

The Salesforce logo, consisting of the word "salesforce" in a white, lowercase, sans-serif font, centered within a blue, cloud-like shape.

salesforce

Connect
SALES AND SERVICE
Around the Customer



INTRODUCTION

Technology – especially easy-to-use cloud software built for businesspeople – is no longer just a concern for the technologist in the IT group. Cloud technology is on the minds of the entire C-suite in today's growing businesses: CEOs, COOs, CFOs, and VPs of Sales and Service are all thinking about how to strategize for booming growth that scales and disrupts.

Leaders are increasingly looking to transform the customer experience to differentiate their business. With instant, personalized service at every step, companies can engage with their customers in a whole new way along the customer journey.

This is a critical time in customer service as service leaders transition from a cost center to a strategic growth engine. Today, the service department is responsible for delivering service that not only solves a problem, but also delivers a 1-to-1 conversational experience that builds customer loyalty. With service connected to a complete CRM, businesses access complete customer insights across all departments.

For businesses of any size to succeed today, leadership must be laser-focused on transforming the customer's experience for the better. In this playbook, we'll evaluate the tradeoffs and advantages of different approaches to investing in software that helps you sell and service customers for a superior customer journey that scales.



A BRIEF HISTORY: SALES AND SERVICE SOFTWARE AND THE EMERGENCE OF CRM

Starting in the mid-1990s, a new class of software emerged that helped automate and improve the activities of salespeople and their ability to generate sales and revenue. This type of tool was originally called sales force automation (SFA), and as the internet developed as a low-cost, low-commitment platform for automating sales, a new generation of cloud providers emerged, with sales software the logical entry point because of mobile non-technical sales users.

With cloud technology, smaller businesses could finally access the tools that were typically only available to larger enterprises. They could access the tools via a simple web browser and (eventually) a mobile device, without installing servers or software. As a result, SFA has continued to evolve. Now with the power of the cloud, SFA is more than just a place to store customer data and try to make selling a bit easier for reps – SFA now encompasses and powers every step of the sales process.

But, as cloud technology continued to develop, the capabilities expanded to include not just tools for how to improve your sales process, but also your customer service department – how a business supported, serviced, and fostered success for each individual customer. Customer service had long been evolving from the toll-free number, including interactive voice response technology, call center outsourcing, and the internet, which led to a flood of email and chatting for customer service. In the late '90s and early 2000s, the increasing experimentation with software and coding led companies to begin implementing customer support with help-desk solutions to bridge together all of the different channels customers were using for support. With the right tools, businesses could think beyond just customer support and begin focusing on customer success.



When customer service software was combined with salesforce automation, the result was a customer relationship management tool, or what we now know as CRM.

Today, businesses have a wealth of terrific choices when it comes to applications and platforms for both sales and service, including commercial products from software vendors, as well as applications that have been built in-house. Many businesses have tried to optimize their sales process with cloud software at one time, and the tools for the customer support department at another. The result? Siloed workflows and technology that often create disconnected customer experiences because businesses lack the 360-degree view they need of each customer to deliver the kind of experience that customers expect.

One of the most unpleasant experiences a customer can have is calling a company's toll-free number to get help with a problem or product, waiting interminably on hold, then getting a support agent passed to another agent who might be able to help you and being put on hold again. Once you're finally in touch with the right agent, you need to repeat your request all over again. This example represents the worst of the worst, with numerous disconnected experiences. But customers today don't tolerate any moments of disconnectivity, and especially not a series of such moments. Agents should be prepared to help any customer because they have the right tools and information from the sales department to do so.

By bridging the gap between the two different systems, companies can take their customer experience to the next level – boosting customer loyalty and revenue growth.



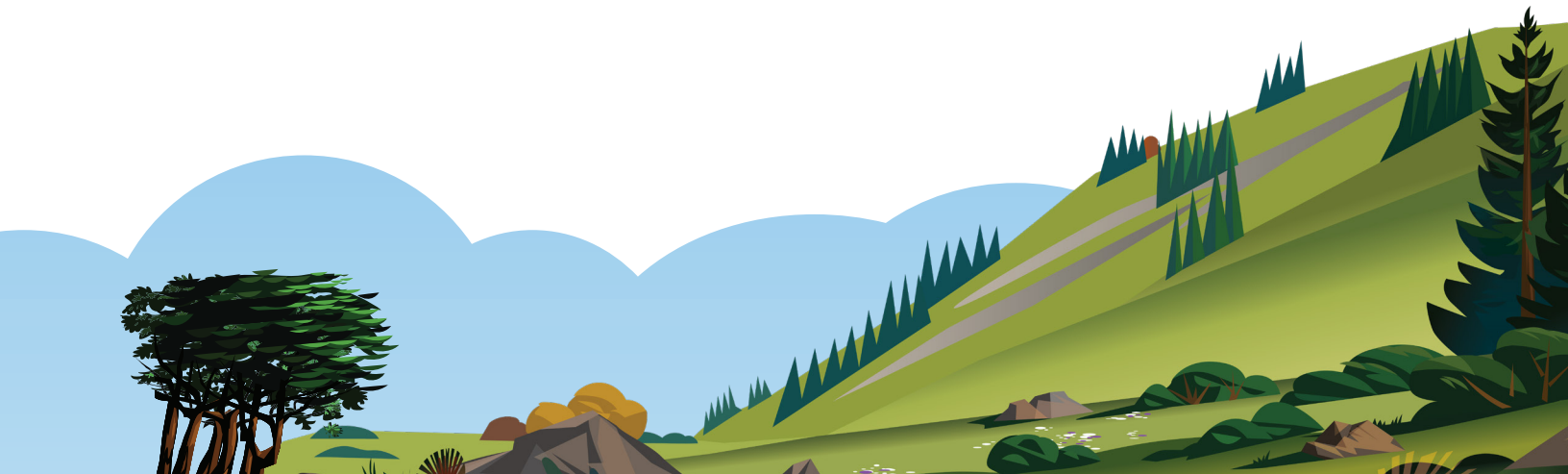
WHY THE CUSTOMER JOURNEY MATTERS

Customers today expect personalized, unified conversations across sales, service, and all other areas of interaction with an organization – regardless of how big or small the company is. Your customers are now hyperconnected, mobile, and more informed and empowered than ever. This means fast response times to customer inquiries and self-service options. Customers have come to expect that service agents within your organization will have the right background information about them. It means that when customers request a quote on their deal, and they don't get a quick response, they'll go with a competitor. Speed is changing the game, and companies have to work faster and smarter to deliver great sales and service experiences.

The pressure is on for companies to meet – and ultimately exceed – these expectations. Not only are your competitors moving faster and delivering innovative customer journeys, but your business misses out on valuable cross-sell and upsell opportunities without the right customer insights. Every day that sales and service teams are separate is a missed opportunity to sell more, service smarter, and build better customer relationships.

It's a challenge, but also an exciting opportunity. More than ever, businesses can harness the power of CRM to connect with customers at each touchpoint. But to do so, you need the right technology to break down silos and engage throughout the entire customer lifecycle. To put it simply: Disconnected software systems are a hidden tax on your business.

Modern customers don't care how your infrastructure is set up or whether your sales and service teams use different systems. All that matters to them is a single, cohesive, and pain-free customer experience that's relevant to their needs. But traditional and on-premises systems store information in silos, making it impossible to have a complete real-time customer view across the organization.



CONSIDERATIONS FOR CONNECTED SALES AND SERVICE SYSTEMS

When considering a cloud platform as your next solution, you need to find a platform that serves both business and IT interests: Both sides are essential in keeping your customers happy.

To find the right fit, you must keep in mind a variety of factors.

TRUST

As with any technology, security, availability, and performance are essential factors when choosing a cloud provider. Ensure that the cloud solution you choose is built around a robust and flexible security architecture. Speak with providers about how they will protect your data and give you visibility into system performance and security.

CUSTOMER SUCCESS

When choosing a cloud platform, find one that prizes your own success. Your cloud provider should offer robust training, success services, and community resources to ensure you're making the most of your investment.

INNOVATION

Cloud computing has gained critical mass in the marketplace, which means it's easier to find a cloud platform solution. But this doesn't mean you should just go with anyone. Choose a cloud provider that's market tested and delivers innovation often, future-proofing the technology and your investment.

MULTITENANCY

Multitenancy is a fundamental technology that true cloud platforms use to share IT resources cost-effectively and securely. When every customer's apps are built on the same code base, it not only leads to massive cost savings, but also allows customizations and new apps to be created at lightning speed.



ABILITY TO SCALE FAST

Not all cloud platforms will give you the ability to customize, extend, and scale according to your business' needs. You need a cloud platform that can innovate without ever losing your business's unique customizations or integrations. Salesforce is the only company that provides three major innovation releases every year, to all customers, without ever losing customizations or integrations.

CUSTOMIZABLE AND EXTENSIBLE WITH YOUR OWN APPS

It's not just about the cloud platform – it's also about what you can do with it. Find a cloud platform that will empower your team to build apps fast, and you'll set up your IT department to add value through rapid innovation.

OPEN ECOSYSTEM

Once you move to the cloud, you'll realize you're not alone. Hundreds of thousands of companies use cloud solutions, so your provider should help you connect with a community of experts and partners who can help you extend the power of your platform and innovate faster.

COMPLETE CRM

When it comes to managing customer relationships, the best cloud solutions connect your entire business around the customer, from sales, service, and marketing to communities, IT, and analytics. Choose a cloud provider that sees the big picture and can help get you there.



A HOW-TO GUIDE FOR MAKING THE MOVE TO ONE SYSTEM

So you're convinced that your customers are demanding an experience that siloed systems are not able to provide, you've envisioned what sales and service would look like together, and zeroed in on what you'd look for in a platform. How do you actually start making the move to one system?

FINDING THE RIGHT LEADER TO GET STARTED

The ideal leader for the sales and service project intimately understands the business and the customer, but also has the soft skills necessary to build alignment within the organization. The project leader must be prepared to solicit help and advice from partners and vendors, as well as evaluate tough tradeoffs between urgent short-term fixes and longer-term improvements. A keen eye for prioritization and big-picture thinking is key.

KEEPING THE CUSTOMER AT THE CENTER

Making the move to one platform for sales and service is all about improving the customer journey, so speaking to and understanding what customers are looking for is absolutely crucial. At this step you should interview customers and document their key goals, frustrations, and current wins around the customer journey. Internally, you should also interview stakeholders at the staff and management levels in sales, marketing, service, production, finance, and the executive suite. Next it's time to build, socialize, and reach internal agreement on the full customer journey, as well as identify the economic impacts, both positive and negative, across the customer journey today.



THINKING LONG-TERM WITH STAKEHOLDERS

Once you have the tentative customer journey in place, you should conduct a cross-functional brainstorm of what the ideal state would look like. Be sure to include finance, operation, and engineering considerations in order to create a broad, potent long-term vision. Identify key human, financial, and technological resources required to deliver on that vision. Additionally, you should prioritize the improvements you'd like to make to the customer journey, and calculate of economic value of each potential improvement. Finally, you must evaluate the project's value compared to other company projects, and establish the funding and timing required to execute the project. With the right vision in place and the right tools to make it happen, you can power a superior customer journey with sales and service working in tandem on one platform.

CONCLUSION

Putting the customer at the center of your business is the key to success in today's world of increased expectations. Separate systems for sales and service are no longer the right road to success for either your business or its customers. With the Customer Success Platform from Salesforce, you can easily log, manage, and analyze all customer activity in one place with our suite of web-based CRM software. The Customer Success Platform is an ecosystem of fully connected mobile and social tools all powered by the cloud. With Sales Cloud and Service Cloud working in tandem on the same platform, your business is prepared to keep up with the speed, innovation, and connectivity that produces awesome customer experiences and customer loyalty. By connecting all of your data, you can build 360-degree views of each customer and provide seamless interactions across any channel or department.

