8 keys to mobile CRM success

Giving your field sales, service, and executive teams mobile access to Salesforce is one of the easiest ways for your team to get instant, added value from Salesforce. You'll boost productivity, improve data quality, and help make sure that being out of the office doesn't mean being out of the loop.

What's the best approach for getting your people, your processes, and your devices ready to go mobile? To start, it's important to know salesforce.com has two mobile products: Salesforce's mobile capabilities for your CRM needs and soon, Chatter Mobile for collaboration. Follow these 8 tips and you'll be well on your way to mobile success.

Abstract

Mobile access to Salesforce is one of easiest ways to get the most from your Salesforce investment.

To get started right, follow the tips in this document. It's an approach that's yielded great results for hundreds of customers.

By: Joshua Schneyer

1. **Leverage mobile collaboration (Chatter Mobile)** – The rise of social networking Web sites like Facebook and Twitter have changed the way users access information, and this shift is rapidly extending to the enterprise. Products like Salesforce Chatter give enterprise users a way to share and follow relevant people and records in an environment that's trusted and secure. Mobile access to one's "feed" is key to keeping employees across the organization continually informed and productive no matter where they go.

2. **Use newer devices** – Whenever possible, give your team the latest mobile devices. Salesforce CRM's mobile functionality supports the most current iPhone and BlackBerry® devices. Once available, Chatter Mobile will also work on iPad and Android devices. If you're not sure whether your device is supported, consult our supported devices list. Or download our mobile apps to test on your device.

3. **Identify key mobile use cases** – You've put lots of thought into customizing your core business processes to meet your organization's needs. Why should your mobile solution be different? Before you get started, identify clear and simple mobile use cases with obvious benefits. Start by defining tasks and processes your users will need in the field, such as:

   - Logging phone calls, emails, and visits on the fly
   - Processing orders or updating customer cases in real time
   - Accessing content in Salesforce like presentations or brochures and forwarding them to customers

   Consider running a quick pilot on easy-to-deploy Mobile Lite for useful insight about which mobile use cases are key to your business.

4. **Less is more** – Mobile users rarely need access to *all* the data and features in Salesforce. Be selective about which applications and data you make available. Users on the go tend to use a small subset of data and repeat the same tasks over and over, such as logging calls and emails and updating opportunities or cases that relate to their territories.

Best practice

Limit available data fields to what's relevant for certain users and avoid the common trap of downloading every record a user might need. Instead, use the application's intelligent filtering capabilities to store only relevant records on the device at any given time.

5. **Train your users –** As with any new application, it's important to show users how to use it—and how they'll benefit. Ask users to watch the Getting Started with Mobile Access videos or attend training before giving them mobile access.

6. **Choose the right version –** Salesforce offers two mobile versions: Mobile Lite, which is free across all editions, and the full version, which is free for Salesforce CRM Unlimited Edition users (or available via an add-on license for other editions).

    - If your users only need **basic mobile access** to standard tabs like Contacts, Leads, and Opportunities, try Mobile Lite. It's free and you can enable it for your org with one click.
    - If your mobile use cases include use of custom objects, Force.com pages (Visualforce), or third-party apps from the AppExchange, you'll probably want to use the full version of mobile.
    - Different users have different needs. Consider a hybrid approach where mobile users with advanced needs are set up on the full version and those with basic needs receive Mobile Lite.

7. **Work with your IT department** – Be sure to work with your IT department to accommodate restrictions or requirements related to mobile devices. For example, if your BlackBerry devices connect through your corporate firewall, there may be security and communications requirements.

8. **Take advantage of our resources** – Mobile access to Salesforce can become one of your most powerful business tools, but there are a few extra moving parts. Salesforce.com provides a range of free resources to jump-start your mobile deployment, including live Q&A Webinars, how-to videos, implementation guides, and tip sheets. To get started, check out these resources:

    - Mobile for the Sales Cloud Web site
    - Getting Started with Mobile video
    - Mobile Community blog
    - Supported Devices list

    Of course, feel free to contact your account team for recommendations for your specific needs.

Summary

Mobile access to Salesforce is one of easiest ways to enhance the value of your Salesforce investment. Before you start, have clear goals that define what you want people to be able to do from the field. For the best performance, make sure you have newer mobile devices. To prepare, define clear use cases and train your users. As you roll out mobile features, start with a standard configuration (Mobile Lite) and improve the application based on user feedback as you expand access and capabilities. Consider providing all employees—not just those working outside the office—with mobile access to Chatter for enhanced, real-time collaboration and communication. Finally, be sure to take advantage of the resources provided by salesforce.com.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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