Mobile CRM

Advantages, Benefits, Challenges and Considerations

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Executive Summary

Workforce mobilization has become a key competitive requirement for most organizations seeking to create greater intimacy and presence with customers. However, enabling mobility is more than just providing laptops, tablets and mobile phones to users and sending them out into the field. It's about selecting the appropriate technologies and developing the right user experience so users can be productive and take advantage of this new work paradigm. This is why extending key business applications like CRM to increasingly ubiquitous smartphone and tablet environments, like Android, Apple iOS and Windows Phone devices, has become critical to successfully tapping into your mobile workforce.

This white paper will walk you through the emerging mobile CRM landscape to help you better understand the benefits you'll reap from deploying a mobile CRM solution, as well as the key requirements you'll need to consider to successfully move forward with your mobile CRM initiative.

Gartner predicts 80% of businesses will suffer revenue loss by not supporting Web-based customer service on mobile devices.

Introduction

Where people work is no longer limited to a single location. People work from home, from cafes, from customer sites, on the road, in the air. In fact people can – and do – work from just about anywhere. Even when they're in the office, people don't expect to be sitting at their desk in order to be productive. We are in an era where mobility really is the new normal.

The cloud-first, mobile-first world is here. People expect to have the ability to work where, when and how they choose. Using the devices they love and the apps they are familiar with. Just look at the story told by some of these stats: 66% of employees use personal devices for work. A large percentage of employees work away from their desk – even when they are in the office. And BYOD (Bring Your Own Device) is going to mean a new way of working across apps and data.

While users have been able to access basic contact details on devices for some time, truly mobile CRM is a new frontier that holds great

potential to significantly transform the way mobile users can connect to and interact with business-critical information—driving revenues, productivity, and customer satisfaction. Today's front-line, mobile field professionals are finding themselves in everyday situations that require an extended CRM environment that works the way they do, when they need it.

Now that desktop CRM has established itself and proven its value in most business environments, IT departments are being tasked to extend CRM to a mobile workforce who is rapidly growing accustomed to mobile devices that are always-on and allow them to always be connected.

What Is Mobile CRM?

Mobile CRM is about taking advantage of the latest smartphone and tablet technologies to introduce CRM into key customer situations where notepads, napkins, or human memory currently dominate. These are situations where laptops either stay in their bag or are even left back at the office—situations where information exchange is still needed, but not always effectively retrieved or captured.

For the most part, the goals of "mobile" CRM are not fundamentally different from "desktop" CRM. After all, CRM is about better understanding and servicing customers' needs to drive revenue, satisfaction, and loyalty. Mobile CRM is about leveraging the unique advantages enabled by mobile technologies to help realize organizational goals, even when employees are on the go.

While mobile CRM has traditionally been addressed by outfitting users with laptops, today's mobile CRM extends the computing environment even further to the latest in mobile devices that optimally integrate voice, e-mail, and other data services in a hand-held form factor.

66%

of employees use personal devices for work purposes.*

25%
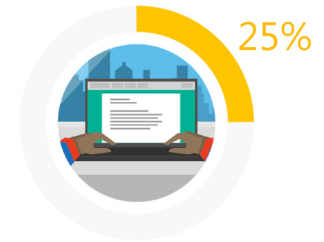
of all software will be available on a SaaS delivery by 2020.**

33%
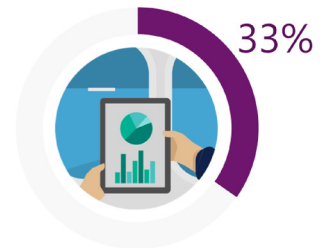
of employees that typically work on employer premises, also frequently work away from their desks.***

* CEB The Future of Corporate ITL: 203-2017. 2013.

** Forrester Application Adoption Trends: The Rise Of SaaS

*** CEB IT Impact Report: Five Key Findings on Driving Employee Productivity Q1 2014.

Unique Advantages of Mobile Devices for CRM

While laptops will always play a critical role in the mobile toolset, smartphones and tablets introduce some unique advantages ideally suited for mobile professionals, especially for CRM.

These advantages, as measured against traditional laptop computing, are:

- **Form factor** – Smartphones and tablets are far less obtrusive than laptops—ideally suited for tightly packed airline seats, taxis, or subways. They are often used for pre-meeting research before customer engagements and they ensure that data is always available and accessible and not confined to those situations where it's "convenient" to use—it's always convenient.

- **Immediacy** – Real-time information access and capture requires a device that is ready on touch. Smartphones and tablets are specifically designed to be highly responsive and available. This ensures that valuable customer data and opportunities are always captured.

- **Discreetness** – For capturing or referencing timely data, it's not always practical, convenient, or even appropriate to pull out a laptop during a face-to-face conversation. Mobile devices provide a level of discreetness that doesn't disrupt business flow or conversations when being accessed to retrieve or input information.

These important characteristics of today's mobile devices are what make them candidates to take CRM "mobile." By providing CRM users with the information they need, when they need it, without complexity or obtrusiveness, smartphones equipped with CRM data and functionality can provide significant value to a mobile workforce.

Mobile Device Advantages for CRM

- Form Factor
- Immediacy
- Discreetness

Key Business Challenges Addressed by Mobile CRM

Mobile CRM is not just an enabler to improve business processes for field professionals, but it also solves an important business challenge faced by many organizations when it comes to CRM, namely, how to improve CRM usage rates among mobile users and turn CRM into a

competitive advantage in the field.

A common observation among companies using a CRM solution is that the field staff often appears to be disengaged from the CRM process. In many cases, mobile processes still appear to be mostly manual and note-driven, with information not being effectively captured into the system. Leveraging the benefits of a CRM solution requires ubiquitous availability of computing resources and connectivity to the CRM database. In many, if not most mobile situations today—either at a customer site or in-transit—the benefits are lost without the right mobility tools, including mobile CRM.

Easy mobile access to CRM means that more information is captured and stored immediately through a smartphone or tablet and transparently synchronized with the CRM system so it can be immediately accessed by all members of the sales, support, and management teams. Similarly, as internal users engage on a customer issue and update the CRM system internally, critical updates can be synchronized with mobile users, in real-time.

Clearly, the mobile field professional is a vital link in the fluid customer relationship chain whose full potential cannot be utilized to drive greater customer satisfaction and revenue with the absence of a mobile CRM solution.

Business Benefits of Mobile CRM

In addition to solving unique business challenges, Mobile CRM offers unique benefits for the organization because it can:

- **Increase average sale by 20%** - Salespeople with immediate access to account history, product information, price lists and promotions can offer customers more options to build sales. No return calls, no calling back to the office for approval, no delays. Opportunities move through the pipeline more efficiently. And, these greater efficiencies and productivity mean that the mobile sales professional has the flexibility to visit more clients and close more deals, sooner.

- **Lower cost of sales by 15%** - Closing sales with fewer interactions keeps sales people working on new opportunities that build revenues. In addition to the benefits like lower cost of sales, higher sales

pipeline velocity and faster inventory turns, accelerated sales cycles allow sales people to earn more commissions. Mobile CRM allows information to be immediately requested and retrieved, which streamlines and even accelerates sales and service processes and improves the mobile user's ability for on-the-spot problem solving. Many to-dos and follow-up action items that used to be done offline can be eliminated as problem resolution can be initiated in real time.

Mobile CRM Benefits

- Increase Average Sale
- Lower Cost of Sales
- Reduce Billing Lag
- Complete Customer Records
- Increase Service Calls
- Deliver Real Time Data

- **Reduce billing lag time by 30%** - With mobile solutions you can eliminate billing lag time entirely. Every type of business that delivers service in the field – from technicians to accountants – can improve cash flow by reducing the time between service delivery and billing. With current technology, you can even invoice inventory sold in the field, like parts and consumables, as quickly as you can in the store.

- **Achieve 90% key field completion in customer records** - In the field, the device can be as important as the data collection. Laptops can set up a "wall" between the customer and the service technician. With smartphones or tablets, the experience is more collaborative and less intrusive, and it integrates the mobile user into the core processes and procedures established as part of the CRM initiative, which allows them to work the way their business environment requires. This makes it easy for mobile users to utilize a CRM system that empowers them and translates into increased effectiveness and greater job satisfaction.

- **Increase average number of service calls per week by 15%** - With mobile technology, you can increase the productivity of service technicians before, during and after the service call. Depending on priorities, automated scheduling will route employees to the most critical jobs or the closest jobs. With full information, the technician can get to work upon arrival, without having to ask customers questions that have already been answered. Automated processes allow the technician to focus on service delivery instead of filling out forms. Greater responsiveness from the field professional and customer service and support, especially through streamlining urgent questions and requests onto the appropriate parties, increases customer satisfaction.

- **Deliver 100% real time data to managers** - The ability to go to one place and get all the information that you need to accomplish the job at hand builds productivity and inspires better decisions. That technology enables you to take that information with you is revolutionary. You will improve the quality and timeliness of the customer data added to the CRM system, and by making it easier for mobile users to input data means more data will be added to the customer record, and therefore data will be more timely, accurate, and complete.

7 Key Considerations for Your Mobile CRM Solution

What do you need to consider when adopting a mobile CRM solution? It's important to recognize up front that mobile CRM is more than just another CRM client. The mobile environment itself can be complex and unique requirements should be considered when extending CRM to mobile devices.

1. **Deliver a rich, familiar user experience** – Optimizing the CRM experience for mobile users requires a rich, familiar smartphone or tablet CRM interface that is similar to the look and feel of the desktop CRM application. This approach serves to both dramatically shorten the learning curve, as well as increase user adoption and productivity.

2. **Mobile offline support** – CRM information should be available locally on the device so users have immediate access to key information at all times, regardless of available mobile bandwidth. This provides the ability to get work done even when there is interruption in connectivity. Users should be able to create, change and delete records while offline. The mobile app should provide a seamless user experience when switching between online (connected) and offline modes.

3. **Embrace customization** – Organizations routinely customize their CRM solution to match the way their business works. Therefore, the mobile CRM application should be fully customizable to reflect relevant changes made to the core CRM application on the network, or tailored to respond to specific mobile user requirements over time. In some cases, this may be just a matter of modifying

existing entities to better align mobile processes with customized internal ones, or it may involve optimizing the mobile experience itself by improving the way that data is collected in the field and presented to mobile users.

4. **Closely examine security options** – Security is clearly a key consideration especially as network-housed information will now be extended to and stored on mobile devices. For both data at-rest on the device and in-transit during synchronization, a secure channel needs to be provided. In addition, a valuable requirement for always-connected devices is "data kill". This is particularly useful if the device is no longer in the organization (e.g., an employee is terminated or resigns) because the data can be deleted remotely without user intervention.

5. **Allow for incremental updating** – Synchronizing large volumes of data over-the-air can be time consuming and costly, depending on data plans, so compressed, incremental updates are an important requirement for both CRM data and application updates. In addition to costs, user patience can be severely tested if they're required to reinstall and synchronize full data sets with every customization upgrade or if downloading data takes an unacceptable period of time. Automated update delivery, often referred to as auto- or real-time synchronization, is also an important criterion which will make the experience more seamless for the mobile user.

6. **Offer broad device support** – While standardization on a specific hardware device or operating system is the goal in many IT initiatives, it can be difficult to achieve in the mobile realm due to individual or departmental user device and data plan preferences. Even if the option to standardize is still open, another challenge is that different devices will appeal to different users based on their role (e.g. executives vs. field service vs. field sales), the device's navigation controls, the keyboard layout, or even the tech savvy factor. So, picking a single popular device to satisfy everyone is not always achievable. As a result, a mobile CRM solution should offer broad support for today's leading mobile devices, including Android, Apple iOS and Windows Phone devices, and keep pace with supporting their respective operating system versions.

Key Considerations

- Deliver Familiar Experience
- Offline Support
- Customization
- Security
- Incremental Updating
- Broad Device Support
- Infrastructure

7. **Support single, mixed device infrastructure** – Your mobile CRM platform should be capable of supporting a broad mix of smartphone operating systems and versions, both for data access, but also in terms of flexible customizations and should have a single point of management so that the number of servers and applications requiring support can also be reduced. Users should be able to secure CRM data in BYOD (Bring Your Own Device) scenarios and be able to separate their personal data and corporate data on their own devices.

These recommendations should form the baseline set of criteria when considering or evaluating a mobile CRM solution.

Building the Case for Mobile CRM in Your Organization

Mobile CRM helps organizations deliver on the goals of their CRM initiative through increased revenue, improved productivity, and greater customer satisfaction and loyalty. While productivity and loyalty are softer metrics to measure, the return on investment for mobile CRM, especially within field sales-focused organizations, will ultimately be measured in terms of revenue realized.

For example, working towards a productivity goal, if a 10-person sales force can be made 10 percent more productive through mobile CRM by driving greater efficiency around key sales tasks and activities or by allowing quicker follow-up on leads, the sales force has virtually been increased to 11, without an additional headcount or associated expenses.

Similarly, for customer loyalty, if customer churn can be reduced by 10 percent through better service and response, the organization is no longer replacing existing customers with new customers, but effectively gaining and building the customer base at an accelerated rate.

When measured against the potential for fully realizing your CRM goals and ultimately increasing revenues, the payback for an investment made in mobile CRM can be measured in months for most organizations.

Research from Innoppl Technologies shows compelling evidence demonstrating that salespeople at companies with mobile CRM meet sales quotas about 65% of the time compared to 22% of sales representatives at companies without the same technology.

Conclusion

Smartphones and tablets are rapidly becoming the working tool of choice among mobile professionals, thanks to ease of use, discreet access, and always-available characteristics. Adoption is occurring organically, through individual and departmental purchases, and through corporate initiatives with the objective to better support mobile users. As a result, the network footprint is already moving beyond classic mobile tools like laptops. Extending enterprise applications, especially CRM, is no longer an option, but an imperative to sustain a competitive advantage. The question then comes down to not whether, but when, you should deploy to mobile for CRM and which application is best suited for your organization.

Next Steps

Choosing a mobile CRM solution can be a time-intensive and complicated process. So, as you continue your consideration of mobile CRM solutions, remember that we're here to help you. Please visit www.yeoandyeo-consulting.com for additional information, to register for one of our monthly webinars, to request a one-on-one personalized demonstration or just to ask questions. We can also be reached by phone at 989-797-4075.

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