



# CUSTOMER SERVICE WEBINAR SERIES

PRESENTED BY THE GLOBAL SERVICE COMMITTEE

## Customer Service Best Practices: “Team Selling” & “Courtesy Calls”

For the voice portion of this webinar follow the registration instructions and dial 1-800-348-8540

Attendee Code - 795418

The slides and a recording of this webinar will be available to you at [www.AMTonline.org/archive](http://www.AMTonline.org/archive)

11:00 am

December 10, 2009



## Mario Winterstein

Business Development Director

Staff Liaison to the Global Service Committee

AMT-The Association For Manufacturing Technology

# Customer Service Webinars

May 8, 2009 – Survival & Sustainability Through  
Customer Service

<http://www.AMTonline.org/archive>

## Best Practices Series:

- ✓ November 12, 2009 – Best Practices
- ✓ December 10, 2009 – Courtesy Calls & Team Selling
- ➔ January 14, 2010 – Service Agreements,  
Long-term Contracts and Financing

# Global Service Committee

**Mr. Dennis E. Stienecker, Chairman**  
General Manager, Customer Service  
The Minster Machine Company

**Mr. Jimmy Berry**  
Manager Technical Services  
W.A. Whitney Co.

**Mr. Donald Forrest**  
National Service Manager  
TRUMPF Inc.  
Farmington Industrial Park

**Mr. Ronald W. Hoffman**  
VP, General Manager  
Maintenance Technologies

**Mr. Matt C. Lane**  
Field Service Manager  
Control Gaging, Inc.

**Mr. John Leone**  
Director of Sales & Marketing  
Cinetic Landis Corp.

**Mr. Richard D. Peach**  
Technical Services Manager  
Siemens Energy & Automation, Inc.

**Mr. Greg Westrick**  
North American Customer Service Manager  
Mazak Corporation

**Mr. Marty Zaccardo**  
Regional Service Manager  
Agie Charmilles

# Key Event Sponsored by the Global Service Committee

## Customer Service & Support Conference

April 15-16, 2010

Nashville, TN

Registration is now open:

<http://AMTonline.org/calendar/customerserviceandsupportconference2010.htm>

# Featured Presenter



Mr. John Leone  
Director of Sales &  
Marketing  
Cinetic Landis Corp.

Team Selling

# How To Make Team Selling Work For You

John Leone

Director of Sales & Marketing



# What Is Team Selling?

- **A Concept Everyone Talks About**
- **Few Actually Incorporate Into Their Sales Tool Kit In A Deliberate Fashion**
- **Even Fewer Consistently Use Effectively**

# Why Use Team Selling?

- **Used Properly Team Selling Is A Powerful Tool That Can Significantly Improve The Odds Of A Successful Outcome.**

# Why Use Team Selling?

- **Two Or More People Have More Experience And Expertise Than One**
- **Questions Are More Likely To Be Answered On The Spot**
- **Less “I’ll Get Back To You” Means More Sales**

# Why Use Team Selling?

- **A Team Is More Likely To Ask Enough Questions To Identify Clearly The Customer's Real Needs.**
- **Having More Individuals Present Increases The Likelihood Of The Customer "Connecting" With Someone On The Team.**

# Why Use Team Selling?

- **Having Two Or More Memories With Different Points Of View Can Make The After-meeting Debriefing More Accurate And Productive.**

# Assembling The Team

- **The Goal Is Always to Meet The Customer's Needs**
- **Each Customer And Each Sales Situation Will Be Different**
- **The Customer's Concern May Be Service, Parts Availability, Updates, Retro-Fits And Not Just Price Or Product Delivery.**

# Assembling The Team

- **The Simplest Team Is An Informal Brainstorming Session**
- **As Few As Two Team Members**
- **No Fixed Structure Or Standardized Reporting**

# Assembling The Team

- **An Organized Strategy Session Is The Basic Formal Team-building Process**
- **Participants Might Include**
  - Vice President Of Sales
  - Marketing Manager
  - National & Regional Sales Managers
  - District Manager
  - Account Sales Representatives

# Assembling The Team

- **Some Different Situations Demand A More Comprehensive Team**
- **Additional Company Participants Might Include:**
  - **Customer Service**
  - **Distributor Sales Personnel**
  - **Direct Sales Personnel**
  - **Manufacturer's Representatives**

# Assembling The Team

- **In Other Special Situations  
Representatives Of Different Internal  
Company Functions May Be Included.**
  - **Field Service, Retro-Fits, Parts**
  - **Design & Engineering**
  - **Manufacturing**
  - **Quality Control**
  - **Shipping**

# Assembling The Team

- **The Largest Teams Often Include Supplier Representatives For Many Of The Same Functions.**

# Building The Team

- **Once You Have Assembled A “Cast Of Thousands” They Should All Be Invited To Meet The Customer. After All ...**
  - ... There’s A Wealth Of Experience In The Team**
  - ... All Of These People Are Focused On The Customer’s Needs**
  - ... That Should Lead To A Successful Outcome.**

# Building The Team

- **Put Yourself In The Customer's Shoes Before You Send Out The Invitations**
  - **How Would You Feel If A “Cast Of Thousands” Showed Up In Your Office?**
    - Startled
    - Intimidated
    - Overwhelmed
  - **So Will Your Customer**

# Building The Team

- **Carefully Consider The Purpose Of The Meeting And The Desired Outcome**
- **Only Select Team Members Who Are Essential To Advancing The Process**
- **This Must Be Done DELIBERATELY**
  - **If You Can't State A Clear Reason For Inviting Someone, Don't Invite Them.**

# Building The Team

- **For Example, The Vice President Of Sales Probably Doesn't Need To Attend A Design Meeting**
  - **But You May Well Want A Representative Of A Key Component Supplier There.**
- **The Vice President Of Sales And Maybe Even The CFO, Are Likely To Be Key Players In A Pricing Meeting**

# Building The Team

- **There Are Two Simple Rules To Follow**
  - **Everyone Who Meets With The Customer Must Be There For A Reason. Different Team Members Will Be At Different Meetings For Different Reasons.**
  - **If It's Necessary To Assemble The Entire Team, The Customer Should Almost Never Be Present At That Meeting.**

# Building The Team

- **Don't Overlook The Human Element**
  - **Team Members Who Meet With Customers Must Be Compatible.**
  - **You Can't Hide Bad "Chemistry" Between Team Members From The Customer**
  - **Trying To "Smooth Over" Or "Finesse" Such Feelings Is Counterproductive**

# Planning The Meeting

- **Only YOU Can Bungle  
A Solitary Sales Call**
- **EVERYONE On The Team  
Can Bungle A Team Sales Call**
- **A Team Must Be Managed  
Or It Can Easily Turn Into A Mob**

# Planning The Meeting

- **Failing To Plan Is Planning To Fail**
- **It's The Team Leader's Job To Make Sure That Everyone Present Knows**
  - **What The Meeting Objective Is**
  - **Why They Are There**
  - **What They Are Expected To Contribute**

# Planning The Meeting

- **Rehearse The Presentation Portion Of The Meeting Until Everyone Is On The Same Page**
  - **Team Members Interrupting Or Contradicting Each Other Is The Kiss Of Death**
  - **Resolve Any “Issues” Between Team Members Before The Meeting**

# Planning The Meeting

- **Assign The Answers To Specific Questions To Specific Team Members**
- **Rehearse The Answers AND The Answers To Anticipated Customer Responses**

# Planning The Meeting

- **Be Succinct And To The Point**
  - **This Is A Sales Meeting, Not A Seminar**
- **Evaluate EVERYTHING From The Customer's Point Of View And Be Considerate Of His Or Her Time**

# Using The Team

- **Never Forget That The Customer's Meeting Plan May Be Different Than Yours**
- **It's Your Job To Keep The Team "On-message" While Responding To Customer Initiatives And Issues.**

# Using The Team

- **STAY FLEXIBLE And Look For Common Ground That Will Let You Both Succeed**
- **Win-win Is Always A Worthwhile Goal**

# Using The Team

- **Never, Never, Never Forget That You Are There To Meet The Needs Of The Customer!**
- **Don't Lose Sight Of YOUR Meeting Goal In The Heat Of The Moment**

# Using The Team

- **Don't Leave Without Achieving Your Goal**
  - **Unless The Customer Makes It Clear That Your Goal Can't Be Achieved In This Meeting**
  - **Then Your Goal Must Be To Plan Another Meeting With An Outcome That Can Be Achieved**

# Using The Team

- **These Rules Apply To Every Team Selling Situation From The Simplest To A “Cast Of Thousands” Extravaganza.**
  - **Select The Team Carefully**
  - **Empower Each Team Member**
  - **Manage The Meeting Conversation With The Customer**
  - **Fully Utilize The Skills And Experience Of Each Team Member**

# **Team Selling Works**

- **But It Only Works When The Team Is Created Deliberately And Used Effectively.**
- **Making That Happen Is Up To You**

# How To Make Team Selling Work For You

John Leone  
CITCO/Gardner



# CUSTOMER SERVICE WEBINAR SERIES

PRESENTED BY THE GLOBAL SERVICE COMMITTEE

## Q & A

### MARK YOUR CALENDARS:

- Next Webinar:  
Customer Service Best Practices:  
Service Agreements, Long-term Contracts & Financing  
January 14, 2010 at 11:00 am EST
- 40<sup>th</sup> Customer Service & Support Conference  
April 15-16, 2010 – Nashville, TN  
( Register at <http://AMTonline.org/calendar/customerserviceandsupportconference2010.htm>)



# CUSTOMER SERVICE WEBINAR SERIES

PRESENTED BY THE GLOBAL SERVICE COMMITTEE

## Customer Service Best Practices: Courtesy Calls

December 10, 2009

# Featured Presenter



- Dennis Stienecker
  - General Manager, Customer Service
  - The Minster Machine Company

# Service Courtesy Calls

Dennis Stienecker

General Manager – Customer Service

The Minster Machine Company

# Benefits Include:

- Improved Customer relations
- Customer awareness of your services
- Visibility of the Customer needs
- Discovery of new service opportunities
- Increase Market Share
- Increased revenue

# Plan The Courtesy Call

- Target Specific Customers in an Area.
- Customer Research.
- Detail Customer Plan.
- Prepare the Serviceman.
- Coordinate with the Customer
- Follow up
- Build on Renewed Relationship.

# Target Specific Customers

- Customer list.
- Customer Relationship information.
- Service and parts history.
- Prior issues or complaints and how resolved.
- Equipment owned
- Availability of upgrades for their equipment.

# Customer Research

- Customer information
- Production requirements
- Customer Customer's base
- Specific area of business interest
- Contact information

# Detail Customer Plan

- Consolidate research information.
- Contact Customer to offer Courtesy Call.
- Determine focus for courtesy call based on Customer's interest.
- Establish level of expectation.
- Establish schedule with Customer.

# Prepare The Serviceman

- Select serviceman
- Train
- Customer information details
- Customer interests
- Review expectations
- Verify schedule and agenda

# Coordinate With Customer

- Serviceman to confirm scheduled arrival.
- Professional interaction with Customer.
- Follow agenda, but be flexible.
- Perform minor service as may be required.
- Exit interview with Customer.
- Ask if their expectations have been met.
- Confirm that all requests will be responded to.

# Follow Up

- Assign ownership.
- Review serviceman's report ASAP.
- Acknowledge customer requests.
- Timely response to all requests.
- Follow up on quotes to clarify any questions.
- Build on renewed relationship with customer.

# Build on Renewed Relationship

- Update internal Customer information.
- Keep Customer on active follow up list.
- Maintain Customer communications.
  - Newsletters.
  - Maintenance reminders.
  - Product updates and notices.
  - Promotional material.
  - Periodic phone call or ‘E-mail’ contact.

# Share With Your Team

- Build plan with Sales staff to get even greater benefit from the investment.
- Share new product suggestions or improvements with Engineering.

# Recent Experiences

- Plan several Courtesy Calls to be done by a Serviceman.
- Focus is to increase market share.
- Provide Serviceman basic sales training.
- Generated 15 -20 new quotes each week.
- Became aware of OEM equipment opportunities.
- More than pays for itself.
- Being well received by Customers.