

**How do we equip our contact centre staff to move from being a service platform to becoming a revenue generating hub – transition from Service to Sales**

**The Client** – A leading multinational bank with contact centres across the globe.

**Target Audience** – Training Heads of 14 countries & Program Champions

**Brief**

Customers of this bank call the Inbound contact centres for their service queries. As the bank wanted to move from a Service to Sales environment, in the new scenario, agents were expected to create a value addition for the Customer by engaging with him to identify needs and suggest the best facility to meet those needs. The premise was that the Customer calls into the Contact Center, thus there is a 100% contact ratio and importantly he takes that time out to make the call. These factors were the derivatives for Business to design the S2S (Service to Sales) strategy and a commitment to generate 4 times the current revenue from the Contact Centers.

**The Need**

Cover agents at the Contact centers for 14 countries - armour officers with skills to effectively transit from service to sales

- How do we create a mindset shift – selling is easy
- How do we get our officers to have confident sales conversations
- How do we make sure officers offer the right product to the right Customer
- How do we equip them to handle objections
- How do we first train our Trainers who can then train the officers
- How do we get officers to look up to their team Leaders as Role Models
- How will we check for application

**The Measure** – Increased sales, increase in pitch rate

**What We Did :**

**Always – Client First**

- On-site research with HK, China, UAE and India team followed by calls with other 8 countries
- 360-degree view from all stakeholders
- Comprehensive understanding on expectations, challenges and successes.
- Findings shared with Client who was very satisfied & encouraged us to move to next stage of tactical design
- Identification of Trainers & S2S champions as program audience
- Roles defined for
  - Trainer – fulcrum who would administer the program for officers & Team Leaders in all 14 countries
  - Team leader – Coach their teams, drive S2S campaign and ensure application on calls
  - S2S champions – designated engines to create momentum, focus & make S2S a way of life at the Contact Centres

**The Intervention**

- A comprehensive 4 day capsule for Trainers & S2S champions
  - 2 days – to attend & experience the actual program for officers
  - Half day – Introduce the TL module to Trainers & coach them for program delivery.
  - 1.5 days – Train The Trainer Certification
- **Key program elements - Agent Program**
  - Mindset to move from service to sales
  - Understanding the call structure
  - Techniques to transit from Service to sales

- Need identification to earn client's trust
- Matching client's needs with benefits
- Confidence in closing proactively
- Videos and simulations
- **Key program elements – TL Program**
  - The big picture
  - New Tools – MIS, Coach's Tool Kit
  - S2S Coaching conversations
- **Key program elements – Trainer Certification**
  - Content knowledge & facilitation skills
  - Teach back delivery sessions
  - Tool Kit with Governance docket to ensure consistency
  - Activity checklist to fine comb the learning from every activity
  - New Tools
  - Coaching conversations

#### ***And that's not all***

- Monthly coaching for the trainers to help them to iron out any challenges and support them in the implementation process
- Special tool kits designed with content and support material for post program reference – customized separately for Agents, Team leaders & Trainers.
- E-books for agents at their desktop for techniques and translated material in their respective languages to make it easy and simple for them

#### ***The Game Changers***

- Scenario based videos & introduction of special, relatable characters
- Customised case studies for each country/region
- Post program reference material – customized tool kits
- Applied the BOT methodology of training through experiencing program delivery, Trainer the Trainer model, post training certification, coaching to build internal capability
- Multiple level intervention for smoother integration among various audiences and high readiness to move to a new environment of selling

#### ***The Results***

- Phase 1 –
  - The Agents program was very well appreciated and earned us a lot of respect from our participants because they found answers to what they and their agents were seeking
  - Trainers felt empowered and confident of running the program with the agents.
  - 100% training completion for all agents & TLs by the Trainers.
- Phase 2
  - Data received from 6 countries on all sales indicators showed increase on all 3 parameters – Conversion Rate, pitch rate, leads generated. Highest numbers reported were at
    - 190% increase in conversion (4 months pre vs 4 months post Training)
    - Increase in no of leads from 15% to 34% over 4 months
    - Increase in pitch rate from 35% pre-program to 78% in M1, 84% in M2 & 85% in M3 post training.