

7 keys to mobile success

Abstract

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

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

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Giving your field sales, service, and executive teams mobile access to Salesforce CRM is one of the top things you can do—for your people and for your company. 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 make the most of these benefits? Follow the tips in this document and you'll be well on your way.

❖ **Use new devices** – Whenever possible, give your team the latest mobile devices. With more memory and faster processors, newer devices make for a superior mobile experience. Salesforce CRM supports the most current devices on the following platforms: BlackBerry, iPhone, and Windows Mobile. If you're not sure whether your device is supported, consult our [supported devices](#) list. Or sign up for a free 30-day mobile trial and test the application on your device.

❖ **Identify key mobile use cases** – You've put a lot 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, that will be embraced by your users.

Define which tasks and processes you need to support, such as:

- Logging phone calls, emails, and visits on the fly
- Updating opportunity and pipeline data from the road
- Accessing a customer's history on site or before meetings
- Responding to new leads from the field, updating work orders, closing out trouble tickets...you name it

❖ **Less is more** – Mobile users rarely need access to all the data and features in Salesforce CRM. 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. By providing this information on a mobile device, the user saves time and calls back to the office.

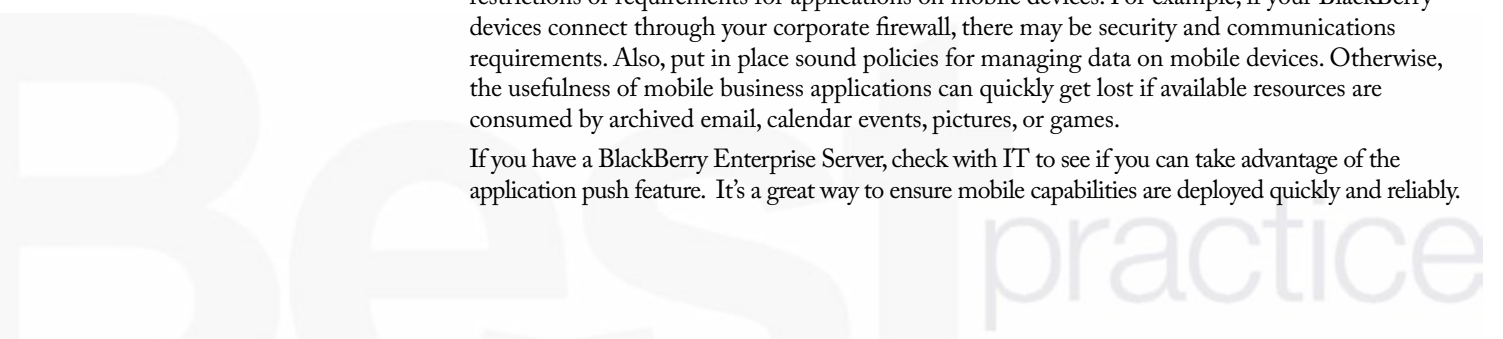
Also, be selective about which applications and data you make available. One strategy is to limit available data fields to what's relevant for certain users. And avoid the common trap of downloading every record a user might need by using the application's intelligent filtering capabilities to store only relevant records on the device at any given time. As a result, navigation will be easier and the devices won't get bogged down.

❖ **Train your users** – As with any new application, it's important to show users how to use the app—and how they will benefit from using it. Require users to watch one of the training videos such as [Getting Started with Mobile Lite Access](#) or to attend training before giving them mobile access.

❖ **Start small** – Instead of making mobile available to all your users at once, start with a simple mobile configuration for a small group of users. You can then expand mobile access to Salesforce CRM gradually and incorporate feedback along the way, without having to redeploy to your existing users. That way, your deployment can grow from a small pilot to a finely tuned solution for hundreds or thousands of users, quickly and painlessly.

❖ **Work with your IT department** – Be sure to work with your IT department to accommodate restrictions or requirements for applications on mobile devices. For example, if your BlackBerry devices connect through your corporate firewall, there may be security and communications requirements. Also, put in place sound policies for managing data on mobile devices. Otherwise, the usefulness of mobile business applications can quickly get lost if available resources are consumed by archived email, calendar events, pictures, or games.

If you have a BlackBerry Enterprise Server, check with IT to see if you can take advantage of the application push feature. It's a great way to ensure mobile capabilities are deployed quickly and reliably.



❖ Take advantage of salesforce.com resources – Mobile access to Salesforce CRM has the potential become one of your most powerful business tools, but there a few extra moving parts. Salesforce.com provides a range of free resources to jump start your mobile deployment, including live, weekly Q&A webinars, how-to videos, implementation guides, and tip sheets available on the Web sites below. And of course feel free to contact your salesforce.com account team for recommendations for your specific needs.

- www.salesforce.com/mobile
- www.salesforce.com/mobile/lite
- [Device demos](#)
- [Mobile access blog](#)

Summary

Mobile access to Salesforce CRM is one of easiest ways to enhance the value of your Salesforce CRM 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 on a small scale and improve the application based on user feedback as you expand access and capabilities. 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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