

# BEST PRACTICES



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## Extend CRM Value With Mobility

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### EXECUTIVE SUMMARY

Leading firms embrace mobile CRM to improve productivity, increase CRM system adoption, and enhance the customer experience. Mobile CRM is now a must-do for many field sales and service organizations because it allows reps to access and update CRM information anywhere they can use a mobile device, such as a BlackBerry. Firms that we interviewed cite several key benefits, including improved service scheduling; more professional sales interactions; and shorter cycle times in areas such as quote generation, incident resolution, and order fulfillment.

### TARGET AUDIENCE

Sales or business development executive, customer service executive, IT operations executive

### FIRMS MOBILIZE CRM TO IMPROVE PRODUCTIVITY AND DRIVE ADOPTION

Field sales and service professionals who rely on laptops to store important data about prospects and accounts often have stale information when they show up for an appointment, and they can face long delays before they can update their CRM system with the latest details or to-dos. Sales and service reps run the risk of showing up at key accounts without knowledge of recently submitted complaints and/or new orders, rendering them less capable of adequately handling customers' issues. Additionally, the reps can't complete follow-up actions — like reserving parts/inventory, closing out a service case, or submitting a deal for manager approval — until they enter the information into their laptops and sync up at the end of the day or week.

While many firms alleviate these problems through phones, pagers, and mobile email, technologically sophisticated firms use mobile CRM. Many industries, including financial services, legal, high-tech, and telcom, are deploying mobile access to their CRM systems even faster than expected.<sup>1</sup> Real-time access and updates through mobile devices, like the BlackBerry and Treo, allow firms to reap benefits such as:

- **Greater productivity.** Mobile CRM tools allow firms to eliminate paper-based processes and prevent duplicate data entry because sales and service professionals can capture information electronically in real time rather than writing it out by hand and later typing it into a system — often late at night or at the end of the week. Additionally, reps can look up customer phone numbers, driving directions, price lists, and inventory availability on the spot, saving them from wasting time phoning someone else for the information. Furthermore, firms can trigger automated processes, such as order fulfillment, as soon as the rep enters data on the device, improving process efficiency.

- **Better CRM system utilization.** With end-user adoption still one of the top challenges in CRM rollouts, many firms use mobile CRM as a way to drive up usage rates. Without mobile access, field sales and service reps often wait until the end of the day or week to enter information into the CRM system, leaving managers and sales support with incomplete information in the interim — which diminishes the CRM system value and potential use. Firms also find that information quality decreases proportionally to the amount of information that is entered at once. Because mobile CRM allows reps to log calls or emails as events happen and to enter additional notes or to-dos during downtime in between meetings or while waiting for a flight, employees use it more.
- **Enhanced team collaboration.** Team-oriented sales organizations have the unique challenge to share information among multiple sales reps all working on the same account. Many of these firms struggle with the best way to keep reps abreast of the latest developments before they walk into customer meetings. While some firms get by with phone calls, emails, or wireless laptop access, many firms cut out manual processes and save time by setting up automated alerts or allowing reps to get and enter the latest information from their handheld moments before a meeting starts.
- **Happier customers through shorter turnaround times.** Delays in entering information often result in delays to processes that can hurt customer experience, such as generating a quote or fulfilling an order. Additionally, service scheduling suffers if cases aren't closed out in real time because firms must work with incomplete information about which service professionals are available for other cases. One medical device manufacturer we spoke with reduced the average time to close a case from 13 days to seven days through the use of its mobile, real-time access to parts and inventory information.

### Successful Mobile Deployments Hinge On Ease Of Use

The vendors and users that Forrester interviewed gave the following advice for ensuring a successful deployment:

- **Keep it simple.** Companies should focus on the top handful of activities that sales and service reps need to do their jobs effectively: account and contact lookups, deal or case information, and follow-up activities. Although most mobile device CRM applications can do much more, keeping it simple ensures that users can quickly and easily access core functionality without getting bogged down by extraneous bells and whistles. Also, firms should involve representative users in the design process to optimize screen layouts and screen flows to actual workflows. If reps have to go through many steps to lookup or update information, they won't use the mobile application.

- **Extend beyond CRM.** Field workers need to access multiple corporate systems, including inventory, order and time management, and expense tracking. Firms get additional value out of their mobile CRM deployment by extending access into these other areas, effectively creating a composite mobile application. Some firms link to third-party services, such as Hoover’s lookups or MapQuest directions, so that their field sales and service professionals can access crucial information without leaving the mobile CRM interface.
- **Support multiple devices — but don’t allow a free for all.** Many firms already use mobile devices for email and therefore start planning their mobile CRM deployment with a specific device and mobile OS in mind. However, almost all of the firms we spoke with stressed the importance of making sure that your mobile application provider can support multiple devices because device standards and preferences are likely to shift over time.<sup>2</sup> Firms we interviewed say that BlackBerry is still the most common mobile OS in North America, and Windows Mobile is gaining in popularity. In Europe, Symbian and Windows Mobile lead. Firms should make sure that both business and IT are involved with vendor selection to ensure scalability, business applicability, and support for open standards.

**Mobile CRM Specialists Align With CRM Vendors Or Go Custom**

Most CRM vendors offer some level of mobile device support, but many of the mobile CRM users Forrester spoke with found better — and more customizable — functionality by opting for a mobile CRM specialist (see Figure 1).

**Figure 1** Approach To Mobile CRM Varies By Vendor

Vendor approaches	Advantages	Disadvantages
Mobile application tailored to specific CRM solution	Strong functionality out of the box; quicker rollout	More difficult to incorporate multiple input sources; likely to need replacing in conjunction with new CRM rollout
Platform approach	Open architectures facilitate integration with multiple applications	Longer, more expensive implementation
Access through device browser	Supports wider range of devices/OSes	Typically more limited functionality, with a generic UI not tailored to the special features of a particular device

## RECOMMENDATIONS

## THINK BEYOND THE TECHNOLOGY WHEN EVALUATING MOBILITY OPTIONS

Too many features or tasks can lead to failed rollouts. To avoid this:

- **Start with the business case and specific business goals.** Make sure you have business challenges in mind when you evaluate and roll out CRM mobility. Get specific with metrics that you aim to achieve through the initiative, such as shorter sales cycles, higher average deal size, or more incident resolutions per day.
- **Optimize the application for usability.** Consider device features — such as keyboard type, screen size, battery life, and scrolling ability — when you plan how users will interact with the device. Firms we spoke with advised setting up pick lists, where possible, to reduce typing on small keyboards. They also suggested limiting the number of fields and tasks available on the device to avoid too many clicks or too much scrolling.
- **Establish a support policy — before rollout.** Inevitably, users will have questions about how to use the device and how to complete tasks on the device. And, users will break devices, lose devices, and leave your company. You should have a support policy in place to address questions, fix or replace broken devices, and remotely shut off all access to data in the event of a lost device or an employee leaving the firm. Additionally, look for applications that come with tools like remote kill.

## SUPPLEMENTAL MATERIAL

## Companies Interviewed For This Document

Antenna Software	Sendia
ClairMail	Vetro
iEnterprises	

## ENDNOTES

- <sup>1</sup> Forrester's enterprise mobility research focuses on how mobile and wireless technologies affect businesses, including how they deploy their employees, how they communicate with their customers, and how they use their assets. See the March 15, 2006 Topic Overview "[Topic Overview: Enterprise Mobility](#)."
- <sup>2</sup> Most mobile users are not loyal to their operator: 22% of them churn in any year to get their hands on a new, discounted phone and cheaper service. See the March 25, 2005, Best Practices "[Boosting Mobile Customer Loyalty](#)."

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