

Executive Brief

How to Rise Above Today's
Economic Challenges: Equip Your
Sales Force with Mobile CRM

by Jane Affleck

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There's never been a time when you haven't needed your field salespeople to perform at peak ability. But a number of challenges in today's global marketplace makes it harder than ever for field sales representatives to stay on top of the game—and keep your company's bottom line from sinking into the red.

For one thing, there's the constantly changing landscape of customer demands that sales teams have to navigate. Customers' expectations are higher than ever before—and continue to change, as statistics show. Business-to-business (B2B) e-commerce increases yearly and makes up the bulk of web-based sales: the [US Census Bureau E-Stats report](#) published in May 2008 states that B2B e-commerce in manufacturing and wholesale industries amounted to \$2,716 billion (USD), or 93 percent of total online sales for 2006. Field salespeople have to remain competitive and ensure that the Web helps them boost sales by appealing to customers old and new who are quickly becoming accustomed to the convenience of accessing products and services from around the world, any time of the day or night.

The economic downturn is another cause for concern. If it walks like a recession, and talks like a recession, then it's probably a recession, bringing with it potential limitations on the opportunities for companies to make sales. The “R word” can often scare businesses into cutting costs and reducing budgets, perhaps by finding overseas suppliers with cheaper products—more reason salespeople may have to compete on the Web to attract and retain customers. And if your own company's budgets have been reduced, you may find yourself dealing with cutbacks in spending on advertising, which only puts extra strain on your sales reps to come through.

These and other challenges can greatly impact the performance of field sales teams—and ultimately that of your company. In an economic downturn, the risk of seeing your profits shrink is high enough. But if your sales force is unproductive or immobilized, that risk is even greater.

What you may not know is that traditional, “same-old” sales force automation (SFA) and customer relationship management (CRM) solutions probably aren't providing you with the help you need to maximize the productivity of your sales teams and make gains in your customer base—and your profit margins.

In fact, sales managers have tremendous difficulty getting the majority of their sales reps to use their CRM or SFA systems. According to [AMR Research](#), “33 to 47 percent of customer management applications [are] facing serious adoption issues”—a statistic that doesn't even account for the reps who do use the system, but use it inefficiently.

All together, this adds up to the fact that large numbers of field sales reps are not achieving the needed levels of productivity that help companies succeed when the economy doesn't seem to be on their side. And what's more, the [sales reps themselves report](#) they don't use or like using these traditional CRM applications because they aren't user friendly, don't correspond to field reps needs in a variety of situations, and involve a steep learning curve.

What you also may not know is that your field sales reps needn't be limited to using only a traditional CRM solution. CRM applications designed for mobile devices allow your sales reps to have 24/7 access to customer data and other information with cell phones or smartphones. Mobile CRM can improve sales reps' productivity and has proven success in driving sales and increasing profitability.

To make the case for mobile CRM, here are the ways it can provide the flexibility and accessibility your sales reps need to keep your business competitive, along with some of the key reasons why traditional CRM applications may no longer provide sales reps with the tools and data they need to keep your company on a competitive track.



Traditional CRM Can Stall Field Sales Reps—but Mobile CRM Can Get Them Going Again

1) Traditional CRM can hamper the productivity of field sales:

- high downtime and wasted time on administration
- lengthy sales cycles
- disconnection from chain of command

High downtime or wasted time:

In an average day in the field, sales reps often find themselves in transit to meet a client and unable to access important customer data. Aside from being cumbersome, a laptop equipped with a traditional CRM solution can only go so far in accommodating the needs of a field sales rep. When the laptop battery needs recharging, it's possible—but far from guaranteed—that sales reps can rely on available plugs in airport waiting areas, or at the client's office or other meeting point. But, even if the laptop battery is fully charged, the sales rep is dependent on having access to wireless Internet service; though this is more available than it used to be, sales reps traveling to smaller cities and rural areas still cannot find consistent wireless availability.

When taking a taxi to a client meeting, the sales rep can do little else but sit back and enjoy the ride, missing out on valuable updates to information that may have been made since the rep left the office. Not only do these reps squander time by being in the field without the data they need, but they also must return to the office to do time-consuming daily administrative work such as entering new client information, planning routes, and updating meeting notes or sales forecasts.

Lengthy sales cycles:

With traditional CRM software, field reps are involved in much lengthier sales cycles than they need to be—or should be, for your company to maintain a solid bottom line. Out in the field and meeting with a client, sales reps can't access the most up-to-date product information, and so have to wait until returning to the office to provide answers to the client's questions. With non-mobile-capable CRM, reps also can't submit an estimate from the customer's location, but again must wait until they are able to log back into the main system.

The inability to do these tasks while out in the field only adds to the time spent back at the office on administration—and that time doesn't affect just the sales rep's personal productivity, but also the ability to provide customers with the goods or services they expect in a timely manner. It's a simple formula: long sales cycles equals fewer customers served and fewer sales made—and ultimately, less money rolling into your coffers.

Disconnection from chain of command:

If field sales reps can't update the system from the field, then managers can't analyze vital current data to determine which sales strategies might be most appropriate for a given customer, and then tell salespeople how and where to focus their efforts. The inability to update means incomplete data, which makes it difficult—to-impossible for managers to view meaningful reports and forecasts. And as new prospects filter in, the account manager may have to wait until the end of the day (or even later, depending on how often a salesperson checks in at the office) to distribute these prospects—further compromising sales reps' productivity, as well as additionally delaying the sales cycle.

Benefits of Mobile CRM

- *No downtime:* Mobile CRM lets field sales reps take advantage of every spare moment during the working day, to perform administrative tasks that once required an hour or more after returning to the office. The flexibility and accessibility of mobile





CRM allows field salespeople to reduce administrative time by up to eight hours per week, according to one advertising agency we contacted that uses mobile CRM—which means up to eight more hours of customer face time than with traditional CRM. Imagine: each of your field sales reps could have at least an additional hour day to spend with customers and prospects to drive new sales opportunities. And, with a smartphone device, sales reps can access the Internet anywhere they have a cell phone signal. But even without a signal, mobile CRM allows reps to access and update information, which can be easily synchronized back and forth with the main system once the signal is reestablished. All totaled, mobile CRM can deliver an increase of over 30 percent in employee productivity, as [IDC](#) research shows.

- *Shorter sales cycles:* With a mobile CRM application, field sales can access client or product data on their smartphones around the clock from any location—enabling better responses to customers during valuable face time. Instead of drumming their fingers on the taxi armrest, your sales reps can be tapping on the keypad of a smartphone mobile device, entering the most recently acquired customer information or following up on a new lead. With a mobile CRM application, one company we contacted reported a 10 percent reduction in the length of the sales cycle—simply by having the ability to submit estimates from the customer location. [Another study](#) reported that mobile CRM helped companies achieve nearly a 5 percent reduction in the number of calls required to close a sale.
- *Connection with chain of command:* The uninterrupted accessibility afforded to both managers and field sales via a mobile smartphone means that sales reps can follow up on new prospects the minute leads come in to managers back at the office. Overall, according to [IDC](#), information flow between the sales rep and the manager is improved, as vital data is available to the manager sooner, which can aid in decisions made about the sales cycle.

2) Lack of real-time visibility in the field and from the field

- lack of ability to share documents with colleagues and managers
- lack of ability to see the latest status or profile on a customer or prospect, moments before walking into a meeting with them
- lack of visibility into other systems, such as enterprise resource planning (ERP)

Lack of ability to share documents:

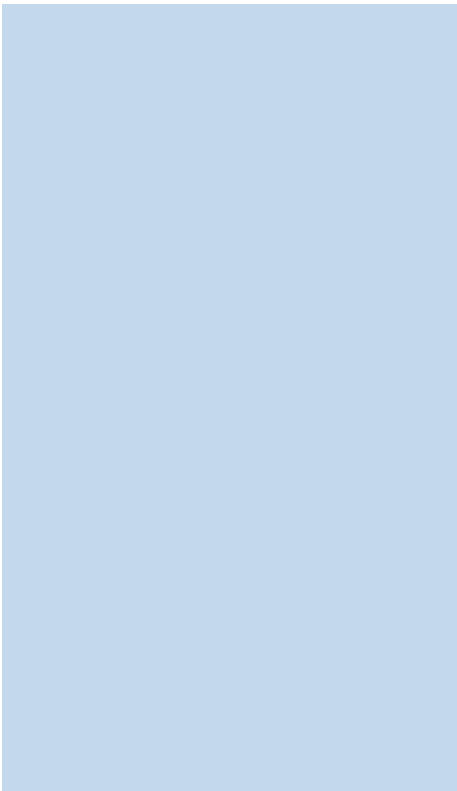
By relying on traditional customer relationship software, field sales reps may be unable to access documents such as historical e-mail threads, proposals, contracts, or other important information that can help them prepare for meetings and improve their chances of closing a sale. Not having this information at his or her fingertips means a sales rep must take time to contact someone back at the office who does have access to documents and can provide the information.

Lack of access to latest updates to client or prospect profile:

While the sales rep is traveling to the next client meeting, he or she may not know that the client has just spoken with someone back at the office regarding a problem with the latest order or shipment. This lack of information can cause potential embarrassment during the meeting as well as derail the meeting's original objective. At the very least, this lack of information wastes time as the client fills in the sales rep on what the call was about and as the sales rep tries to address the problem on the spot. Rather than making a sales call, the field sales rep ends up making a service call, stretching the sales cycle even further.

Lack of visibility into other systems, such as ERP:

Not having access to real-time inventory figures means sales reps can only estimate how soon a product will be shipped and arrive at the customer's door. Being unaware of sudden depletions in stock means that salespeople may provide customers with inaccurate estimates of delivery time—and by so doing, risk inconveniencing and even angering customers if the product isn't delivered until later than they've been led to expect.



Benefits of Mobile CRM

- *Share documents:* Mobile CRM allows reps to access and share documents such as contracts while in the field. The rep can e-mail a contract to the prospect while in the prospect's office, and then have the contract printed and signed on the spot, closing the sale with maximum efficiency. This shortens the sales cycle (the sales rep doesn't have to wait until returning to the office to send the contract)—and furthermore, the sales rep demonstrates to the client not only the desire but also the ability to provide excellent service. In the long run, this can increase your profits *and* save you money (following the generally accepted concept that the cost of keeping a customer is five to ten times less than the cost of attracting a customer in the first place).
- *Access the latest client and prospect data:* With mobile CRM, sales reps can review timely and accurate data about the interaction history of each client with a single click, adding insight to all client meetings. When there are problems with orders, mobile CRM allows the sales rep to address the situation prior to a client meeting, so that upon arrival, the rep can let the client know that the resolution is already in progress. The end result: the sales rep saves time while making a good impression and increasing the chances of making a sale—and additional sales. And, the progress of a customer's case can be tracked much more easily and accurately with a mobile CRM system.
- *View data in other systems:* Having on-the-fly access to real-time information in other business systems, such as ERP, helps field sales provide accurate and timely answers to client questions about inventory, shipping, account status, and more.



3) Poor customer and prospect relationships affect your top line:

- inability to send information such as product quotes to customers in an instant (in various formats: phone call, e-mail, text message, fax)
- inability to properly escalate issues; lack of responsiveness to customer demands or issues (resulting in increased customer frustration)
- inability to respond to changes in customer profiles

Inability to send info to customers:

Field sales reps on a laptop without wireless access can't send e-mail to clients to respond to requests or to set up meetings. Even with wireless laptop access, salespeople may not be able to provide instant quotes or estimates or other information, as the laptop data may not have been synchronized with data on the main CRM system. Not getting replies to requests for information from sales reps can frustrate clients and push them away from closing vital sales.

Inability to properly escalate and resolve client issues:

Salespeople on the road who don't have complete access to information can't adequately respond to and resolve client problems or complaints. The rep may not even be aware that the client has complained or expressed concern about, for example, a shipment or invoice. But even if the rep does know, she or he will spend unnecessary time getting the information or documents that will settle the issue. Resolution time is delayed—as well as potential further sales—until the sales rep can access the necessary resources to mollify the disgruntled customer.

Inability to respond to changes in customer profiles:

Sales reps need client information prior to meetings with clients not only to appear knowledgeable and develop a well-aimed pitch. But without access to that client info—from a history of purchases and problems to how the client responded to the sales rep's attempts at humor—the salesperson will be hard-pressed to create the intimacy that is required to keep customers. And keeping customers you already have is less costly than trying to find new customers.

Benefits of Mobile CRM

- *Improve communication with client:* Mobile CRM systems deployed on smartphone devices can improve communication between sales reps and customers by allowing sales reps to contact clients or prospects via e-mail, text message, or even fax, depending on the information being relayed and the customer's preferences (from a mobile device with fax capability, sales reps can send documents or images to the client's fax number). But primarily, it's the 24/7 availability and accessibility of mobile CRM that allows sales reps to stay in touch with and respond to clients.
- *Better resolution of issues:* Access to up-to-date CRM info on a smartphone allows sales reps to get what they need to deal with customer complaints. From asking managers for permission to give discounts, to accessing information about policies for returning goods or providing reasons that field service wasn't done as promised, mobile CRM applications help sales reps soothe frustrated customers. Consequently, customers won't be lost due to bad service but will stay loyal—and happy.
- *Better access to accurate client info:* With a mobile device, sales reps can show up to meetings with clients, with all client data one click away—helping the meeting to go smoothly from the salesperson's perspective. But that's only half of the situation—a salesperson's ability to access client data also helps create trusting relationships with customers, leading to more sales and higher customer satisfaction.

Moving Forward with Mobile CRM

By using traditional CRM solutions alone, your bottom line can be compromised not only by the downtime of field sales reps, but also by these systems' inherent lack of flexibility and accessibility.

But, if you ramp up your CRM system with mobile functionality, you can stop wondering about how productive your field sales reps are, because you'll know. With mobile CRM, you'll know that your reps are more productive, and doing what they do best—making sales—in order to help your company stay on top. With many analysts predicting a global economic recession until well into 2010, you need to adopt strategies now that will help your company maintain current profits, and even grow. With a mobile CRM application, you increase your chances of surviving and thriving—no matter how tough the market conditions.

About the Author

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