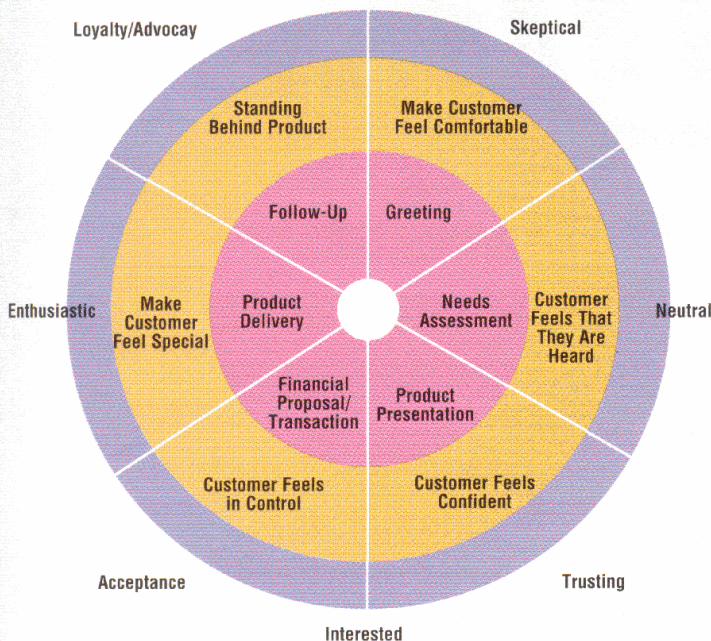
This process is dramatically different from a standards-based checklist

approach. Instead, the company representative is trained and instructed on how to deliver key customer requirements throughout the transaction, to seek feedback and adjust the presentation accordingly. When put into practice by the company, customer service behavior is modified to deliver personalized service. The results are measurable improvements in customer loyalty that are simply not achieved with the usual checklist behaviors. ■

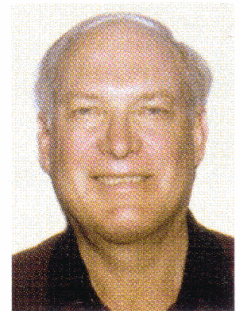


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