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**RDI**

**BETTER TOGETHER:**  
ALIGNING SALES AND SERVICE WITH THE CUSTOMER  
EXPERIENCE TO DRIVE GROWTH AND REVENUE

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## **BETTER TOGETHER: ALIGNING SALES AND SERVICE WITH THE CUSTOMER EXPERIENCE TO DRIVE GROWTH AND REVENUE**

Traditionally, the success of a sales agent pivoted on making “the sale” — landing that top-dollar deal with that big-name client. However, much has changed in the modern sales landscape. Customer experience is king — and it’s your responsibility as a sales leader to make sure your customers and prospects have a fantastic experience with your brand before, during and after your team closes deals. [As John Goodman, VP of Customer Care Measurement & Consulting LLC](#), has written: “Quality service is a vital part of developing a positive brand image.” And in the age of the customer experience, a positive brand image might be what sets your company apart from competitors.

What’s more, all the departments in your company (sales, service, customer support, marketing, product development) want the same thing — success and revenue. However, they must all be on the same team for everyone to achieve those goals. It’s time for sales leaders to take on a new responsibility: align sales with cross-organizational departments to deliver the high-quality service customers today expect, no matter where they are in the sales cycle.

Read on to learn how sales leaders can work to improve the customer experience by tearing down company silos and aligning sales and service to better connect to future and current customers. Not only will this drive more revenue, but it will transform your sales department into one ready to take on challenges presented by the modern sales landscape.

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## Tearing Down the Silos in Your Company.

One of the biggest problems with growing companies today is that sales works in a silo separate from other departments. In order to deliver a truly cohesive customer experience and drive sales success in today's world, internal departments must be on the same team. [Lead generation expert Alex Shipillo of Influitive](#) writes: "All too often, organizational silos prevent the flow of information between various departments within a business, even those with closely aligned interests. Silos between sales, marketing, care and customer engagement teams can be detrimental to both the business and the overall customer experience." Instead, work to foster communication between your business units so that everyone is working towards the same goals and in support of each other.

**It's critical that your sales team understands that they are part of the entire customer experience and lifecycle — not just a part of the company that functions as a revenue generator.** What's more, as customers expect personalized, fast service, sales has to work harder for revenue and customer satisfaction than ever before. As you work to make your team a piece of a more cohesive, beneficial customer experience, not only will more of your customers come back and refer eligible business to help create new revenue, but scaling business up and down will be much easier.

[Bob Armour of serVelocity](#) provides four tips to foster stronger collaboration between the departments in your company:

**1. Agree on your product offerings.** While this may seem basic, it's important that everyone across your organization agrees on your product and service offerings. Included in this is that everyone shares the same business benefits, timeline and pricing for your solutions with your customers and prospects.

**2. Define your opportunity engagement model.** Make sure your process for closing sales and engaging members of teams across your company is consistent and that everyone sticks to it. Doing so is important for a seamless customer experience, as well as good rapport between your business units.

**3. Set proper expectations.** Again, making sure everyone is on the same page as far as expectations is key. It's your job to make sure your sales team isn't making promises that your service agents can't actually deliver. Hold monthly or quarterly "level-set" meetings to make sure customer expectations are being properly set and met.

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**4. Don't short-change your service team's value.** Before your sales team ever enters into an agreement with a customer, they should be making sure that the customer understands the long-term costs associated with the solution. The customer should fully understand the value they're agreeing to pay for and the service experience they'll receive over the months or years — and it's your sales team's job to show them this value.

The days of your sales reps making a sale and moving on to the next opportunity are over. To connect with customers and keep generating revenue, you have to connect your department with the others in your company, too.

## Re-aligning Marketing, Sales and Service.

Marketing and sales notoriously clash when it comes to aligning service before the sale. Why? Because management often does a poor job at setting expectations for each team and isn't actively working to repair broken processes and communications. [Rick Lepsinger of Business 2 Community](#) warns: "When customers see a disjointed approach, companies lose credibility and potentially lose business." For instance, if marketing hands over leads to sales that have been properly nurtured and feel connected to the brand, don't let your reps drop the ball by treating them like just another prospect. Your sales team must live up to the expectations marketing sets, or customers will leave during this critical hand off.

[Armour of serVelocity](#) writes about the importance of aligning your sales and service teams: "With customer expectations increasing and their success more important than ever to sustained revenue growth, best-in-class companies recognize the importance of building the bridges necessary to deliver solutions and drive results."

And this can't be accomplished if sales and service aren't on the same page. If your sales team promises something to customers during a sale that a service rep can't actually carry out, yes, your rep gets to count the sale as a win, but service has to clean up the mess. If the service team can't deliver on what sales promised, you can bet that customer won't be referring any new clients and most definitely won't be coming back for future business. Count this as an opportunity lost.

It's clear that sales leaders must work to solve disconnects on the inside to win big with customers in the long run. That means to take sales revenue to new heights, leaders must be the internal bridges to facilitate collaboration, and in turn, growth and profit. [Lepsinger of Business 2 Community](#) writes: "To deliver the best possible experience, aligning sales and marketing and your customer service departments is crucial." He gives the following three tips on aligning your internal teams:

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- **Assess your current process.** Your company can't clearly define where you want to go before you understand where your customer experience currently stands. Begin by taking a holistic assessment of your current sales process and the customer experience at each of those steps. Then, match your process up against marketing and service processes to discover gaps that you can work to fill in.
  - **Build a culture of collaboration.** Take steps to make sure the members of each of your company's various teams — sales, marketing, customer service, product innovation — are in regular communication and working together to close process and communication gaps. Reinforce the fact that everyone is on the same team and you're all working towards the same goals, namely delivering an excellent customer experience to drive up company revenue in the future. Better results for each team means better results for the company, and that can't be accomplished without working together.
  - **Establish service level agreements to measure goals.** Speaking of goals, you'll need an effective way to track your progress towards them. Lepsinger suggests crafting a service level agreement for each of your departments, in which members set monthly or quarterly team and personal goals that contribute to the wider goals of the company. Keeping each employee accountable to and responsible for attaining your overall company goals will go a long way in fostering a community of collaboration and communication.

Not only is aligning your departments a great way to improve your customer service, but it's also a fantastic means to boosting your internal morale. [Armour of serVelocity](#) writes: "The best services people like to solve problems and make a visible impact. They thrive on it! When they feel they're providing value, they're more likely to stay and your organization is more likely to retain these top performers." When your sales, service and marketing teams are allies, you improve your customer experience, your company revenue and your employee camaraderie — which is definitely a company-wide win.

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## Stay on the Same Page: Crafting a Consistent Brand Experience.

As a sales leader, it's critical that you don't underestimate the importance of consistent company customer service, messaging and branding. [John Goodman](#), VP of Customer Care Measurement & Consulting LLC, discusses the importance of delivering an aligned service experience: "When service is not aligned with the brand image, it dilutes the brand's message and leads to unmet customer expectations, customer dissatisfaction, and decreased loyalty." As marketing develops a brand image, sales must be sure to sell with that image in mind, and service must meet customer needs based on what both marketing and sales have promised — none of which can be addressed until you've broken down departmental silos and developed service level agreements.

Marketing, sales and service must collaboratively establish the overall brand experience you want to portray to customers. With an agreed-upon experience, customers and prospects will encounter similar communication no matter who they're talking to in the company. [Goodman](#) has developed nine "building blocks" that can help every team get on the same page in delivering excellent, brand-aligned customer service:

- 1. Clear brand promise.** Many of the world's most prominent companies use their strong history and brand legacy to demonstrate to customers and employees the promise that their brand carries today.
- 2. Clear accountability for the brand.** Every level of your company — from the executive level to new hires — should be held accountable for upholding the tenets of your brand in everyday work.
- 3. Focused values that are operationalized.** Companies with strong values that play out in their day-to-day customer experience have found clever ways to incorporate their values into their culture and business operations. One way that companies do this is by developing and spreading key "catch phrases" that employees find meaningful and can apply to their customer interactions.
- 4. Measurement and feedback.** Companies that are committed to delivering a consistent, holistic customer experience make sure they are doing so through soliciting customer feedback on satisfaction and employee competency.

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**5. Formal process.** Companies with strong brands “have a formally defined process for developing new services and integrating new corporate acquisitions to ensure brand consistency as early as possible.” Such companies have detailed processes in place to ensure that no new solution goes to market without being aligned under the parent brand.

**6. Ongoing communication to everyone.** Companies use rich storytelling to share brand messaging from the highest levels down to entry-level employees. Such communication can occur via scheduled trainings, briefings and meetings, informative quarterly newsletters and by ensuring that everyone has access to timely, relevant information on demand via a web portal.

**7. Emotional connections with customers.** Businesses with positive customer experiences have found impactful ways to connect with their customers. For instance, your sales reps could make personal calls to customers already passed on to the service team and check in to ensure they’re satisfied with what they were sold.

**8. Employees who deliver the brand.** Goodman explains: “Brand-aligned organizations that employ people who fit the brand image understand that if they can hire individuals with the right psychological attributes, they can teach them the necessary skills.” In short, hire employees that will be dedicated to sharing your company values with customers.

**9. Customized brand for different market segments.** When developing brand messaging, companies with strong brands think holistically but also account for how they’ll share their story with smaller segments of their target market for maximum impact.

With a collaborative approach to crafting a brand experience, sales, marketing and service can all ensure customers have positive interactions at every company touchpoint.

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## Getting Your Sales Department Up to Speed.

Let's take this back to sales. You've broken down the sales silo. You've bridged the gap between marketing and sales, and sales and service. You've participated in developing a brand experience that each of these departments agrees upon. What's next? Making sure your sales reps are ready for the switch from hitting sales numbers to collaborating across departments to deliver consistent messaging and customer service. This will require coaching, and perhaps the creation of a new customer experience strategy playbook.

As you bring your internal sales agents up to speed on new customer-centric processes and goals, you must also ensure that all of your third-party vendors fully understand and are part of the transformation. See that everyone who interfaces with customers on your company's behalf does so with a unified front, even if they aren't in-house. [Jason Hutcheson of Iconic](#) points out that every, "message that is sent out [to customers] helps, hurts, or confuses brand identity in your target market's mind."

If vendors such as contact centers are part of your sales department, work to integrate your overall company customer experience strategy into the training of that outsourced staff. Additionally, service teams are also frequently outsourced. **Work with service management to give all third-party vendors the same training and customer experience guidelines.**

As well as getting every sales team member up to speed with new processes, you need the technology to back up your efforts. Ensure everyone at your company — both internal and external resources — is working in the same CRM or with the same customer database technology. As leads come in to marketing, pass through the sales team and are then handed to service, all communication should be transparent across teams to ensure the customer experience is as smooth as possible. As a sales leader, use your pull to integrate the technology used across departments so you can ensure your own team's success, as well as company-wide success.



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## Using Customer Feedback to Make Continual Process Improvements.

As your sales team plays a part in these company-wide changes to improve your customer experience, be sure you're keeping customers top-of-mind. Take time to regularly solicit candid feedback — and then take that feedback to heart. While positive feedback can serve as validation that pieces of your process are on track, negative feedback can inform you of where service and communication gaps still exist.

You should also use negative feedback to inspire collaboration among your business units. [Shipillo of Influitive](#) says to “get your support team involved and provide constructive feedback to the product development department. Loop in your sales reps so they understand the story behind the bad review when they speak to prospects.” **One piece of negative feedback is everyone's problem to solve — so don't let it lead to non-productive finger-pointing.**

Sales leaders should take this feedback seriously because your happy customers are your biggest champions. As you align sales, marketing and service experiences, **more happy customers will lead to increased referral traffic.** Shipillo explains that a successful, ongoing referral program is great for everyone: “The sales team will love that they can leverage your happy and successful customers to help influence the buying decision earlier in the process.” Even in today's hyper digital world, word-of-mouth referrals are still one of the most impactful ways to generate new customers. Shipillo offers advice on how best to solicit requests for referrals: “Position your reference calls as a way for your customers to build their network and share their success story and they'll be glad to participate.”

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To foster customer trust and loyalty that leads to referral traffic, consider working with marketing and service teams to develop customer advocacy programs, in which satisfied customers share their experience and story with prospects. Shipillo explains how to build such a program: "...brands need to build trust early in the buying process by surrounding buyers with social proof for their product in the form of online reviews, customer testimonials, organic forum discussions and more." Reward customers in the form of a discount or free service upgrade for a month if they publish an online review, blog about their experience with your company or regularly interact with your brand on social media.

With consistent customer feedback and attention to creating an experience that makes customers feel comfortable making referrals, your sales team will be better equipped to reach the goals your department set with marketing and service.

## Making Customer Experience King at Your Company to Drive Growth and Revenue.

The modern sales landscape is changing, and the modern customer expects more from brands than they ever have in the past. **Sales leaders can't afford to ignore the customer experience.** As your company overcomes the challenge of organizing internal efforts to provide a better experience across the organization, remember the vital role that sales plays in making it happen.

If customers undergo a fragmented experience, it depreciates the value your company provides them. Don't risk losing customers that choose to work with companies that actually cater to their expectations. In the age of the customer, if you don't provide a seamless experience, you can bet your competitors will. When it comes to generating revenue and growth, you can't afford to miss any opportunities.

**About Us**

**RDI Corporation** was founded in 1978 and is headquartered in Blue Ash, Ohio. We provide precise business solutions through a fully integrated outsourcing model. Our clients range from mid-sized corporations to distinguished Fortune 500 companies.

Since 1978, RDI has been winning for clients every day, every call, every interaction — we'll show you a track record and game scores that prove it. RDI tailors programs and activities to fit perfectly with clients' needs, operations and expectations. We don't have rigid requirements or structures that prevent your program from success. The motto "Winning Smart" represents an unmatched combination of knowledge and passion you will notice in every member of our team.

RDI Corporation consists of four distinct divisions closely integrated to cover the spectrum of customer service and sales, market research, digital strategy and design and technical support. Our organization consists of responsive, experienced professionals from a broad range of backgrounds, all commonly bonded by the spirit of winning.

RDI functions as the service provider for many discerning Fortune 500 companies. We earn the respect and trust of each client by vigorously evaluating and optimizing the work we carry out for them. We adapt our work when complications arise and resolve issues proactively. RDI does what others strive for: high value service in a cost contained environment.

**Have additional questions or comments?  
We'd love to hear from you!**

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**Additional Resources:**

[The Ultimate Guide to Creating New Revenue Streams](#)

[Doing the Right Thing: Leadership Defined](#)

[4 Steps to Legendary Customer Service](#)

[Learn About Our Pilot Program](#)