Going for Growth:
Build a Better Customer Experience

An Evaluation Guide for Connecting
Sales & Service on One Platform

salesforce | service cloud

Technology – especially easy-to-use cloud software built for business people – 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.

Often, when it comes to disruption, it seems that we either hear about large global titans like General Electric, Coca Cola, and Stanley, or about agile 5-person startups out to change the world. Too often innovative small and medium-sized businesses area forgotten.

These mid-sized businesses are at the heart of the entrepreneurial economy, driving job growth and innovation across every industry. But the challenges at this business size are unique. Accelerating growth and scaling a mid-sized business require rapid change in the core business practices, systems and software that help you drive growth and expand sales to new and existing customers, as well as in how you service and support these customers.

For mid-sized businesses to succeed today, businesses must be laser-focused on transforming the customer's experience for the better. In this guide, 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.

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A Brief History:
Sales & 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 salesforce automation (SFA), and as the internet developed as a low-cost, low-commitment platform for automating sales, a new generation of cloud providers emerged, and 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 90's and early 2000's, 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 solutions 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 point in 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 individual customer to deliver the kind of experience that customers expect.
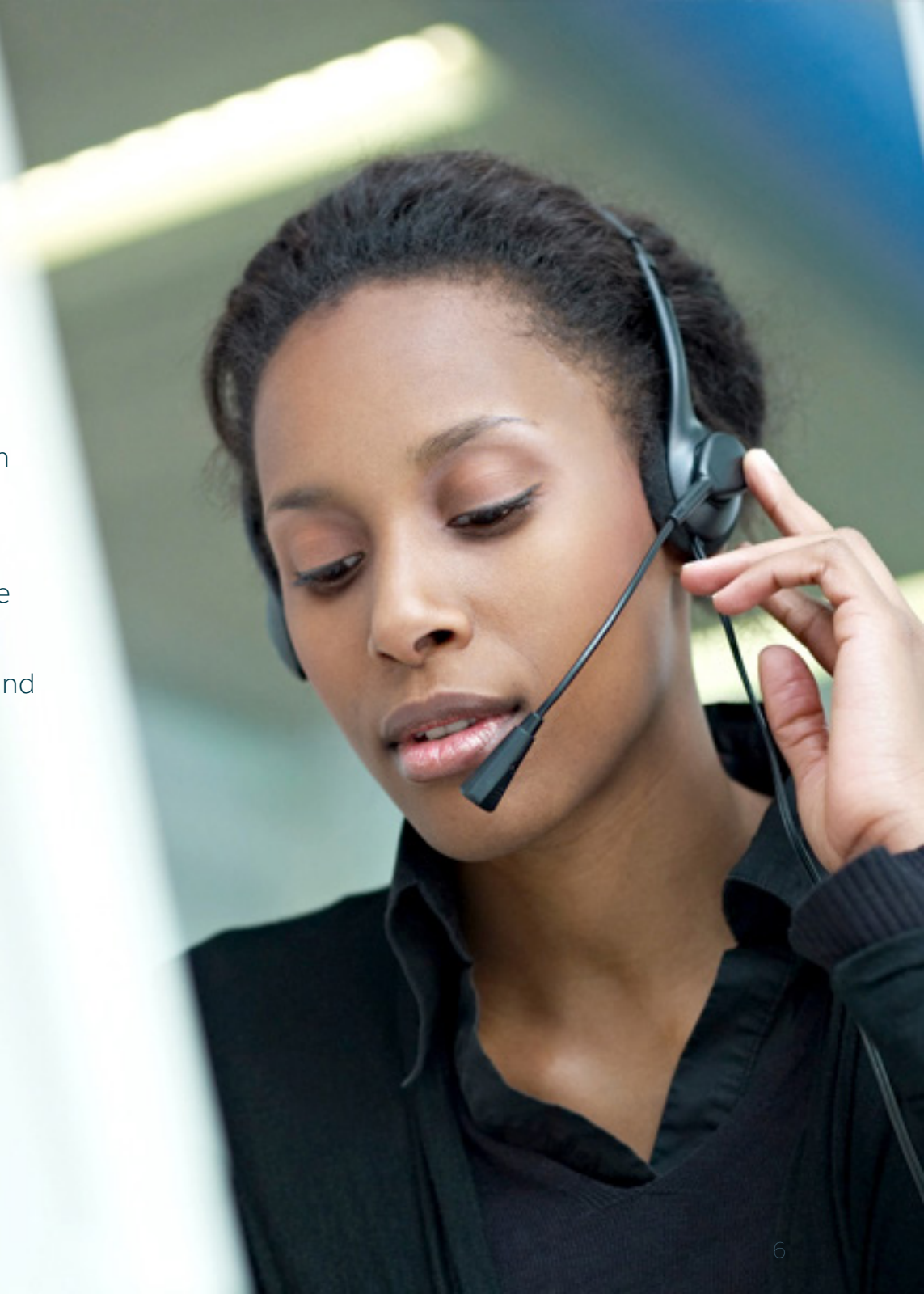
We have a story in global business culture of the most unpleasant of experiences as a customer – calling a company's toll-free phone number to get help with a problem or a product. The story often includes waiting for hours on hold, then getting a support agent who doesn't know what products or services you've purchased, anything about them, or even how to fix the problem. So the next step in this miserable customer experience includes being passed to another agent who might be able to help you and waiting on hold. Once you're finally in touch with the right agent, you need to repeat yourself 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 multiple. Every agent 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 interactions 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. This means no matter who the customer talks to within your organization, they're expected to have the right background information about that individual customer. It means that when a customer requests 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 deliver on – 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 each customer touchpoint. But in order 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-premise 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 prioritizes 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 - 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.

CUSTOMER SPOTLIGHT:

Rosetta Stone

Rosetta Stone specializes in providing interactive language-learning solutions to a massive global audience. The company's products have been used by millions of users in more than 150 countries, with a new focus on educational institutions and corporations. As the company's business model shifts towards B2B and subscription-based, it's relying on Sales Cloud and Service Cloud to drive customer success and renewal rates.

"We're becoming a subscription business, and keeping customers engaged is more important than ever before, Salesforce is helping us become a customer company – allowing us to connect with customers and collaborate with employees in real time."

Mark Moseley,
VP of IT

With the move to Service Cloud, Rosetta Stone was able to conduct a higher volume of customer service interactions while redirecting a significant amount of call traffic to its self-service portal and online chat feature. But it's the ability to have Sales Cloud and Service Cloud interacting seamlessly on one shared platform that truly enables Rosetta Stone to understand and engage its customers more effectively. With Salesforce, they're able to look beyond response times and first call resolution, but actually get closer to their customers, keeping them engaged and renewing their business.

Rosetta Stone was a Sales Cloud customer, but was also looking to move to a different customer service solution. The company's customer base was expanding and leadership had concerns about scalability with the current system. Call times are of course a crucial part of the customer experience, but Rosetta Stone was also looking to provide a more integrated, complete journey for its customers. The solution? With sales and service on one platform, sales reps and service agents have access to the complete 360-degree view of each

individual customer, without any of the silos that hinder a great experience for the customer.

With integrated backend systems, Rosetta Stone can customize communications and make every interaction personal - like congratulating a learner, or giving them an encouraging nudge to keep going.
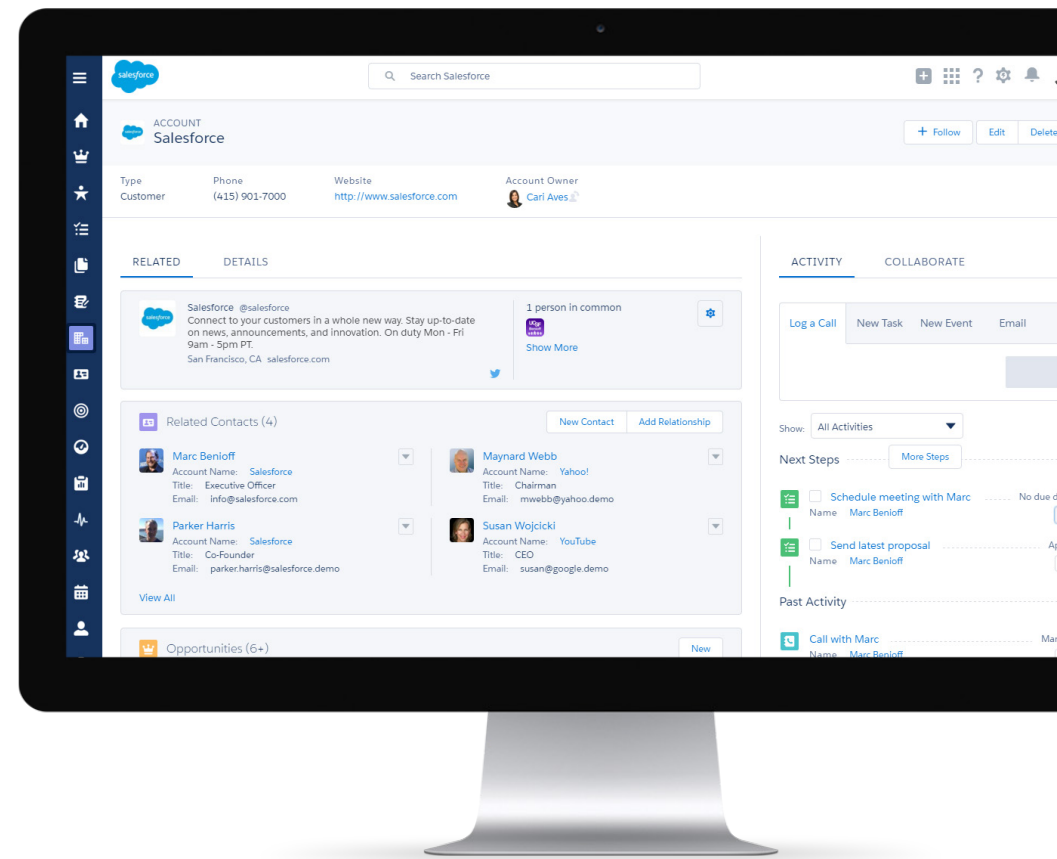
# A How-To Guide for Making the Move to One System

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+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.
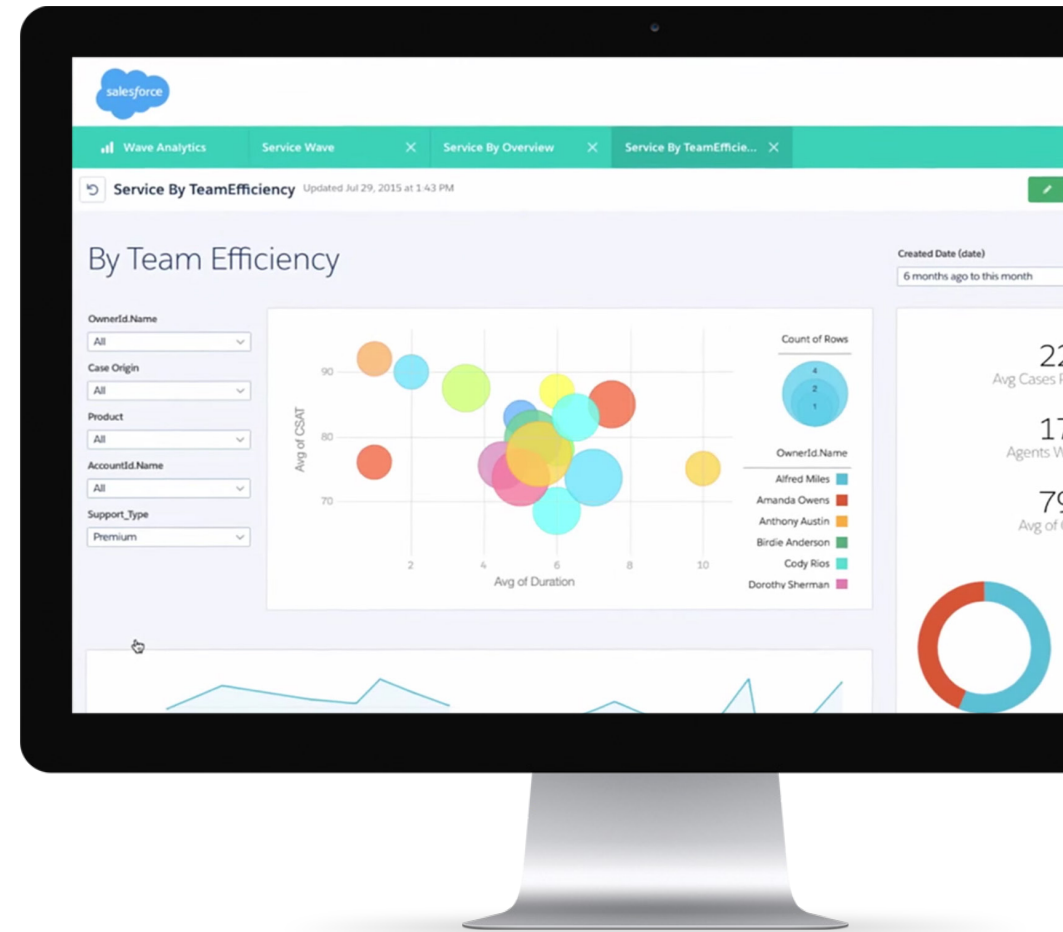
Keeping the customer at the center

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.
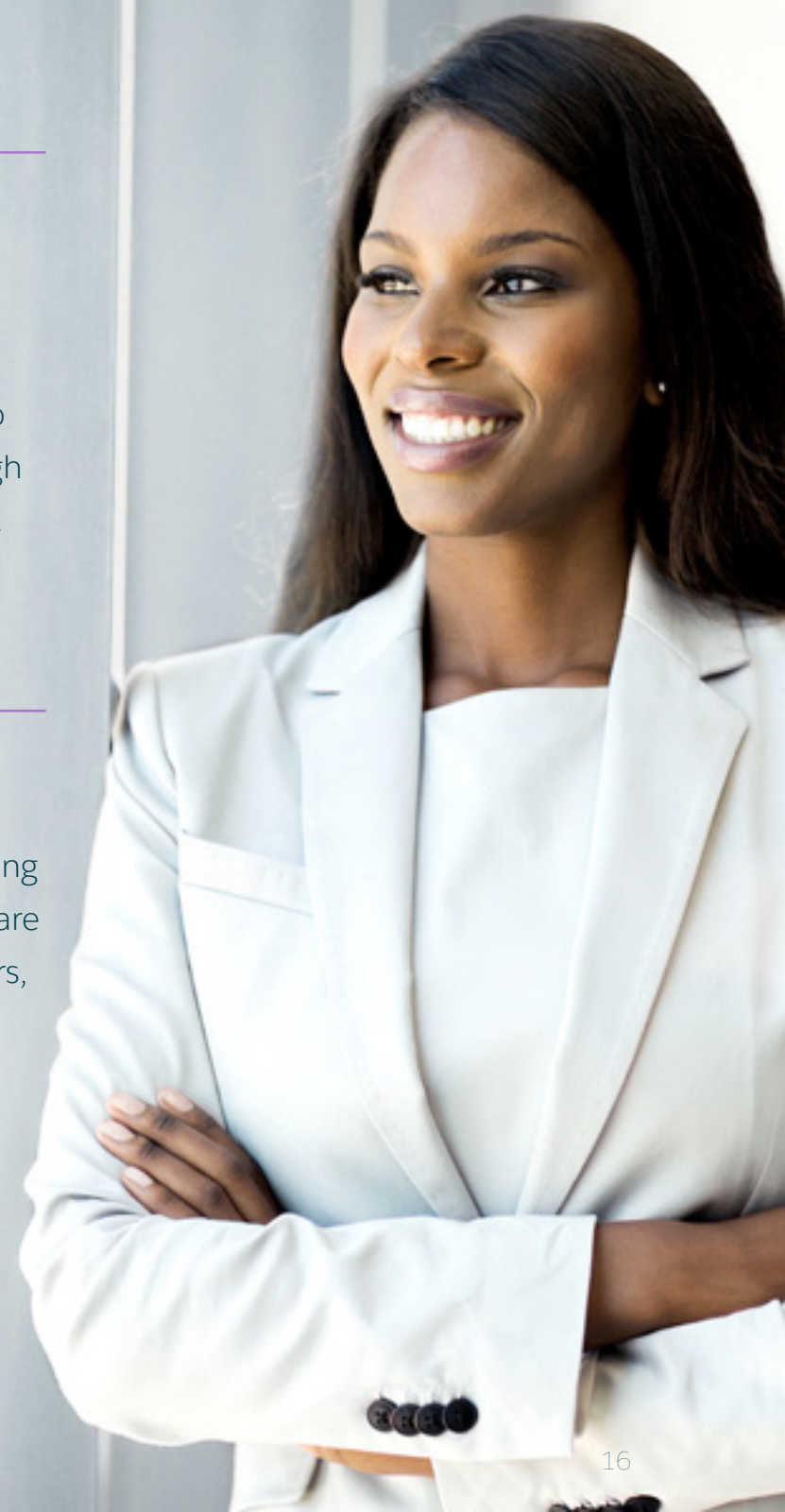
Next it's time to build, socialize, and reach internal agreement on the full customer journey, as well as identify the economic impacts, both positive and negative, across the customer journey today.

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 future target 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 start prioritizing the improvements you'd like to make to the customer journey, and calculate the ranges of potential economic value of each potential improvement. Finally, you must evaluate the project's priority versus other company projects, and establish the funding and timing required to execute on 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.
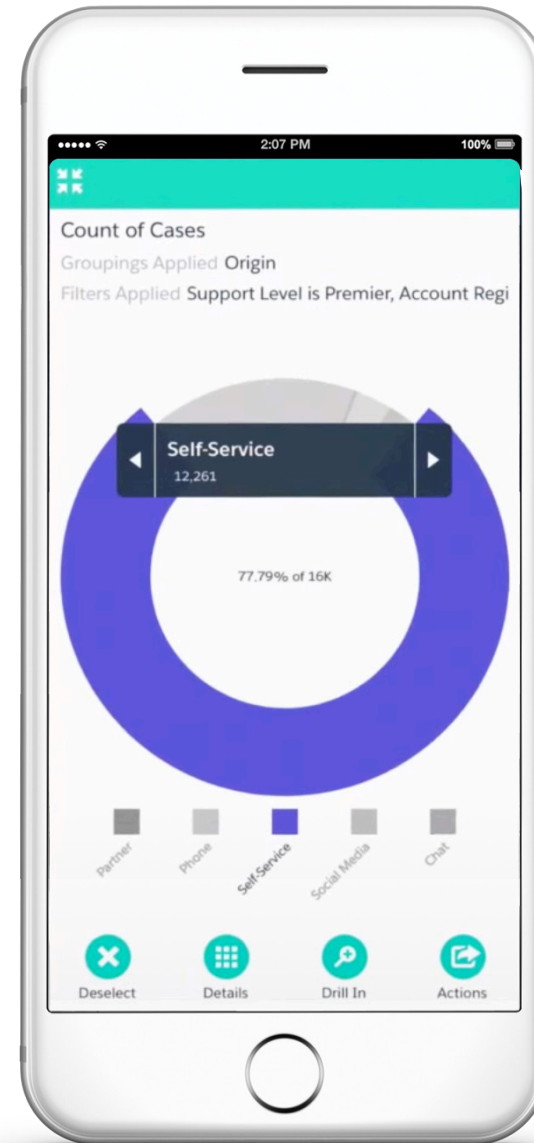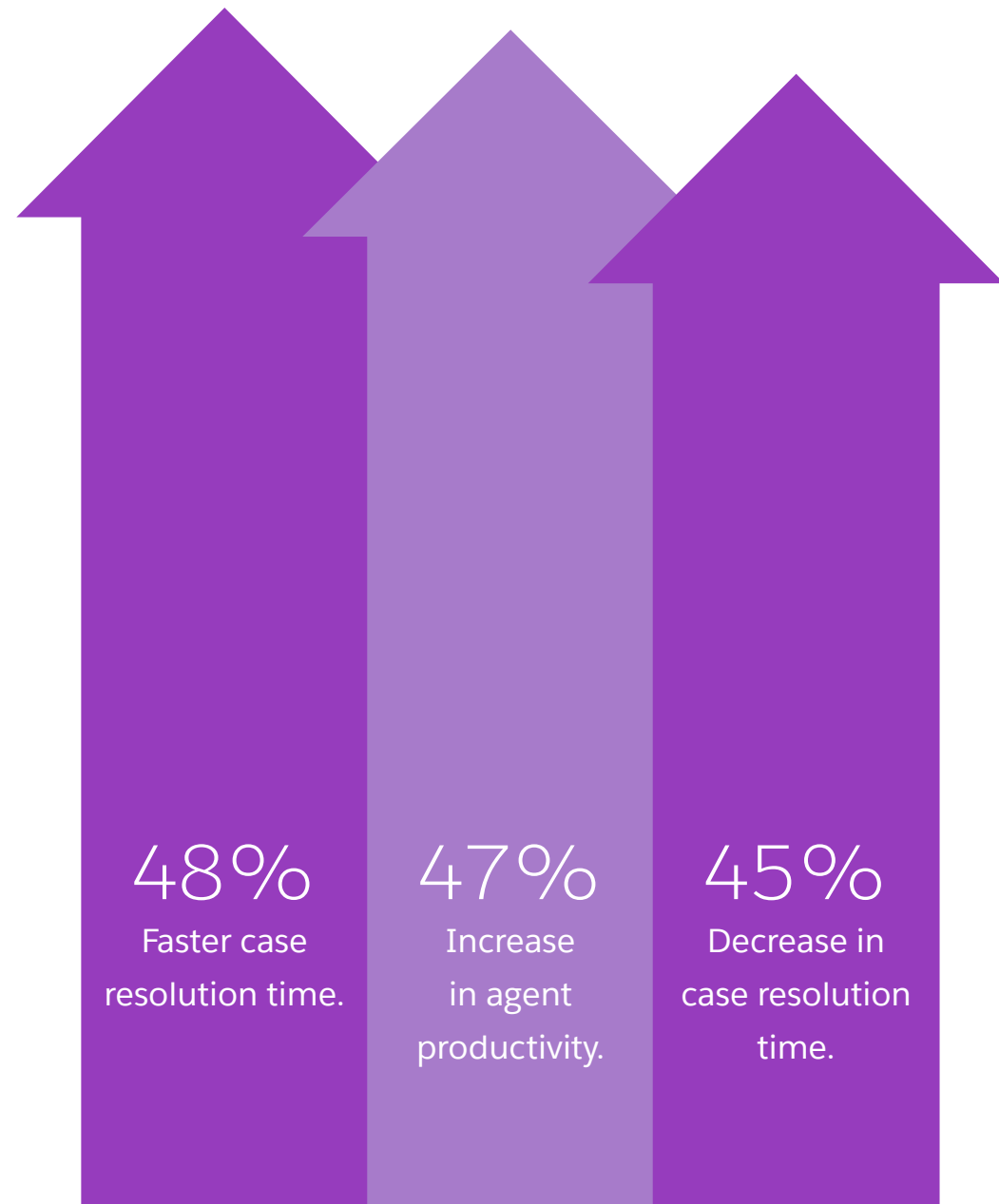
The future of customer service, now.

Service Cloud customer service software gives you faster, smarter customer support. Give your customers the answers they need, whenever they need them. Meet their new needs by providing personalized service that goes above and beyond what your competitors can deliver. Meet customers where they live with multichannel support and fix problems before they happen and delight customers in the process.

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48%
Faster case resolution time.

47%
Increase in agent productivity.

45%
Decrease in case resolution time.

CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY