

CRM – Anytime, Anywhere



CRM for the Professional on the Go

CRM Guru Paul Greenberg shares his unique perspective on what sales executives need to know in the age of the Mobile Enterprise.

Overview

Ever watch TV on your cell phone while sitting in an airport? Ever tell someone calling you on your cell that you're in a business meeting and can't talk – and you did that through text messaging? Ever send a document to a client that they need via your mobile device while sitting in the back of a limo? You haven't? Man, you are missing something very cool – and very, very important to your business and your staff productivity.

Get used to all that because that's the direction that we are heading in – as late as 2008 and as early as.....now.

A mobile workforce may be something you as a business leader would like to put into your mental "to do later" box, but fortunately or unfortunately, depending on your workload, it is something that needs to be considered now, for many reasons. Among them, employee retention and competitive differentiation and successful customer relationships – especially given the demands of the current crop of customers – who know they are empowered and who know that you're just one of many possible options for them. So speed, mobility, time and knowledge are of the essence – and a mobile CRM solution is something that was a useful luxury and now becomes a business requirement.

Really? Yeah, I know that's what you're thinking...

Let me throw some numbers at you. How do these grab you?

1. Gartner Group at their CRM conference in Chicago in September 2006 said it rather succinctly. 45% of the workforce – just short of 60 million workers – are mobile, not including teleworkers in that number. That 45% is away from their "tethered workstation" at least 20% of the work week. (Source: *Mobile Technology Choices for CRM*, Gartner Group, 2006)
2. Ellen Tracy of the Forrester Group, in 2005 found that "large enterprises are adopting mobile applications faster than planned." For example, in 2004, 39% of the companies surveyed had planned to adopt wireless email or a BlackBerry® solution and 51% of them did. (Source: *Mobile Application Adoption Leaps Forward*, Forrester Group, 2005). More recently at the 2006 Research In Motion sponsored Wireless Enterprise Symposium she spoke of a cycle beginning in 2008 where the widespread adoption of "ubiquitous technologies" – meaning mobile applications and the devices associated with them – would start becoming mainstream.

The Big Picture 2.0: What Does This Mean?

The questions that come to mind are "why should you care?" and "Okay, well, the numbers are staggering, but ultimately, I don't really care about everyone else's numbers so how does this impact me?"

Good questions.

Probably the best way to answer “why should you care” is the simple one.

Because your competitors will gain on you and even overtake you if you don't. That is not a particularly dramatic statement. It just happens to be the case. Do you think its coincidence that in every single category identified by Forrester in the 2005 report mentioned above – there was a greater rate of actual adoption than planned adoption? (See table below)

Adoption of Wireless Applications

Category	Planned	Actual
Wireless Email/Blackberry	39%	51%
Personalized contacts and calendar	30%	56%
Content/information for employees	23%	44%
Sales force applications	20%	30%
Field service applications	20%	26%
Customer facing applications	18%	28%

Of course not. It's because the senior executives out there who are savvy about their business are finding it a necessary move and quickly because of the changes in the demands of the customer. And what it requires to acquire and retain a customer is a far more difficult task than ever before.

The Customer Ecosystem - Dominus

The customer that you face in the 21st century – whether in the B2B or B2C world – is empowered and fully aware of how the power has shifted to them. You can pick up any mainstream publication and routinely read the lines like the following:

"Companies used to focus on making new, better, or cheaper products and services....Now the game is to create wonderful and emotional experiences for consumers around whatever is being sold. It's the experience that counts, not the product" – Business Week, December 19, 2005

"Consumers are in control," says Joe Mandese, editor of online and print trade publication MediaPost. "If you don't give them what they want, they're going to go somewhere else." – New Technology, Portals Making Everyone A Network Programmer– USA Today, September 20, 2006

What you see here is starting to embed itself into mainstream strategic business thinking and planning. Businesses ranging from the micro sized – like Threadless or John Fluevog Shoes –to the megastars like Proctor and Gamble or Kraft Foods are developing their business models around meeting the demands of that customer in control. They and many other companies are increasingly recognizing that the customer is the hub of the business ecosystem and that the customer is demanding a real relationship – one that is transparent enough to provide them with the information they are asking for – in real time. The implications for you, coupled with the increasing mobility of and desire for mobility by the workforce, are powerful – and non-negotiable.

What Do The Customers Want From You?

What the customer is looking for from you is how well you provide them with the resources that he or she needs to satisfy their business requirements. That means that they are looking for the products, the services and the interrelationships between you and them and are assessing the value of those aggregated resources in meeting their business or consumer needs. They are moved and compelled by the overall experience they have with your company. In other words, your competitive differentiator is the experience and relationship with your customers, not so much the products and services you provide them – because they can get them in other places.

Federal Express or UPS anyone? Or DHL? Or Airborne? Or the U.S. Postal Service? Or....See what I mean?

The implications for sales organizations are huge. It means that the salesperson is not only responsible for opening the opportunity, following it through the pipeline and closing the deal, but, because the sales person is a frontline professional, he is responsible for a relationship. Actually, it's even more than that – he has primary responsibility to see that the customer has a unique satisfying ongoing experience with him as representative of the company. That means it's not just the buddy/buddy stuff anymore. Go to dinner, fete the customer, treat them really well and provide the services or products they need at volume pricing. It also means that they have an expectation that involves delivery of content on demand throughout the life of the relationship you have with them. That means in real-time.

Thing is, we're all used to that. I'm sure that most of you have ordered from Amazon.com. In many cases, it's just an ordinary and very convenient way to get something you need. Plus they understand you via algorithms that work so you'll occasionally even impulse shop and buy one of their suggested items.

How much time do you think about the purchase? You go, you do it, and that's it. Real-time on demand and within a few minutes the audit trail begins. You have notification of your purchase, then your shipment with suggested dates, then your actual ship date, then any problems that may arise with a choice on what you want to do if there is a problem, then your tracking number and the order is entered as completed when they find out it is. In other words, there is a transparency between you and Amazon that engenders trust between you and Amazon. No person involved.

That is what your customer expects of you – and not via the Net – when you are there in person or your sales person is. Your human representative is expected to provide the transparency and content as easily as Amazon and as needed too. In other words, content in real time.

Without mobile CRM, you literally can't do it, because your sales guy physically needs to be at a workstation or at a Wi-Fi® locale or Ethernet connected laptop to provide what your customer

expects. That might not work. But if you can provide it on the spot with a mobile device and sales apps that handle order tracking and inventory visibility? That might work just fine. Indeed it does.

Recently, I participated in a roundtable discussion that included a senior manager from Rogers Communications, one of the two major Canadian telcos. She spoke rather animatedly about the change in their customer's thinking (if you, reader, are Canadian that would be you) when it came to what it is they expected from Rogers. They no longer just ask for cell phones to make calls nor even just cell phones that also handle email only. She said their business customers especially, but also some of their consumers, are asking for content. When pressed, she elaborated a bit on the content being useful applications so that they can access business functionality and data while on the go and then communicate to various people via various channels. So, if a salesperson needed to know how much of a product was available in inventory so that he could let a client he was going to see know, he could, while on a train or plane, find the information and send that information via an email or text message to his customer (or via a phone call – yawn) prior to his arrival at the customer's site. Real-time and accurate information.

Most recently, the delivery mechanism for this real time content has been smartphones and other smart devices or, if you're into the academic or the world of analysts "the converged mobile device." The market for these devices is continuing to grow at a rapid pace. Why? Because sales people, field service technicians, executives – in fact, mobile professionals in general – are recognizing the value of having something that provides both business and personal value on their belts or in their pockets. IDC completed a study in June 2006 which tracked the sales of the "converged mobile devices" and found the market sales in 1st quarter 2006 were 18.9 million up 67.5% from the comparable quarter a year ago and 7.5% from the last quarter of 2005. (*Source: Worldwide Quarterly Mobile Phone Tracker, IDC, 2006*)

What both supports the study and makes it even more interesting are the discoveries of marketing research firm In-Stat during August of 2006. They found that 96% of the smartphone users found them either essential or helpful (at a ratio of 2:1) to their work. Bill Hughes, the analyst at In-Stat who ran the study commented in SearchCIO.com "With smartphones, if there were any questions of them as a platform in the past, these should no longer be considered a real limitation."

So clearly, the devices needed to effectuate the relationships of your staff to your customers are there. So are the platforms and the content they are looking for. But that's only part of the equation. Mobile CRM is another big part.

So What is Mobile CRM Then?

That's really not a hard one. It's CRM but "any time, any where and on any untethered device." Its value is significant as a part of an overall CRM strategy, not as an independent effort. Just to be clear, let's start with a straightforward definition of CRM. "CRM is a philosophy and a business strategy supported by a system and a technology designed to improve human interactions in a business environment." This was a definition that I gave in my CRM Magazine column in February 2003 and nothing has occurred since that would make it any different. Mobile CRM, because of the nature of the 21st century customer and the business models necessary to meet the customer's requirements, has become an increasingly significant strategy and technology for CRM execution. It can support improvements in sales effectiveness or even support sales

alignment. It can handle customer intelligence provision or customer intelligence gathering. It can provide the optimized resources that a field service technician needs to both maintain the customer's machinery and to enhance the customer's relationships with him as the representative of your company. That means that an application that is developed to carry out functions necessary to improve the interactions with the customer so that the business objectives of the company aimed at that customer are met is CRM. With the evolution of IT infrastructures such as service oriented architectures, web services, and the on-demand model, there have been a proliferation of mobile CRM applications that are available at a reasonable price, scalable, and easily distributed that can operate in real time.

What's Really Involved?

There is a lot of unavoidable angst that something like a mobile CRM deployment creates. The angst is created because the hard and soft costs can easily skyrocket and there are elements that you just don't control – like carrier problems or the sunsetting of support for a device you've been using for several years or the weakness of coverage in certain areas like rural America. But, while companies like Sprint are investing \$3 billion over the next two years for 4G WiMax deployments to begin to address issues of coverage and cost of coverage, you, unfortunately, have to either wait until the costs come down and the coverage improves, or go with what's out there. There are regulatory problems that you have to consider and policy issues that the company has to settle. But those are issues that need attention that come as standard with the deployment of any corporate strategy or business project of any kind.

On the other hand, the only valid reason for mobile CRM not being part of your plan is that you already own your market niches so completely that you have no concerns or you're planning on quitting soon so you don't care.

If neither of those are the case, then there is little reason to not begin thinking about mobile CRM. Products and services – those things you provide – are easy to get from someone other than you if you don't garner the attention of your customers. Mobile CRM is a really valuable asset when it comes to capturing that attention.

Don't underestimate the value of grabbing customers' attention. That cool device you hold in your hot hand which not only looks good, but has good "stuff" on it, may make the difference between a customer listening to you or just placing you in the "zone out zone." Thomas Claburn, in an Information Week article entitled "Fight for Consumers' Attention Online Heats Up" points out that there are so many message being thrown at customers these days in multiple channels that if you are "ignoring the value of their attention...that will lead to failure in the Attention Economy." What is clear is that, as a person who is deploying those sales folks who have small windows into a customer's time, a mobile system that can reach out to enterprise servers thousands of miles away and provide accurate and useful information to your customer, will retain their attention all that much longer. Remember, the more attention the customer is giving you, the less he is giving your competitor and the greater the opportunity to retain that customer.

So how do you get started?

The Numerous Pre-Steps

There is no difference in many respects between a “normal” PC-based, tethered CRM deployment and a mobile CRM deployment. You need to have identified and created your CRM mission, vision, program, strategy, redefined your business processes and triggered your culture change before you can consider the IT infrastructure and the hardware/software that you’ll be utilizing for a mobile CRM deployment. The latter are dependent on the former and there is no getting around this.

Additionally, you need to assess the business case for using mobile sales force automation, or field service or more universal CRM applications clearly – but not the strictly operational business case that you might be used to. Instead, I’m talking about the business case that also asks the question, what do our customers want from us and what kind of business value can we provide to them? That means that the actual voice of the customer, not the one that you presume is there, needs to be clearly identified. The customer’s requirements are as vital, if not more so, than your internal operational requirements. The 21st century version of requirements gathering includes actual discussions with your customers about what they need to communicate and collaborate with you.

The Yankee Group approach is a little more internally focused, but equally valid. It recommends that companies considering mobile deployments create business process frameworks. In turn, these will enable best practices that can drive the project. They think that companies implementing this kind of mobile strategy should make the deployment part of an overall application roadmap, such as CRM, SFA or service implementation, considering business cost, form factor and connectivity.

This, through recent years, has been accepted best practice for any CRM deployment, of which mobile CRM is one. What you will see, though, is that mobile CRM can provide a serious productivity boost once implemented – a case where the technology actually is a little more pre-eminent than in most “ordinary” CRM deployments as a productivity driver.

The Considerations

Now let’s take a high level look at what you have to consider in getting your mobile pros to agree to adopt a mobile CRM strategy and deployment. There’s a lot of ground to cover, far more than any one white paper could, so we’ll focus on some of the key considerations and touch on others. I’m not focusing in on pricing here since I’m sure it’s pretty much self-evident that you want the best price either from a value added reseller or direct from the service providers. Or whatever provider suits your purpose. Their willingness to provide you with volume discounts and favorable payment terms should be a consideration. I mean, who can’t figure that out? So let’s assume we all know that.

Mobile Device

Examine the form factor, brands, models, costs, type of networks (Wi-Fi, WAN, Bluetooth® connectivity), and the mix of personal and business features needed to maximize productivity. You have to consider the challenges the device brings too – small screens, cramped keyboards and how they deal with it can affect productivity. Do you want a QWERTY keyboard or can you live with less because the software works with the more limited keyboard? Do you need a touch

screen or not on the device – because of the applications that are available that use one – or those that don't.

Also, be realistic. Recognize that the mobile professional is going to use it on occasion for their personal use and accept that and build some of that into cost. For example, the National Basketball Association has 600 Blackberries that are used by personnel including the players. The players use it to stay in touch with their families, girlfriends, etc. – in other words for personal business. Nothing wrong with that. It makes them more productive. For them, points, assists, and rebounds. For your sales people, closing deals.

A survey of smartphone users or potential smartphone purchasers being run continuously on the mobile enterprise focused website Unstrung (<http://www.unstrung.com>) is finding (it's ongoing as this paper is being completed) that while multimedia features are seen as the least important feature to factor in the decision-making process (32%), 62% of the respondents say that they would pay a little more for the style and 81% say they'll be using it for work and play, not just work. So the content available on the phone, which can include services that can be used both for work and personally, does actually matter – as does, as I will remind you, the realization and acceptance of the fact that your employees will use the devices for both and that must be factored into the thinking and the budget.

As should the looks.

Let's face it. Coolness and lifestyle are part of the DNA of the contemporary mobile professional – or even those stuck at the office. There are office hierarchies that you have to acknowledge – there's no point in denying it. There are status issues. The technology that you use has a "proud to show it" reflection of lifestyle that can't be ignored and actually can affect adoption rates if you do.

Don't think so? Ah, skeptic, listen up.

Here's a study that came along in September 2005 by Harris Interactive called "The Intel/Ultasuede Laptop Style Study." Some of the insights are cogent. Here's the one I want you to see:

- 73 percent of U.S. adult computer users want to buy technology products that reflect their personal style

Do you think that having something cool in hand isn't noticed by both your customers and by those who are holding it? Shall we make it anecdotal? When you have a good looking or "early adopter" piece of technology with you on a customer call, don't you end up at some point during the meeting, showing it to your customer, or asking about theirs if they have it?

Oh, yes you do.

The simple point is that when you are considering form factor, and network types and costs, weigh the benefits of the emotional value along with the utility of the device when making the decisions. They are meaningful benefits.

Here's a brief anecdote to support this. Me. My device is offered by multiple carriers. I assessed the business benefit, the coverage based on my traveling, the costs of the service plans –

especially the data plans - the infrastructure I would need to utilize this device, the CRM applications that I could use on this device that were important and the personal services and entertainment features of the device. The carrier that provided me with the best balance of those wasn't the cheapest but was the best for my purposes. Note what I considered as part of the equation. I often am traveling to clients and killing time in airports sometimes needs some mobile entertainment just to keep me alert. That wasn't an unimportant part of the thinking.

Service Providers

Obviously, effective coverage is one of the primary considerations, not just geographic range or blanket coverage.

How actually mobile are your sales teams? How do you handle geographic coverage which can have a dramatic impact on which provider you carry? For example, if you travel internationally, it isn't necessarily in your interest to use a carrier who provides a network based on CDMA. You're better off with GSM. Forget what the acronyms stand for here. This is a matter of CDMA not functioning internationally, while GSM does it well.

But also, how good is the coverage in rural areas, inside buildings? If much of your sales calls are urban, then the device you choose may be different than if you are selling insurance to rural America.

Choose your carrier accordingly.

For your other needs, the best case choice for your service provider would be one provider who can give you the device, the platform, the operating system and the infrastructure (hosted or on premise) since mobile CRM is heavily data driven and needs a coherent and seamlessly functioning IT infrastructure. But there is no service provider who can provide you with all of the software you need for a mobile CRM deployment since it tends not to be the specialty of the companies who are platform providers and/or device producers.

Information Technology Platform/Systems

Sales force automation and business intelligence vendors have moved rapidly to the mobile world to provide the applications that your workforce needs for mobile CRM deployments.

But using a hosted on demand set of CRM solutions or an on premise CRM solution for your mobile deployment is actually going to place different stresses on your infrastructure. The more complex the application – the on premise applications such as Oracle® etc. tend to be more complex – the higher the total cost. Even if the system is a hosted multi-tenant system out of your direct hands, operational costs will still be part of the infrastructural considerations. For example, if you allow SMS text messaging services, there will be usage costs that sit on top of your monthly per user fees to the on demand company. What if you're considering a mobile CRM application that has offline capabilities you need? How does wireless synchronization or the more frequent tethered kind affect your IT infrastructure if you are dealing with hundreds or thousands of mobile devices?

While the questions are somewhat arbitrary, the point isn't. There are hidden costs to be ferreted out and infrastructural stresses that aren't apparent – and they need to be discovered before you make your choices on what IT infrastructure and vendor applications you care to go with.

Luckily, there has been significant progress since the pre-millennial days of the first mobile CRM deployments. The IT architectures have evolved to the point where there are common standards for web services that allow the deployment of applications that can talk to each other even though they have been built by independent companies who weren't collaborating on their production. So the device platform bolstered by the services oriented architecture or the advanced web services is the foundation for mobile CRM applications to speak to each other and to integrate to a back office built on the same sets of services – making integration easier.

“Solutions are no longer device-centric or jury-rigged for individual wireless applications, said Tien Tzuo, now the Chief Strategy Officer at Salesforce.com. “If you look back at the software infrastructures of 1999 and 2000, each company had to be responsible for wirelessly enabling its mobile data. But today with service-oriented architecture, that's not really true. You can build your applications and customize them on an applications exchange platform. Once loaded, those applications will automatically appear on your device.”

Integration is a lot easier, but there are still integration challenges that have to be met. They tend to be at companies that have heavy investments in legacy systems that weren't built on those web services-based platforms and thus are not naturally “speaking the language.” This can make it quite difficult to develop the bridges that are necessary to get the more advanced mobile platforms to speak to their much older kin.

A Very Fast Look at Some Challenges - FYI

These aren't the only questions that have to be answered around the mobile CRM deployment. There are several challenges that range from, on the IT side, the stresses that scalability will place on the existing IT infrastructure to the cultural – resistance to adoption is inevitable. People are initially always resistant to change. There continue to be high total cost of ownership (TCO) in some companies due to any number of factors. They could involve the cost of the devices and the carrier service costs which can be substantial depending on the complexity of services offered and the geographic distribution of the devices among other things. There are security issues that are always concern e.g. the secure transmission of text messages. One cautionary on security. Many of the security issues are more fear than reality. The mobile enterprise platforms that exist are all secure to one degree or another. You have to choose the one whose security features match your requirements most closely.

Another challenge that is age old and not particularly related to mobile CRM per se is an expectation that the return on investment (ROI) will appear quickly. That is rarely the case with any CRM deployment. Most CRM ROI takes awhile to be realized but if the patience is there, the results can be excellent. More on this below.

This only touches on some of the issues. However, in general, though not ALWAYS, the business benefit outweighs the potential challenges – as long as the commitment and patience is there.

The Business Benefits of Mobile CRM

Okay, we've seen that the customer is demanding and the market is valid and that devices exist and the IT infrastructure is more amenable to success than in the past. Now what? I'm presuming that you still haven't seen the business benefits other than the fact that the devices and their

operating systems are cool and available and, at least generally, businesses are increasingly finding the barriers to entry a lot lower than they have been – thus they are entering.

But what are those not-described-so-far business benefits? How does this meet the needs of your employees who are on the go and their customers and what can it do for you?

Take a deep breath and get set to dive.

There are numerous benefits to going mobile and what has changed over the past few years is that both management and the likely users know that the benefits are there.

The most often cited benefit is increased productivity. In fact, in a study done by Ipsos Reid and Microsoft®, of Canadian professionals, in March 2006, 59% of them saw mobile devices and especially the ubiquitous email connectivity as something that made them more productive and a mind-blowing 84% saw that this would *increase productivity and profitability*. Admittedly, we've all seen the perception of increased productivity, but adding profitability to that as something that was "obvious" to that high a percentage can't be overlooked. But there was an even more important result: 65% of those Canadian professionals find it is *necessary* to remain connected outside the office because of the competitive environment. Yes, you heard me. Necessary. Not useful, not important – necessary. This means that we've moved from mobile devices and platforms and customer-facing applications as a useful luxury to a mission critical necessity. Big shift. Big time.

Some of the reasons for this apparent productivity gain are because the mobile CRM-embedded device provides some remarkable capabilities for the sales person and their managers and great benefits for the company.

1. **Visibility into account histories, current order status, available inventory, customer credit standing, accounts receivable, etc.** - This kind of information provides the sales person with what they need to make a smart decision about what they can do for their customer – or even if the opportunity with the customer is legitimate and worth their time. It also allows them to see what up-sell and cross-sell possibilities exist – while they are on the way to the customer or even at the customer's locale.
2. **Remote order entry** - Not only can sales handle an order on the spot, but they can track the progress of the order as it wends its way through the various demand chain, supply chain and financial systems at the company – and let their customers know the status in real-time. THAT can make for a very happy customer who might even take you out for a beer afterwards. Unless of course, you used the media you had available on the device to give him the status update – via phone, email, SMS or some web based service.
3. **Customer value** – the ability to provide the customer with the information they need in the format they want – whether it be a text file, a PowerPoint®, a PDF or Word file or, as bandwidth and devices improve, video presentations – on a mobile device is almost immeasurable. The customers are getting their needs met in real-time which can only improve the possibilities of a sale. Since we are dealing with an empowered customer, one who basically wants what they want, and this gives the opportunity for a much more real collaboration with that customer to the account rep who is sitting there – without that account rep even standing up on his/her tired feet.

4. **Improved customer contact** – As simple as this sounds, as benign as its success can often be (though fabulous sometimes), the results of the failure to be in touch with customers is truly dramatic. Heed Paul Sweeney, SearchCRM Board of Advisors member and European Marketing Director at the Irish company, VoiceSage: "The ability to contact a customer, and resolve an issue, is really only relevant where it directly collapses the time it takes to complete a process. A sales value is realized when their money hits your account. Research conducted in February 2006 by Intrum Justitia, a division of one of the largest credit management companies in the world, concluded that the average company needs to increase revenues by \$10 million to cover the affect of a \$700,000 hit to cash flow from late payments. With the average outstanding payment time in Ireland being 50 days for consumer purchases, the ability to collect payments in a more timely fashion is clearly one process where mobile CRM could make immediate and quantifiable impacts." Whoa.
5. **Business/customer intelligence** – This does not mean the ability to do the analytical work on the mobile device, because the processing power necessary for that simply is not there – at least not yet. However, what does exist is the capability to pull reports from the back office servers that are doing the actual number crunching. For example, General Binding Corp won the Gartner 2006 CRM Innovation Award by developing a CRM focused "closed loop" process that leverages and consolidates critical sales, contact center, and field service data across the enterprise. An integrated mobile solution extends the competitive advantage to the field with quick, efficient, and timely information that enhances their customer's experience and provides effective service and information on potential sales opportunities besides. For example, Business Objects is now offering a CRM analytics dashboard for mobile devices, which provide access to data that the system has already analyzed. These advances in technology can give mobile users access to information to develop insight rather than just the level of information to sound intelligent or to carry out a function. This level of intelligence could also allow executives in the field to make better qualified presentations to customers or even do things such as staff reallocation or on the fly resource shifts – without ever having to even think about a workstation.
6. **Email Access** - Innumerable studies have shown that just having the ability to check your email while in a cab or other "anytime, anywhere but the office" location, saves an hour a day and increases the available time to do productive work. I'd source them for you, but they literally would double the size of the white paper and I suspect that any of you reading this can already figure that one out because you check your email on the go all the time. This is already so prevalent that Gartner in the same report from their recent CRM conference mentions that by 2008, they see 100% of the smartphones and 60% of all enhanced phones having wireless email as a built in application.
7. **Sales Management Benefits** – I think that those of you reading this in sales management, at least in theory, believe that mobile CRM will drive upticks in the sales results. In studies quoted by Richard Hill at Powerhomebiz.com of mobile CRM use, he cites the following: "82% believe PDA access for sales representatives would drive field usage of CRM and 91% believe mobile CRM software on PDAs will become an important sales tool for their organization." So, the awareness is there. But what are the specific benefits to you? Pipeline visibility in real time; easier and multichannel communication with your sales or field service folks; an empowered sales force that likes you because

you provide them with what is both cool and makes them more productive. Thus, a sales force that will sell more and better.

8. **ROI benefits/soft & hard** – Return on Investment has been hard to quantify in the SFA or BI CRM arenas because they are relatively young. However, where you see a mature mobile CRM – for example, field service – the ROI is much easier to quantify. In a recent article in Mobile Enterprise magazine, William Clark, a VP in research communication at Gartner took a cut at mobile CRM's ROI. "There are really two classes of return on investment for mobile CRM. The first is a 'softer,' subjective set of benefits." These include morale builders like greater personal satisfaction with work, or increased convenience. These are what I always have called in my 4 rules of CRM, the "self-interest" factors. They might include contacting multiple users in a sales team using a mobile CRM e-cast. "These benefits are running at less than 50 percent ROI annualized," Clark asserts. "A second and more interesting [class of ROI] is in mobile field service. Technicians can be traveling out in bands or within the four walls of an institution. Yet depending on a lot of variables, typically what we see exceeds 200 percent ROI annualized, and that makes a very compelling investment."

Stories Worth Telling

Now time for a little case study or two to drive home real life and not just a bunch of theoretical quantified results. Ultimately, these mobile CRM applications have to be used in real life, so real life examples qualify as something you should get some exposure to – which is what I aim to do here.

- **Symetra Financial** – Symetra Financial is a financial services firm based in Bellevue, Washington. They have 30 external wholesalers who are sales and support representatives that reach out to Symetra's 20,000 to 30,000 independent insurance agents across the U.S. They use BlackBerry devices to look up addresses and notes on agents they're visiting. All customer touch points are logged as they happen; they are able to distribute literature wirelessly. They can do quotes, contact their sales teammates, solve client support issues, update client info in real-time, and management can track those external wholesalers as they move throughout the United States. This is tied to an Onyx database in real-time back at Symetra's HQ. All on a device that sits on a belt or in a pocket. They can't play MP3s unless they upgrade to the BlackBerry® Pearl™ 8100™ Smartphone though.
- **Pharmion Corp** – Pharmion is a pharmaceutical company that develops and licenses products that are created for hematology and oncology patients. Their sales people – over 100 – are part of that odd world of pharmaceutical sales which doesn't work on the same plane as regular sales people. They market to physicians so that pharmacies will buy the product. Each salesperson in the pharma world tends to have specific product responsibilities so there are often several reps seeing the same physician, which can be irritating to the physician. The Pharmion reps used laptops to go from call to call, which was a burden that often made leave the laptop at home and then enter their handwritten data when they got back, losing valuable intelligence, enormous amounts of time, and sales as a result. They began to use salesforce.com's AppExchange Mobile with BlackBerry devices and the result was dramatic. They were able to personalize the features they used, open up the applications they needed in a brief second or two and

the lost time of the past was a thing of the past. They had the customer data at their fingertips; they had the order activity available and recent reports of sales interactions with that customer. Plus they could capture information immediately. And, in what might seem to be funny, but wasn't, the devices were a lot lighter than what they were lugging around and that is not insignificant.

In Summary

This hasn't been an academic exercise. Mobile CRM is something that is necessary for your business *at this time* – not some indeterminate future era. The sooner you realize that, the sooner you'll begin your initiative. The benefits are clear, the deployment a bit smoother than in the past, the stresses on IT less than they have ever been and the adoption rates are higher than ever. In fact, adoption isn't really the issue anymore. Mobile professionals are asking for a new toolset and that toolset is mobile CRM.

Read what's here to get you started but don't stop with that. Get to Google and start working on finding out what it's going to take beyond what I mention. What you see here is a high level version of what's going on and what the benefits are in a marketplace that's growing dramatically, a customer paradigm that's shifted into ownership of the ecosystem and a workforce that is increasingly away trying to hook up to their customers, to get their attention and to make a business arrangement that's satisfactory to all sides involved.

The tough part? You're doing this but so is everyone else. Mobile CRM and the devices and applications that go with it make your advantage just a bit greater than the next competitor – that is if you move fast enough.

Which is now.