

Selling Surveys to Sales

The Role of Sales in effective Customer Surveys

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About David Jackson

David Jackson, is a founder and Managing Director of Clicktools Limited, a leader in the field of customer experience feedback software. He is widely recognised as an expert in the area of customer focused organisations and a driving force behind the Excellence in Customer Experience programme. Much of his time is spent with clients, working with senior managers to design and implement effective feedback measurement and management strategies and build organisations that can continually adapt to meet changing customer needs.

David is a popular speaker around the world. He has had many articles published, and is an author and contributor to several books, including “Dynamic Organisations: The Challenge of Change” and Becoming Dynamic”.

About Clicktools

We are the leading European provider of products and services for measuring and improving customer experience.

Founded in 2000, the company is a technology based solutions provider. We provide a range of products and services that help companies improve their customer focus.

- Clicktools – web based software that enables an organisation to measure and improve their customer experience.
- Multi channel feedback – collect feedback across all the channels your customers use, including web, email, phone, post, mobile phone, digital TV, IVR, kiosks and handheld devices.
- Feedback deployment and management services – management of all your feedback activity.
- Support services – training, bespoke survey & dashboard development and systems integration.
- Business consultancy – support for management teams seeking to improve their customer experience from Clicktools and our specialist consultancy partners.

We serve leading companies, large and small, seeking to measure and improve their customer experience. Our clients include Amcor, Cheshire Building Society, Economist Intelligence Unit, Direct Line, National Gallery, O2, the One Account, Rackspace Managed Hosting, Royal Bank of Scotland, Unisys, Yamaha, Yorkshire Building Society.



If you listen to the so called experts, they will tell you that sales people do not think much of customer feedback surveys. Conventional wisdom says that sales people and their managers rile against anything that detracts from the task of closing the next deal. They warn that sales people will unfairly prejudice the results, excluding the customers they have problems with and wining and dining others to give favourable results.

As you might predict from a company that has “Question conventional wisdom” as one of its core values, I don’t agree. Conventional wisdom leads to conventional ideas when the problems companies face often need fresh thinking. I think the problem is with many of the people who design feedback programmes, not the sales people they berate. Whilst there is evidence of some manipulation of feedback results by a small minority, I believe that most sales people will welcome anything that helps them to win and retain customers; it’s good for their commission.

Organisers of feedback solutions should take a leaf out of the salesman’s handbook. I was always told that selling is based on understanding the customer’s issues and concerns and then explaining how the product or service addresses them. The question to ask therefore “Is how does customer feedback benefit sales people?”

Effective Feedback Programmes

Before that however, let me set out a few pointers to setting up effective customer feedback programmes.

- Forget satisfaction and focus on measuring the essential attributes that drive buying decisions and the effective delivery of your product and service.
- Track performance at the key points your company interacts with the customer.
- Collect feedback while the experience is fresh in the customer’s mind. You will impress the customer with your responsiveness and provide opportunities to follow up quickly with those customers who are dissatisfied with your performance.
- Use the data to drive improvements in performance. Gathering feedback is a cost: using it to improve performance and generate loyalty and advocacy is the payoff.
- Get results that compare you with the competition. Business is about being better than the competition at the things that matter most.

- Don’t forget that most buying decisions have an emotional component. Test for the strength of your relationship with customers, not just how well you do at the operational aspects.
- Get sales people involved early on!

Sales People Matter

Without the active support and involvement of sales and account managers, it is difficult to implement effective feedback programmes: I will explain why.

Sales are the company’s main contact and have a significant influence on relations with the customer. It would be foolish to exclude them from any programme that has improving relationships with customers as its aim.

They have invaluable information about the structure of the customer’s operations and the names of people that the company interacts with. This information is critical to the successful operation of an effective feedback programme.

If they are doing their job properly, sales people spend their time talking with customers. They understand their business - the thoughts, concerns and ideas that keep customers awake. They have a rich vein of anecdotal evidence and experience – a vital element of the feedback that any organisation should take heed of.

Excluding them from the design and implementation of feedback programmes risks alienating a group of people that, as I have explained, is essential to the success of any feedback programme. If you want to raise the concerns and resistance of the sales people, to encourage them to manipulate the programme, then ignore them from the beginning at your peril. Far better to capture their ideas and address their concerns from the beginning than face a wall of resistance on implementation. Involvement is the most effective form of communication.

Building Feedback Programmes Sales People Will Use
Here are a few pointers to building customer feedback programmes that sales people will love.

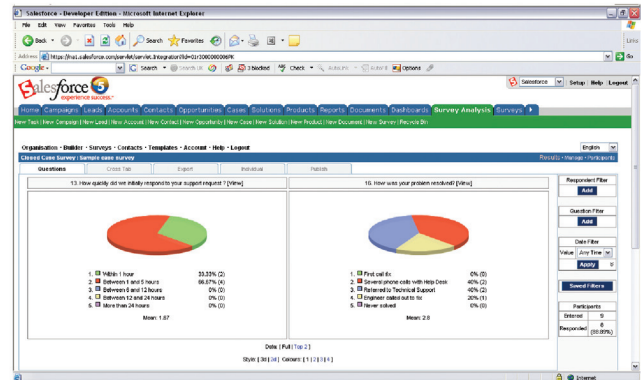
- Get them involved in its design from the start.
- Ensure the programme provides information that helps to improve the performance of selling and account management. Provide insights into how the company performs relative to the competition by market segment and, where applicable, at the level of individual customers. So what if 95% of customers say they will buy again if Cara or Ron’s customers

have given negative feedback? Providing general information to customers that have specific views is not the way to strengthen relationships.

- Strengthen the sales people's competitive position by investing to improve performance in the areas that shape customer's buying decisions. Do not assume that you know: companies have gone out of business because they thought they knew what the customer wanted. Do not assume that it is all about price. A number of our studies show that, whilst being competitive on price is always a factor, it is often not the most important to customers.
- In a complex business to business relationship, help sales people build broader relationships by highlighting the quality of interactions between your organisation and the different parts of the customer's organisation.
- Use existing systems and data sources where possible. Too many feedback programmes operate in isolation and do not integrate their data with existing systems that sales people use – CRM being a classic case. (See sidebar – Integrating Feedback and CRM Systems)
- Give them data that are relevant to their role and customer base and easy for sales people to access. All too often, sales people have to hunt for relevant data in reams of powerpoint slides or tables, making it much less likely that will engage and exploit the results.
- Show them how to use the data to win sales and build customer loyalty and advocacy. Build sales material that leverages your commitment to customer focus, demonstrated by the investments led by customer feedback. Use feedback to shape and validate your value propositions, focusing on the different priorities of different market segments, where possible.
- Mine the data to identify what customers value in the actions and behaviours of your top performing sales people. Use this information to develop and coach the rest and see their commission and your sales grow.
- Keep them informed of progress with the programme, particularly where it affects relations with their customers. No sales person enjoys looking like a mug when the customer knows more about their organisation than they do. It implies that one of their key contacts doesn't know what's going on, raising doubt in the customer's mind – not a position that is conducive to effective selling.

Integrating Feedback and CRM Systems

Whereas CRM software holds information about a customer's structure and activity: who they are, what they buy, when, how many and the like, feedback systems focus on why customers buy, how well you perform, what they think about you. In this world, the customer's perception is what counts. Put the two sets of information and you have a much more useful view of the customer – you can understand better why they did what they did.



To be effective therefore, customer feedback has to be closely integrated with CRM data. Clicktools shows the way with its tight integration with on-line CRM provider Salesforce.com. This removes the need to hold duplicate contacts and allows sales and service staff to issue and see the results of feedback for both individual customers and the company as whole from within the CRM package. This ensures that sales people can always see the complete picture of a customer in one place, making their work easier.

David Jackson in the Managing Director of Clicktools Ltd and a recognised expert in the area of customer management. For more information, visit www.clicktools.com.