

SUPERIOR SERVICE



Making a Cross-Selling Connection

By Wanda Sitzer, *Look.Listen.Be.*

Develop a cross-selling approach that adds value to the service interaction. How to avoid the three most common mistakes.

Cross-selling to your existing customers when your service representatives have them on the phone can be a great opportunity. It can also be a minefield if it's not handled right. Pitching the wrong product or trying to sell to a customer who is not in the mind-set to buy can turn customers off and damage your relationship in the long term. Your CSRs need to learn to recognize the subtleties of each customer's needs. That insight will help them to make the right match between customer and product.

But there's another hurdle to getting CSRs to cross-sell — many reps have a natural resistance to selling. You need to show them how cross-selling can genuinely benefit their customers *before* you try to teach them the skills they'll need and launch a cross-selling program.

Cross-Selling Mistakes to Avoid

There's a basic truth that often gets lost in the desire to increase revenue through any possible avenue — cross-selling does not always make sense. Admitting this up front is not only good business, it can also instill a stronger sense of trust between managers and CSRs. Your reps will see that you're not just pushing cross-selling for its own sake, but are actually thinking the process through from the customer's perspective.

MISTAKE #1: NOT ADDRESSING THE REAL

REASON THE CUSTOMER CALLED

Simply assuming that reps should always try to cross-sell when they have the customer on the phone doesn't take into account the fact that customers frequently call to have a problem solved. If reps fail to offer an effective solution first, customers will be frustrated and in no mood to hear about other products. Taking care of customers and meeting their needs always comes first.

How do you know if you're achieving that essential goal? Listen to your reps. When they give you feedback from their customers that a policy isn't working, take their comments seriously. If possible incorporate reps' suggestions into a new policy and keep them in the loop about what you're doing to actively address the issues that they raise. Your attention to their concerns and your willingness to take action based on their input will help you to tailor offerings to better meet customer needs and expectations, and it also helps to build buyin from the reps. They can see concrete evidence that the company is committed to meeting customer needs. That understanding can unlock the door and make them more receptive when you ask them to engage in cross-selling.

MISTAKE #2: TRYING TO SELL SOMETHING THE CUSTOMER PROBABLY DOESN'T WANT

Some companies take a "kitchen sink" approach to cross-selling by offering customers a laundry list

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of products that are on sale, instead of refining the offer to products or services that the customer is likely to be genuinely interested in. By first pinpointing the customer's interests and needs, reps can also add value by offering any free products or services that your company provides — a smart business strategy in today's tight economy. While these offers may not boost the bottom line, they increase good will and give your customers a reason to stay loyal to your brand. That's vital in tough times — according to a recent survey, when money is tight, 80% of customers say that they are very or somewhat likely to switch from the brands they usually buy to lower-priced brands or brands offering sale prices.

While it's important to align the cross-sell offer with the customer's needs and interests, rolling out a broad program to cross-sell to every customer costs more and is unlikely to produce results. It's more effective to focus your efforts on building additional business with your current high-spending or most loyal customers. If you have a good relationship with a customer and you're making cross-sell offers that show that you understand what they're interested in, you're more likely to make the sale.

MISTAKE #3: NOT PROVIDING YOUR REPS WITH THE TOOLS AND UNDERSTANDING THEY NEED TO SELL

Most service reps take pride in the fact that they are problem solvers

for customers. In fact, some think selling is not appropriate for their position. How can you overcome rep resistance to a cross-selling program? Start by providing training to build effective selling skills and also to help reps understand that, when done right, selling is a form of servicing. In fact, they're providing customers with something they need or will enjoy but would not have heard about if the rep hadn't brought it to their attention.

Equally important, you need to show reps how cross-sell efforts, such as combining sales or bundling products, can actually save customers money, which customers will be grateful for in a tight economy. It's another way of building good will with your reps — you're doing what's good for the company and also for the customer for whom they feel they are the advocate.

Another point of resistance occurs when reps feel that they're being asked to do more work for the same pay. Well-designed incentives for cross-selling success can effectively counter that attitude.

Building a Successful Cross-Sell Team

When you take the time to understand how your CSRs feel about selling, show them how cross-selling can benefit customers and win them over to your point of view, you have the foundation for an effective cross-selling team. When service reps know how to ask the right questions and make the right offers, they become a valuable resource for tapping new potential sources of revenue and increasing retention.

Cross-Selling Technique: How Do You Find the Right Fit?

The key to effective cross-selling is to make sure that what you offer customers is customized to fit their needs. You need to turn your service reps into "headset psychologists" so they can read the customer and figure out exactly what each customer wants. The best cross-sell offer shows that you're listening to your customers, care about what they're telling you and understand them.

To make that match and strengthen customer loyalty, teach your CSRs a straightforward system that helps them to uncover the customer's needs and make an offer that fits those needs. The formula for successful cross-selling can be broken down into three steps:

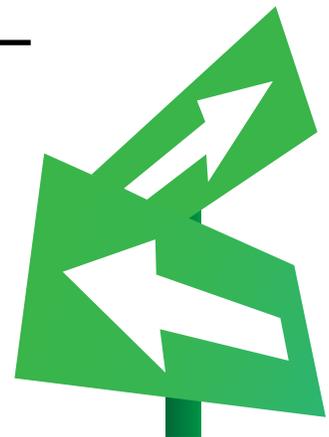
1. Questioning.

Engage customers by asking questions related to the purpose of their call. This gives reps the chance to learn more about the situation, make a conversational connection and uncover potential cross-selling opportunities.

For example: A customer calls to check whether there are bank branches where her son will be attending college. The rep responds, "I'll be happy to check our branch auto-locate system. Where's he's going? Congratulations! You both must be excited... We have several services for these young adult transitions. Has your son had the opportunity to think through his approach to money management?"

2. Creating worth.

At this point, using the information gathered, the rep has to decide whether the goal of this interaction is to land more revenue or to



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enhance customer retention. The statements made to the customer should pique his or her interest and include both facts about the product or service and the value of the offer.

For instance, in our previous example, if the rep decides that retention is key, the response could be: "We're committed to helping our teens handle money the smart way. We can offer your son tips through our free online videos, which are specifically targeted to college kids. It helps them to think twice before putting purchases on a credit card and to learn how to manage a budget."

3. Closing.

Once the groundwork has been laid, the next step is to grow the commitment. To close the banking conversation, the rep might ask: "Would you like me to email the links to our online smart money videos? You can your son can also check out our Facebook page, which includes smart money details."

The customer has been offered a free service that builds good will (the bank cares about my family) and increases customer loyalty. 

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