

Executive Summary

Competitive market is forcing business to rethink how when and where they interact with clients for existing and new opportunities efficiently. Geographic dispersion is growing leaving sales team over-burdened on how to manage their relationships with the customers and at the same time be more effective.



IT Executives have increasingly complex enterprise systems to manage which are become even larger, integrated and complex. Providing information to sales force team in real time is an ongoing challenge. While the power of mobility is becoming increasingly clear, many organizations are finding it complex and expensive to manage.¹

Companies providing convergence of voice, messaging and synchronization of enterprise data on mobile device to its sales force are able to differentiate themselves in the market place. Some customers merely use mobile phone as a device to render web pages will be outpaced by companies who leverage email, SMS, WAP, calling, call recording with CRM data.

Why does your sales force need a mobile solution?

General Pain points expressed by sales professionals:

- I have to haul out my laptop, even on road just to view customer information like billing, contacts or invoicing.
- I am not updated about changes in my scheduled appointments and other changes on time which plies to a lot of downtime.
- I wish to have the ability to dial out to a contact from my contact list itself and send a sms greeting to my clients.
- Conversations with my client should be recorded and stored somehow, so that it can be heard and transcribed later.

Mobile reps today are able to access the company's CRM system on their laptops. That meant finding the time, while on-the-road to haul up a laptop, connect via WI-FI or dial up connection and search for customer information prior to meetings. Offline access backend is possible but the salesman always has this thought whether he has the latest information. Sales reps were relying heavily on their internal sales team to look up information on-the-fly. There are numerous phone calls between the team members during the day to catch up on details – creating an inefficient way of managing customer relationships.²

A recent Economist Intelligence Unit survey "Business in motion – Managing the mobile workforce" of 375 executives of companies across the globe published in its report that 50% of the respondents said "Accessing enterprise applications (e.g. ERP, CRM) was the most difficult task to carry out using a mobile device." 43% respondents felt that the company should develop clear strategy and implementation plan for the use of mobile technology in the enterprise to increase employee productivity. Most respondents felt that their own

¹ <http://www.busmanagement.com/pastissue/article.asp?art=268810&issue=181>

² http://www.blackberry.com/products/pdfs/pioneer_tech_casestudy.pdf

productivity and organization productivity as a whole has improved significantly through deployment of mobility solution. Greater than 50% respondents felt that one of the important measures a company should take in the future to increase the productivity gains that employees reap from using mobile technology was to spend on greater integration of mobile applications with core Enterprise systems.³

The above pains, of a salesman and this survey led us to ask the next question- what should be provided on mobile devices to make the daily activities of a salesman simpler and easier?

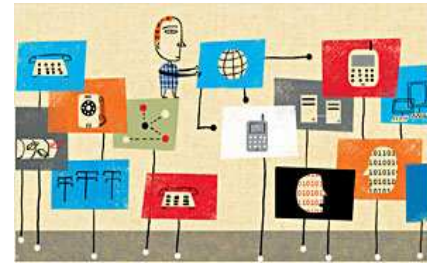
What sales information should be accessible on Mobile Phones?

Functions were identified by going through existing CRM functionality offered by package products and then selecting screens that should be provided to users where usability will not be compromised. Enable functions on mobile devices that will result in increase in productivity, reduce reporting effort and calls to head office. Emphasis was to enable search and viewing of information, messaging and calling with very few taps or presses to access information thereby providing ease of use, convenience and less strain on the sales person. Secondly, recording vital information and assigning tasks in real time. Updates only for critical tasks related to an order or invoice which will give significant benefits. We have purposely avoided creation of complex invoices and order on mobile as this can be done in the second stage of the project.

Account Information – Display of representative (Contact) information related to account. To call the person or SMS someone by touching the screen or using stylex

Contact Information – Ability to add, track and update contacts and companies. Ability to search and access Organization chart in a tree view.

Opportunity Information – Record opportunities with contacts and their roles. Display List opportunities for various accounts and contacts. Search opportunities based on access rights.



Time Management – Calendar views, ability to schedule an activity in the calendar, display all the calls and tasks scheduled for the day. Bi-directional updates with MS Outlook Mobile and CRM systems. Access to appointments programmed by head quarters. Ability to create new appointments for users and reallocate leads. Receive SMS whenever a critical appointment is scheduled by the inside sales team.

Invoice Management - Reception of pending invoices from headquarters. User can update invoices which have been delivered against orders to headquarters. Sales agents can view list of partial or total payment of invoices for various accounts.

Accessing this information on the phone is not as easy as one has to choose an architecture which allows for easy navigation, security and at the same time the solution needs to work on all devices seamlessly.

³ http://www.salesforce.com/assets/pdf/datasheets/MobileSalesForce_effectiveness.pdf

Architecture for Enterprise Integration with mobile phones

Gartner research report discussed the six styles of mobile application architecture -

1. Thick Client - Code and data stored on the device
2. Rich Client - Code stored on the device; little or no resident data
3. Streaming - Streaming client on the device
4. Thin Client - Browser or similarly generic client
5. Messaging - E-mail, SMS, instant messaging or other messaging technology used as data transport and user interface

A comparison on Mobile Application Architectures done by Gartner team

	Thick	Rich	Thin	Message
Usability	High	High	Moderate	Low
Sophistication	High	High	Moderate	Very Low
TCO	High	High	Low	Low
Support Peripherals	Yes	High	Low	Low
Out of Signal Operation	Yes	Limited	No	No
Security	Flexible, High	Flexible, High	Inflexible, Low	Inflexible, Low
Device Range	Very Limited	Limited	Broad	Very Broad

Some analysts believe that we will see more mobility of Web services, thin client model will dominate, Mathias said. While Mathias admits he's a bit biased on the side of Web services, more so than thick client solutions, he said it's more realistic to envision mobile workers accessing information and applications through the Web. Using Web services, he added, takes up less real estate on the device." A *Web services* model, Mathias said, can let workers access information from any Web-enabled device.

With convergence of sms, phone calls, email and enterprise application on mobile devices a sales person can execute activities in synchronous through calling and online interaction with the back end, and in asynchronous mode he can receive sms and work offline to schedule appointment and regular tasks providing extreme flexibility and freedom to work wherever and however s/he wants. With 3G and 4G network rollouts connection speed and network availability is only going to improve reducing the dependence on internet and moving towards web 2.0 second generation mobile internet-based services that emphasize online collaboration and sharing.⁴

One Associate's believes a new model wherein Thin Client, Thick client, web Services and messaging converge and that is where enormous potential lies for enterprises to exploit the power of mobile for its sales force.

Conclusion

Enterprise mobility solution provides substantial benefits in multiple ways Salespeople can opt to travel lighter, because the mobile device offers them everything they need to do business on the road. Salespeople maximize their time by accessing CRM data that helps with decision-making in the field. Last minute cancellations no longer mean they have downtime, since they can search

⁴ <http://www.mobilecomms-technology.com/projects/tmobileusa/>

and receive sms alerts about other customers to be visited in an area. Better Reporting Helps with Business Analysis Quicker reporting cycles ensure meeting results are recorded, providing better business intelligence for the company. With customer information now available in a wireless format, phone time has been reduced between mobile and internal sales reps.⁵

With WAP enablement of enterprise data we foresee that sales force users will gain by improving accessibility of data, productivity and quicker reporting by sales force. Mobiles provide management another method to drive sales behavior in the field. Increase forecasting ability through improved data collection accuracy. Sales team get results by decreasing cost, increasing revenue and maintaining competitive advantage. Sales team can now capture information in real time, take down tasks, events and customer notes leading to reduced sales cycles.

“One-Associates focus on creating and building software solution on Web Mobile using the combination of thin client, thick client, messaging and web services architecture. We use our proprietary Mobile Portal frameworks which enable enterprise data on handheld devices with ease”.

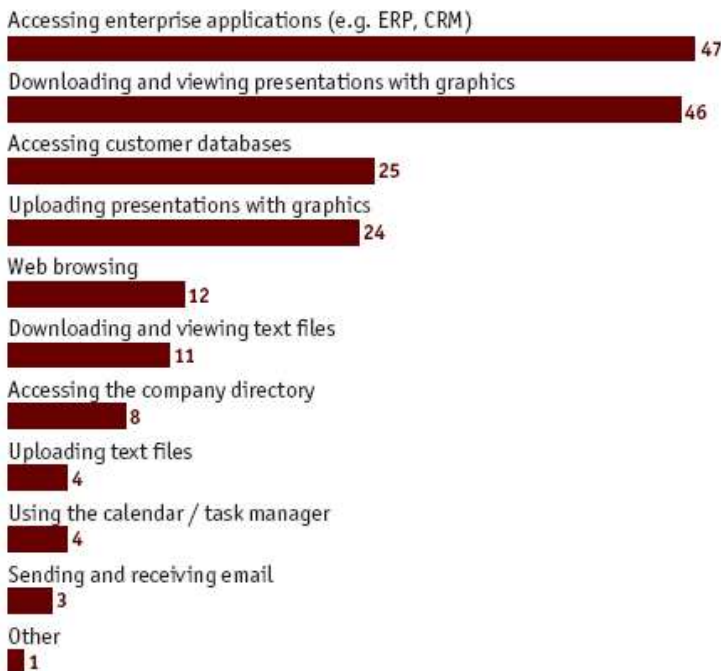
⁵ http://www.blackberry.com/products/pdfs/pioneer_tech_casestudy.pdf

Appendix: Survey Results

Which of the following operations do you find most difficult to carry out using a mobile device?

Select up to two responses.

(% respondents)

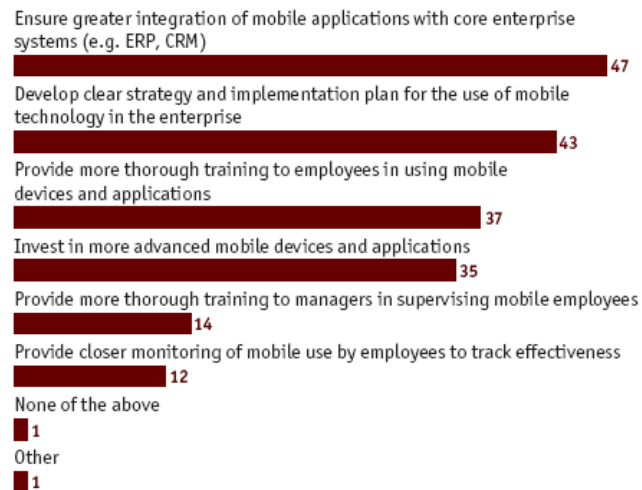


Source: Economist Intelligence Unit survey, December 2006.

In your view, what are the most important measures your company should take in the future to increase the productivity gains that employees reap from using mobile technology?

Select up to two responses.

(% respondents)



Source: Economist Intelligence Unit survey, December 2006.

NEERAJ KAPOOR

PUNE

7 Shankar Parvati Chambers,

Bund Garden Road,

Pune, INDIA

Tel: (91.20) 30524113

E-mail: n.kapoor@one-associates.com