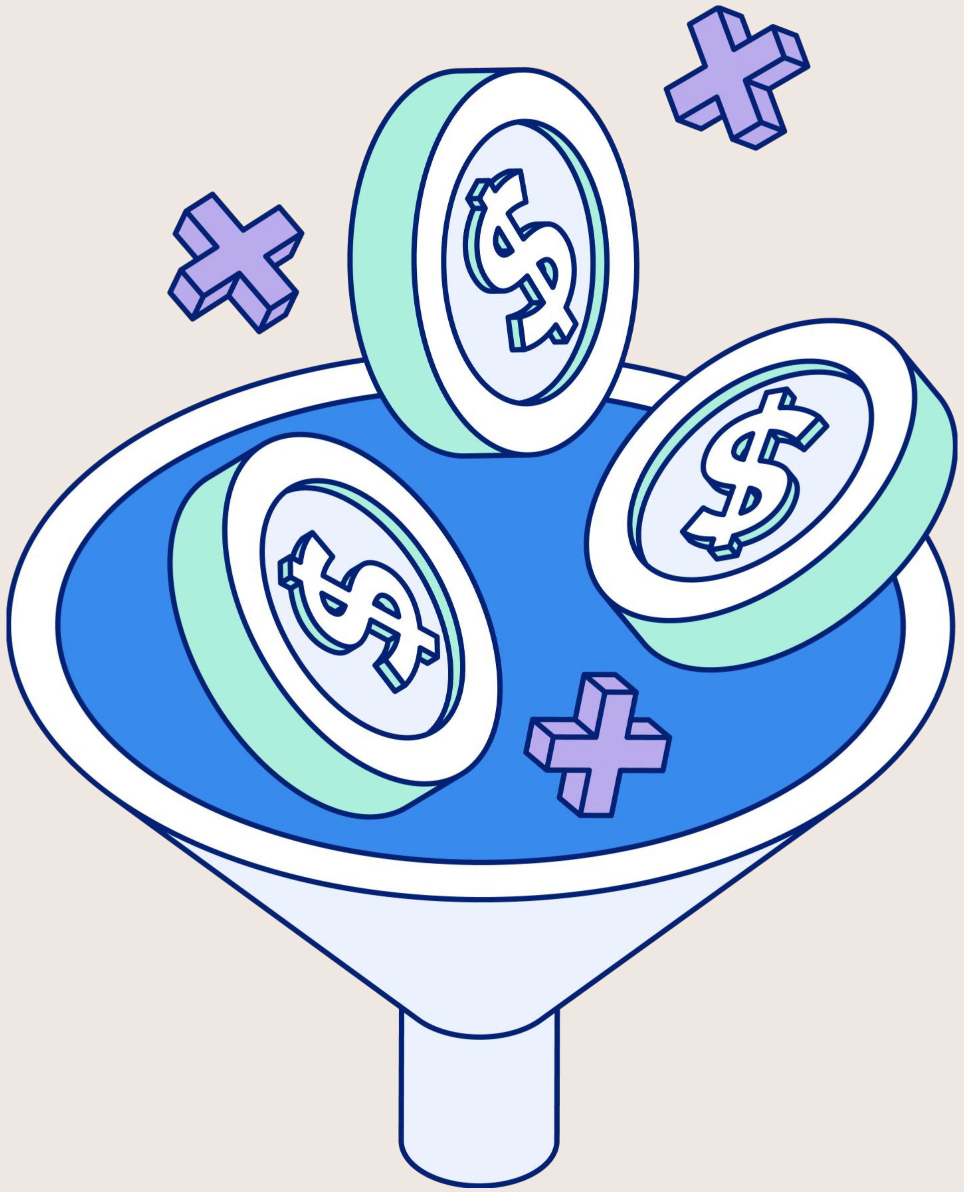
CallRail

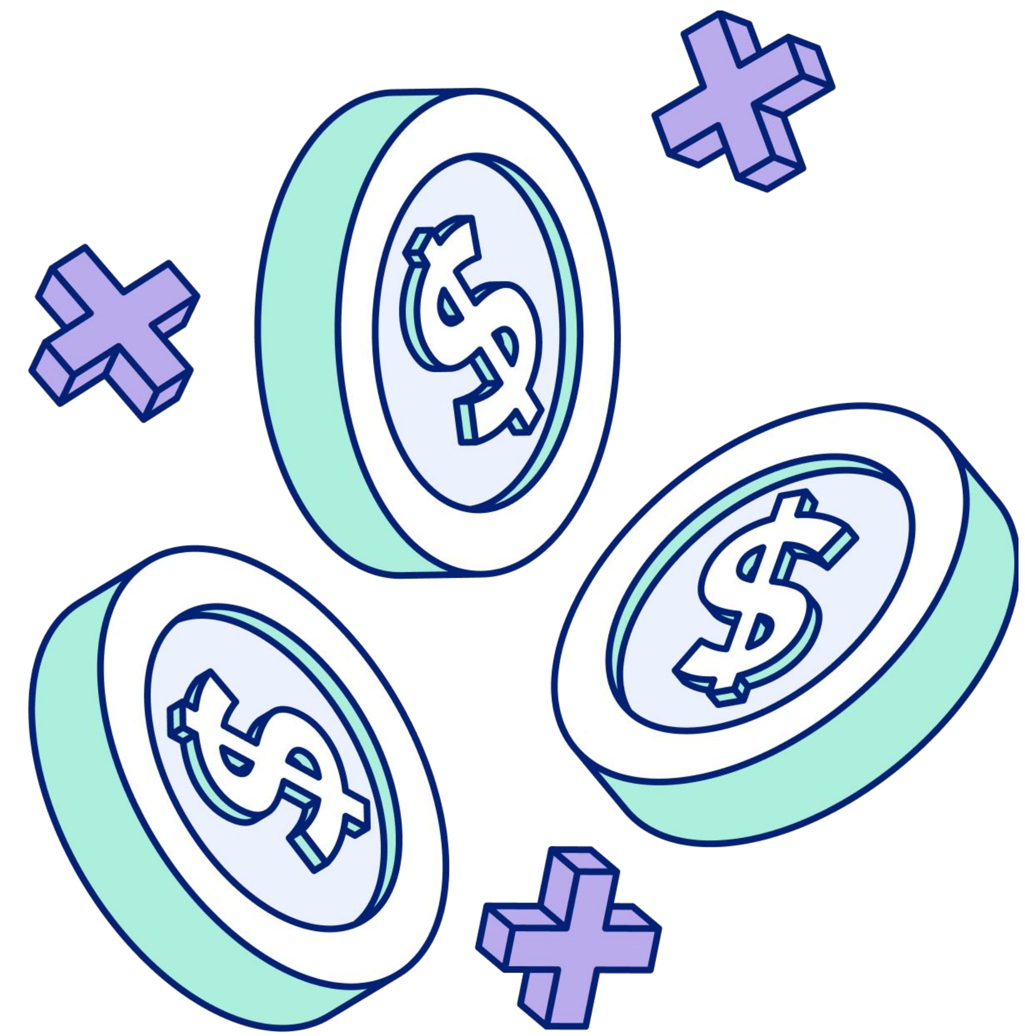
How to convert more leads with better connected sales and service teams



When you don't return someone's call, they may think you're "ghosting" them to end the relationship. In business, you never want to ghost a potential lead. Yet, too many businesses do just that. As many as **39% of businesses** admit they've struggled to respond to inquiries quickly and to provide a consistent experience.

Dropping the ball by not following up with customer inquiries can be costly as leads fall through the cracks and customers move on to your competitors' businesses. With customers having higher expectations for today's companies, the risk of losing sales due to slow or no follow-up becomes even greater. More than half **(56%) of U.S. customers** say they expect more from customer service than the previous year. And **75% of customers** say a fast response time is the most important part of a good customer experience.

Naturally, your business isn't trying to drop the ball or ghost customers, but if your sales and service teams aren't well connected and don't have clear insight into who is calling, why, and what they need to do to help them, customers end up getting shuffled around, put on hold, forgotten, or never followed up on at all. The answer to happier customers and a higher rate of lead conversions is unifying your sales and service teams to make sure you answer all customer calls and provide a consistent, reliable experience.



Create consistency across departments to forge customer loyalty

A consistent customer experience builds trust because customers get the service, products, and information they expect. On the other hand, conflicting information may cause customers to get frustrated and even look for other product and service providers. In fact, [83% of customers report] that they give more loyalty to companies that give them a consistent experience, no matter the department.

While companies don't intend to provide inconsistent experiences—they just don't know how to easily provide consistency. Customers say the **two most frustrating experiences** are being transferred between representatives (22% of customers) and having to contact a company more than once (21% of customers) for the same issue. When you resolve those issues, you can eliminate a big percentage of customer disappointments.

To eliminate common inconsistencies, start using a **unified communications system** that can provide representatives with a customer's interaction history, including calls, texts, chat messages, and form submissions. With those capabilities, the customer or prospect doesn't have to start each conversation from scratch, and employees don't have to worry about what the customer has already been told because they have the information right in front of them.

Another big area of concern in creating consistency in the customer experience for businesses is when they need to transition prospects to another representative, department, or channel. Often, those transitions are where it's easy to lose leads because the call gets dropped or the next representative still isn't the right person.

A lead who has made contact through your website may get lost in the shuffle of a phone tree or when trying to find an answer via chat. Or, if a representative tells a customer someone from another department will call them back, and the way team members communicate this is via sticky note or email, it's easy for the other person to lose the note or overlook the email and never follow up with the customer.

These transition gaps or blind spots are why all team members should work from the same inbox.

With a single inbox, your sales and service teams are able to:

- Track all interactions across key transition points
- See context into previous conversations and transactions
- Establish trust with customers who can tell you have the right information about their issue

Customers also gain a number of benefits:

- A consistent and trustworthy brand experience
- No need to repeat oneself
- Faster and better service because every representative knows their history

Given customers' increasing expectations for better experiences, customer care leaders are also focused on improving them. Customer care leaders say creating better customer experiences **has grown as a priority for them by 19%** since 2019. So, it's important to adopt the right tools—those that can centralize your business contacts, classify or qualify leads, and allow you to quickly look up customer histories—to provide better communication and experiences for your customers.

Capitalize on the increasing role of field service teams

Customer-facing service teams out in the field are the front line of customer service. Of service organizations, 82% say they use their field service teams to upsell and cross-sell to customers. They're essential to sales and maintaining customer relationships.

Field service teams should have access to all the tools and information required to provide an exceptional customer experience. Even though field service used to be limited to certain industries, all kinds of companies are now offering services to customers at their homes. In fact, mobility is a priority for service professionals, with 79% saying it's important to be able to work from anywhere.

That's one reason lead management platforms shouldn't be designed just for sales teams. Those designed to support both teams in the office and in the field enable businesses to provide better customer experiences that generate loyalty and repeat business regardless of where staff is located.

Another reason is that customers want a consistent experience across all channels, departments, and interactions. Giving your field representatives on-the-go capabilities with a mobile app that integrates with your communications system will enable them to do their job more effectively and deliver a better customer experience. Capabilities they need in the field include:

- Access to the same customer system of record the office team uses
- Text capabilities to/from your business number on your personal smartphone for easy communication with customers
- Representative-to-representative call transfers for smooth transitions when necessary to resolve complex problems without letting a customer fall through the cracks
- Representative-to-representative calling between sales and service teams to cooperate on customer issues
- The ability to receive call transfers from customer service representatives while on the go

It's essential that your customer-facing teams don't have blind spots where leads could be slipping away without even realizing it. By providing representatives with customer communication history and communication tools no matter where they are, they can respond quickly to customers, provide a better customer experience, and convert more leads.

Unite channels to better serve customers

Connected experiences across the entire customer journey provide consistency and build trust. By building the customer relationship at every interaction, you'll increase customer loyalty, encourage repeat purchases, and upsell and cross-sell more often.

Unfortunately, 60% of customers say when dealing with a company the communications don't seem like they're all coming from the same organization. And two-thirds say they frequently have to repeat themselves when talking to different representatives within the same company.

Those issues of disconnected communications can frustrate prospects or make them feel like they're wasting time. These problems can prevent them from converting to customers. Here are some steps you can take across channels to provide a more unified, consistent customer experience.

Personalize the customer experience

Customers expect human, empathetic interactions when dealing with a company. So representatives need information from the entire customer journey to see contacts' touchpoints across marketing channels and any sales interactions.

Create a single source of truth

Using disparate tools across your teams causes them to lose information and possibly even leads if their messages get lost. Our survey shows that the average small business uses 4 or more customer communication tools like text, forms, phone calls, and live chat. And 94% of them think they use too many communications tools. With CallRail's Lead Center, representatives—whether in sales or customer service—can see a customer's interaction history. This history is easy to access in a centralized location, where users can also see the notes of representatives from previous interactions.

Unify your inbox

When prospects and customers can contact you via phone, text, chat, or form, you shouldn't have to search all your different inboxes for information. With Lead Center, these are all integrated into one team inbox and are accessible via desktop or the **Lead Center mobile app**. All representatives can work from the same inbox from any location. They can see the customer timeline for marketing engagements, sales interactions, and customer service handoffs. Field representatives also have easy access to all the data they would have in the office, and all teams can be aligned.

Connect teams

Misalignment between teams and in customer communications not only frustrates customers but also employees. In our recent survey, 70% of small businesses employees said they've been **frustrated by lack of internal alignment** around customer communication.

It's revealing that 72% of employees report having misspoken on a call with a customer because they didn't have information from previous conversations. Such interactions can cause customers to view your company as unprofessional, unhelpful, or not worth doing business with. You can solve these disconnection issues by providing a shared inbox as well as other tools that let teams transfer calls, share communications, and see past notes.

Treat customer service reps like sales reps

Customer service representatives are your second line of salespeople, and upselling is only one part of what they can do. They can also enhance the customer experience, provide accurate answers, and communicate with prospects and customers to build rapport for your brand. If your customer service representatives have the same tools and opportunities you give the sales team, they can also play a key role in **converting leads and boosting sales**.

Use time-saving technologies like quick texts

Technology can help create consistency and reliability for customers. Capabilities like **quick texts** can be used to let callers know when you'll answer or return a call. Templates can be saved for teams so their text messaging is consistent, and representatives can use texting to follow up on marketing efforts. Today's customers expect fast response times and not to be "ghosted." If they don't get the treatment they expect, they'll take their business to companies that will be responsive and communicative.

Align your sales and service teams to convert more leads

Sales teams and customer service teams may be different departments, but they have the same goals when it comes to winning over customers and supporting the business' bottom line. That's why connecting your sales and support teams is good for business.

Alignment in your small business means all departments, all teams, and all team members are on the same page. You create alignment by giving everyone access to the same tools, the same messaging, and the same access to customer communications. Utilizing a unified communication solution like [Lead Center](#) across your entire business provides consistency and better customer communication to help build trust and convert leads at a higher rate.

Align your sales and service teams with a smart business communications system like Lead Center.

Start your 14-day free trial today

CallRail