

# SILOS No More

Cross-functional customer-service teams can put aside departmental agendas and work together using new rules of engagement. Here are a few good ones to get you started.

**T**he location: a conference room at a major global corporation, where a cross-functional team led by a relationship manager is trying to solve a customer service problem. The team also includes representatives from marketing, engineering, customer service, and finance.

The problem: In the midst of a campaign to get a key customer to renew its multimillion-dollar contract, a major product quality problem has arisen. As a result, the customer's assembly line is stopped, at a cost of millions of dollars a day. The customer is threatening to move its business to a competitor.

The scene: Progress at the meeting has ground to a halt. The relationship manager wants the problem solved *now*. The finance people want more information about the financial impact of potential solutions, and the engineering manager is concerned about the lack of staff to fly to the customer's site on short notice. The marketing manager is introducing creative idea after creative idea to solve the problem, but no one seems to be listening. The customer service manager isn't contributing at all; he feels that no one respects his ideas.

The challenge: to save the account by developing a cost-effective, innovative solution to the customer's problem.

The question: Can this customer team work together successfully?

When it comes to selling, the days of the Lone Ranger are over. These days, successful selling and post-sales service are typically done in teams. Sales professionals must coordinate with their organization's service, technical support, marketing, finance, and operational staffs in order to sell, negotiate, and implement customer solutions successfully.

In more and more industries, a good product or service is the price of admission to the sales process. Winning, retaining, and growing customers now depends even more on the intangibles—speed of response, creativity in customer prob-

lem solving, extraordinary post-sale support. In this environment, the performance of customer teams is as important as the performance of the individual sales professionals.

Unfortunately, many companies find that although customer teamwork is critical to building customer satisfaction and company profitability, breakdowns in this area create costly problems. They include

- embarrassing miscommuni-

cations and disclosures of sensitive information caused by lack of team coordination

- costly giveaways of valuable products or services

- dissatisfied customers whose expectations have been set higher than they should have been

- inability to compete and win business because customer team members are unable or unwilling to find creative ways to address customer needs, meet key deadlines, and free up the resources needed to get the job done.

That's unacceptable. If a company wants its selling relationships to work, it must make its customer teams perform more effectively by giving them better rules of engagement they can use in their work.

## Tough barriers

Making any team perform effectively is challenging. Customer teams are often especially difficult to manage. Here are several reasons.

**Silos and tribes.** Despite recent efforts to improve cross-functional teamwork, most large companies assemble customer teams made up of people who affiliate more with their own parts of the organization—sales, engineering, customer service, or finance—than with the team and its goals.

That can create major problems. At one global telecommunications firm, for example, a culture of fiefdoms developed, in which more time was spent focusing on what was

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## Sales and Support: Tribal Warfare on the Customer Team

In many companies, customer teams are made up of representatives of sales and technical-support departments. A unique challenge of making these teams work is bridging the gap between the two tribes. Here are some typical scenarios:

On the issue of...	Salespeople usually see it like this...	Technical-support people usually see it like this...
When it's needed	ASAP	"Let's take the time to do it right."
Information	"Don't confuse me with the details. Let's go!"	"I need more information before I can make a final recommendation."
Recommendations	"I want options to share with my customers."	"I want to find the one best solution to the problem."
The top priority	"Closing the sale."	"Solve the problem in a quality way."
The most exciting part of the job	"Close the big deal."	"Solve a tough problem in an elegant way."
It's working if...	"...the customer is happy."	"...the solution works."
The new opportunity	"This could be a HUGE deal!"	"You haven't shown me the data yet that proves this deal is really qualified."
Deal expansion	"Great news! The deal just grew in size by 50 percent."	"Oh no. The workload on the project just grew by 50 percent."

wrong with other departments than in working together to develop better solutions for customers. That resulted in slow growth, lack of innovation, and inferior customer service.

In some organizations, such groups are called silos. In others, they're referred to as tribes. Regardless of what they're called, these organizational groups typically have different goals. They're made up of distinct types of people who have divergent styles, priorities, and belief systems. Putting representatives of silos together to serve customers doesn't necessarily create a team; it may, in fact, foster a new level of conflict (see the sidebar, Sales and Support: Tribal Warfare on the Customer Team).

Culture of individualism. Though most companies talk about the importance of teams, many still recognize and reward individual rather than team results. That's especially true in the sales arena, where most companies still have a strong focus on top performers and are more likely to reward fire-fighting by individuals than smoothly running account teams. In such environments, it's not surprising to find a weaker commitment

to working in teams than is needed to get the job done.

Remote and fewer team resources. In the past, customer team members usually worked in the same location, ensuring some level of face-to-face interaction. With an increased emphasis on corporate efficiency and cost control, that has changed. Now, virtual teams made up of people from different locations are more common. In some companies, support resources (such as engineering professionals and customer service staff) are now shared between salespeople located in different time zones. In fast-growing companies, those trends are heightened by an influx of new employees who may have little experience working on corporate teams. The result: a lack of clearly understood norms for team interaction.

Customer demands for rapid response. Within most industries, sales cycle times have decreased dramatically. Customers are demanding shorter schedules for proposal development, product customization, and response to requests for information. The advent of voicemail and email has made the demands for

quick turnaround more intense. In an environment of shrinking resources and virtual offices, teams have less time than ever to form, get organized, build relationships, and learn from experience the best ways to interact with each other and customers.

Buyers are demanding higher levels of customer team performance. Sales executives are asking for the same thing. Those stresses in the business environment often work against effective teamwork. Instead, they tend to increase the level of team contention and make it more difficult than ever for a team to function effectively for customers.

### The bad habits of highly successful people

When faced with new challenges and the resulting high level of team conflict, what do customer team members do? Typically, they revert to the old bad habits. Here are some examples of typical wrong turns customer teams make and the consequences:

❑ **Wrong turn:** Fail to check with other team members before making commitments on their behalf.

**Consequence:** Salespeople present solutions to customers that are hard to implement because key resources aren't available or because the solutions don't reflect the best thinking of all team members.

❑ **Wrong turn:** Move forward too quickly on deals without gathering or sharing enough customer information.

**Consequence:** Team members are asked to work on unqualified business. Once they've wasted time in such situations, nonsales members of the team are less motivated to perform in sales situations.

❑ **Wrong turn:** Involve team members too late in the sales process (see the sidebar on page 36).

**Consequence:** Easy or less costly solutions are missed, and customer service solutions are implemented in stressful, last-minute fashion.

❑ **Wrong turn:** Communicate in disrespectful ways.

**Consequence:** Team morale drops. Team members check out and stop contributing to the achievement of team goals.

❑ **Wrong turn:** Give unclear instructions or incomplete data to fellow team members.

**Consequence:** Last-minute rework is needed because instructions weren't given clearly the first time. Key steps in the sales and service process fall through the cracks because team members make incorrect assumptions that others are completing key tasks.

When customer team members make wrong turns like those, it creates conflict on the team. The team members start to lose their commitment to team performance, begin demonstrating blaming behavior, and cause rework.

The team also begins losing access to its most important asset—the brainpower and creative contribution of each member. As a result, the team develops less innovative solutions for customers, who, in turn, experience lower levels of service. Team credibility drops, corporate performance erodes, and customers are less trusting that the company will provide the best possible solutions.

### Counterintuitive moves

It's surprising how often even experienced customer team members fail to behave constructively when contention arises. Whether it's in a group setting or

a one-on-one meeting with a team member, many people not only act badly, but also do the opposite of what they should do to resolve tough issues. Sales professionals, who usually lead customer teams, often comment that they usually behave the right way with their customers but the wrong way with team

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members.

In fact, for most customer team members, constructive handling of conflicting team issues is counterintuitive. For example, team members will typically

❑ communicate in ways that lower rather than raise the self-esteem of other team members, by putting down their ideas or talking over them

❑ withhold rather than share information about a customer problem

❑ focus too quickly on one favored solution rather than encourage the exploration possibilities

❑ protect their own parochial, department interests rather than refocus the team on the shared higher business purpose

❑ devalue the potential contributions of others who look at the problem from different points of view and seek input from people who think as they do

❑ talk too much and listen too little.

Why does that happen? Because many of us are uncomfortable when challenging, divisive team issues arise. So, we fall back on old, ineffective behavior patterns. We do the natural thing rather than the right thing and, in the process, make it less likely that fellow team members will stay fully engaged when conflicts arise.

### New rules of engagement

Given the counterintuitive nature of effective team behavior, the best way to build and reinforce team norms and skills in customer team members is to encourage new behaviors that meet the following conditions:

❑ The behaviors communicate the importance of effective customer teams to the corporate business strategy.

❑ They demonstrate the personal and professional benefits of constructive, creative customer team communication.

❑ They help team members understand that their natural habits can lead to poor decisions in contentious customer team situations.

❑ They provide team members with feedback that points out the skills they need to improve, as well as their strengths.

❑ They offer experiential opportunities for building new, counterintuitive team skills in a safe, low-risk environment.

❑ They build skills in planning for potentially combative customer team situations.

❑ They enable team members to apply new learning to actual team situations so time spent in training has immediate payback.

❑ They include ongoing reinforcement of new skills and norms; and provide feedback of results to management.

The overall goal is to create new norms or rules of engagement for customer team members. Here's a sampling.

Rule 1: Stay in the tension. Conflict is inevitable in customer team environments. To be successful, team members must learn how to handle tension constructively, assertively, and creatively. In the process, they must unlearn old behaviors such as

❑ confronting tough issues in unproductive ways that damage team morale

❑ avoiding, smoothing over, or managing away tough issues rather than confronting them constructively

❑ ignoring controversial issues completely or waiting for someone else to bring them up

❑ settling for adequate or easy solutions to tough, contentious customer team problems rather than staying with the tension to prompt innovative breakthroughs.

When tough issues are on the table, staying engaged with other team members creates tension and stress. High performers remind themselves to "stay with the tension." Rather than disengage from tough issues, they find ways to maximize their own contributions and those of others and, in the process, help their teams develop innovative ways to meet or exceed customer expectations.

Skill training in this area must accom-

plish two things. One, give team members key listening skills for lowering tension when there's too much of it in a team interaction. Two, build skills in being assertive, setting boundaries, and communicating clear expectations. Those skills are needed in what's often a common situation—team members ignore or smooth over tough issues in order to retain group harmony.

Rule 2: Welcome diverse personal styles and ideas. Conflict on customer teams often comes more from the way members handle issues than from the actual issues. For example, when conflicting issues surface, it's not unusual to hear the more analytical team members say that others on the team who focus on the people issues are too soft on the problem. In the same way, action-oriented salespeople may suggest that the big thinkers from marketing have their heads in the clouds, or may become frustrated when the technical support people ask for large amounts of data before making a decision.

That's a reflection of a basic human trait: People prefer to work with people who are like themselves. Engineers are comfortable working with other engineers. Creative marketing professionals like to work with other intuitive thinkers. Fast-moving salespeople like to work with other salespeople. When conflicts arise, most people tend to distrust people who think differently than they do. Team members must understand this pitfall and take action to avoid it.

Training can help by providing specific feedback on personal styles, especially as relates to handling conflict. Training can make people aware of their natural tendency to look at problems from a too-limited point of view, and it can reinforce that team members with diverse styles and ideas can make important contributions to team success. Training should enable team members to develop specific, behavioral strategies for working more effectively with others who think and act differently.

After the training, the organization should take steps to reinforce it, encouraging participants to use their new knowledge in actual team interactions. In one global telecommunications company, for example, workshop graduates display their workstyle survey scores on their ID badges. At a major consulting organization, style data is inserted next

### Last-Minute Team Involvement: A Bottom-Line Issue

One common customer team problem is the late involvement of key customer-team members in projects. That often has a negative bottom-line effect. Here are two examples.

Example 1: At an electronics company, failure to involve finance staff early in customer team deliberations caused major problems. After spending many months crafting a sales agreement, the finance manager was brought into the discussion to help close the deal. Unfortunately, this team member determined (late in the process) that the buying company was too weak financially to be extended credit. Too much of the buying company's business depended on one large customer. Involving the finance manager late in the sales process led to extra work at the end of the sales cycle, a last-minute revision of the proposal, and ultimately the loss of business to a competitor.

Example 2: At a computer manufacturer, sales professionals made commitments on product delivery and specifications, without getting sufficient input from the technical-support people on their teams. When the company was unable to fulfill its promises, a costly lawsuit resulted. Earlier involvement of technical professionals would have led to more realistic customer expectations and avoided costly litigation.

to employee names on the company phone list. In both cases, the goal is the same—to remind members of customer teams to use their knowledge of people's style differences when communicating.

Rule 3: Maintain mutual esteem. Constructive handling of contentious customer team issues is built on a strong foundation of mutual esteem and respect. Top teams operate in ways that build rather than erode the esteem of all parties in negative team interactions. Team members consciously seek opportunities to reinforce other team players for staying positively engaged in contentious discussions.

A common problem in this area relates to team rewards and recognition.

Too often, customer team leaders—usually sales professionals—assume that other team members are motivated in the same way they are, by closing deals and winning. In fact, for many customer team members, the only reward for closing a sale is more work. The real rewards for such supporting players on the customer team are recognition—such as a complimentary email to the boss, the satisfaction of knowing that their design ideas solved the problem, or getting to work with cutting-edge technology.

Smart team leaders recognize the challenge and take the time to uncover what motivates team members. They build mutual esteem by making an effort to provide individual recognition and rewards that keep each team member motivated and productive.

Rule 4: Maximize the flow of information and foster creative solutions. When customer teams are in conflict, they typically spend too much time attacking other positions and defending their own, and too little time looking for the best possible solution. Rather than share all of the information about a problem, they communicate only the information that supports their point of view or damages someone else's. At stressful times like that, it's also easy to make incorrect assumptions about a situation, fail to validate those assumptions with real data, and make wrong and costly decisions.

High-performing teams typically avoid such problems by operating on this unstated rule: Get all of the information on the table, and then begin looking for solutions. They avoid the natural tendency to end a difficult team discussion by settling on quickly developed, adequate solutions. Instead, they consciously stay with the tension of the situation, going beyond the first solution to explore alternatives.

Team members maximize the flow of information by consciously encouraging extensive sharing of team knowledge about problems, asking in-depth questions, and summarizing what they've heard to the satisfaction of their peers. They also find vehicles (such as kickoff meetings and regular email updates) for facilitating an ongoing exchange of information among team members.

Rule 5: Find the higher business purpose. Top customer teams work hard to avoid tribal warfare and silo thinking

when tough issues arise on their teams. Rather than polarize around parochial positions, they actively seek areas of common ground and refocus discussion on a shared, higher business purpose such as customer satisfaction, quality, or profitability. As a result, team interactions are constructive and creative.

A sales manager at a California aerospace company embodied this rule in a unique way. At the start of a potentially contentious customer team meeting, she would place a book or small box in the middle of the conference room table and say "This represents the customer. Let's make believe he or she is listening in on our meeting." By making the higher business purpose tangible, she was able to keep the customer team meeting more productive.

The key to keeping the focus on shared purpose (rather than on department interests) is excellent questions—questions that create new information to help solve problems. For example, it's not unusual to hear a member of a high-performing

customer team ask questions like these:

- "That's one possible solution, but if our customers were here, what would they say?"
- "What's the toughest question a customer could ask us, and what would be our common answer?"
- "I know all of the reasons we can't do it that way. But if we could get it done, how would we do it?"

In effect, such teams are better than average at reframing—actively seeking and examining problems from multiple perspectives. Rather than propose and critique one solution after another, they spend time making sure they're asking the right questions from the start. Inevitably, that leads to additional exploration of creative alternatives and more innovative solutions for customers. □

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