



Miller Heiman™

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Bridging Service into Sales for Over 4X Increase in Revenue

Putting customers at the center brings deeper relationships with CSAT scores to prove it

Building on a History of Success

Clients expect exceptional customer service: it's a hallmark of the firm's value proposition and a key differentiator for this fintech market leader. When the firm first engaged Miller Heiman Group, now part of Korn Ferry, 11 years ago, their roughly 80-person customer service team were "islands of support," with customers only wanting to work with certain support personnel.

After implementing Service Ready for Technical Support™ and Diagnostic Troubleshooting to be Service Ready™, customer complaints dwindled as support staff began offering all customers a consistent support experience. In fact, post-training customer surveys indicated that the support team now had great communication and follow-up skills—skills that the firm attributes directly to Miller Heiman Group's training. They now see:

- Annual CSAT scores between 96 and 98%
- Service Quality scores that increased from 88 to 95%
- First Call Resolution rates that rose from 29% to 52%
- NPS scores that jumped to 82

With Miller Heiman Group's proven successes, there was no question that this firm would reframe their customer service approach leveraging training and support of key staff.

The Firm

This fintech firm's solutions support clients around the globe, serving nearly 1,000 clients in 150 countries, including 50% of the Fortune 500 and 60% of the Fortune 100.

A fintech leader, their platform offers a focused approach to highly-regulated and complex requirements and needs.

The Challenge

Turning Support Conversations into Sales Opportunities

The firm restructured its incentive program to encourage teamwork by rewarding the entire company, not just individuals, based on both company revenue and positive customer satisfaction scores. Capitalizing on this approach, there was an additional opportunity to reward the customer support team. With a custom incentive program, the firm pays a bonus after the sales team closes a deal connected to a customer support team member—giving customer service team members the ability to earn rewards year-round rather than annually.


While a handful of team members embraced the new incentive program and started referring opportunities that became closed-won business at the onset, others expressed concerns about getting a sales quota and needed to develop new skills to succeed. Noting the inconsistency in the team's performance, the firm wondered, "How can we build those skills across the board?"

For the solution, they returned to Miller Heiman Group.

Strategy

Miller Heiman Group provided Bridging Service into Sales training to the customer support team, helping them recognize and capture additional revenue opportunities through their sales referral bonus program.

Implementation

 Bridging Service into Sales

Delivery Channels

 Instructor-led training



The Solution

Improve Understanding of Customer Needs and Grow Opportunities to Build Relationships

The firm didn't want to implement a high-pressure sales program. They wanted the team to develop stronger listening skills, which would help them identify more customer needs—and thus opportunities—to hand off to the sales team. This would support the already-high revenue retention rate, but also solving real customer problems. There was a renewed focus to develop understanding on customer calls, with staff noting "What am I hearing from the customer? What can we provide to help them differently?"

In studying Miller Heiman Group's Bridging Service into Sales™ curriculum, the firm found exactly what was needed: training designed to help the customer support professionals recognize sales opportunities that would enhance the overall service-forward mindset. The course offered the consultative skills development the team needed to offer customers more complete solutions and strengthen their relationships.

The firm piloted of a small team of support professionals trained by a Miller Heiman Group trainer. Noting the pilot's success, they then rolled the program out to the remainder of the team over a six-month period, beginning with multiple training sessions during their annual company meeting.

The Results

Greater Problem-Solving Skills and Over 4X More Closed-Won Business

The firm's customer support underwent a remarkable transformation as a result of the Bridging Service into Sales™ training. In the first five months of 2019, support professionals have seen a **staggering 475% increase** in the number of **opportunities** identified, resulting in a **381% increase in revenue through the support channel**, compared to the same five-month period two years ago.

The team has also learned skills that will sustain their success. Support team members gave the Miller Heiman Group's training rave reviews:

- "I thought the training was a good reminder of how to lead customers to what they need without feeling as if we are selling anything."
- **"I like that we started the class saying we are not salespeople and this is not to make us salespeople.** Yet, it's important for us to listen to find out when our clients need additional help and we hand off to those who fill in the details. The examples were relevant to our work as we can relate to everything that was being said."
- "I learned a few new tools that I can begin using immediately, such as listening for clues to upsell new products, turning the conversation around and closing the deal."

Now, the customer support team recognizes that identifying upsell and cross-sell opportunities is a critical part of their job description. **By offering more solutions, the customer support team increased their value to their customers and deepened their relationships**, becoming a vital part of generating repeatable, long-term revenue.

"Miller Heiman Group made it so easy to **understand our needs and adapt the program** to achieve the goals we wanted. It's also a lot of fun to see how people develop, take the skills they learn and apply them to create better customer experiences."

Protecting Customer Relationships in Challenging Times

An added bonus: the yearly recertification of the Service Ready for Technical Support™ and Diagnostic Troubleshooting to be Service Ready™ programs helped the customer support team relieve customer anxiety and protect customer satisfaction in relation to massive new guidelines and regulations. When the government belatedly published final regulations addressing changes in summer 2019, the company had to rush to update a product. The product release occurred in time for clients to meet their enhanced obligations, but some customers expressed frustration with the lateness of the update.

A support staff, trained and supported, minimized the decrease in customer satisfaction scores as a result of the delayed regulations. It reinforced the skill set to deliver world-class support to drive product adoption across our customer base.

- Increased the number of sales opportunities identified and closed by **475%**
- Increased revenue from closed-won opportunities by **381%**
- CSAT scores reached a high of **98.1%**, with an NPS score of **82** and a Service Quality Score of **95%**
- Maintained steady, high customer satisfaction score, customer support score, and Net Promoter Scores during challenging product update

About Miller Heiman Group, now part of Korn Ferry

Miller Heiman Group is the global leader in providing organizations sales and service methodology to drive revenue and change business outcomes. The company's training, consulting, technology and research solutions align process, people, tools, data and analytics **to prepare sales and service organizations for the future of selling.**

For more information, visit www.millerheimangroup.com