



Facing the Business Challenge

Increasingly, organizations worldwide rely on mobile access to information to enhance productivity. Beyond the basic—though essential—information available through email and phone contacts, information residing on back-end servers is often difficult to access remotely. With corporate executive and sales representatives spending more time traveling, data stored within the customer relationship management (CRM) system becomes an extremely valuable resource. Providing access to this information can unlock a number of opportunities, but the access method—to be useful—must be secure, convenient and timely. To gain a competitive edge, organizations need to implement solutions that let them capitalize on the advantages of mobility without compromising the integrity of CRM data or exposing sensitive data to risk.

Unlocking Opportunities

Sales force automation and field service automation offer two proven areas in which mobility solutions can leverage the data available in CRM systems. By providing access to account information, order details and technical information, mobile workers can take advantage of opportunities that arise in the field and perform tasks more effectively while traveling. By providing easier access to information and developing mobility solutions to drive primary business processes, organizations can transform the efficiency and effectiveness of their operations.

Capitalizing on the Business Benefits

Improving access to CRM data for sales force and field service applications can:

- Boost productivity through workflow, enhanced collaboration and better communication
- Improve return on investment with decreased operating costs, increased revenue opportunities and better data accuracy and timeliness
- Increase customer satisfaction by responding to requests promptly, processing orders and service requests on the spot, and providing informed decision making quickly
- Accelerate responsiveness with access to immediate information and dynamic business intelligence
- Increase adoption of existing technologies by extending them to the field through mobility solutions

The Mobile CRM Solution

Through the extensive BlackBerry partner ecosystem—consisting of carriers, solution providers, system integrators and independent software vendors—organizations can collaboratively develop mobility solutions to fit their precise needs. Each organization should carefully research available options and choose a mobility solution that meets their organizational goals, business process requirements and user profiles.

Solutions available to sales teams empower both mobile sales representatives and their managers. By tapping into CRM data, salespeople can more readily view and update account information, distribute sales leads, process orders wirelessly and make well-informed strategic decisions.

Solutions available to field service groups enhance productivity by means of a paperless workflow and timely processing of work orders. Back-office managers and schedulers can distribute jobs to the mobile workforce more effectively, track worker locations dynamically and reduce costs through more efficient scheduling.

Working with Research In Motion and BlackBerry Alliance Partners, mobility solutions can be crafted to individual requirements, whether an off-the-shelf solution or custom application addresses the need.

Taking Advantage of BlackBerry Capabilities

The BlackBerry solution provides unique advantages well suited to the challenges of improving sales force and field service operations, including:

- **Single-device mobility solutions:** The BlackBerry device does it all: network access, phone communication and web browsing—no need to carry separate notebooks, PDAs or mobile phones.
- **Integrated tools for exceptional productivity:** BlackBerry applications work together. Open a web page from inside email. Telephone a contact from within the CRM application. Generate messages from your address book. Integrated activities streamline workflow.
- **Ease of use:** Mobility solutions to improve sales force and field service operations have been optimized for the BlackBerry interface, simplifying daily work and extending mobile access to CRM data. A number of existing browser-based solutions dramatically reduce the learning curve for users.
- **Push technology:** The BlackBerry platform incorporates push technology, which sends data, messages and alerts to BlackBerry device users automatically—no need to retrieve information.
- **Industry-proven results:** The BlackBerry Enterprise Solution™ has been implemented worldwide, spanning over 95 wireless carriers across 40 countries. Thousands of organizations have achieved better communication and enhanced productivity with BlackBerry.

Developing a Business Case for a Mobile CRM Solution

Among the many factors to consider when developing a business case for a mobile CRM solution, the following issues merit attention:

- **Understand your existing business problems:** How effectively is your organization's CRM system being used? Is the mobile workforce able to access it easily? The costs associated with inaccurate account information, lost opportunities, scheduling conflicts, and so on, should be factored in. The productivity issues (such as traveling to and from the office) should also be considered.
- **Determine the potential savings of a mobile CRM solution:** To calculate the likely cost savings of a wireless solution, consider the productivity and revenue gains that can be achieved through extended mobility and wireless data access. The efficiencies that can be gained through making account activity more visible and assigning priorities dynamically also weigh into the equation.

- **Getting support from IT:** Decision makers in your organization's IT group will want to fully understand the deployment costs and the anticipated return on investment. Keep in mind that costs can be minimized if there is an existing BlackBerry platform in place. Investments in a CRM system can be leveraged, as well. Finally, ensure that the process to integrate the mobility solution with the current infrastructure is considered and that the trade-offs have been discussed.

For further information, the *Enterprise Solutions Guide for BlackBerry 2005-2006*—an interactive CD-ROM with flexible search options—offers a detailed view of the various solutions available for the platform from BlackBerry Alliance Partners.